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Number 5

UTILITY ARBORIST NEWSLINE

FOCUS ON WORKING WITH GOVERNMENT AGENCIES

CREATE A CULTURE OF SAFETY

PERSPECTIVE, PERFORMANCE,
AND PROCESS

LEARN HOW

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CONSERVATION BEFORE REGULATION

THE BENEFITS FOR
MONARCH BUTTERFLIES
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OPINION EDITORIAL



Turn to **page 11** to learn more about safeguarding monarch butterfly habitat and your organization simultaneously.



Find out on **page 18** how after action reviews are evolving into a better culture of safety.



Learn more about how arboriculture training is giving inmates a bright future on **page 28**.

This is a list of common industry terms and acronyms frequently used in this magazine.

Best Management Practices (BMPs)
Endangered Species Act (ESA)
Integrated Vegetation Management (IVM)
Light Detection and Ranging (LiDAR)

Occupational Safety and Health Administration (OSHA)
Operations & Maintenance (O&M)
Personal Protective Equipment (PPE)

Rights-of-Way (ROW)
U.S. Fish and Wildlife Service (USFWS)
Utility Vegetation Management (UVM)
Vegetation Management (VM)

PRESIDENT'S MESSAGE



Tim Walsh

In our May/June *UAN*, we discussed the differences between Safety I and Safety II. Let's shift and look at the view from a regulatory perspective. Part of this is to think about the difference between lagging and "leading" indicators, including what OSHA believes can significantly improve safety capacity and

resiliency in our organizations.

Lagging indicators measure "the occurrence and frequency of events that occurred in the past, such as the number or rate of injuries, illnesses, and fatalities."¹ Presented variously, whether it is called TRIR (Total Recordable Incident Rate), TCIR (Total Case Incident Rate), or some other derivation, it is a measure of the injuries (or fatalities) that have been reported to OSHA that meet specific criteria. This information isn't useless; it can tell us what happened, or was reported, in our organizations, but it doesn't tell us about the future.²

However, looking backward at past incidents doesn't really drive down SIFs (Serious Incidents and Fatalities), and this is where we should be spending our time, energy, and resources. Some of this rearward focus comes in part due to our requirement to report specific incidents to OSHA, which uses this information to target higher-risk industries to reduce incidents. Additionally, utility system owner/operators have used this information to compare contractors, including recently (the last 25–30 years) using third-party prequalifying and monitoring companies to do so. Internally, most contractors likely use this information to rate the success of their safety performance.

We have all been using lagging indicators to help us track and rate our safety performance. Safety is about ensuring things go right, not the absence of incidents. We have been trying to look forward, to look for "leading" indicators, even "predictive" metrics. While we may generally understand that certain types of incidents can occur, we will not likely be able to predict *when* an incident will occur.

While there are different definitions of the term "leading indicators," they are generally thought to measure aspects of safety systems that can improve resilience and capacity. Paul Esposito had a decent overview of safety metrics,³ which raises some good points. The leading indicators should be based on the SMART principles (Specific, Measurable, Accountable, Reasonable, and Timely), and you

should use the PDCA (Plan, Do, Check, Act) model. These indicators attempt to measure or monitor the components of a proper health and safety system. They may vary between companies and by industry but they incorporate the components of OSHA's Recommended Practices for Safety and Health.⁴

In addition to the recommendations in the aforementioned OSHA documents, another suggestion is implementing a formal Occupational Health and Safety System. There is even a consensus standard that can assist you in the process: ANSI/ASSP Z10.0-2019. OSHA may look to see if companies have health and safety systems that comply with this standard.

Let's shift to looking at energy-based hazard assessments. Dr. Matt Hallowell, and others, in conjunction with the Edison Electric Institute have created the Safety Classification and Learning Model (SCL).⁵ A simplification of the model is to assess the level of energy present on a jobsite that can cause injury (or damage) and determine if there are direct controls present. You may have heard of this described as the "energy wheel," where a graphic was created to identify the various forms of energy in the workplace.

In an attempt to create a method to monitor the presence or absence of safeguards against those hazards that cause SIFs, Dr. Hallowell and his team created the High Energy Control Assessment⁶ (HECA). It was designed to provide a way to consistently, objectively, and quickly assess hazards and controls in the field.

All of this to say that how we, and OSHA, view safety is continuously changing.

We are getting away from believing that things in the past—lagging indicators—can predict the future. What do our financial advisors always tell us? *Past performance is not indicative of future results.* Let's move from measuring to monitoring, from focusing on individual behavior and incidents to health and safety systems. If we want to get better, we can't keep doing the same things.

¹ OSHA Leading Indicators, 2019, www.osha.gov/sites/default/files/OSHA_Leading_Indicators.pdf.

² Hallowell, M., et. al, 2021, "The Statistical Invalidity of TRIR as a Measure of Safety Performance," PSJ.

³ Esposito, P., 2018, "Safety Metrics Corporate and Site-Level Scorecards," PSJ.

⁴ OSHA Recommended Practices for Safety and Health Programs, 2016, <https://www.osha.gov/sites/default/files/publications/OSHA3885.pdf>.

⁵ EEI, "Power to Prevent Injuries and Fatalities," <https://www.powertopreventsif.com/VideoSCL.aspx>.

⁶ Deniz Oguz Erkal, E., et. al, 2023, "Moving Beyond TRIR: Measuring and Monitoring Safety Performance With High-Energy Control Assessments," PSJ. [⌘]

Tim Walsh

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EXECUTIVE DIRECTOR MESSAGE



Dennis Fallon

This edition of the *UAN* is likely to arrive just before the 2023 Trees & Utilities Conference in Pittsburgh, Pennsylvania. This year's theme for the conference is "The Power of People" and is described as "the chief learning and engagement event that will celebrate, connect, and inspire the individuals who work tirelessly to deliver energy to our urban and rural areas. By our efforts united, we are improving communities and creating meaningful change for our industry and our environment." This annual conference brings together the largest group of UVM professionals anywhere to enhance and develop our skills so that we can deliver on the unified goals described in this year's theme. It is the space where we can learn from each other, expand our networks, and develop our teams. The theme fits very well with a professional organization where members can influence the direction of the industry through direct participation.

It is an exciting time to be a UVM professional. There are more tools than ever available to us to take on the challenge of improving communities and creating meaningful change for our industry and our environment. Access to these tools is also becoming more attainable as more folks adopt innovative approaches or techniques. Through committees, the UAA is working hard to keep our members current with all the advancements in the UVM space.

In May, the UAA Board of Directors met to discuss strategic areas of focus for the organization for the next 16–18 months. At that meeting, they laid out some tangible goals and guidance to leverage the power of the committees. Some of the highlights included:

- **Safety Committee**—Create a Safety I/ Safety II integration assessment tool, UVM moving beyond Total Recordable Incident Rate (TRIR) as a metric of program efficacy and maturity.
- **Environmental Stewardship Committee**—Identify BMP needs. Use member surveys on areas of need in environmental stewardship

on ROW. Identify certification gaps, opportunities, and needs. Identify affinity group support/collaboration efforts.

- **Outreach Committee**—Identify UAA offering gaps (e.g., wildfire BMP, certifications, etc.) and affiliated groups the UAA should seek to market offerings or support to. Develop SMA/UAA collaboration tool kit, programming, and offerings. Develop a list of community colleges with the capacity to add a UAA two-credit UVM course.
- **Professional Development Committee**—Develop a UAA two-credit community college UVM course curriculum, with lectures and labs (15) and PowerPoints, along with readings for each lecture. Identify educational material distribution opportunities for UAA expansion (online LMS, webinar, and digitizing or repurposing existing materials).
- **Editorial Committee**—Provide six *UAN* publications with industry-innovating themes and content.
- **Events Committee**—Deliver regional meeting and safety summit opportunities with local hosts.
- **Finance Committee**—Develop an annual budget, review our policies, manage revenue and expenses, participate in an annual audit, and safeguard our financial integrity.

Current membership of the UAA spans across 23 countries with more than 5,000 professional members, and we have the capacity to continue to grow our influence and our networks. There are multiple ways you can leverage the power of the people in the UAA and enhance your career at the same time. Examples include recruiting new members, attending events, volunteering for a committee, hosting outreach events, providing content for the *UAN*, and the list goes on. More information on the committees can be found at www.gotouaa.org/uaa-committees or by contacting a member of the UAA Board of Directors or the staff. ☝

Dennis Fallon



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ENVIRONMENTAL STEWARDSHIP COMMITTEE UPDATE

The Environmental Stewardship Committee (ESC) has had a busy and productive year, and now is a great time to get involved. In addition to the exciting work we've accomplished in the past 12 months, the ESC has been working towards setting new priorities based on the needs and interests of the UAA Members. While we have several new projects lined up, our first priority is to seek input from you to be sure our committee is pursuing work that the member base finds valuable. This article will summarize what we've accomplished between July 2022 and June 2023, give a preview of what's coming next, and demonstrate why it's an excellent time to get involved with the Environmental Stewardship Committee.

UAA Spotlight on the Environment

The ESC is responsible for providing the "Spotlight on the Environment" section for each *Utility Arborist Newsline* edition. Over the past year, experts from the committee or referred by committee members have provided the following articles:

- "New Tools Are Available to Help Manage Biodiversity" by Dan Salas (September/October 2022)
- "The Importance of Training When Managing for Compatible Vegetation" by Derek Vannice (November/December 2022)
- "Reporting on Biodiversity" by Phil Chen (January/February 2023)
- "The Vegetation Management Maturity Model" by Stan Vera-Art and Phil Chen (March/April 2023)
- "Wildfire Safety Prevention" by Stephen Hilbert (May/June 2023)
- "Bats and Disease: Emerging Challenges Facing ROW Managers" by Roy Van Houten (July/August 2023)

Biological Controls PSA Video

In the fall of 2022, the task force responsible for creating a PSA video about biological controls wrapped up that project by developing a discussion guide to go along with the video. This guide assists viewers with understanding and interpreting the video. Both the video and the discussion guide are now available on the UAA website (gotouaa.org).

Guidance Document for Invasive Species Management

Another task force has been working on developing recommendations for managing non-native plants on ROW. This group of subject matter experts is finalizing the creation of a decision tree to assist land managers with determining how to handle different types of non-native plants. The document will also include definitions and additional considerations. We anticipate this project to be finalized in time for the UAA Board review this month.

UAA Member Survey

A third task force has been developing a brief survey to learn more about UAA Membership priorities, reinforce the importance of environmental stewardship in UVM, and help identify strategic and practical priorities for the ESC to best support the industry over the next five years. The survey will be ready by the time of this update's publication, so please be on the lookout for it! We encourage all UAA Members to participate so the ESC can align our mission and goals to meet UAA Members' needs. It should only take about 5 minutes to complete.

Future Endeavors

The committee is poised to begin work on several new projects. While we hope the timing of the Member survey will allow us to wait for the survey results before beginning new project work, ESC members have discussed several potential new endeavors:

- **Guidance documents about compatible species management**—To support compatibles-based vegetation management on ROW, the ESC has discussed creating regional plant guides to help with training personnel in identifying key compatible plants.
- **Long-term vegetation management plan template**—Most UVM plans are relatively short-term (less than 5 years). This template would give land managers a baseline to generate longer-term programs.
- **Organizational collaboration**—Members of the ESC have discussed seeking other member organizations focused on best practices in VM, environmental stewardship, and other goals that align with the UAA mission and core values. Identifying and connecting with these organizations may open opportunities for our members to partner with them on projects and benefit from diverse experiences.

Where we go next as a committee will depend largely on the needs and desires of UAA Members. If you are interested in helping promote and improve environmental stewardship in utility vegetation management, please consider getting involved in the Environmental Stewardship Committee! 🌲



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SAFETY TOOLS

Harmonize Your Safety Program with Regulatory Agencies

By Mark Kimbrough, Vice President—Safety and Training, Townsend Corporation

With the Occupational Safety and Health Act of 1970, Congress created the Occupational Safety and Health Administration (OSHA) to ensure safe and healthful working conditions for workers by setting and enforcing standards and by providing training, outreach, education, and assistance. Effectively working with OSHA and other government agencies can be summed up in five aspects of safety.

- **Management Leadership—Extreme Ownership**—Extreme ownership refers to the idea that “Leaders must own everything in their world.” You, as a leader, are responsible for your team’s failures, regardless of your rank or position. The idea that there are no bad teams, only bad leaders is a derivative of this principle. The principles of Extreme Ownership are Cover and Move; Simple; Prioritize and Execute; and Decentralized Command.
- **Worker Participation**—Worker participation refers to any process in the company that allows workers to exert influence over their work or their working conditions. Worker participation is obligatory in various processes in the company. Workers’ participation in management is a process by which subordinate employees, either individually or collectively, become involved in one or more aspects of organizational decision-making within the enterprises in which they work.

This process prompts “employee ownership,” which goes with the principle of Extreme Ownership, as previously referenced.

- **Hazard Identification and Assessment**—Hazard Identification Risk Assessment (HIRA) is a process of defining and describing hazards by characterizing their probability, frequency, and severity and evaluating adverse consequences, including potential losses and injuries. The job hazard briefing is a process which allows all members on the work site to take place in hazard identification and the establishment of mitigation measures.
- **Hazard Prevention and Control**—Effective controls protect workers from workplace hazards; help avoid injuries, illnesses, and incidents; minimize or eliminate safety and health risks; and help employers provide workers with safe and healthful working conditions. Controlling exposures to hazards in the workplace is vital to protecting workers. The hierarchy of controls is a way of determining which actions will best control exposures. The hierarchy of controls has five levels of actions to reduce or remove hazards. The preferred order of action based on general effectiveness is:
 1. Elimination
 2. Substitution
 3. Engineering controls

4. Administrative controls
5. Personal protective equipment

- **Education and Training**—OSHA believes that training is an essential part of every employer’s safety and health program for protecting workers from injuries and illnesses. The standards stipulate which topics/tasks require training, which employees should be trained, how often, the necessary qualifications of the person providing the training, and requirements for training documentation.

The Occupational Safety and Health Administration’s training standard for all industries can be summed up this way:

- Each employee must be trained in the tasks, situations, and tools they will use on the job.
- This training must be provided by a qualified person in a manner (e.g., language and vocabulary) the employee best understands.
- Training must be performed as often as required for safe operations.
- Training must be documented and stored for a period of time.

Combining these aspects of an effective safety program will allow for a harmonized workflow with OSHA and other regulatory agencies. It will also promote an exemplary safety culture that harmonizes with the mission of OSHA—ensuring safe and healthful working conditions for workers. ¶

Why Utility Arborists Should Advocate for the Monarch CCAA

By Lawrence J. Kahn, Esq., Executive Director, Tulane University Law School Utility Vegetation Management Initiative

"Just living is not enough—one must have sunshine, freedom, and a little flower," said the title character in beloved children's author Hans Christian Anderson's *The Butterfly*. These words, written approximately 200 years ago, suggest a way forward for a better life for us and future generations. But they also stand as a warning: if we deny the little flowers the chance to exist, then we could very well be threatening our own futures.

One of the most marvelous pollinators in North America, the monarch butterfly (*Danaus plexippus*), is threatened with extinction. This insect's migration from Canada across the United States to Mexico each year is a phenomenon we've all learned about in elementary school, but over the past two decades, the number of monarchs has plummeted precipitously. According to the Center for Biological Diversity, the population of monarch butterflies has declined by an astounding 99%, and it is feared that the remaining number of these butterflies is only half what is needed for the species to avoid extinction.

This drastic situation has prompted the U.S. Fish and Wildlife Service (USFWS) to join state agencies, tribes, other federal agencies, and nongovernmental groups to attempt to identify threats to the monarch and to take steps to conserve this special creature throughout its migratory range. Consideration has been given by the USFWS to list the monarch as an endangered species, which would give the monarch special protections under the Endangered Species Act (ESA). A recent

determination by the USFWS, though, was that although listing under the ESA is warranted, it is currently precluded by other higher-priority species. As a result, the protections that could be afforded to the monarch by ESA listing will have to wait for now (listing the monarch as an endangered species will be subject to annual review by the USFWS). However, the USFWS has specifically published that "we ask the public to submit to us any new information relevant to the status of the species or its habitat at any time."

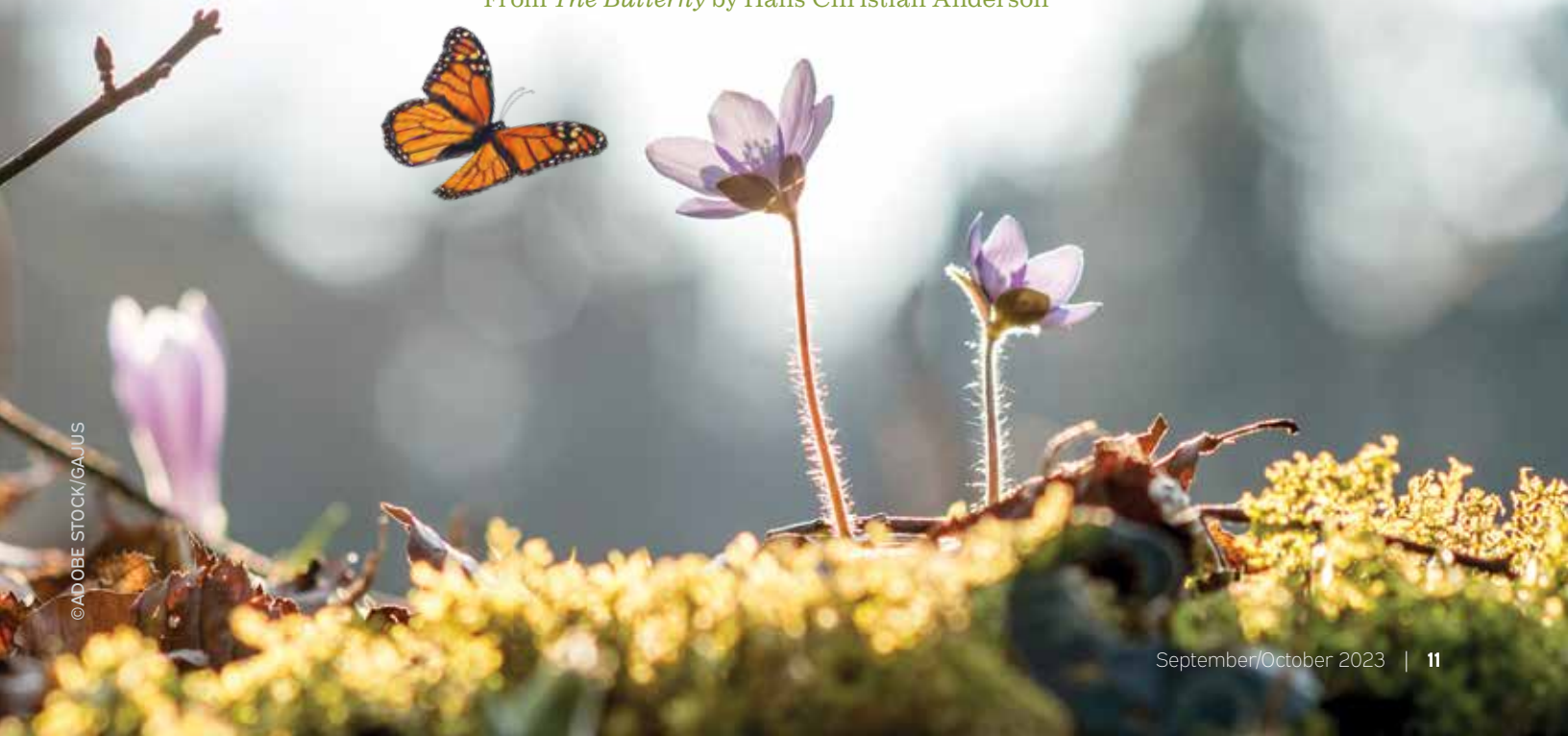
With or without listing on the ESA, the monarch needs our help. Fortunately, there are actions that can—and should—be taken. In April 2020, the Nationwide Candidate Conservation Agreement with Assurances (CCAA) on Energy and Transportation Lands was approved by the USFWS. Since that time, dozens of energy and transmission companies and state departments of transportation have voluntarily agreed to participate. If the utility that you're working for has not opted in, consider the following to encourage participation.

The Monarch CCAA is a voluntary agreement between the USFWS and a participating nonfederal landowner or manager (which can include lease and/or easement holders). In the agreement, the participant agrees to certain conservation



*"Just living is not enough—one must have
sunshine, freedom, and a little flower."*

From *The Butterfly* by Hans Christian Anderson



"I must endure the presence of a few caterpillars if I wish to become acquainted with the butterflies."

practices, such as planting concentrations of milkweed (*Asclepias spp.*) and native nectar-providing plants, to help stabilize or restore monarchs. In return, the USFWS provides participants with an "Enhancement of Survival" (EOS) permit, containing assurances that they will not be required to implement additional conservation measures beyond those in the agreement, even if the monarch does get listed. By proactively incentivizing conservation action ahead of regulation, such agreements provide benefits to the at-risk species as well as the USFWS and the participating landowners and land managers, all with the goal that listing becomes unnecessary. Given its voluntary nature, industry participants can terminate their involvement in the agreement at any time.

Preventing the loss of this species requires an all-hands-on-deck approach, and the Monarch CCAA represents

an important public-private partnership that encourages voluntary conservation efforts that both (a) have a tangible benefit to the participant and (b) a realistic chance to improve environmental conditions for the sustainability of the monarch.

Utilities should enter into the Monarch CCAA with the USFWS because it's the right thing to do and could save this species from extinction. But consider what will happen if sufficient efforts are not made to save the monarch, and it continues to decline and gets listed as an endangered species protected by the ESA: ESA protection imposes strict standards for protection of habitat and significant penalties for the taking of individuals. Habitat protections can include recordkeeping, report writing, and more, and civil penalties can reach \$25,000 per occurrence. Additional criminal penalties can be imposed under the ESA of \$25,000 and/or imprisonment of six months per violation.

Given the wide territory of the monarch, nearly every utility in the United States can anticipate that some part of its territory will include monarch habitat. If the monarch is listed, then utilities can expect to be required to conduct monarch habitat mapping and insect counts, report on deaths of individual monarchs, and loss (or gain) of monarchs, milkweed, nectar-providing plants, and more until such time as this pollinator recovers. This will come at significant expense to utilities in terms of human capital and will almost certainly result in significant delays to (or prohibition of) maintenance and construction work in proximity to such habitat. Those delays will, in the current environment, necessarily result in negative impacts on safety and reliability, and potentially substantial financial cost as well. It should be expected that if the monarch is listed under the ESA, then the USFWS will impose restrictions on how and when utilities can mow, prune, and control for vegetation growth, and where new infrastructure can (or cannot) be located. Even access to utility ROWs and

easements can be restricted. Voluntary CCAA participants, however, with valid EOS documentation, will not suffer these setbacks and can protect their operations from future changes or challenges.

By providing regulatory assurances, the Monarch CCAA encourages energy companies and transportation agencies to voluntarily adapt their land management practices to incorporate native flowering plants, increase the use of IVM best practices, and implement other conservation measures to maintain habitat for the monarch butterfly, which will have the side benefit of assisting other pollinators, too. This is certainly good work that can be reported in company ESG statements.

Conservation measures that benefit monarchs include many practices that are consistent with vegetation management requirements on ROW and other energy and transportation lands. Management actions such as brush removal; conservation-timed mowing, seeding, or planting of native wildflowers; and pollinator-focused IVM are some of the conservation measures included in the CCAA. Applicants are only required to conduct conservation measures that address the key threats to the species that are within their control. As a result, some conservation measures may apply differently to land managers, depending on their management ability, land ownership, easement requirements, or other constraints on management abilities. In addition, participants will be required by the USFWS to conduct some tracking of where conservation measures occur and undertake some simple monitoring protocols to verify their on-the-ground results.

Enrollment in the Monarch CCAA is not hard and can be conducted through the University of Illinois at Chicago (UIC). As part of the application required for enrollment, your organization will need to provide an application containing information regarding the lands enrolled. Any information identified by the applicant as confidential, proprietary, or business-sensitive will maintain confidentiality between the applicant and UIC. The basic elements are:

1. Determine the extent of lands you want to enroll.
2. Calculate your "adopted acres target" based on your total enrolled lands estimate and applicable adoption rate(s).
3. Complete your application form.
4. Provide maps displaying the extent of enrolled lands.
5. Provide payment for the first year's administrative fee, as calculated by the Program Administrator.
6. Share any supplemental information necessary to support your application.



BUTTERFLIES ©ADOBE STOCK/JPS





~From *The Little Prince* by Antoine de Saint-Exupéry

Each utility can pursue what is best for its own unique circumstances, providing operational flexibility. The conservation measures included in the CCAA should not adversely affect O&M activities needed on transmission and distribution systems or road/rail ROW. An applicant to the agreement can define which conservation measures and covered activities will apply to their managed lands and how they will implement them. Implementing the CCAA may involve modifying VM practices and will require monitoring habitat establishment. Certain CCAA conservation measures, such as reduced mowing and targeted herbicide treatments, may even result in cost savings and create opportunities for staff to focus on other priorities.

Rights-of-way and related landscapes provide valuable opportunities to connect available habitats, provide diverse breeding and feeding habitat (especially compared to much of the surrounding landscape), and offer areas that are generally safe from major disturbances or future development. Never before has an agreement been created for this scale of voluntary conservation. It is a first-of-its-kind in terms of geographic extent (across 48 states) and broad multi-sector collaboration—creating an innovative model for large-scale landscape conservation. The agreement incentivizes industry-wide efforts to create on-the-ground conservation benefits while aligning with other important initiatives, such as the Mid-America Monarch Conservation Strategy and the Rights-of-Way as Habitat Working Group's geospatial habitat database and related efforts. This is a unique way to partner with government that will inevitably lead to improved relationships as well as an opportunity to give the monarch a fighting chance for survival.

Saving the monarch butterfly from extinction is still an achievable goal and it is to the advantage of utilities to take forward-thinking and proactive action now by voluntarily joining the Monarch CCAA. There will be some work involved, but that work will be to everyone's long-term benefit. Perhaps you can think of it this way (quoting *The Little Prince* by Antoine de Saint-Exupéry): "I must endure the presence of a few caterpillars if I wish to become acquainted with the butterflies."

The full agreement is available at tinyurl.com/MonarchCCAAAgreement. 📄



Scan here to join the Monarch CCAA now!

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SPOTLIGHT ON THE ENVIRONMENT

Rights-of-Way the Right Way

By Amy Ferriter, Marketing and Communications Manager, Nutrien Solutions

Federal, state, and local governments manage millions of miles of rights-of-way across the country. This includes land managed for electric utilities, roadsides, railroads, pipelines, solar, and canal infrastructure, and totals more than 35 million acres.

Rights-of-way are utilitarian—allowing access for operations and maintenance and keeping the public safe. But they are also an opportunity for government agencies to bring sustainable vegetation management practices to our local communities.

Government agencies recognize the need to manage roadside ROW with safety in mind, and many agencies have transitioned to the use of custom, pre-blended herbicide products. Why? Because herbicide selectivity and modes of action are unique, so it's necessary to find exactly the right combination to provide the desired results. Making an herbicide blend in the field often requires numerous ingredients and can pose increased risks for workers, the public, and the environment. A mistake—like adding the wrong ingredient, adding it twice, measuring incorrectly, or spilling a product—can have detrimental consequences. Incorrectly mixed herbicides will not work as intended. Reducing the need to mix and handle herbicide concentrates also provides added protection for workers and the public.

Toby Lee, facilities superintendent with the Auglaize County Roadside Department in Ohio, shared, "What I like best about custom blending for our organization is it takes care of the measuring of multiple products and amounts; we only have to remember one quantity. We have 13 licensed applicators, so it is easier for everyone to know what they are spraying and at what quantities."

In Washington State, Grays Harbor County has been using pre-blends on roadsides for seven years. Mike Johnson, vegetation management superintendent, said, "We especially like the no-contact, close-loading system with returnable

A look at how custom-blended herbicides can help roadside programs contribute to agency sustainability and safety goals.

containers that we do not have to rinse. Everything is blended for us, so we can operate more efficiently. My crews love no-tank mixing with very little cleanup."

When VM professionals mix herbicides in the field, they can sometimes make mistakes or have accidents, even when following all safety protocols. Hamilton Land Services (Loomis, California) is a privately owned company that contracts for government agencies in the State of California. Owner Jerad Hamilton shared, "Our efficiency has improved since we've moved to blended drums—our staff no longer have to mix and load various formulations of materials. This system reduces the risk of exposure by eliminating the mixing process, with the added benefit of measuring errors being avoided. We have eliminated time spent having to triple-rinse and dispose of numerous containers."

Hamilton Land Services has converted all of their vehicles to a direct-connect, closed-loop system. "We love it; it's eliminated our exposure to concentrated chemicals and my staff feels safer in their daily duties," said Hamilton.

One approach some government agencies have adopted along roadsides is the use of plant growth regulators (PGRs) to reduce routine mowing. Depending on factors such as grass species, application rates, and growing conditions, agencies embracing these practices can eliminate several mowing cycles each year. This can lead to a significant reduction of greenhouse gas emissions while reducing exposure to roadway dangers. Mowers can throw rocks into travel lanes, causing life and property damage. Several of our state agency customers have noted a significant decrease in claims and maintenance costs since they have shifted to using PGRs, while achieving a safer, more aesthetically appealing ROW at a fraction of the cost.

Closed Chain of Custody: Closing the Loop on Herbicides in the Field

Many governmental organizations that use custom blends are now seeking additional tools to increase sustainability and accountability in their VM programs. Closed Chain of Custody



Custom blends increase efficiency because applicators no longer have to mix and load various materials in the field. It also eliminates time spent triple-rinsing and disposing of containers. Photo courtesy of Steve Gray, Nutrien Solutions.



Nutrien Solutions has specialized custom-blend facilities in Cloverdale, Virginia; Selma, Indiana; Vicksburg, Mississippi; and Salem, Oregon. Photo courtesy of Amy Ferriter, Nutrien Solutions.



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(CCC) refers to a system for tracking and documenting the movement of herbicides from the point of purchase to the point of use or disposal. This is designed to ensure that these materials are used safely and responsibly and they do not pose a risk to human health or the environment. Closed Chain of Custody also provides government agencies (and their contractors) with a way to validate results using customized metrics to help meet program needs.

As more government agencies embrace the benefits of custom blends, many have begun to write pre-blended products into contract specifications. This gives agencies an extra level of accountability about the products and product rates being used on public ROW. Many agencies are also expressing an interest in including CCC as part of their VM procurement process. This provides agencies and contractors with assurances that the products are being used in the intended areas and in the quantities specified in the contracts. Agencies can verify quantities purchased versus quantities applied, and they have auditable documentation if a misapplication claim is made.

Realizing the benefits of combining pre-blends and CCC is a win-win for agencies, the environment, and the public. Governments globally are making positive changes to take ownership and find opportunities to address environmental issues, such as climate change, solid waste disposal, and habitat degradation. Many publicly traded corporations strive to meet sustainability goals. We work with state and local governments across the United States to develop strategies that help them do their part to operate in a more sustainable, accountable, and environmentally conscious manner.

Effective vegetation management programs using custom-blended products in a CCC system are designed to be integrative and site-specific, and can have the following benefits to any rights-of-way VM program:

- Lower overall VM costs with the ability to manage inventory and capture cost efficiencies



Hamilton Land Services has converted all application vehicles to a direct-connect, closed-loop system. Photo courtesy of Jerad Hamilton, Hamilton Land Services.

- Safer ROW
- More effective and transparent long-term VM programs
- Reduced environmental impacts on land and water resources, pollinators, and wildlife
- Reduced solid waste in the waste stream
- Increased accountability for agencies and contractors
- Auditable results and customized metrics

Nutrien Solutions provides technical assistance and support to agencies and agency contractors to create sustainable IVM plans that improve environmental and safety outcomes on thousands of miles of ROW. In addition to restoring and enhancing habitat on these corridors, the custom blend/CCC system helps agencies achieve and track sustainability objectives, capture and document program efficiencies, engage local communities, and improve safety on roadsides across the United States.

ABOUT THE AUTHOR

Amy Ferriter is the Marketing and Communications Manager for Nutrien Solutions. She has more than 30 years of experience in natural resources management. Ferriter began her career in vegetation management as a Senior Environmental Scientist at the South Florida Water Management District, working on invasive species management plans in the Everglades and Lake Okeechobee for 14 years. She also served as the State of Idaho's Invasive Species Coordinator for nine years. 🌱

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SCHOLARSHIP PROGRAM

2023 Nelsen Money Scholarship Winners

By the UAA Nelsen Money Scholarship Committee

2023 was the third year the Nelsen Money Scholarship Program has awarded scholarships to students enrolled in college programs, such as urban or traditional forestry, arboriculture, a related field, or the Utility Vegetation Management Professional Development Program at the University of Wisconsin–Stevens Point. This year, the UAA Scholarship Committee received applications from five outstanding candidates and is pleased to announce that Riley Pierce and Amanda Gronemeyer were selected as the 2023 recipients of the Nelsen Money Scholarship!



Riley Pierce

RILEY PIERCE—better known as “Tree Boy” to his family and friends—explained in his essay that his interest in trees began in high school when he joined the Kent Roosevelt Forestry Career Program. What Pierce learned in this program led him to aspire towards a career in arboriculture. Pierce is a member of the West Virginia University (WVU) Tree Campus Committee and is an executive board student member as the one and only student on the Alleghany Society of American

Foresters Board. During his senior year, he will lead the Arboriculture Club at WVU as president.

Pierce said, “As I take in all of these experiences, I understand that, from here, the only way forward is to help people as much as possible. Last summer I found an internship and career that will help me do that—utility arboriculture. I spent a summer in Virginia working with Dominion Energy on their powerline projects. This is a career that helps people get their power and that gives me personal fulfillment. I hope to get a job with them after I graduate and then work with them until I earn my Board Certified Master Arborist license. Then I plan to get a master’s degree in arboriculture and consult with companies about proper practices and furthering arboricultural knowledge.” Pierce clearly meets the criteria to be a recipient of the Nelsen Money Scholarship. He is a very passionate young professional and will be a great addition to any utility vegetation management program. Way to go, Riley! Keep up the excitement and don’t ever lose that passion!



Amanda Gronemeyer

AMANDA GRONEMEYER, a tree person from an early age, made the decision to take on one of her passions and become a professional arborist. She started chipping brush on Saturdays, working with the Plymouth Department of Public Works in Wisconsin. That quickly transitioned into focusing on and performing tree care and pursuing an education in the tree care industry. Gronemeyer’s supervisor at the DPR and a program advisor for the landscape

horticultural program at Milwaukee Area Technical College, where Gronemeyer is a student, both described Gronemeyer as being a highly motivated, enthusiastic, dedicated student and tradesperson—and all of these traits have proven to be contagious among her classmates and work teams. Gronemeyer said, “Receiving the Nelsen Money Scholarship would facilitate the pursuit of my college degree and career goals, enabling me to acquire the wealth of knowledge needed to efficiently serve clients by implementing a high standard of tree care.” Both of Gronemeyer’s references described her as being very well suited for the Nelsen Money Scholarship. Based not only on the references but her transcripts, essay, and extracurricular activities, the committee felt Gronemeyer undoubtedly met the criteria to be a recipient of the Nelsen Money Scholarship. Nicely done! And keep up the passion and enthusiasm, Amanda—you’ll fit right into this industry!

Congratulations to Riley Pierce and Amanda Gronemeyer, our Nelsen Money Scholarship recipients! 🌳

A man with short dark hair and a goatee, wearing a blue puffer jacket, is shown from the chest up. He is touching the rough bark of a large tree with his right hand and looking upwards with an expression of awe or contemplation. The background is a soft-focus forest with green leaves.

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50 Years Later: After Action Reviews Connect Perspective, Performance, and Process to Create a Culture of Safety

By Herbert Law, Safety and Human Performance Manager, Lewis Services

The meeting reminder flashed at the bottom of the computer screen and, within minutes, nearly 100 Lewis staff from across the country—area managers, regional leaders, department directors, and members of Risk Management—were logging on for the daily storm call. For 10 intense days in June 2023, at exactly 2:30 p.m. EST, organizational leaders paused what they were doing to listen, learn, and provide support while crews responded to a massive storm system impacting Texas, Oklahoma, and Louisiana, leaving more than 160,000 households without power. At the peak of the response, 425 Lewis craftworkers, operational leaders, and safety professionals were on scene conducting restoration efforts in the 105+ degree heat index. Each storm call began with the intentional recitation of Lewis' mission and operating principles as a daily reminder of the critical work being conducted by frontline workers in the storm-weary south.

While these 30-minute storm calls—activated whenever crews are engaged in emergency response—provide a tactical overview of the “boots on the ground” utility restoration being executed during disasters, the reports offer a mere glimpse of the leading-edge approach to safety that Lewis has embedded into its DNA and company-wide culture.

Utility vegetation management is considered one of the most dangerous professions, often ranking in the same risk category as firefighters, police, and loggers. Unlike controlled environments, where predictable hazards can be mitigated with consistent safety procedures, utility line workers often conduct their work at high elevations, within feet of energized powerlines, in variable weather conditions. Adding to the complexities are emergent risks—such as snakes, stinging insects, and even the occasional gator—and the reality that no two trees are alike. In his article “Tree Worker Safety Update by the Numbers: Another Us vs. Them,” John Ball (PhD, CTSP) asserted, “...arboricultural operations are still among the leading industrial activities for fatal and nonfatal injuries. Compared to

all industries, tree workers have at least 15 times the fatality rate (Bureau of Labor Statistics 2020) and three times the nonfatal rate (BLS 2018).”

Established in 1938, Lewis has spent decades studying, testing, and investing in safety protocols. And while improvements have been consistently implemented since its founding, leadership knew that a better method was needed and possible. Lewis' “New View of Safety” began taking shape in 2018 when the company took a bold step to embrace a scientific approach that leverages the best of traditional training techniques combined with insights on human thinking and actions. The concept of “human performance” is grounded in what current research tells us about our brains (cognitive science) as well as incorporating human behavior factors. Utilizing this knowledge, Lewis is designing work and processes that give people their best chance at success.

One of the key components of this safety culture is institutionalizing the practice of After Action Reviews (AAR) following routine work and during storm responses. Developed by the U.S. Army in the 1970s as a replacement for performance critiques, AARs are intended to be open, honest, and inclusive. Whereas performance critiques were punitive in nature and



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Lonnie Peyton (right), a Lewis Safety Supervisor.

created division, AARs seek to teach and unify. Traditionally taking place at the end of military exercises, AARs create a safe space to discuss four key components while details are still fresh in mind: (1) What did we expect to happen? (2) What actually happened? (3) Why was there a difference between what we expected and what actually happened? And (4) what can we change next time?

Lewis adds one more component to its AAR process: “What surprised us?” with the belief that in order to build a resilient system, we must be ready for surprise. While it sounds contradictory to “be ready for surprise” (after all, isn’t the element of surprise...surprise?), being ready for the *general shape of surprise* helps to forecast likely future surprises. This supports capacity-building for future response, and even asking the question “What surprised us?” helps us notice how often we are surprised so that we value the extra capacity.

In a recent Harvard Business Review article “A Better Approach to After-Action Reviews,” Angus Fletcher, Preston Cline, and Matthew Hoffman described their collaboration with the U.S. Army, during which they tested modifications to the Army’s original AAR and took a deep dive into what needed to change. The conclusion was that AARs must be **participatory** and **narrative** to be effective. According to the research, the most impactful AARs seek participation from all team members in order to “surface every perspective—to harvest all existing insights and to ensure that the entire team felt included, eliminating disaffection and promoting unity.”

Lewis’ experience with AARs supports that conclusion. During a recent safety call, General Foreperson (GF) Yancey Sine highlighted the importance of participatory AARs and tailgate meetings, especially related to handling and maintaining equipment. Sine described their participatory methods of training when it comes to the treatment of equipment, including role-modeling procedures, active engagement with all team members, and repeat training if a person is absent from a previous meeting. Sine also explained how their mechanic goes through the safety inspection *with* the crew to provide additional education and uses photos to emphasize specific safety points. Quick AAR check-ins with crews at the end of the day surface challenges and close calls the team dealt with, enabling leaders to better support their teams. Conducted in this participatory

vein, safety is no longer separate from culture but part of the operational picture.

It’s important to normalize active participation in AARs and have leaders tailgate meetings by empowering their teams to be problem solvers—from the most veteran team members to the newest hires. As part of Lewis’ “New View Safety,” leaders are listeners and learners, engaging their craftworkers in solutions. This approach fosters productive discussion among peers without fear of repercussion, which empowers workers so that they can adapt to changing conditions. Additionally, the sharing of institutional knowledge often expands beyond specific crews, creating a network of supporters between teams. In this shared culture, it is not uncommon for crews to reach out to their division colleagues and ask for advice. Before AARs, this type of outreach and support would have been rare.

For Brandon Sullivan, a GF in Lewis’ Ohio division, frontline leaders must know how to listen and respond to their crews—not just when they’re asking for new tools or safety equipment, but also when they have new or different ideas on how to approach tasks. Sullivan explained, “The top GFs know how to listen to everybody and give them an actual voice, even if it’s their day one.” He continued, “You never know, they might catch something that we’ve been doing one way for a long time, and they may have a little improvement opportunity just by mentioning something that we didn’t think of.”

Fletcher, Cline, and Hoffman’s research revealed that **narrative** AARs are particularly helpful for reinforcing successes and identifying where things weren’t as effective, because instead of simply listing what went right or wrong, narrative AARs link behaviors and actions to results. This inclusive process helps to generate unified learning that is owned by the entire team. Lewis teams have successfully



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Lewis Safety Team



incorporated “narrative” into their AAR reporting through the process of storytelling. The act of storytelling prompts crew members to start at the beginning, tell the story, and make risk real to understand why things happen. To provide professional guidance on the practice and value of productive storytelling, Lewis worked with a storytelling coach (who was also a journalist) to teach the safety team how to gather and write narratives that have the power to affect change. The practice of storytelling inspires group ownership and collaboration and contributes to collective memory, all of which are critical for building adaptive capacity in highly variable work.

Sometimes during the course of narrative storytelling, crews might have to step back and hit the pause button. Lewis Safety Supervisor Lonnie Peyton advised, “It’s okay to press pause to gain awareness of a situation. This is how we ensure that we have plans in place for safety and success.” Peyton continued, “When we pause and ask newer team members *What did you notice? What did you think was going on? What does that mean?* it provides a space for members at all levels to think, reflect, look critically at their own actions, and accept feedback.” Not only is the process a good pulse-check for seasoned staff, but it can actually accelerate the expertise of less experienced team members.

Though Lewis has earned an industry-wide reputation as a pioneer in safety with its human-performance-based approach to vegetation management, continuous learning remains the key to keeping people safe. Consequently, the safety team focuses much of their time and energy on building a culture of constant improvement. By eliminating blame and empowering frontline workers, team members are motivated to be part of the solution. By managing safety from a position of positive engagement, workers do not worry about getting in trouble for making a mistake. Instead, they are inspired to learn from close calls, embrace agility, adapt when needed, and handle a variety of situations over time based on shared experience.

In my 25+ year career, I’ve had the opportunity to serve in leadership positions at Siemens and Calpine Corporation and on special assignments with organizations such as NASA and the Department of Energy. I’ve researched cognitive science and resilience engineering in many sectors and analyzed countless methodologies related to safety. But if I had to choose one human performance tool—only one tool—it would be After Action Reviews. I believe that After Action Reviews were instrumental in moving Lewis forward to become a learning culture and safety leader. We are on a mission-critical journey to save lives and prevent serious injuries by embracing a new view of safety and human performance—and that’s exciting.

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Frontline Leaders Are Our Secret Sauce

Type “leadership books” into an online search and prepare to be flooded with a plethora of motivational manuals aimed at leaders who range from bold and aspiring to disillusioned and struggling. Each tome provides a slightly different perspective on successful leadership qualities and suggests (some subtly, some overtly) a proprietary foothold on the “secret sauce” needed for mastery.

When asked about the secret to Lewis’ 85-year success in vegetation management, Lewis leaders collectively point to their general forepersons (GFs)—the strong frontline leaders who manage Lewis’ 4000+ workforce across 27 states. General forepersons have the profound responsibility of overseeing crews that are conducting some of the most dangerous work in the field in highly variable environments. Because of these ever-changing conditions, GFs must operate like Swiss Army knives and remain observant, organized, agile, adaptive, and innovative amidst a spectrum of evolving circumstances. General forepersons are the first responders to their crews and customers, the face of the company to partners and homeowners, and “boots on the ground” to help solve problems.

Yet if you ask a GF about the secret to being a successful leader, their response will likely be *less* about authority and *more* about humility. General forepersons often point to listening, empathy, and empowering others as the keys to success. As an organization, Lewis embraces a mindset of continuous learning from the newest hire to the most senior staff, and provides the training, tools, and opportunities necessary for workers to build and hone their leadership skills.

Lewis relies on all employees to help build a culture rooted in trust, respect, and constant learning in order to fulfill the corporate promise of Job Done Right®. At Lewis, every day provides a new opportunity for learning and leadership. For more insights from Lewis leaders, visit www.lewisservices.com/blog. 📖



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UAA Texas Regional Meeting Recap

By Jerry Staton, Senior Operations Manager, ACRT Inc.

On June 27–28 in Fort Worth, Texas, industry professionals from several utilities, tree companies, and consulting partners from the Texas and Oklahoma region converged at the beautiful Fort Worth Botanical Garden for two days of presentations. The event featured a diverse range of topics that promoted discussion after each presentation.

The first day began with Bill Spencer from CNUC discussing the hazards of lone workers in our industry, along with equipment that can be used to communicate outside of cell phone range. Ryan Krause from Pedernales Electric then presented his remote sensing data that had been collected in partnership with IBM. Susan Rossbach from Brains4Drones followed up with a presentation on takeaways from addressing wildfire risk in the Pacific Northwest. Tim Cool from Texas-New Mexico Power gave the last presentation of the day and discussed increasing productivity and building a culture through effective communication, highlighting being a leader



A panel discussion highlighted the various perspectives from an investor-owned utility, a cooperative, a municipality, and a private landscaping company.



through strong communication. A networking event was held at the hotel after the presentations and attendees were able to enjoy some delicious finger foods and socialize in a casual environment.

Day two started off with a presentation from Dr. Michael Liptak from EnviroScience discussing utility response to declining pollinator habitats. Dr. Liptak discussed the many different species of pollinators and the specific plant communities they have an effect on. The rest of the meeting was a two-part panel discussion moderated by Quentin Stewart from Davey Resource Group and Jerry Staton from ACRT, Inc. The first panel discussed landscape trees in utility rights-of-way. The panel provided perspective from an investor-owned utility (Grant Ehlen, Oklahoma Gas and Electric), a cooperative (Penny Whisenant, Pedernales Electric) and a municipality (Joe Osborne, Austin Energy), along with that of a private landscaping company (Jason Klontz, TerraScape) on tree ordinance conflict with utilities. After a short break, the second panel discussed how landscape trees and ordinances can potentially impact storm response and restoration efforts. The panel discussion provided several recommendations on how utilities can partner with cities, HOAs, and private landscape companies to try and reduce conflicts based on tree ordinance.

The event was capped off by a tree identification workshop by Trey Anderson. The group endured heat in excess of 105 degrees, but Anderson did an excellent job of keeping the group entertained and in the shade. Anderson's passion and knowledge paired with the Botanical Gardens made for a great experience, despite the excessive heat.

Thank you to our attendees, presenters, panel members, and sponsors for making this event such a success. 🌳



Professionals from utilities, tree companies, and consulting partners from the Texas and Oklahoma region networked at the Fort Worth Botanical Garden for the two-day event.

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TECHNOLOGIES 

How to Talk Tribal

By M.K. Youngblood, Safety Manager and Tribal Liaison, ACRT Pacific

Interacting with tribal nations can be very daunting for companies, especially if there are projects on or near tribal lands. One thing to be aware of is that federally recognized tribes are domestic sovereign nations with a unique status in the United States, with numerous laws to protect them. Many vegetation management companies work as contractors to major utility companies which have powerlines that run through these lands that lead to thinning projects and fuel-reduction programs, such as defined scope, enhanced vegetation management, or even lump sum. The issues that may arise can be mitigated by engaging these tribes in a *good way*. The term “good way” means that your company is engaging in business practices that are considerate of the tribe’s sovereignty, culture, and history. This includes operating in accordance with local, state, tribal, and federal laws, such as the National Historic Preservation Act (NHPA), the National Environmental Policy Act (NEPA), the Native American Graves Protection and Repatriation Act (NAGPRA), and other tribal laws specific to each tribe. Many tribes have their own tribe-specific laws that deal with cultural and natural resources.

Sometimes engaging with tribes can be unnecessarily arduous because people attempting outreach do not have a good understanding of the social, legal, and political context of American Indian tribes in general and the particular tribe involved. Whether you are employed by an energy company, VM company, developer, regional authority, or other entity, chances are there is a tribal group near you that might be impacted by your activities or have the potential to impact your work. Proactive steps to understand tribal perspectives and issues are essential for making these relationships productive. There are some considerations that can be made prior to starting work in these areas that will cultivate better outcomes for all involved.

Utilize a Tribal Liaison

This position within a company can provide measurable benefits in relation to lawsuits, time lost, negative publicity, and more. This person should be of Indigenous descent, preferably from a local tribe. The cultural connection here is immeasurable. The tribal liaison (TL) will be the intermediary between the tribe and your company for all issues pertaining to business with their current and ancestral homelands.

Contact the Tribe’s Tribal Historic Preservation Officer

The tribal liaison should be reaching out to the tribe’s Tribal Historic Preservation Officer (THPO) whenever projects fall within the

boundaries of the local tribes. Doing so prior to any work being done is a step in the “good way” process. The THPO can advise the TL of sensitive areas within the scope of the work area so that steps can be taken to mitigate any potential damage to the tribe’s resources. Remember, each tribe is different so do not generalize every tribe. While federally recognized tribes have a special status in Section 106 of the National Historic Preservation Act and National Environmental Policy Act review processes, don’t forget about state-recognized tribes. It is important to engage with them early and often to develop relationships and surface any concerns about your project.

Engage the Decision-Makers

With every tribe being different, the chain of command will also be unique. Some tribes have a “chief” and a tribal council, while some may be run more like a Fortune 500 company with a board of directors and a chief operating officer (COO) or president. Do the research and find out ahead of time how the tribe is organized. Making a faux pas with this can have disastrous effects. When you engage with the decision-makers, do so in a respectful manner—another step in the “good way” process. Treat tribal leadership the same way you would treat the President of the United States or the CEO of a major corporation. It is very important to demonstrate respect for their role in their tribal nation, in addition to their role in the process and the value they bring to the table.

Understand Tribal Areas of Concern Are Ever-Changing

Just because a tribe did not get involved in a previous project in the same area does not mean that their priorities could not change. The tribe can become involved at any time on any project, and understanding this is paramount when looking at current and ancestral tribal areas. Remember, all of the United States is ancestral tribal land. Just because failed treaties and forced migrations pushed tribes around, it does not alleviate the fact that their ancestors walked the land.

Gifts Can Be a Double-Edged Sword

If the company wants to give the tribe a gift at the first meeting, research should be done to see what is appropriate. Traditional gifts such as cedar, sweetgrass, tobacco, and sage are always a safe bet. Stay away from bottles of alcohol; this would be highly insensitive, due to some tribes dealing with astronomically high rates of alcohol and/or drug abuse. One of the ways to connect is to learn the culture of the tribes with whom you are dealing and find something unique about them that shows consideration and respect.

PHOTO COURTESY OF GRANDRIVER/GETTY IMAGES.

Listening Is Critical

Be prepared to talk with the tribe and engage in meaningful dialogue about their thoughts, issues, and concerns with the project. Perhaps the most important part of talking to a tribal leader is what seems to be small talk, and most likely dominates your first interaction with a tribe member. They are not more interested in your position than in knowing who you are and understanding your motives.

Don't Forget about Training

Key leaders of the company should also be trained to build constructive relationships with Native American tribes, including the culture, protocol, treaty rights, and worldviews of the Native American tribes affected by your business. Often the tribes, themselves, help with such training. This will allow the company to better understand why Native American tribes are concerned and improve internal communication between designated liaisons and others within the company. Although daunting, researching to understand tribe-specific tribal perspectives and issues will strengthen relationships, making projects smoother and more productive. If we engage in the "good way," our efforts will be successful and protect not only the land, but the tribe's sovereignty, culture, and history.



ABOUT THE AUTHOR

M.K. Youngblood serves as the Safety Manager and Tribal Liaison at ACRT Pacific. He has more than 30 years of public service and first responder experience, with core proficiency in Indian law, Indian culture, and disaster

cleanup. Youngblood also serves as a certified instructor for the U.S. Department of Energy (National Nuclear Security Administration and Center for Radiological Nuclear Training), U.S. Emergency Management Institute, and Center for Domestic Preparedness, and as the Tribal Secretary for the Haslett Basin Holkama Mono Tribe of Fresno County, California. For the past 11 years, he has led the California Tribal Emergency Response & Relief Agency (CAL TERRA) as its Chief Officer of Emergency Management. Most recently, Youngblood has given presentations for regional safety organizations, developed apprenticeship curricula for nationwide use in cultural conservation and environmental science, and has written peer-reviewed articles for safety in the utility industry. He is currently finishing a special bachelor's degree at California State University, Fresno, in disaster archeology, natural, and cultural resources, with a minor in American Indian studies. 🌱

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Gaining an Appreciation for Working with Government Agencies: Alyssa Collins

On a day-to-day basis, ACRT Pacific Vegetation Management Inspector Alyssa Collins compiles tree data identified by her fellow vegetation management inspectors. Oftentimes, this data is collected on agency lands, including the U.S. Forest Service and Bureau of Land Management to the Bureau of Reclamation,



Alyssa Collins

California State Parks, and the California Department of Transportation (Caltrans). An important part of her job is serving as a facilitator between ACRT Pacific, the utility, tree crews, and these agencies—a task she's grown fond of since stepping into the vegetation management inspector role just over a year ago. Collins also noted that she has an attention to detail and enjoys having the opportunity to put those skills to use by sorting data and keeping track of inventories.

"One of my favorite parts of this position has been molding all these people together to accomplish one thing: getting tree work done on agency land. It's very rewarding and reminds me that our roles are just one small part of the bigger picture as we work together to improve vegetation management," explained Collins.

Collins also shared, "I've loved being outside since I was a child" and she got into utility forestry in the first place because it's 90–95% outdoors. She earned her International Society of Arboriculture (ISA) Certified Arborist designation in 2020 and appreciates the opportunity she's been given to know and learn about the trees surrounding her work.

While she may not spend as much time in the great outdoors with her new role, Collins values the time she spends on agency lands, "because some of these places are beautiful."

To learn more about ACRT Pacific and our vegetation management services dedicated to California, visit pacificacrt.com. 🌱

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Rehabilitating Citizens and Ecosystems

*By Mike Pittman, Assistant Business Manager, IBEW Local 17 and Terrell Lockhart, Manager-Local Resource Development, DTE Energy.
All photos courtesy of DTE Energy.*

Beginning in 2019, the International Brotherhood of Electrical Workers (IBEW) Local 17 launched two utility arboriculture training programs, and has since trained and equipped 125 Michigan residents for an in-demand line clearance career. We accomplished this by building dynamic, win-win partnerships with state and local government, private businesses, and nonprofit organizations to equip and train Michiganders for an in-demand energy career and pair them with those ready and eager to hire.



The Parnall Tree Trim Program participants.

Our utility arboriculture training ecosystem includes DTE Energy (Michigan's largest utility), their five utility arboriculture vendors (Asplundh Tree Expert, Davey Tree Expert, Kappen Tree Service, Wright Tree Service, and Urban Tree Trimming Services, Inc.), the State of Michigan Department of Corrections (MDOC), and the City of Detroit Mayor's Office and his workforce development team. Our ecosystem of partners, all committed to the same goal, has accomplished remarkable results in a short time span.

These efforts grew out of two parallel and complementary needs. The first was an aging and nondiverse line clearance workforce colliding with a steep increase in consumer demand for electric reliability, amid more frequent and powerful weather patterns affecting the Midwest. Added to these dynamics was the pandemic-induced shift to remote work-from-home schedules, which deepened the need for stable, reliable power in our communities.

In creating our line clearance training programs, we found that making a difference involved tackling two things together. First, programs with the largest impact pair a business need with a community need. Addressing business pain points while simultaneously doing good in the communities that the business serves created too compelling an opportunity to not take up. Second, programs that tackle inequity are those that create change.

IBEW Local 17 is located in one of the most diverse and economically challenged areas of the United States. This offers a rare, significant opportunity to introduce utility arboriculture careers to our fellow Michiganders, while simultaneously diversifying our union with talent drawn from the rich communities across our Great Lakes state. Our two programs focus on removing barriers that prevent a person's ability to successfully pursue a line clearance career. This ranges from attaining a commercial driving license as part of our curriculum to providing wraparound services to address needs, such as childcare or transportation.

In 2019, we launched our first program at Parnall Correctional Facility's Vocational Village, which envisioned reducing the 50% national reincarceration rate by providing education and skills-based training for prisoners. To date, the Vocational Village boasts a 7% reincarceration rate for their program graduates. Our program was unique in that it brought a specific workforce need to the Vocational Village's leadership with the request it expand their current career offerings beyond auto mechanics, masonry, CNC, welding, carpentry, computer programming, and CDL training. While the idea of chain saws and climbing equipment in a prison at first appeared unworkable,



The Parnall Correctional Facility's Vocational Village utility arboriculture training is its most sought-after program.

Local 17, DTE Energy, MDOC, and the Vocational Village teams took up the challenge.

The result is a first-of-its-kind utility arboriculture training program that, today, is the Vocational Village's most sought-after program, receiving countless applications from inmates housed in prisons across Michigan. To date, 25 graduates have been paired with DTE line clearance vendors and placed in IBEW Local 17's line clearance apprenticeship program, which is one of only three registered with the U.S. Department of Labor. The apprenticeship is a two-and-a-half year program—and so far, four Parnall graduates have reached journeyman status.

To support student success, Local 17, DTE Energy, and the MDOC aligned the program's one-year curriculum to each student's release date to ensure each are completing training just as they transition back to society into a well-paying job on day one. In addition, we worked together and adjusted parole officer check-in times to after-working hours, to forego losing a day's work to attend a mandatory parole meeting that are traditionally scheduled during the workday.

One of the surprising, yet exciting, outgrowths of our returning citizens program is the enthusiasm of graduates to give back to the program. Last fall, Corey Boerner and Jeffrey Gunnells—two of our first cohort graduates and Local 17 journeymen—returned to Parnall Correctional Facility to share their stories and inspire those currently enrolled.

"Our past doesn't have to be our future. And while we all make mistakes, what matters is how we use them to better our future and the futures of others," said Boerner. "The opportunity to give back to those who believed in me while at the same time inspiring those enrolled to stick with it...it's hard to fully describe how meaningful it feels."

Gunnells, Boerner, and a third Parnall graduate, Nicholas Herrick, are currently

spearheading the creation of a mentorship program to help other graduates on the path to becoming Local 17 journeymen and, simultaneously, reentering society successfully.

In our second program, launched in April 2021, Detroit-based Tree Academy offers an unparalleled, seven-week training program, offering students career-readiness preparation, safety training, and utility arboriculture skills. Once again, we partnered with DTE Energy and five line clearance vendors, as well as collaborated with the City of Detroit's Mayor's Office and his workforce development team. Together with the mayor's team, we identified a property, situated immediately adjacent to the City of Detroit's Rouge Park, to house our training facility, which was purchased through the City of Detroit's Land Bank Authority.

Rouge Park is Michigan's largest urban park, encompassing 1,184 acres. It features six miles of paved walking paths. With 4.6 miles of the Rouge River as its centerpiece, its natural areas offer many miles of hiking and mountain-biking trails winding through more than 400 acres of forest, 60 acres of native prairie, and a five-acre marsh. With such a varying topography, the park hosts numerous tree species from lowland conifers to upland deciduous hardwoods. Champion species likely exist, just waiting to be discovered. Its sister park, Eliza Howell, is the City of Detroit's third largest park, nestled along the Rouge River and immediately proximate to Rouge Park and the Tree Trim Academy.

Rehabilitating an area abandoned for more than two decades has had an immediate, positive impact on the Warrendale, Detroit neighborhood by removing blight. It has also given rise to local community collaborations. For example, while our students learn tree identification in Rouge Park, they also work alongside tree enthusiast organizations to support them in tree maintenance needs, such as pruning trees that are encroaching on walking and bike paths. The City of Detroit extended temporary operating permits to the academy for our students to practice climbing and pruning in the thousands of trees in the park, which provides an incredible real-world, hands-on learning environment that also supports maintaining the park.

In partnership with two trusted Detroit-based nonprofit



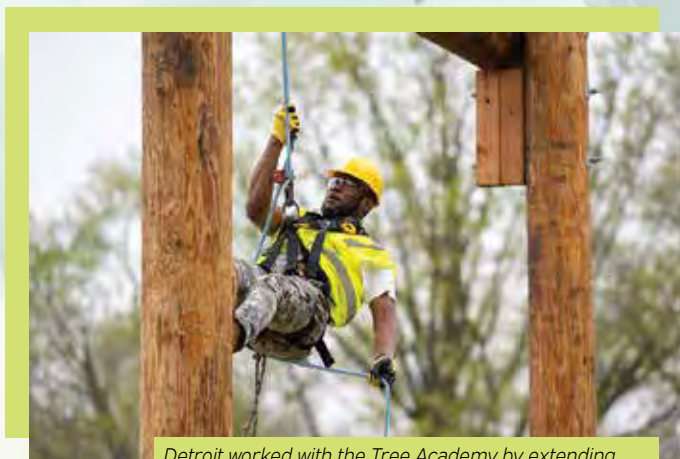
The Detroit-based Tree Academy prepares students in safety training and utility arboriculture skills throughout the 7-week program.

organizations, Focus: HOPE and Detroit at Work, we inclusively recruit students from Detroit and the surrounding metro-Detroit area and employ a "screen-in" rather than a "screen-out" approach. Instead of denying applicants who have, for example, admitted to having a fear of heights or may not currently be in the physical condition to endure the demands of line clearance, our instructors interview all qualified applicants and accept all who are eager for the opportunity.

"Screening in" students has brought about countless success stories, such as those who completed the program despite an initial fear of heights. Upon graduation, some realized their fear of heights had been overcome, while others were offered a maintenance planner role. Demarcus Cleveland began working out at his local gym before joining the academy's second cohort and, today, is on track to achieve journeyman status by April 2024.

In addition to student recruitment, our nonprofit partners provide wraparound services, such as childcare and transportation, which support students as they transition into a new career.

In just two years, more

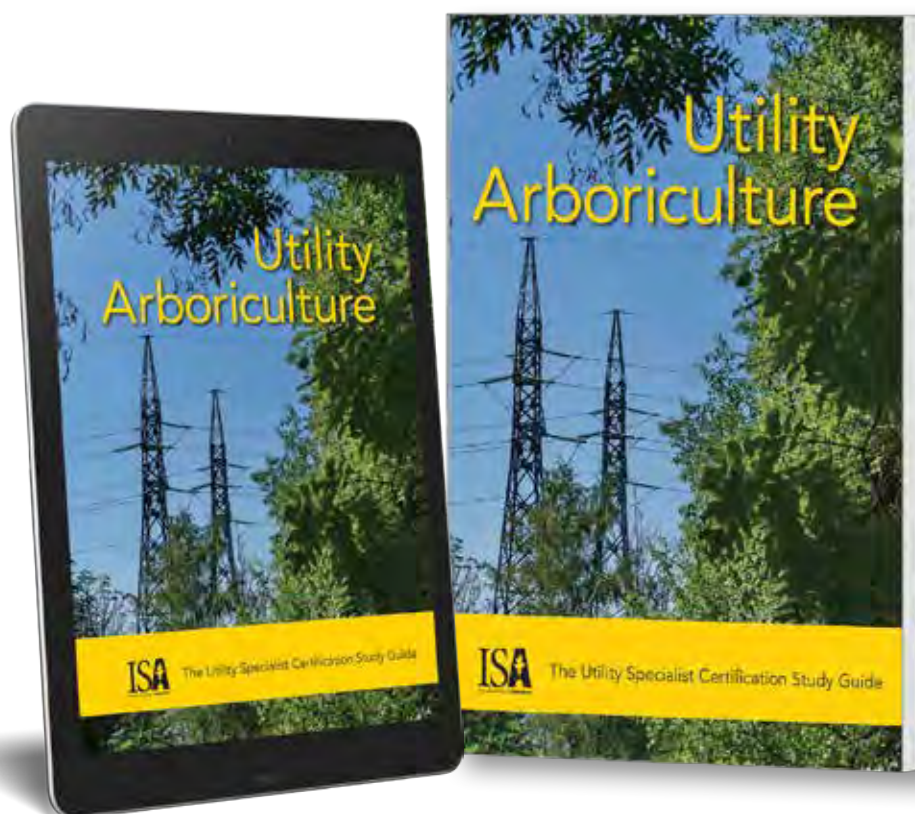


Detroit worked with the Tree Academy by extending operating permits, allowing students to practice climbing and pruning in Rouge Park.

UTILITY ARBORICULTURE STUDY GUIDE

Utility Arboriculture: The Utility Specialist Certification Study Guide is an essential text for professionals in the field of utility arboriculture. Based on scientific research and proven best practices, this publication provides utility arborists and foresters with the information necessary to navigate the complexities of today's vegetation management industry.

This study guide covers the latest methods and techniques in the areas of safety, program and personnel management, utility pruning, integrated vegetation management, electrical knowledge, storm preparation and response, and communications. This product is also available in digital format.



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100% of Tree Academy graduates are offered placement at one of DTE Energy's line clearance vendors.

than one hundred Detroiters and metro-Detroiters have graduated from our program—with 100% of our graduates offered placement at one of DTE Energy's line clearance vendors whose service territory is proximate to where they live. This ensures our graduates are working in their own communities, as well as diversifying the crews. Students also complete entry-level driver

training (ELDT) and test for their Class B commercial driver's license (CDL), which ensures graduates are fully prepared to move into our apprenticeship.

Most graduates are working in the field, and more than forty are already well on their way to completing the apprenticeship program. We anticipate several academy graduates will achieve journeyman status by summer 2024. Remaining graduates have taken up lineman apprenticeships and gas technician roles with DTE Energy, with several awaiting placement in maintenance planner positions. Others have gone on to pursue local employment with companies, such as FedEx and Avis.

Local 17 is growing and expanding to include diverse Michigan residents, and both DTE Energy and their line clearance vendors have a steady stream of trained union talent working in the communities they serve. This kind of success in such a short span of time is the direct result of the win-win ecosystem, built together with our partners. We believe our programs offer a template for skilled trades workforce development that answer demands that will only continue to grow. We welcome sharing what we have learned with other IBEW Locals, energy utility firms, and utility arboriculture service providers to start in your own communities. ♻️



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On Island Time: Delivering UVM in Paradise

Wright Tree Service was founded in Iowa in 1933. Throughout our 90-year history, our service footprint has expanded across North America. In October 2021, we established a new division in Puerto Rico. This expansion into the Caribbean was made possible through partnership with LUMA Energy.

Our relationship with LUMA began after Hurricane Maria in 2017, when WTS sent storm restoration crews to the island. The current partnership provides safe, reliable power to the people of Puerto Rico and brings 200–250 career opportunities to the area.

Due to the large number of inexperienced local applicants, work commenced slowly. We had to plan carefully to implement our processes in a new, somewhat remote environment. We worked to recruit talent, support training, and maintain our standards of safety and excellence.

We continue to learn about Puerto Rico's climate, terrain,



and vegetation. In addition to some of the typical onboarding issues we face in any new division, the island presents its own learning curve. Our crews are often driving in mountainous regions and on narrow highways, which can present safety challenges. Equipment transport requirements can also occasionally slow down work progress.

Safety is our highest priority and number one value. We work diligently to overcome the existing safety culture on the island and emphasize the importance of putting safety first in all situations. We were very pleased to reach our one-year milestone without any workers' compensation claims. We recently hosted our first ever Safety Days event on the island. The entire workforce participated in training sessions, like equipment selection, chain saw safety, and jobsite setup.

With our second anniversary just around the corner, we are so proud to have witnessed both personal and professional development of our staff members in Puerto Rico. 🌴

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Jerry Robbins

Navigating Regulations

Working Effectively with the Government

By Jerry Robbins, Project Manager, Transcon Environmental, Inc.

Most government-related projects require various levels of environmental review and approval. This coordination typically includes multiple agencies at various levels of federal, state, and local government. Progress can feel very slow—even convoluted—as project sponsors and their contractors bounce back and forth between repeated phases of “hurry up and wait.”

These government projects are also subject to countless regulations. At a minimum, these projects require compliance with the National Environmental Policy Act (NEPA) and all applicable and relevant requirements. Obstacles can include restrictions set forth by the U.S. Fish and Wildlife Service (USFWS) to avoid harming biological systems; measures for preserving historic or cultural sites established under the National Historic Preservation Act; or measures for protecting marine mammals by the National Marine Fishery Service. Even with proper planning, coordinating compliance across multiple agencies can slow project progress.

If the number of regulations isn't enough to cause confusion, project sponsors and their contractors must coordinate project details with a host of different cooperating agencies. These agencies become involved when a

project is conducted on property owned or operated by other government agencies or those who have delegated responsibility for issuing permits or some type of governmental approval. For example, a contractor working on a dredge-and-fill project, which discharges into waters of the United States, will end up working with the U.S. Army Corps of Engineers (USACE). This is because the USACE has delegated responsibility for issuing Clean Water Act 404 Permits. Other examples include the USFWS, who has delegated responsibility for Endangered Species Act consultations and conducting oversight of the Migratory Bird Treaty Act.

One of the greatest challenges for project sponsors and their contractors is aligning all the different agencies required for project approvals in a streamlined approach. As a project manager and government official for more than 35 years, I have seen numerous contractors effectively guide sponsors through the labyrinth of regulations. By completing detailed early planning and working closely with project sponsors, agencies can be properly and effectively aligned. However, the process can be fraught with issues that cause progress to stop and go numerous times, so one must ensure all data submitted for an agency decision is sufficient and

inclusive at the beginning of the process. This includes providing sponsors with estimates of relevant costs and collecting all essential planning documents, such as GIS shape files, KMZ maps, hard copy maps, permit forms, and required cooperating agency agreements (in particular, interagency reimbursable agreements). Further in the process, contractors should be prepared to provide estimated costs for project mitigation and restoration activities to be conducted after completion of construction. These costs can be assessed when sufficient environmental resource data becomes available and has been adequately assessed to support the estimate.

During my career, I have witnessed many projects halted that likely would have been successful with more detailed, early evaluation and planning. Often the issues that stop projects are not strictly environmental resource issues or technical/construction issues, but a combination of both. Resolving these issues requires early, effective coordination between project managers, engineers, and environmental resource planners.

Roadblocks can pop up at any stage of a project. Throughout my career, I have witnessed several project issues that could have been avoided with detailed, early planning.

- Not realizing certain activities in a project involved construction or removal of older structures, such as abandoning old potable wells or deconstructing buildings. Modification of some of these structures was found to be restricted or prohibited based on the National Historic Preservations Act. Depending upon the age and historic importance, modification of these structures can be disallowed or severely restricted.
 - Groundwater monitoring wells were installed to identify contamination at a site without fully understanding the local subsurface hydrogeological conditions. After completing the contaminant site investigation, the agency determined that monitoring wells which were installed could contribute to cross-contamination. These wells had to be removed at significant costs after already paying for the costs for installation.
 - Discovering late in the process that a critical substation required for a power transmission interconnection was located within a flood plain zone (which was recently surveyed and redesignated by the United States Corps of Engineers). Meeting requirements for the new flood plain designation would have made the construction of the transmission line cost-prohibitive.
 - Not having sufficient total project cost (including mitigation costs, project construction costs, etc.) until late in the project planning process and, therefore, not being able to demonstrate a positive cost-to-benefit ratio for project construction (required for federal funding).
 - Projects that were delayed because a visual resource impact of a site (i.e., was not adequately evaluated until late in the planning process).
 - Not realizing (until late in the process) that another agency's involvement was required to complete all permits and/or approvals for the project.
 - Projects that were delayed because of interagency agreements or permits that were not completed in a timely manner.
- Effectively securing planning documents and identifying all issues that can delay or stop a project

early in the planning process is not a simple task. In my experience, only a few project sponsors or government officials are open to work freely with a contractor early in the planning process. Government officials, and sometimes project sponsors, can seem aloof or difficult to access, especially at the beginning of a project when they are not familiar with the contractor. Keep in mind that government officials and project sponsors have the responsibility to ensure that contractors do not have an advantage over another and that they maintain competitive contractor pricing. However, a conscientious consultant can, at the least, work toward obtaining all relevant project planning documents early in the process and conduct a thorough evaluation of the information.

Ideally, a good contractor will instill sufficient confidence in the project sponsors and agencies, which allows them to provide broad planning support beyond the simple task order level. With or without support of other parties, the contractor should make all reasonable attempts to relay and collect critical project details. ☞

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2023 System Utility Vegetation

By Greg Alan Skellington; Supervisor, Distribution Forestry–Northern Region; National Grid

Challenges

1. Cost of Labor
 - Bid
 - Availability
 - Rising Cost for Vendors
2. Budget Flucuations
 - Depencancy on Overall Earnings
3. Lack of Accountability in Other Depts.
4. Influx of Capital Work
5. Environmental Regulations/Issues
6. Challenges with Government Agencies
7. Communication
8. Resources

Stakeholders

1. Accountants
2. Contractors / Labor Union
3. Management
4. Engineers / Designers
5. Regulators
6. Federal / State Agencies
7. Customers / Member

Solutions

1. Stakeholder Education
2. Engagement with Regulators
Engagement with Board Members
3. Tangible Examples
4. Legal / Political Support
5. Pubblc Education
6. Earmark Funds
7. Think About Future Solutions
8. Be Proactive - ID Threats
9. Use Environmental Consultants
To Make Rate Case
(Cost of Service - Coors)

This year the Utility Vegetation Managers Summit was held May 16 in Akron, Ohio. I had the rare opportunity to attend the summit as a supervisor, due to my manager at National Grid being unable to make it. As a supervisor, I was not expecting to attend this event—in fact, I was unaware that this event takes place annually. With this rare opportunity to attend the summit, I'll share my experience with you.

We've all been to conferences that either didn't align with our skill sets or didn't deliver useful information. Add the aforementioned to the responsibilities and tasks of a supervisor, I was less than ecstatic about attending a three-day conference. Let me be candid, I thought this was going to be another dull conference. I prepared myself to be less than thrilled during the seven-hour drive from Watertown, New York, to Akron, Ohio.

John Hawkins, the Vice President of Distribution Support at FirstEnergy, welcomed the group and offered high-level insight on the future of electrification. Hawkins' overall message was that electric utilities will play a larger role in industry and transportation in the future, but we'll have challenges to overcome. Hawkins tasked the group with finding solutions to the challenges discussed and preparing ourselves to respond to those on the horizon.

Virginia Bowman and Dennis Fallon presented us with the icebreaker. On a sticky note, we were to write down our responses to two questions:

- What is the strangest thing you've seen in rights-of-way?
- If there were no limitations, how would you maintain your rights-of-way?

I scribbled on the sticky note. Bowman asked us to stick our notes on the board at the front of the room. Bowman and Fallon took turns reading the responses aloud. *Dead bodies found in rights-of-way. Bears, cars, garbage, marijuana...*and the list went on and on. *Goats suspended from helicopters. Laser eye pruning. Trained beavers.* The room erupted in laughter! As the volume went down, I glanced around. People were smiling, laughing, nodding in agreement, and a few wiping cheerful tears away. This was clearly not going to be another dull conference.

The Utility Vegetation Managers Summit is an interactive conference, where all who attend participate in robust conversations, all structured around headlining topics. For the 2023 summit, we had discussions about lone worker safety, utility vegetation management funding challenges, tree failure reporting, and mechanized equipment.

At this annual event, each headlining topic is presented by a speaker. The attendees then break into four groups to discuss any challenges or concerns that may accompany that topic and provide possible solutions to those challenges. It is through this breakout-group process that I met so many bright industry leaders. We had critical discussion about questions like *What does your company do in areas where herbicide cannot be applied? How long is your pruning cycle? Does your company cut hazard trees off cycle? What kind of support do you send when using the helicopter to maintain rights-of-way?* If you ask questions, you will get answers. If you're like me, you'll have information overload in about two hours, so take notes.

Let's look at utility vegetation management funding challenges as an example of this process. As seen on the left, some groups brainstormed "Challenges" for stakeholders, while other groups tackled possible solutions.

Cost of labor, budgets based on earnings, inability to capitalize, overages in other departments...and the list is seemingly infinite.

Most of these challenges are out of our control as supervisors and managers, but we are left with the product of these challenges.

Because of this, we are often creating solutions for these problems—and sometimes we are the solution. Your organization

Managers Summit

may be dealing with an issue that another utility may have already overcome, and they may be willing to share their experience. Therefore, it's critically important that supervisors and managers attend the UVM Managers Summit. In my opinion, the UVM summit is designed to illuminate paths to solutions.

The whole conference is about 16 hours of seat time spread across three days. If I could describe the experience, it would be this: it's as though you went back to college for three days with everyone who shared the same major. Except the UVM Managers Summit offers multiple experts and is less expensive. We can look at cost benefit in several ways, but I'll share my own. The average cost of 16 college credit hours is about \$4,500. For the conference, two nights in a hotel, and provided food, the cost was around \$900. In my opinion, that's a very small investment for a substantial reward. If you are fortunate enough to be invited, I strongly suggest that you go. The folks that attend this summit have years of experience in their

field of expertise, and they're interested in the future of the industry—which means they are willing to share information. I guarantee that you'll hear what other utilities are doing, make new contacts, have a few laughs, eat well, and you may even learn something about yourself.

I feel very lucky to have attended the UVM Managers Summit. It was educational, so yes, you'll get CEUs, but it was so much more than that. You have an opportunity to converse with eye-level peers from across the country and share information. It's a chance to pull our collective voices together and be part of something bigger than ourselves and bigger than the utilities we support. If you value the free and open exchange of information, networking, and taking part in the steering of our vegetation management profession, then this event is for you.

ABOUT THE AUTHOR

Greg Alan Skellington is a Morrisville College graduate with 20 years in the field of arboriculture. He began his career with Bartlett Tree, maintaining the trees of Manhattan's Central Park. He has worked in residential, commercial, and utility arboriculture. Skellington is an ISA Certified Arborist, ISA Certified Utility Specialist, and Tree Risk Assessment Qualified. He is currently employed at National Grid as the Supervisor of Distribution Vegetation Management in the Northern New York region. Skellington spends most his free time with his wife, Melissa, and his two daughters, and enjoys reading and outdoor sports. 🌿



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Use Vegetation Data Intelligently to Drive Successful Rate Case Applications

By Rich Alexander, Product Manager, ACRT Services

PHOTOS COURTESY OF ACRT SERVICES

A Long-Term Process with an Even Longer-Term Impact

As a professional working at an investor-owned utility (IOU), you will undoubtedly be familiar with an important process known as a rate case (also called a distribution rate case). This monumental undertaking involves virtually every department and function in the utility in order to prepare an extensive application to increase the utility's rate to customers for delivering their power, water, or gas.

Whether a rate case is conducted annually, every few years, or once every other decade ultimately depends on the utility, its circumstances, and its long-term financial needs, but it is generally required in order to justify and receive approval for an increase in the cost of service to its customers. If you've worked on a rate case before, you'll know the timeline and process can be extensive—let alone the actual rate case application itself.

Typically anywhere between a few to several thousand pages, rate cases provide in-depth information and analysis on the utility's existing infrastructure and delivery system, its financials, its immediate and long-term needs, and why the increase in cost to customers is necessary. There are multiple phases of review, both within the utility and by the state public utilities commission, that ultimately lead to a decision.

There are many reasons why a utility rate case may be needed, but the end goal remains the same: to adapt to changing circumstances and conditions and secure the funding needed to continue providing service and achieve other goals.

Vegetation management departments have a distinct challenge when it comes to rate cases, particularly as this function has one of the highest operations and maintenance costs within the utility. The information that VM teams provide as part of the greater rate case application will heavily influence

the final decision of the PUC and will subsequently impact VM's budget and, thus, its priorities. That impact will be immediate and can continue to influence priorities for years to come.

A Utility Rate Case Application and Vegetation Management

While the rate case application and documentation itself is vast, VM's part in justifying the increase is by no means small. Extensive information about the vegetation on the system, vendors, and equipment needed to control it, and more must all be detailed. Thus, the VM team must have in-depth strategic knowledge of its system in order to prepare its portion of the rate case and demonstrate its ability to be a good steward of ratepayers' resources. Examples of what vegetation management teams include in a rate case include:

- **Safety**—Safety-related incidents and injuries are one of the biggest impacts to VM teams and their budgets. Just one incident can result in significant costs and potentially fines to the organization. In a rate case, utilities should detail in depth their investments into safety training and awareness, both for their teams and the vendors and partners that work on their systems.
- **Vegetation Information**—Tree inventories (and potential inventories of other brush types), species, density, health, age, growth rate, required pruning techniques, proximity to infrastructure, and much more.
- **Work Types**—Understanding everything about the work needed to manage vegetation on the system, such as the type of work (e.g., bucket pruning, climbing, etc.), the vendors used for these services, expected program costs, whether IVM solutions are planned, and more.



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- **Sustainability Goals**—As utilities are stewards of the lands they own and manage, it's important to detail efforts to convert ROWs, green spaces, and other environmental areas into more sustainable spaces that keep maintenance costs down, encourage pollinator habitats, prevent invasive species, and more.
- **External Influencers**—A number of outside factors impact VM programs every day, including customers themselves, invasive plant species, pests (e.g., emerald ash borer [*Agrilus planipennis*]), ongoing shifts in climate, land erosion, and—particularly notable for today—wildfires.
- **Storms**—Closely related to the above, storms can cause widespread damages and other issues that force VM teams to pivot from planned workflows and incur additional costs. These must be planned for as best as possible. Additionally, storm hardening is a growing budget line item and focuses on efforts to mitigate risks and associated costs due to natural events, such as hurricanes, ice storms, and flooding.

The Vegetation Management Data Challenge

One of the key challenges with gathering and mapping out all of the above data is where, and when, it comes from. Without an understanding of how these data points work together to influence vegetation management budgets, utilities are simply left with the data and a best guess on what the most ideal budget looks like.

Typically, VM teams rely on historical data to inform rate cases, which is problematic because of what it is: data about the past and not about the future. Local knowledge from employees that have been with the utility for much of their careers is also a source; but with older generations approaching or already at retirement age, much of that knowledge is being lost. Additionally, another curveball: the recent supply chain and logistics issues of recent years have had long-lasting effects that continue to impact utilities and the companies they work with today, along with high interest rates.

Again, the aim of a rate case is to create a justification for a higher cost to customers in order to continue meeting their need for reliable electric, gas, and water supply, and for the utility to sustain its operations. Without success, service reliability and even safety suffer because there are fewer dollars available for key infrastructure upgrades, VM work, safety programs, and more.

But without data that looks to the future to identify and weigh risks, workflow, resources, timelines, and other factors, utilities can't get the most realistic budget target to pursue. Static data from years past also won't be helpful—it needs to be dynamic to account for what could happen. While a common strategy is to shoot for the moon with rate cases and hope for something in the middle, it's not the most ideal, because even that approach can't see what lies in wait in the months and years ahead.

As an example, what if the vegetation information on an existing current system could be used to justify switching from a three-year pruning cycle to a five-year cycle? The result, of course, is a significantly reduced vegetation management budget. This exact scenario has happened many times before at utilities nationwide that leverage their system data in intelligent ways to identify opportunities for improvement.

Use the Tools That Are Available

Technology specific to UVM has been available for some time but is continuing to evolve to help teams more proactively plan out their work, not just for the current cycle but for much further in the future. The key here is how system data is used in this planning. Remember, static data leads to static decisions and plans. Dynamic data—influenced by the ability to adjust the inputs based on needs and situations—allows for much more effective use of vegetation management dollars.

At ACRT Services, we have been able to leverage the Arborcison platform to take sample datasets from a system and create data-driven, actionable cycle plans that factor in timeline, all the variables discussed above, and cost benefits to give utility leaders their best next step. More importantly, this data allows VM leaders to create better plans and budgets. And when it comes to navigating a rate case, knowing what has the potential to impact the program down the road can make all the difference.

How have you been able to use system data to make more effective decisions? Have you leveraged new tools to help you with a recent or upcoming rate case effort? We'd enjoy hearing from you. Anyone interested in carrying on the conversation can reach out to me directly at ralexander@acrtinc.com.



ABOUT THE AUTHOR

Rich Alexander is a Product Manager at ACRT Services and a seasoned vegetation management professional, who bears 20+ years of industry experience. In his role, Alexander manages Arborcison™, a management tool that uses collected data and proprietary methods to provide critical intelligence about UVM programs. He holds both

Arborist and Utility Specialist certifications from the ISA and is a licensed commercial pesticide applicator in several states. Alexander also serves as a facilitator for the Utility Vegetation Management Professional Certificate program at the University of Wisconsin-Stevens Point. He holds a Bachelor of Science in forest resources and conservation from the University of Florida and a project management certificate from the University of Minnesota. 🌲



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Giving Back to Those Who Gave So Much: Saluting Branches

By Sam Hickey, Content Specialist, ACRT Services

I was honored to serve as a volunteer at my first Saluting Branches Day of Service in 2022 at Lake View Cemetery in Cleveland, Ohio. It was special seeing so many folks from our industry join forces for a special cause. In total, 3,000 volunteers across the country spent the day donating their talents and services to 83 different veteran properties. Despite having what some would refer to as a lack of tactical tree-related skills, I still left at the end of the day feeling confident that our team had made a difference in just a few short hours.

As the child of a U.S. Air Force veteran, Saluting Branches' mission inspired me to give back to those who served before, with, and after my dad. He dedicated a total of 12 years to our country, six of those spent on active duty. After I was born in the United Kingdom, we lived in Stanton, Gloucestershire, England, while he was stationed at Royal Air Force (RAF) Mildenhall.

Sacrificing time away from our daily tasks seems so minuscule compared to those who made the ultimate sacrifice—just like my dad.

Arborists United for Veteran Remembrance

What started as a small, local civic project has blossomed into an annual, nationwide day of service. Saluting Branches, a nonprofit organization that is dedicated to recognizing and honoring our veterans, was brought to life by the Rainbow Treecare organization in Minnesota. The certified 501(c)(3) organization is run by a small group of industry volunteers who are elected to its Board of Directors and one part-time, paid employee.

In addition to its Board of Directors, Saluting Branches is composed of committees that

focus on enrollment, logistics, communications, sponsorships, and tree planting. Among the most pivotal roles in the organization are the site leaders across the country who are instrumental in making these days of service a success. These professionals dedicate time in the months leading up to each event and are the crucial boots-on-the-ground volunteers, as they serve as the liaison between the government agencies and our industry volunteers.

Taking Root

With the help of the United States Department of Veterans Affairs (VA) and its National Cemetery Association (NCA), Saluting Branches held its first Day of Service in 2015, which garnered more than 1,000 industry volunteers who gathered at 27 sites. Saluting Branches Past President Brent Cooper and Historian Ben Cooper, both of Rainbow Treecare, reflected

on the hurdles the team encountered when introducing the initial idea of Saluting Branches to the head agronomist at the VA, commenting that he was reluctant at first and pointed to a number of failures by other nonprofits. In the end, the head agronomist gave Saluting Branches a chance and identified 23 locations that would be interested in trying out the partnership. After the initial event in 2015, Saluting Branches was offered high praise from around the VA, for the professionalism and quality of the event our volunteers brought to them.

Nine years later, the Saluting Branches Annual Day of Service continues to flourish as





PHOTO COURTESY OF SALUTING BRANCHES

the tree care and landscaping industries offer support for our troops by helping to make their final resting places a safe and beautiful environment.

Brian Bruce, of Vermeer Corporation and Saluting Branches president, shared, "Saluting Branches is bigger than all of us combined. It is a day and time to put all else that troubles us behind. We come that morning with the world's weight on our shoulders, our family troubles, raising kids, work stresses, and just overall burdens; we leave with a sense of pride and the fact that we just spent an entire day beautifying the final resting place of strangers, friends, brothers and sisters, mothers, and fathers. A selfless act that we then desire to do until we can no longer. You forget your problems and leave them with the fact that you just gave back to the ones who gave it all."

Acts of service, such as the Saluting Branches Day of Service, experience their share of struggles, too. "Coordinating anywhere from 5–150 volunteers all from different parts of the industry can be challenging. Working in a cemetery that actively interns veterans daily can be challenging to work around, logistically. Enforcing safety has gotten much better, and staying humble and serving in the tasks most needed by your site is a constant," explained Carrie Tauscher, arboretum director at the Crown Hill Heritage Foundation in Indianapolis, who also serves as a director on the Saluting Branches Board.

Offering Support through a Day of Service

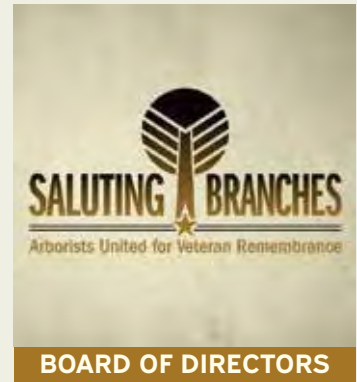
"The VA has provided Saluting Branches with access to its locations around the country. If there are arborists interested in giving back through their skills and talents, we are able to provide them with a location in their geographic region," shared Brent Cooper and Ben Cooper.

I invite and encourage you—regardless of your skill set—to join Saluting Branches for the largest one-day volunteer event in the tree industry for its 10th Annual Day of Service in 2024. For more information on registration, site locations, and sponsorship opportunities, visit salutingbranches.org.



ABOUT THE AUTHOR

Samantha (Sam) Hickey is a Content Specialist at ACRT Services. She has been with the organization since 2020 and serves on the Saluting Branches Communications Committee. Hickey holds bachelor's degrees in public relations and media production from the University of Akron and a Master of Arts in professional communication from Youngstown State University. 🌳



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PROFESSIONAL PROFILE



One thing that I would like to see as an improvement in UVM is the deployment of intelligent management systems.

Ricardo Velerde

I was born and raised in Los Angeles. The only work and careers I was familiar with were carpentry-, mechanical-, and industrial-type trades. My father worked multiple jobs and I helped him during the summer and weekends to earn money and gain experience for what I believed would be my eventual profession.

I got into UCLA and explored different career paths, but I wasn't really drawn towards any particular direction. I graduated with a Bachelor of Arts in psychology and worked odd jobs. One of those was at a salmon cannery in Egegik, Alaska. I worked 16-hour days during the salmon runs—it paid minimum wage and everything I owned smelled like fish. However, during breaks and at the end of shifts, I would walk outside and enjoy the most amazing hikes and views. I know now that there are wonderful natural resources within and outside of urban areas, but I had never been introduced or exposed to them growing up.

After my last summer in Alaska, I was determined to find a job in natural resources and found an entry-level position with the Natural Resources Conservation Service (NRCS), helping with soil surveys in Hoopa, California, in 1998. In 2002, I became a soil scientist for the U.S. Forest Service on the Chugach National Forest in Anchorage, Alaska, then for the Shasta Trinity National Forest in McCloud, California, in 2006.

In 2009, I accepted an Environmental Protection Specialist position with the Western Area Power Administration (WAPA). Although the primary responsibility was environmental compliance, I was also given vegetation and access road management responsibilities because of my background in natural resources. In 2013, I was promoted to Vegetation Management Specialist, where I took over the Vegetation and Access Road programs for WAPA's Sierra Nevada Region.

Upon entering the industry, I had expected the majority of the challenges to be related to vegetation encroachments—that is, keeping trees away from conductors and tower footings. The importance of IVM became increasingly more apparent as I learned the trade from managers and colleagues within and outside of WAPA. Transforming a ROW to accommodate a transmission line doesn't have to be destructive to habitat or significantly limit its use. I learned that IVM provides the tools to limit disturbance to—and even enhance—habitat, such as providing and promoting habitat for pollinators.

As climate change continues to impact all of us, the threat of wildfires is changing our industry. When I first entered the industry, managing to prevent ignition and spread of wildfires was an important but relatively minor component of our program, compared to other objectives. But it's now a major part of all planning and funding considerations. Every time we go out in the field, we see how quickly and how much tree mortality is changing the landscape. Every dead and dying tree outside of our ROW that can strike our line is a hazard and needs to be addressed quickly.

I am currently working on updating our wildfire mitigation plan. We are adapting and modifying our plan as we assess what worked and what didn't, on an annual basis. I look at what other utilities are doing through my connections and through industry forums where we share ideas. Wildfires will be part of our lives and careers for the foreseeable future. We have to keep learning about how the threat will develop over the next years, what tools we have to mitigate the hazards, and what it's going to take in terms of resources, policy, and cooperation to meet the challenge.

We are always looking at new remote sensing technology that could allow us to quickly assess changing conditions and prioritize accordingly. The challenge is striking a balance between spending funds on these technologies and mitigating the hazard.





What I enjoy most about UVM is the collaboration while being out in the field. Every opportunity I get, I'm out with crews assessing conditions and reviewing completed work, sharing ideas on how to meet challenges and how to improve our programs. I enjoy the camaraderie and the relationships I've built over the years.

I've been very fortunate to have had supervisors and managers that ensured that I was not only ready for my current position but prepared for any potential promotion opportunities. I've learned from all my colleagues, whether they were UVM managers, environmental specialists, archeologists, or foresters—they all brought something to the table and we learned from each other.

Looking to the future, I'm really fascinated by how satellite imagery may be a new inspection tool for utilities. Traditional remote sensing methods, like LiDAR, can be expensive and time-consuming to acquire, process, and analyze. There are more companies proposing satellite-based remote sensing for VM, including conductor-tree distances, tree health, and fuel load.

My vision for the future success of our industry is by having continued collaboration between utilities—by sharing ideas, innovations, lessons learned, best management practices, and more. 🌱

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Finding Common Ground Between Wildlife and Arboriculture: Darrell Pardoe

As an experienced consulting utility forester (CUF) at ACRT, Darrell Pardoe has collaborated with various contractors, entities, and agencies over the years.

Before climbing into the arboriculture industry, Pardoe graduated from Unity College in New Gloucester, Maine, where he studied wildlife biology. He also spent a few summers in Jackson, Wyoming, at the Safari Club International Foundation's American Wilderness Leadership School (AWLS). Throughout his career, Pardoe has worked for multiple tree care contractors. He served as a general foreman and a supervisor before stepping into his role as a CUF. He is also an International Society of Arboriculture (ISA) Certified Arborist, ISA Utility Specialist, and Certified Pesticide Applicator. Pardoe describes his work as a "mixed bag." His primary responsibility is to plan vegetation work for tree contractors, but his other duties include auditing work and training fellow CUFs on proper planning.

While he no longer works directly with wildlife, Pardoe's had several opportunities over the years to collaborate with similar-minded agencies, such as the Pennsylvania Game Commission and the Pennsylvania Department of Conservation and Natural Resources Bureau of Forestry. With 17 years of experience under his belt, Pardoe says the key to the success of these collaborations are detailed processes and effective communication, such as this simple, four-step process:

1. Locate and assess the areas where work needs to be performed.
2. Conduct a vegetation survey where the percentages of plant and tree species are recorded.
3. Identify and mark what needs to be trimmed and/or removed.
4. Submit all necessary forms.

Despite the constant evolution of agencies, organizations, and processes over time, there's nothing that can't be accomplished when our industry joins forces to accomplish one common goal. Learn how ACRT can become a liaison, like Darrell Pardoe, for your organization's vegetation management needs at acrt.com. 🌱



Darrell Pardoe

The Synergy between a Utility and California State Parks

By Lauren Baeta, Environmental Program Manager, PG&E

Consecutive years of drought conditions in many regions of the country have fueled significant wildfire activity. Pacific Gas and Electric (PG&E) understands the increased wildfire danger to its facilities, customers, and communities, and has long believed the State and Federal Government should consider taking additional steps to maintain safe and reliable electric service; promote public health and safety; protect our natural resources; and reduce state and federal regulatory and administrative burdens on our public lands, including undertaking efforts to develop operations and maintenance plans to expedite routine operations and maintenance activities on state and federal lands.

The fire season of 2019 created an awareness for the need to improve timelines and efficiencies for the process in which PG&E conducts critical O&M work on California State lands. Pacific Gas and Electric and the California Department Natural Resources (State Parks) began negotiating an agreement in 2019 that memorialized standard operating procedures to expedite review and approval of PG&E's requests to conduct routine operation and maintenance work on their gas and electric facilities on property managed by State Parks (SP).



There are more than 500 miles of electric and gas infrastructure maintained by PG&E within 18 California State Park Districts, which covers more than 100 State Parks. The plan is referred to as the "Near-Term Process for Utility Right-of-Way Maintenance Activities," an agreement between PG&E and the California Department of Parks and Recreation, dated April 27, 2020. The agreement represents the first deliverable intended to memorialize process, standard conditions, and best practices to be incorporated at the field level. The agreement allows much of the utility's maintenance work to be released within 14 days of submittal to the district for review. A long-term agreement is anticipated to be executed between PG&E and State Parks Districts in future years.

The agreement establishes the activity review process, defines environmental review and protection process, and establishes communication and monitoring protocols. The agreement has successfully reduced the amount of time SP staff spend reviewing and processing routine operation and maintenance activities. The agreement aids with maintaining PG&E's facilities in a safe and reliable manner and achieves greater consistency and certainty across the State Parks for reviewing and approving O&M activities. It lays out the when, where, and how the utility can conduct vital work. Before

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this agreement was in place, it could take 6–12 months to obtain approval to address a potential wildfire hazard—it now takes 14 days of district-level review to move forward with the activity.

The streamlined process helps assure electric and gas facilities are regularly maintained, thereby reducing fire hazards. The plan ensures maintenance work is done quickly and efficiently to protect the State Parks lands and vital resources. The agreement is necessary to ensure that facilities are maintained in compliance with applicable federal, state, and local laws, including the California Public Utilities Commission requirements and regulations. The agreement also outlines procedures to avoid effects on plants, animals, aquatic features, endangered and sensitive species habitats, areas of resource concern, and other areas of potential affect.

Although the Near-Term agreement has allowed PG&E to significantly increase the pace and scale of work completed, there are ongoing challenges and negotiations on many of the projects managed within the 18 SP districts. The increased volume of work, and speed in which to complete it, has required PG&E to meet with State Park leadership and staff, ongoing. Pacific Gas and Electric has a programmatic permit team who work directly with the 18 SP District staff on issues that may arise from our O&M work, and work closely to problem solve and ensure work is done to meet environmental requirements and protection. Annual meetings are held to explore opportunities where we can continue to collaborate to reduce wildfire risk within California. Topics that will be explored in the coming years are clarifying the process for prescriptions for the disposition/treatment of felled trees (e.g., timber sale, lop and scatter, chipping) and moving from a short-term agreement to a long-term agreement. Pacific Gas and Electric is currently undergoing similar efforts with the National Park Service and Bureau of Land Management and has executed a 50-year operations and maintenance plan with the U.S. Forest Service.

The teamwork between PG&E and State Parks has proved to make both operational and relationship successes between the two groups, creating avenues for both to meet their environmental goals. 🌱



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FirstEnergy's Seed Mix Initiative

One of FirstEnergy's five core values is stewardship: We seek to positively impact our customers, communities, and other stakeholders, and we strive to protect the environment.

As part of our vegetation management program, FirstEnergy has worked to support diverse pollinator habitats by introducing a pollinator seed mix initiative. Since the program began in 2020, FirstEnergy has supported more than 190 acres of newly created pollinator habitat, making significant progress toward our goal to create 225 acres on company rights-of-way and properties by 2025. The program aims to replace traditional grass seed mixes with pollinator seed mixes after initial clearing activities on ROW. FirstEnergy has also partnered with local municipal agencies to collaborate on pollinator establishment in strategic locations.

FirstEnergy has worked with horticulturalists to develop a custom seed mix that not only meets site stabilization needs but also incorporates several native grasses and more than a dozen native flowering species. FirstEnergy has monitored performance of these custom mixes and has seen post-construction stabilization efficacy consistent with grass mixes. With this native seed mix, FirstEnergy is promoting deeper-rooted forbs and grasses that compete with incompatible species to help reduce future maintenance costs. By integrating a native seed mix, FirstEnergy can enhance service reliability for our customers while demonstrating our commitment to reduce our environmental impact.

FirstEnergy has partnered with EPRI to conduct a three-year study of native seed mix performance compared to cool season grasses through 2025. The study will also observe the results of pollinator maintenance activities (selective mowing and targeted invasive species control) on 20 different one-acre plots at a site in eastern West Virginia. This research includes analyzing pollinator habitat value by collecting data on pollinator insect presence and studying bat activity compared to grass plots. 🌱



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OPINION EDITORIAL

USDA–Forest Service *Special Uses Handbook* Chapter 80: A Tool for UVM Cooperation

By Randall H. Miller, Director of Research and Development, CNUC

In the United States Department of Agriculture (USDA), Forest Service land managers are responsible for environmental stewardship on property under their purview. Their focus is to comply with an array of regulations, which they take seriously. A central issue in vegetation management on national forests is the decentralized decision-making authority on these public lands. That means each local district has autonomy over activity decisions in the area under their jurisdiction.

Many public land managers cooperate with utilities, as they understand integrated vegetation management, especially its emphasis on environmental sustainability and cost effectiveness. They recognize the importance of the electrical grid as critical infrastructure and the potential consequences of tree interference with powerlines. Others, ostensibly interpreting the same regulations, are skeptical about utility vegetation management, misinterpreting it as a threat to sustainability, and consequently impose what utility vegetation managers consider impractical impediments. As a result, many utility vegetation managers find that requirements change abruptly from full cooperation to strident opposition at management boundaries, which are ecologically arbitrary. The climate of cooperation can also change suddenly due to personnel changes or transfers to/from a management unit. Unnecessary fire, service reliability, and public safety risks have resulted.

The electrical grid is too important to leave to a patchwork of decision makers who may not understand the critical issues surrounding utility infrastructure maintenance. Rather, public good demands continuity of decision-making regarding VM work on national forests.

In February 2022, chapter 80 on operating plans and agreements for powerline facilities was added to the Forest Service *Special Uses Handbook* (Forest Service Handbook 2709.11, available at fs.usda.gov). The chapter focuses on VM operating plans and is intended to facilitate long-term, cost-effective, and timely VM on powerline facilities crossing Forest Service lands. Among other considerations, the directive recognizes the 2016 Memorandum of Understanding reached among Federal Agencies, the UAA, and Edison Electric Institute member utilities. Further, the chapter intends to minimize the requirement for case-by-case approvals of routine VM on electric facilities. It emphasizes that Forest Service employees who work with utilities should receive training in the directive, including on industry reliability standards, common practices, and new technologies. The chapter directs that all new and existing powerline facilities on Forest Service lands have an approved operating plan or agreement, the difference being that a plan must be made for lines subject to FAC-003

while other lines may be maintained under an agreement. Plans and agreements should be approved within 120 days of submittal. Forest Service authorized officers are encouraged to comprehensively comply with environmental and consultation requirements for all activities, rather than on a per-project approach.

One responsibility of utilities is to describe the planned VM, inspection, and maintenance methods—including chemical controls—to comply with the management plan. They also need to comply with environmental protection and cultural resource regulations; federal and state fire safety requirements; and electrical system reliability standards, including FAC-003. Integrated vegetation management BMPs should be considered. Forest Service employees should require only environmental analysis and consultation for species of concern and cultural sites. However, the provision does not preclude case-by-case environmental analysis and approval, which allows room for individual judgement at a local level, possibly problematic for utilities.

The chapter is a good faith effort on the part of the Forest Service to strike a balance between environmental stewardship and protecting critical infrastructure. The training requirement is important as it facilitates an understanding of IVM as consistent with agency goals of stewardship while protecting the grid.

Vegetation management work on national forests has challenges for utility vegetation managers due to a misunderstanding of Forest Service employees about IVM. That, combined with decentralized decision-making authority, has led to inconsistent policy application across national forests, unnecessary fire, service reliability, and other risks associated with powerlines crossing federal lands.

Chapter 80 to the Forest Services' *Special Uses Handbook* is a positive development. It encourages approval of comprehensive authorizations for VM activities, rather than individual approval. Although it provides exceptions for local authorities to require case-by-case when appropriate, the chapter encourages consideration of IVM best management practices, including chemical control methods. In return, utilities must submit a comprehensive plan for their facilities describing their approach (sample available at tinyurl.com/Chtp80SamplePlan).

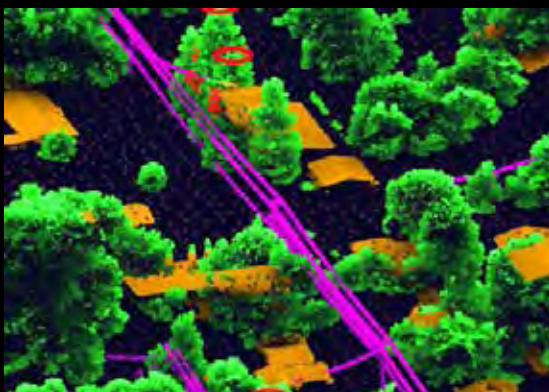
Utility vegetation managers should utilize Chapter 80 of the USDA Forest Service *Special Uses Handbook* when working on Forest Service lands. The chapter strikes a balance between the environmental responsibilities of federal land managers and the need to protect critical electrical infrastructure. 🌲



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