



TREE LIFE CONSULTING, LLC

PO BOX 12685 – SAN DIEGO, CA 92122-3685/ (858) 967.2420/ BEVERETT@TRELIFECONSULTING.COM

Courtney Kisner
The Paseo's Association
c/o Avalon Management, Inc.
31608 Railroad Canyon Rd.
Canyon Lake CA., 92587

RE: THE PASEO'S HOA - STRUCTURE CONFLICT ASSESSMENT

Dear Courtney,

At The Paseo's HOA, there are (68) different locations where tree(s) were installed in locations that create conflict with structures, hard-scape or both. While we did note use of root barrier to minimize any future hardscape damage, no consideration was made to accommodate future tree canopy development and structure conflict is already present. Many of the planting spaces are either too small to accommodate trees or the trees were planted too close to structures and the planting space will not support proper crown development.

In the spaces that are too small to support proper tree development, the trees should be removed and replaced with suitable shrubs. In those spaces where the trees were planted too close to structures and adequate space exists, the trees should be removed and re-planted at suitable distances which will allow for proper tree development.

Sincerely,

A handwritten signature in black ink, appearing to read "L. Everett, Jr.", written in a cursive style.

Tree Life Consulting, LLC
Laurel F. Everett, Jr.
Certified Arborist # WE-4233A
Registered Consulting Arborist # 562

PO Box 12685, San Diego CA. 92112-3685

THE PASEO'S HOA
TREE VS. STRUCTURE
CONFLICT ASSESSMENT

SUBMITTED TO:

Courtney Kisner
Avalon Management Group, Inc.
31608 Railroad Canyon Rd.
Canyon Lake, CA. 92587

PREPARED BY:

Laurel F. Everett Jr.
Certified Arborist #WE-4233A
Consulting Arborist # 562
Tree Life Consulting, LLC

DATE:

December 5, 2016



Table of Contents

Summary	1
Introduction.....	2
History.....	2
Assignment.....	2
Limits of Assignment.....	2
Purpose of Report	3
Observations	3
Site Description.....	3
Tree Descriptions	4-10
Testing & Analysis	11
Discussion	11
Conclusion	12
Recommendations.....	12
Appendix A – Supporting Documentation - Photos # 1-9	13-16
Appendix B - Supporting Documentation - Conflict Locations.....	17-19
Glossary	20
Assumptions & Limiting Conditions	21
Certification of Performance.....	22



SUMMARY

On November 3, 2016 we were contacted by Courtney Kisner, property manager with Avalon Management Group, to evaluate tree installation locations at The Paseo's HOA in Murrieta. The trees were located in small planters throughout the community and had begun to present conflict with adjacent structures. We were asked to assess the trees and their locations in regards to them being able to grow to maturity and the conflict they presented with nearby structures.

On November 28, 2016 we performed a detailed assessment of the tree population at The Paseo's HOA in Murrieta, CA. We reviewed all trees in the association that were over 15 feet in height. We observed all trees in planters, along walkways and trees planted on small slopes throughout the association. We determined the areas of inspection based on a map prepared and provided by Avalon Management, Inc. We took several digital photos and relevant notes regarding these photos. We observed any obvious or potential conflicts, we wrote down locations of each and marked a map with specific recommendations we determined were necessary.

There were (68) different locations with trees consisting of multiple species that were planted too close to structures or hard-scape. We used a measurement of 48" from tree stem to structure as a suitable distance. At this distance, trees can become adaptable to the space restriction with minimal ill health affects due the repeated pruning required and being far enough away not to be impacted by roof eaves or overhangs.

While we did note use of root barriers to minimize any future hardscape damage, no consideration was made to accommodate future tree canopy development and structure conflict was already present. Many of the planting spaces were either too small to accommodate trees or the trees were planted too close to structures and will not support proper development. In the spaces that are too small to support proper tree development the trees should be removed and replaced with suitable shrubs. In those spaces where the trees were planted too close to structures and adequate space exists, the trees should be removed and re-planted at suitable distances which will allow for proper tree development.

INTRODUCTION

History

Courtney Kisner of Avalon Management Group contacted us on November 3rd, regarding an association she manages in Murrieta, CA. Ms. Kisner was concerned that during the landscape installation process, the trees in the community had been planted too close to structures. The trees had been planted within the last few years and they were already encroaching upon structures throughout the development.

Assignment

We provided Ms. Kisner with an estimate to perform a **Level One: Limited Visual Assessment**¹ (LVA) of the trees throughout the community. She provided us with her written consent to proceed on November 7, 2016. She requested that we assess the trees and the planting areas and present our findings in a formal, written report. Our assignment was as follows:

- Perform limited visual assessment of the community trees and their planting locations in relation to structures or hard-scape.
- Identify all trees in conflict with structures. Provide locations, quantities and species of trees, note existing conflict and provide mitigation options if available.
- Document our findings in a formal, written report.

Limitations of the Assignment

The assessment was performed from common areas only. We were not granted permission to access any private property. Only visual observations were made and they were made from all angles of the trees. Distances between the tree stems and structures were measured with a standard tape measure. Tree identifications were made based on experience and knowledge of the tree species.

¹ *Terms appearing in boldfaced type are defined in the glossary section at the end of the report.*



Purpose and Use of Report

The purpose of this report is to provide Ms. Kisner and the Avalon Management Group with credible information documenting improper tree planting locations and any available mitigation options. After submission, this report becomes the property of Ms. Kisner and the Avalon Management Group and its use will be at their discretion. This report is not legal advice and should not be used as such.

OBSERVATIONS

Site Description

The Paseo's HOA was located in an inland, suburban neighborhood of attached homes on small lots within the city limits of Murrieta, California. Trees and shrubs were installed in small planters adjacent to concrete walkways and driveways situated between the homes throughout the community (see Site Map and Conflict Location Map attached as separate documents). Concrete curbs and asphalt streets lined the homes and planters throughout the community.

There were (68) different locations with trees consisting of multiple species that were planted too close to structures or hard-scape. Some locations had only one tree in conflict with structures and other locations had multiple trees in conflict (see Conflict Locations in Supporting Documents, Appendix B). The **drip line** area under the trees consisted of mulch and shrubs that were being irrigated with drip tubing and emitters (see Photos # 1-3 in Appendix A).

The structure conflict consisted of insufficient space for proper **crow**n development (see Photos # 4-7 in Appendix A). Many of the trees had been planted in planters too small to accommodate even a shrub (see Photo # 8 in Appendix A). Also, many trees were planted in areas that did not contain the minimum root space that would typically be recommended. We did note the use of **root barriers** (see Photo # 9 in Appendix A) and they may minimize, yet not prevent, any future hardscape conflict.

Tree Descriptions

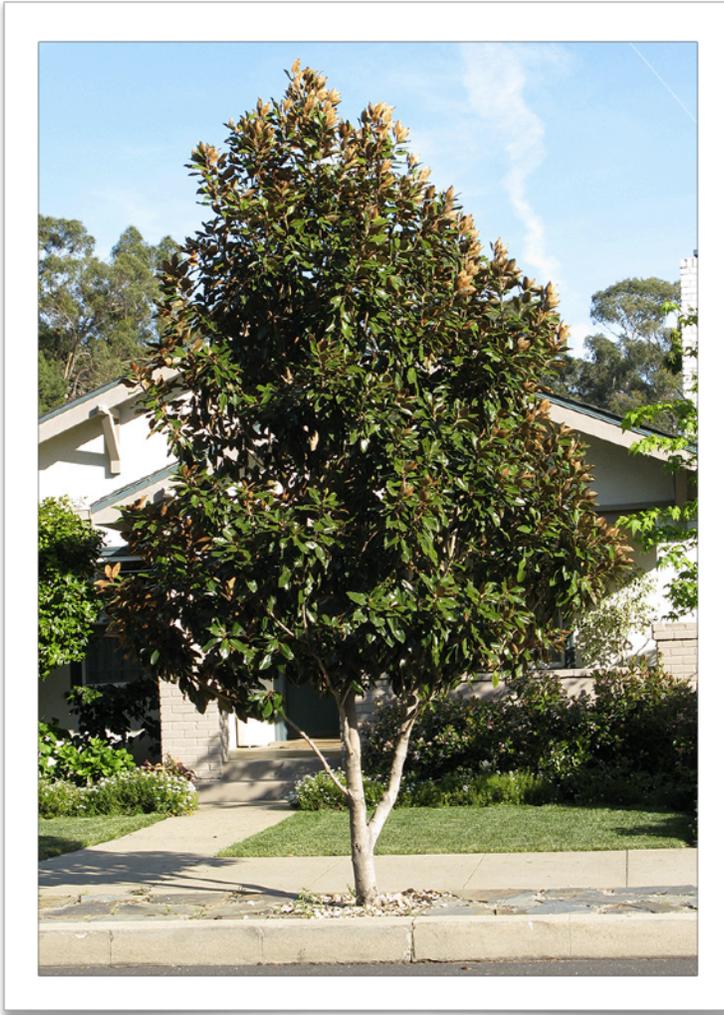
Olive tree (*Olea europaea*)



- Evergreen.
- Vase or rounded shape.
- Grows 12-24" per season.
- Average height up to 25-30 feet.
- Average crown spread up to 25-30 feet depending on variety.
- Suitable for minimum 3' cut-out.

SelecTree. "Olea europaea Tree Record." 1995-2016. Dec 5, 2016.
< <http://selectree.calpoly.edu/tree-detail/olea-europaea> >

Magnolia sp. (*Magnolia grandiflora*)



- Evergreen.
- Oval or rounded shape.
- Grows 24” per season.
- Average height up to 60-80 feet.
- Average crown spread up to 50-60 feet.
- Suitable for 8’ minimum cut-out.

SelecTree. "Magnolia grandiflora Tree Record." 1995-2016. Dec 5, 2016.
< <http://selectree.calpoly.edu/tree-detail/magnolia-grandiflora> >

Crape myrtle (*Lagerstroemia indica*)



- Deciduous.
- Oval or rounded shape.
- Grows 24” per season.
- Average height up to 20-25 feet.
- Average crown spread up to 10 feet.
- Suitable for 2’ minimum cut-out.

SelecTree. "*Lagerstroemia indica* Tree Record." 1995-2015. Dec 11, 2015.
< <https://selectree.calpoly.edu/tree-detail/lagerstroemia-indica> >

Brisbane box (*Lophostemon confertus*)



- Evergreen
- Oval or rounded shape
- Grows 24-36" per season
- Average height up to 30-50 feet.
- Average width up to 10-30 feet.
- Suitable for 5' minimum cut-out.

SelecTree. "Lophostemon confertus Tree Record." 1995-2016. Dec 5, 2016.
< <http://selectree.calpoly.edu/tree-detail/lophostemon-confertus> >

African sumac (*Rhus lancea*)



- Evergreen.
- Spreading or low canopy.
- Grows 24" per season.
- Average height up to 20-30 feet.
- Average width up to 25-30 feet.
- Suitable for 5' minimum cut-outs.

SelecTree. "Rhus lancea Tree Record." 1995-2016. Dec 5, 2016.
< <http://selectree.calpoly.edu/tree-detail/rhus-lancea> >

Strawberry tree (*Arbutus unedo*)



- Evergreen
- Rounded or vase shape.
- Grows 12-24" per season.
- Average height 20-35 feet.
- Average width up to 25-30 feet.
- Suitable for 3' minimum cut-out.

SelecTree. "Arbutus unedo Tree Record." 1995-2016. Dec 5, 2016.
< <http://selectree.calpoly.edu/tree-detail/arbutus-unedo> >

Coast live oak (*Quercus agrifolia*)



- Evergreen.
- Rounded or umbrella shaped.
- Grows 24” per season.
- Average height up to 20-70 feet.
- Average width up to 20-70 feet.
- Not suitable for cut-outs.

SelecTree. "Quercus agrifolia Tree Record." 1995-2016. Dec 5, 2016.
< <http://selectree.calpoly.edu/tree-detail/quercus-agrifolia> >

TESTING & ANALYSIS

- We took (55) digital photos on site, nine of which are included in Supporting Materials – Appendix A. None of these photos was enhanced in any manner.
- We walked through all streets and walkways in the development. We identified all trees and their planting locations in reference to nearby structures. *We did this to properly identify all trees and be able to properly estimate their required future growing spaces.*
- We measured the distance between the stem of the trees and the structure surfaces with a standard 25-foot measuring tape. *We did this to determine if the spaces allowed the trees sufficient spaces to properly develop.*

DISCUSSION

The cardinal rule of proper tree care is “right tree, right place”. This rule refers to planting a tree in a location where it can properly develop, un-abided by conflict with nearby structures or utilities. When a tree is planted in a location that does not allow proper development, the tree will eventually pose conflict and mitigation actions are required to maintain the tree’s presence. These actions are not always appropriate for the trees and early tree mortality or decline typically will accompany the inappropriate treatments. Additionally, the treatment required is expensive and that itself can present another set of challenges for communities.

There are (68) different locations with trees consisting of seven different species that have been planted too close to structures or in other inappropriate locations. The conflict consists of tree crowns and stems being too close to structures that are inadequate for vertical and expanding radial growth. These trees will continually need to have foliage removed from one side of the tree to accommodate the inappropriate locations. Additionally, many of the trees have eaves overhanging their planting location that will require constant height reduction as well. These types of pruning will create excessive wounding and minimize or decrease photosynthesis to a point that will lead to early tree decline and mortality.

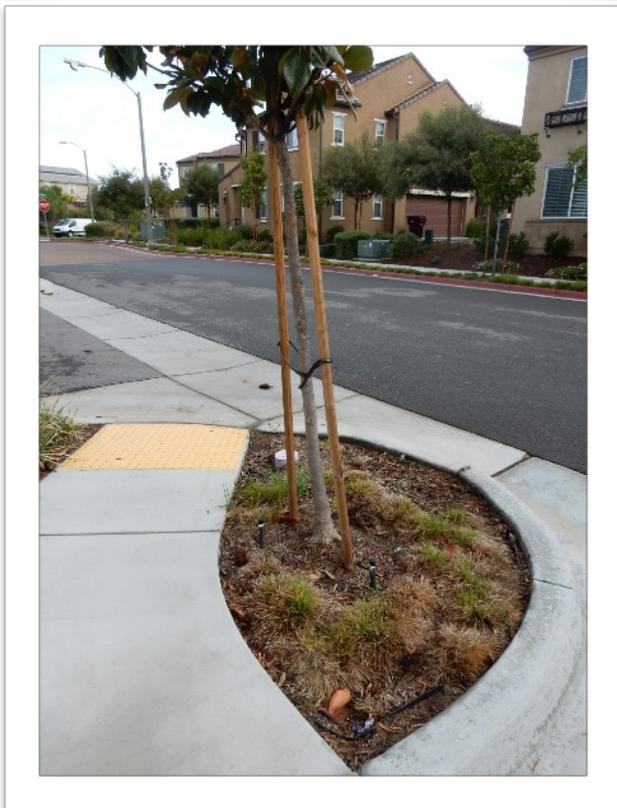
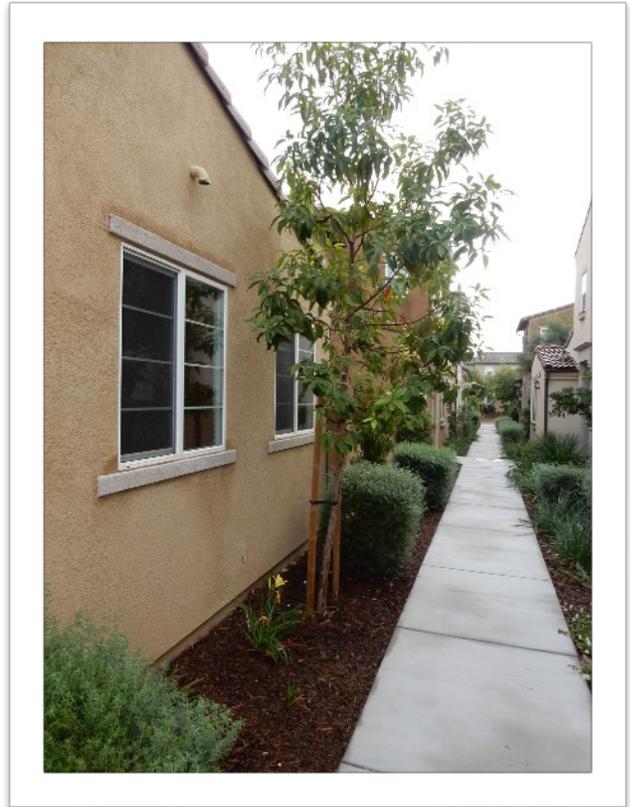
CONCLUSION

The trees were planted in spaces that will not accommodate their future development. This is going to require the community to perform repeated, expensive and unnecessary treatments to the trees in order for them to remain in these locations. These trees should be removed from spaces that will not accommodate their growth rate and replaced with suitable shrubs. In areas where space is adequate and trees have been planted too close, those trees can be removed and re-planted in an appropriate locations that will support their growth rates.

RECOMMENDATIONS

- Remove all trees that do not accommodate appropriate spaces for trees to properly develop.
- Replace those trees with suitable shrubs that will add value to the landscape and not require extensive, inappropriate treatments. *I do not recommend replacing trees in unsuitable locations with other trees. Adequate space does not exist in these locations.*
- In spaces where adequate does exist, trees can be transplanted to spaces that will accommodate their future growth.
- In all areas where transplanting occurs, a high mortality rate should be expected and some replacements should be planned for.

SUPPORTING DOCUMENTS - APPENDIX A



Clockwise from top left:

Photo # 1 - This photo shows understory plantings. This is consistent throughout the community.

Photo # 2 - The shrub plantings are the appropriate choice for this application. The planters are too narrow for large trees.

Photo # 3 - All areas are irrigated with bubblers, drip tubing or a combination of both.

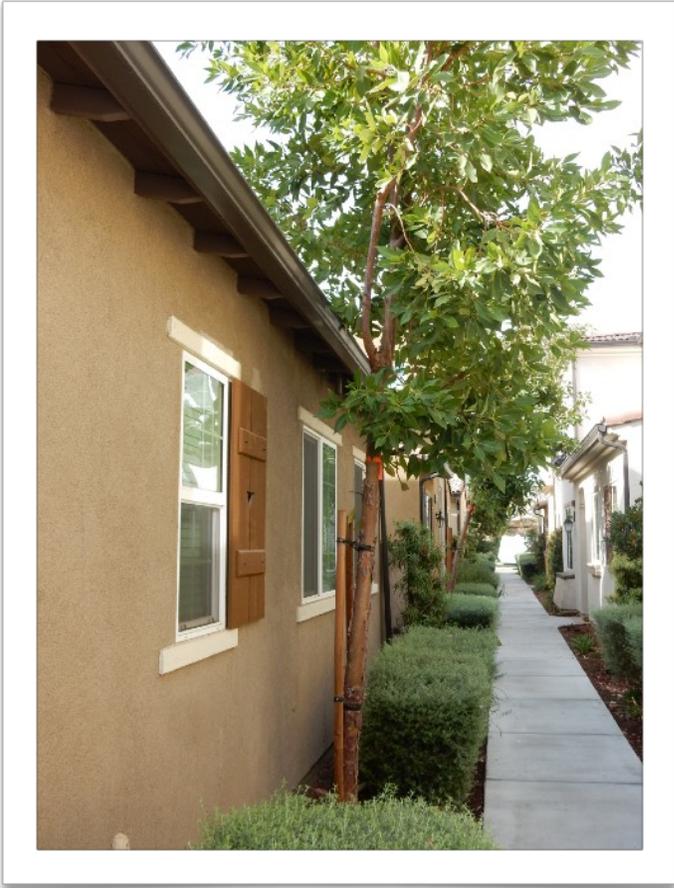
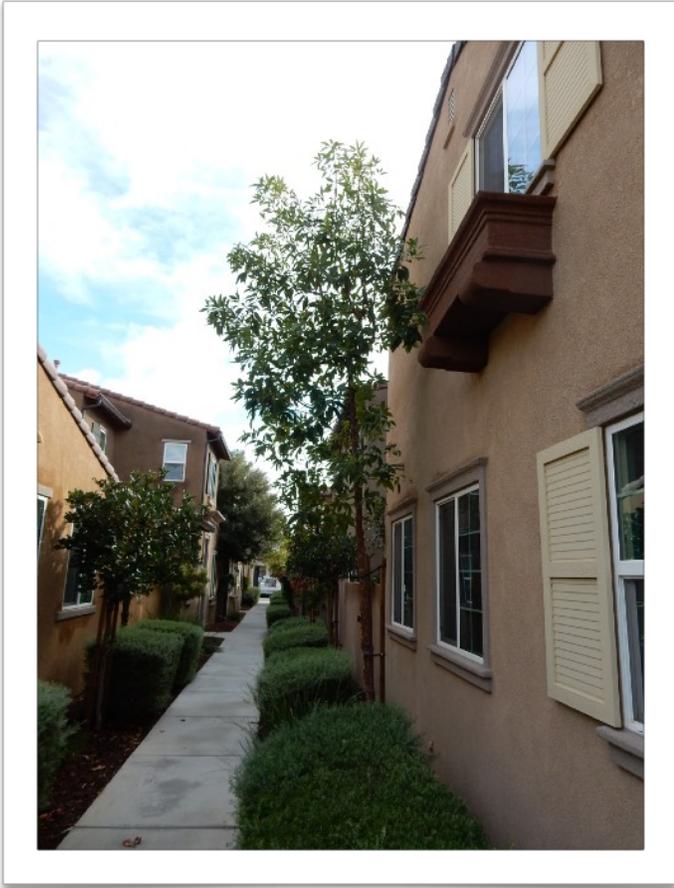


Top to bottom:

Photo # 4 - This African sumac is still on stakes and is in conflict with adjacent structures.

Photo # 5 - There are (2) African sumac flanking this walkway. This is preventing safe access to a living unit.

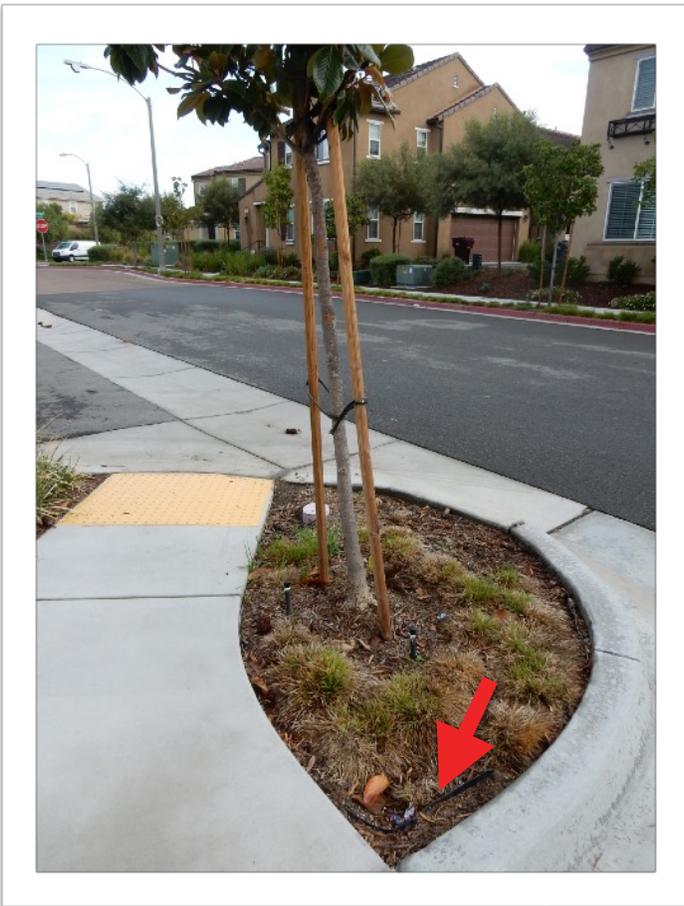




Left to right:

Photo # 6 - This Brisbane box is approximately 10” from the structure.

Photo # 7 - This Brisbane box is in conflict with overhang and rain gutters. It is still on its stakes.



Top to bottom:

Photo # 8 - This strawberry tree was planted in a planter less than one foot wide. It was also planted against a wall. A planter this small may not even support a shrub.

Photo # 9 - We did note use of root barrier (red arrow) in some locations. These will provide some protection, however, the limited spaces and root barriers will create long-term root defects.



SUPPORTING DOCUMENTS - APPENDIX B

CONFLICT LOCATIONS

Tree Species	Location #	Conflict Noted	Recommendation
Olive	1	Structure	Prune/monitor
Olive	2	Structure	Prune/monitor
Cherry	3	Structure	Remove/replace*
(2) Magnolia	4	Hardscape	Monitor
Brisbane box	5	Structure	Prune/monitor
(2) African sumac	6	Structure	Remove/replace*
Brisbane box	7	Structure	Remove/replace*
(2) African sumac	8	Structure	Remove/replace*
Brisbane box	9	Structure	Prune/monitor
African sumac	10	Structure	Remove/replace*
(2) African sumac	11	Structure	Remove/replace*
Crape myrtle	12	Structure	Monitor
Strawberry tree	12	Structure	Monitor
Strawberry tree	13	Structure	Remove/replace*
Brisbane box	14	Structure	Remove/replace*
African sumac	15	Structure	Remove/replace*
(2) Brisbane box	16	Structure/hardscape	Monitor
(2) Magnolia	17	Structure/hardscape	Monitor
Strawberry tree	18	Structure/hardscape	Remove/replace*
Strawberry tree	19	Structure/hardscape	Remove/replace*
Brisbane box	20	Structure/hardscape	Remove/replace*
African sumac	21	Structure/hardscape	Remove/replace*
Brisbane box	22	Structure/hardscape	Remove/replace*
(2) African sumac	23	Structure/hardscape	37429 - Remove/ replace* 37457 - Monitor

Tree Species	Location #	Conflict Noted	Recommendation
Crape myrtle	24	Structure/hardscape	Monitor
Brisbane box	25	Structure/hardscape	Remove/replace*
Brisbane box	26	Structure/hardscape	Remove/replace*
Brisbane box	27	Structure/hardscape	Remove/replace*
African sumac	28	Structure/hardscape	Remove/replace*
African sumac	29	Structure/hardscape	Remove/replace*
Brisbane box	30	Structure/hardscape	Remove/replace*
(2) Brisbane box	31	Structure/hardscape	Remove/replace*
Strawberry tree	32	Structure/hardscape	Monitor
Strawberry tree	33	Structure/hardscape	Remove/replace*
Brisbane box	34	Structure/hardscape	Remove/replace*
African sumac	35	Structure/hardscape	Remove/replace*
Brisbane box	36	Structure	Prune/monitor
African sumac	37	Structure	Prune/monitor
(4) Brisbane box	38	Structure/hardscape	Remove/replace*
(2) African sumac	39	Structure/hardscape	Remove/replace*
Brisbane box	40	Structure/hardscape	Prune/monitor
African sumac	41	Structure/hardscape	Prune/monitor
African sumac	42	Structure/hardscape	Remove/replace*
African sumac	43	Structure/hardscape	Remove/replace*
Brisbane box	44	Structure/hardscape	Remove/replace*
(2) Crape myrtle & (1) strawberry	45	Structure/hardscape	Remove/replace*
African sumac	46	Structure/hardscape	Remove/replace*
African sumac	47	Structure/hardscape	Remove/replace*
(9) Magnolia	48	Hardscape	Monitor
Brisbane box	49	Structure/hardscape	Remove/replace*
(1) Brisbane box & (1) African sumac	50	Structure/hardscape	Remove/replace*

Tree Species	Location #	Conflict Noted	Recommendation
(1) Brisbane box & (1) African sumac	51	Structure/hardscape	Remove/replace*
(2) Brisbane box	52	Structure/hardscape	Remove/replace*
African sumac	53	Structure/hardscape	Remove/replace*
(2) Brisbane box	54	Structure/hardscape	Remove/replace*
(2) Crape myrtle & (1) strawberry	55	Structure/hardscape	Remove/replace*
(1) Brisbane box & (1) African sumac	56	Structure/hardscape	Remove/replace*
(2) Brisbane box & (1) African sumac	57	Structure/hardscape	Remove/replace*
Coast live oak	58	Hardscape	Remove/replace*
African sumac	59	Structure/hardscape	Remove/replace*
African sumac	60	Structure	Prune/monitor
(3) Strawberry tree	61	Structure/hardscape	Remove/replace*
(2) African sumac & (1) Brisbane box	62	Structure/hardscape	Remove/replace*
Magnolia	63	Structure/hardscape	Monitor
Brisbane box	64	Structure	Monitor
African sumac	65	Structure/hardscape	Remove/replace*
(3) Brisbane box	66	Structure/hardscape	Remove/replace*
Brisbane box	67	Structure/hardscape	Prune/monitor
African sumac	68	Structure/hardscape	Prune/monitor

- *When replacing, be certain to place in specie appropriate location.
- Prune for required clearance.
- Monitor for hard-scape damage or unacceptable structure conflict.



GLOSSARY

Crown – The horizontal width of a tree canopy measured from drip line to drip line.

Drip Line – The area defined by the outermost circumference of a tree canopy where water drips from and onto the ground.

Level 1: Limited Visual Assessment – A visual assessment from a specified perspective of an individual tree or population of trees near specified targets, conducted in order to identify obvious defects or specified conditions. (Smiley, E.T. et al 2011)

Root barrier - Products that direct root growth from shrubs and trees downward, dramatically decreasing the roots' potential to clash with and penetrate nearby hardscape, walls, or building foundations.



ASSUMPTIONS AND LIMITING CONDITIONS

- Any legal description provided to the consultant is assumed to be correct.
- Care has been taken to obtain all information from reliable sources. All data has been verified insofar as possible; however, the consultant can neither guarantee nor be responsible for the accuracy of information provided by others.
- Loss or alteration of any part of this report invalidates the entire report.
- Possession of this report or a copy thereof does not imply the right of publication or use for any purpose outside of this proceeding without expressed written consent of the consultant.
- Neither all nor any part of the contents of this report, nor copy thereof, shall be conveyed by anyone, including the client, to the public through advertising, public relations, news, sales, or other media, without prior expressed written or verbal consent of the consultant particularly as to value conclusions, identity of the consultant, or any reference to any professional society or institute or to any initialed designation conferred upon the consultant as stated in his qualifications.
- This report and values expressed herein represent the opinion of the consultant, and the consultant's fee is no way contingent upon the reporting of a specific value, a stipulated results, the occurrence of a subsequent event, nor upon any finding to be reported.
- Sketches diagrams, graphs, and photographs in this report, being intended as visual aids, are not necessarily to scale and should not be construed as engineering or architectural reports or surveys.
- Unless expressed otherwise: (1) information contained in this report covers only those items that were examined and reflects the condition of those items at the time of the inspection: and (2) the inspection is limited to visual examination of accessible items without dissection, excavation, probing or coring, unless otherwise specified. There is no warranty or guarantee, expressed or implied, that problems or deficiencies of the plants or property in question may not arise in the future.



CERTIFICATION OF PERFORMANCE

I, Laurel F. Everett Jr., do certify:

- That I have personally inspected the tree(s) and the property referred to in this report and report my findings accurately;
- That I have no current or prospective interest in the tree(s) or property that is subject of this report;
- That I have no personal interest or bias with respect to the parties involved;
- That the analysis, opinions or conclusions stated in this report are my own and based on scientific procedures and facts;
- That my analysis, opinions and conclusions were developed and this report has been prepared according to commonly adopted arboricultural standards;
- That no one provided significant professional assistance to me except as stated in the report;
- That my compensation is not contingent upon reporting a predetermined conclusion that favors the cause of the client or any other party;

I further certify I am a member in good standing of the American Society of Consulting Arborists and the International Society of Arboriculture.

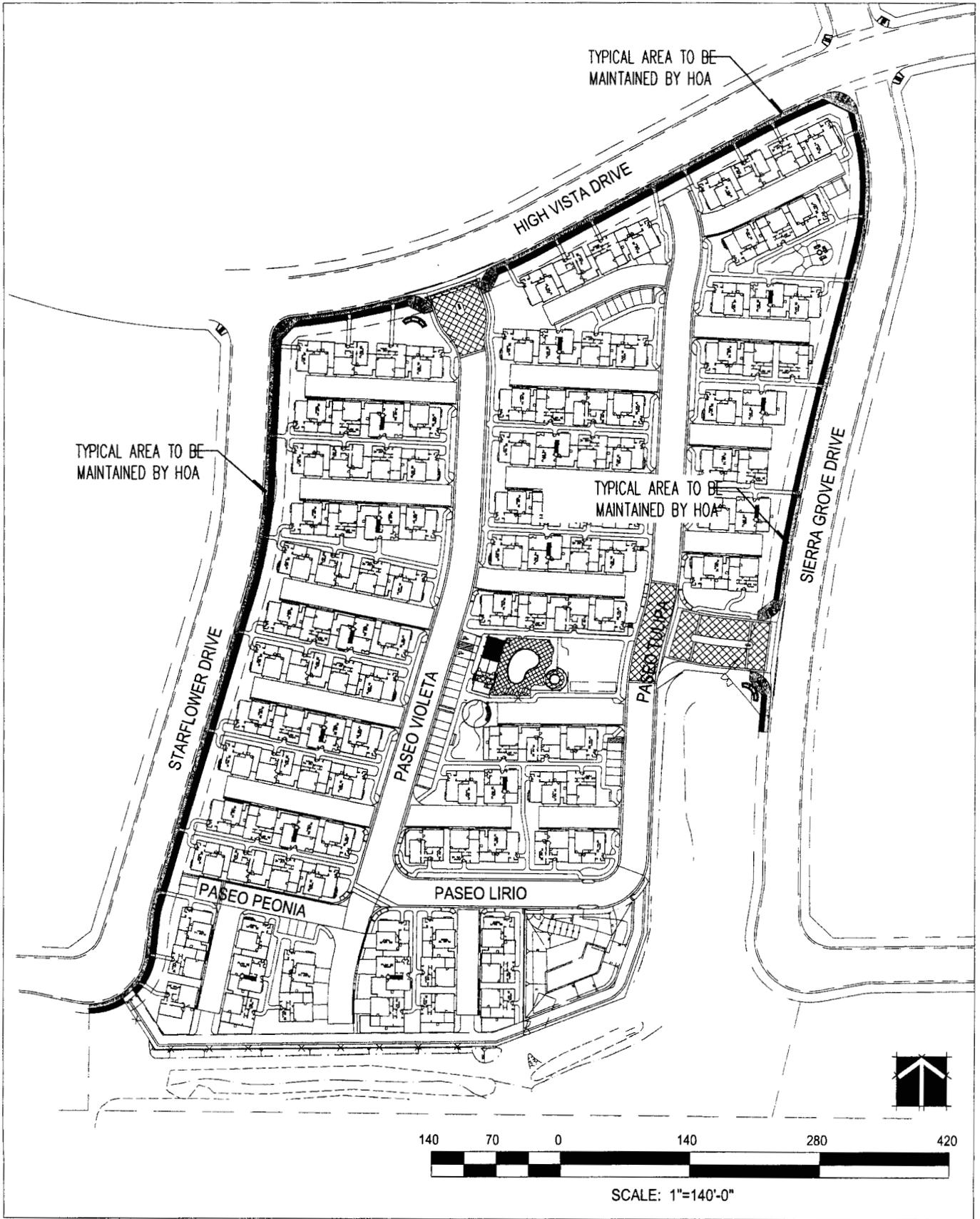
Signed:

A handwritten signature in black ink, appearing to read "L. F. Everett, Jr.", is written over a light gray rectangular background.

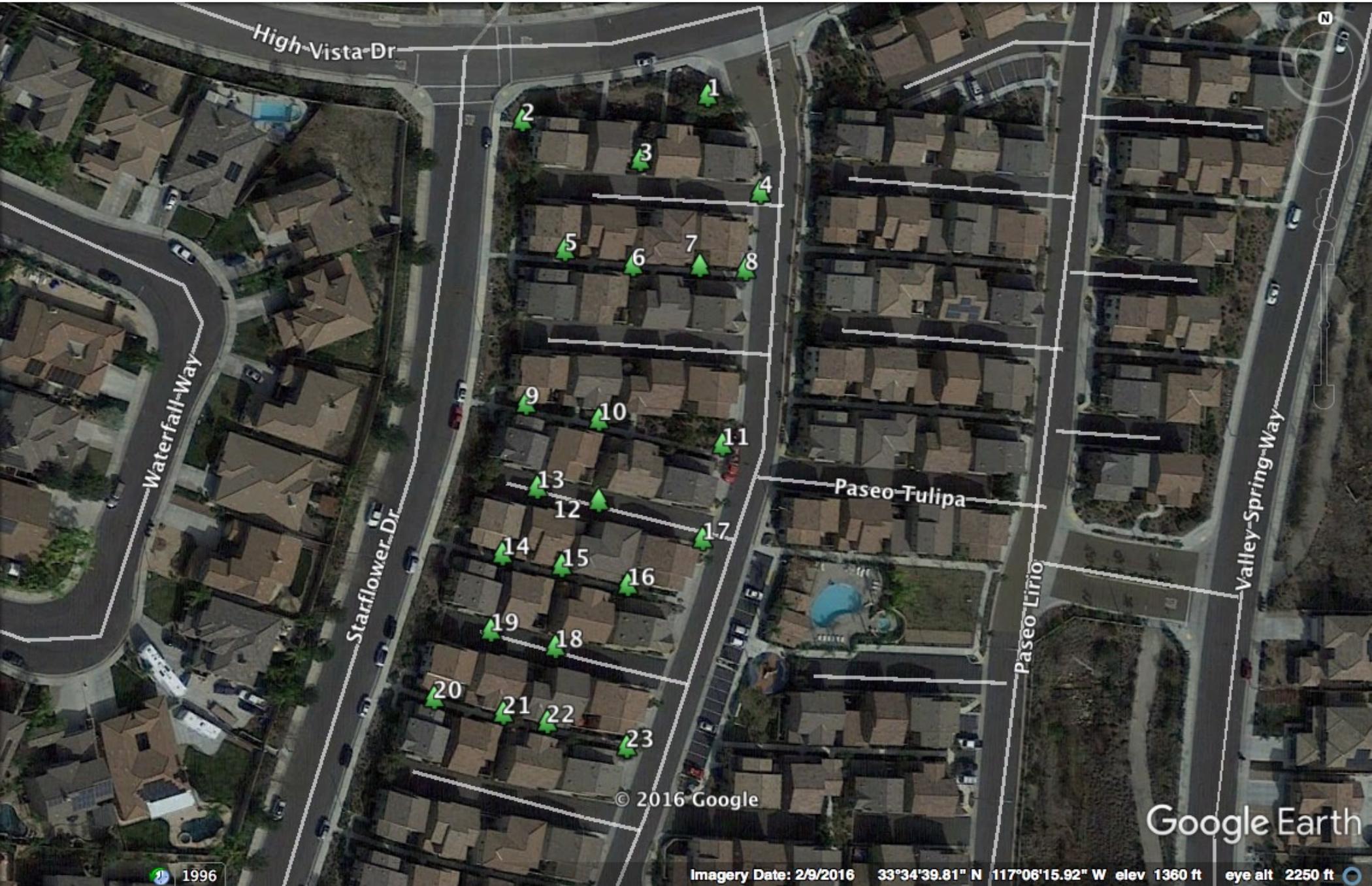
Date: December 5, 2016

**Laurel F. Everett, Jr.
Tree Life Consulting®, LLC
PO Box 12685
San Diego CA 92112-3685**

[PO Box 12685, San Diego CA. 92112-3685](#)



LANDSCAPE MAINTENANCE EXHIBIT
 TR 34324, IP 070001



High-Vista-Dr

Waterfall-Way

Starflower-Dr

Paseo Tulipa

Paseo Lirio

Valley-Spring-Way

© 2016 Google

Google Earth

1996

Imagery Date: 2/9/2016 33°34'39.81" N 117°06'15.92" W elev 1360 ft eye alt 2250 ft

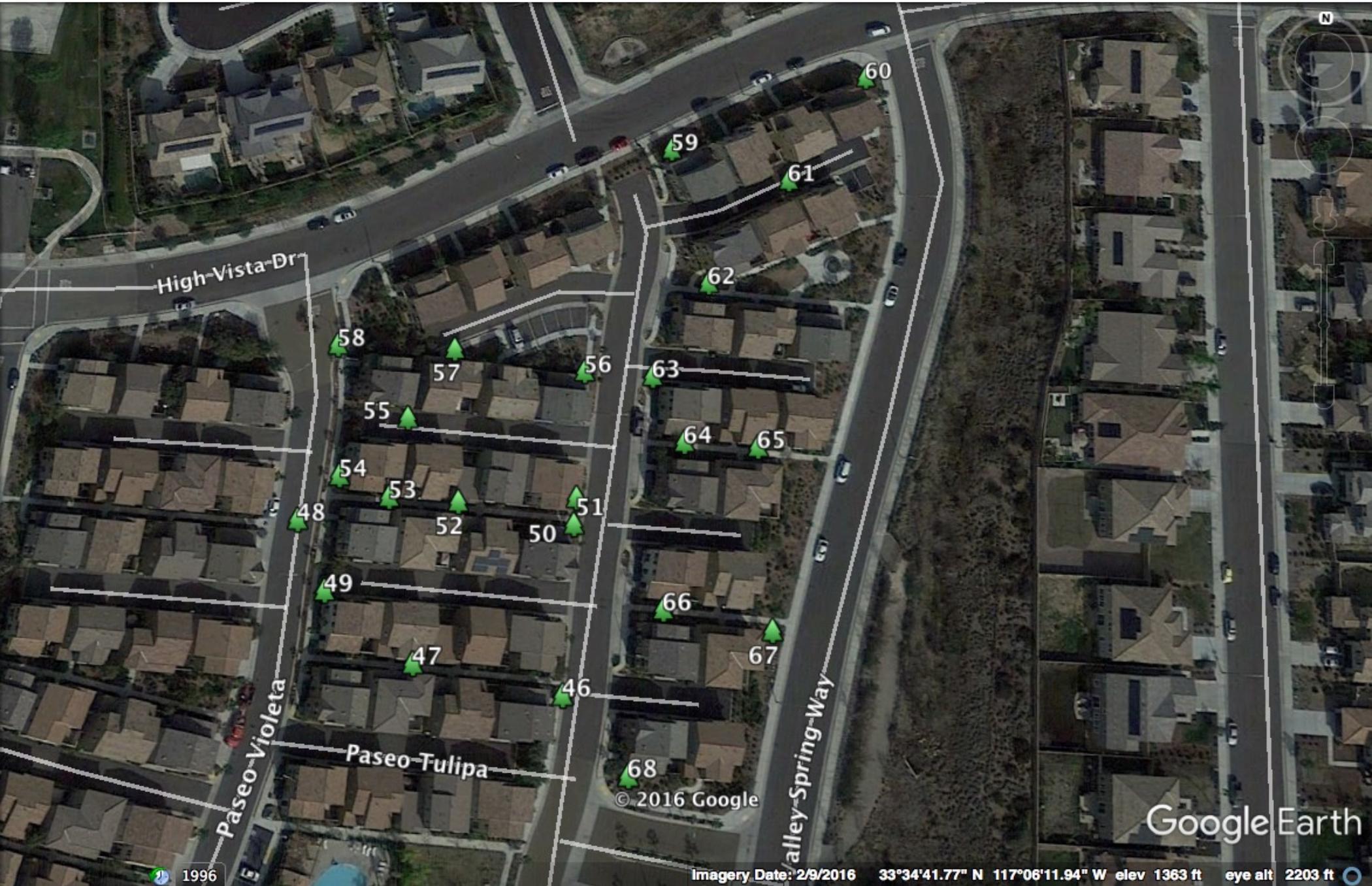


© 2016 Google

Google Earth

1996

Imagery Date: 2/9/2016 33°34'37.04" N 117°06'15.82" W elev 1356 ft eye alt 2250 ft



High-Vista-Dr

Paseo-Violeta

Paseo-Tulipa

Valley-Spring-Way

- 58
- 57
- 56
- 55
- 54
- 53
- 52
- 51
- 50
- 49
- 48
- 47
- 46
- 60
- 59
- 61
- 62
- 63
- 64
- 65
- 66
- 67
- 68

© 2016 Google

Google Earth

1996

Imagery Date: 2/9/2016 33°34'41.77" N 117°06'11.94" W elev 1363 ft eye alt 2203 ft