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INTERNATIONAL SOCIETY OF ARBORICULTURE

# ARBORIST NEWS



**Green Power**

**Tree Nutrition and Fertilization II**

**Climbers' Corner: Aerial Assessment**

**True Professionals of Arboriculture**

**ISA's 87th Annual Conference & Trade Show**



## Tree Nutrition and Fertilization II

The August 2010 issue's CEU article introduces a fertilization matrix to aid in determining the need and context of tree fertilization as one component of a tree management prescription. **Page 12**



## Green Power

Read about the science behind photosynthesis, discovering the process' detail and complexity. **Page 44**

## ISA's 87th Annual Conference & Trade Show

A sneak peek at next year's international conference, trade show, and climbing championships to be held in Paramatta, Sydney, Australia. **Page 32**



## Volunteer Spotlight

In a new segment, *Arborist News* will be observing the success various organization committees are having in their particular area of involvement. **Page 36**

## TREE Fund Update

New funds have been established to assist with research into safety, science-based urban forestry principles, and more. **Page 38**

## SRC News

In ISA Science and Research Committee news, documenting the importance of research scientists interacting with field arborists. **Page 49**

## Climbers' Corner: Aerial Assessment

Catch up on the current topics under discussion among tree climbers and consulting arborists as they relate to tree care aloft.

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## True Professionals of Arboriculture

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*Lagerstroemia x "Natchez"*

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# The Detective's Guide to Report Writing

By Guy Meilleur

As an arborist, you approach tree work with passion, confident in your knowledge and abilities. But when it comes to writing reports on trees' condition and care, that confidence and passion can be replaced by fear and loathing. Arboriculture is complicated enough, but the prospect of putting this work into words can intimidate otherwise fearless arborists. Writing reports will always be difficult, so try approaching each report as if it was a detective case. This tactic pulls the writer into a more objective outlook, and does away with a lot of the stress that comes from being involved with the case too personally. When tree cases seem so complicated that you don't know what to think or say, ask yourself: What would Detective Dendro do?

Like most tree jobs, the stories begin with contact from a potential client with a tree problem. Dendro's first job is hearing them out, listening to all of their concerns and their perceptions. Sifting through this random information for clues, he patiently pulls out the elements essential to defining the real problem. If the client digresses too far into areas irrelevant to the tree problem, or if their perceptions are colored too darkly by emotion and wild supposition, he gently reminds them that he can only be of help if he focuses on the heart of the matter. Quoting Joe Friday of the old television show *Dragnet*, he gently says, "Just the facts, ma'am," when the stories start spinning. The first step is to define the clients. Who is paying for the report? Who is benefiting from it? There may be secondary clients, or agencies that get a copy. Who will use it, and for what purpose? Once you get a feel for the context of the job, the people and entities involved, and their interactions, then it's time to ask probing questions for bits of information that complete the picture:

What is the history of the tree? How did it look last year, ten years ago? Are there any pictures, or an account of past maintenance done on the tree? What is the history of the site? Have there been any changes recently, or in the past? Have all the underground utilities been located (free)? Is there irrigation, or change in the associate plants around the tree? Are there other trees of the same species in the area? What are the owners' goals for this plant, this landscape, and this property? Are there adequate financial resources, and other forms of energy, to achieve these goals?

The problem always boils down to a lack of information. There may be no open-and-shut solution possible, but the client still benefits from information that only rules out some suspects, even if the culprit remains at large. The solution, or information, may be unreachable without expertise that is beyond the detective, in which case he goes through his little black book of specialists and calls for reinforcements. In most cases, you can piece together the problem, and determine a reasonable route to a solution. The work that is needed to travel that route from beginning to end is known as the Assignment.



MICHAEL MURPHY

**When reporting on large populations, measure the time it takes to assess a few trees before estimating the time needed to do them all.**



NATHANIEL SPERRY

**Root problems are hard to observe, so dig for more information!**

## All in the Assignment

Defining the assignment is a collaboration. The professional's first job is to put the client's problem and need into words, and the next is to describe a course of action to solve the problem and meet the need. That course of action is the assignment. It's up to the professional to make sure the client understands what the job is. Very often, tree owners want specific answers to general questions, and the challenge is to gently let them know what is possible, and how you can satisfy the desires that drove them to call you without promising them the moon. Clients can't always get what they want, but with our help they just might find that they'll get what they need, to paraphrase The Rolling Stones. Repeating key portions to them in conversation and hearing their reply is a good way to know whether you need to reword the assignment, and repeat the conversation.

This process may sound like a headache, but consider the alternative. "The customer is always right" may apply to some aspects of retail marketing, but it can lead to real problems when applied to the business of consulting. There's that "c" word! Like it or not, when you are supplying information in the course of your job, and selling your opinions, you are working as a consultant. When new consultants just cut-and-paste the client's wishes as the assignment, as if it were a straightforward removal job, the case can quickly spin out of control. If the clients want to know whether how safe their big old tree is, or what management is needed for their entire landscape, all in an hour's time, they are asking for the impossible. Too often, valuable trees are condemned because mitigation does not get fair consideration. Recommending removal of every tree you see is not credible, and will not cover your aspirations to minimize your liability. Give the trees a break! Just back up what you say with facts, and don't bite off more than you can chew. Like a good detective, keep your role realistic. Consultants may not always be right, but they can determine that the job is doable, and how it gets done.

The *Guide for Plant Appraisal 9th Ed.* (CTLA 2000) uses a similar approach when seeking a dollar value for plants: "The purpose of the appraisal is defined by the client's needs and questions. If the client's questions are understood, the purpose of an assignment can also be clearly stated... The valuation process begins when an appraiser performs a needs assessment for the appraisal and ends up with a conclusion to the client." The consultant assesses what result is needed, and defines the work needed to get there. The clients either accepts it as defined, or ask for changes. Any differences need to get ironed out early, because "The form an appraiser's final report takes depends on the nature and scope of the assignment."

To simplify this most difficult task, it may be good to set aside factors that are not always in the assignment:

**Budget** is the clients' concern; they determine what is reasonable to spend on their report and on their tree. If they ask for an estimate, carefully count all the hours needed to complete the job, but don't provide a number until you both agree on the scope of work. If they don't ask, there is no need to limit the job by voluntarily offering them an estimate. Allow the job to develop, providing periodic, often weekly, updates and invoices. If their budget has limits, your report will too.

**Limitations** are an essential ingredient in every report. The process of determining what you can do starts with determining what you cannot do. List everything that may keep you from doing a better

job—lack of time, money, equipment, information, expertise, and other resources all can hinder your performance. Your clients need to know this. Disclosing your limitations keeps you from being held responsible for any deficiencies that may be found in your report, and also keeps you from trying to do too much with too little.

**Recommendations** are optional, according to the *A Consultant's Guide to Writing Effective Reports* (ASCA 2004). When clients need information on clear tasks like pest control or pruning or root invigoration, you meet that need by listing practical management options, often in a table. Then the clients can choose which treatments to budget for. Sometimes clients want similarly specific directions on managing more complex issues, like managing the risk and benefits associated with large old trees, but don't want to pay for the work needed to give them the details they ask for. Clarify what is needed. Your clients can understand that information is the goal, and they only need to learn about practical management options. Decisions on which actions to take remain with the tree owner, unless you decide there are adequate resources to take on that responsibility, and are prepared to accept it. Clients do not get what they paid for when resources are lacking to make defensible recommendations. Don't promise what you can't deliver!



**Hard reduction pruning, like this pollarding, can be a reasonable management option.**

## Game On

Once the clients understand what is assigned and agree to it, the real work begins. You study the history of the tree and the site, review your observations, and diagnose the problem. You make the assessment, catalogue the data, consider reasonable treatments, and draw your conclusions. Now here comes either the easiest or the hardest job of all: packaging and delivering this information, actually writing the report. Images and numbers can be powerful elements in a report, perhaps worth millions of words, but writing is still the standard form of communication. There are some sources that can make this dreaded task much easier, so let's follow them.

*A Consultant's Guide to Writing Effective Reports* is one such source, a step-by-step manual that describes the process in clear detail and with a variety of examples. The *Guide* describes three different formats you can follow. The form report is a preprinted form with checkboxes and lines for comments, like the forms companies use to ensure a systematic approach to monitoring in Plant Health Care, risk assessment, and other tasks. Filling out a form may not seem