

# Exhibit D

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# Tree Assessment/ Construction Impact Analysis 3 Wild Turkey Run

Prepared for:

Mr. David Fehrman

Prepared by:

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November 25, 2022

(Amended 1/31/2023)

(Amended 2/13/23)

(Final Amendment 4/28/2023)

Owner:

Mr. David Fehrman  
7160 E Kierland Blvd #605  
Scottsdale, AZ 85254

Architect:

James Newhall Smith Architect, Inc.  
716 Lighthouse Avenue, Suite C,  
Pacific Grove, CA, 93950

Forester and Arborist

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## SUMMARY

Development is proposed for the site located at 3 Wild Turkey Run, Carmel, CA 93923. Because native protected trees forest this site, a tree assessment/ Construction Impact Analysis has been prepared that identifies and addresses the effects that construction will have on the existing tree resources on-site as well as a list of recommendations for the project.

The Proposed development consists of building a new single-family home near protected trees which will require the pruning and removal of trees located on site and protection of others identified for retention. Remaining trees are considered to range anywhere from poor to good condition both structurally and in health and are to be protected and retained. The current design would require the removal of 12 native oak trees.

- Two (2) Valley oak (*Quercus lobata*) – One (1) landmark tree (Larger than 24-inches diameter)
- 10 Coast live oaks (*Quercus agrifolia*) – One (1) landmark tree (Larger than 24-inches diameter)

## **ASSIGNMENT/SCOPE OF PROJECT**

To ensure the protection of the tree resources on-site, the property owner, Mr. David Fehrman have requested an assessment of the trees in proximity to proposed development areas and an arborist report for trees that are adjacent to these areas on this property. To accomplish this assignment, the following tasks have been completed;

- Evaluate health, structure, and preservation suitability for each tree within the site's homesite area greater than or equal to six diameter inches at 24 inches above grade.
- Review proposed building site plans as provided by James Newhall Smith Architect, Inc.
- Make recommendations for alternative methods and preconstruction treatments to facilitate tree retention.
- Create preservation specifications, as it relates to numbered trees keyed to an annotated Tree Location Map.
- Determine the number of trees affected by construction that meet "Landmark" criteria as defined by the County of Monterey, Title 21 Monterey County Zoning Ordinance; as well as mitigation requirements for those to be affected.
- Document findings in the form of a report as required by the County of Monterey Planning Department.

## **LIMITATIONS**

This assignment is limited to the review of plans submitted to me by James Newhall Smith Architect, Inc. dated October 17, 2022, to assess the effects of potential construction to trees within or adjacent to construction activities. The assessment has been made of these plans specifically and no other plans were reviewed, Ono Consulting are neither designers nor engineers and this report is explicitly based on the plans given to us. Only minor grading and erosion details are discussed in this report as it relates to tree health. It is not the intent of this report to be a monetary valuation of the trees or provide a risk assessment for any tree on this parcel, as any tree can fail at any time. No clinical diagnosis was performed on any pest or pathogen that may or may not be present. In addition to an inspection of the property, Ono Consulting relied on information provided in the preparation of this report (such as surveys, property boundaries, and property ownership) and must reasonably rely on the accuracy of the information provided. Ono Consulting shall not be responsible for another's means, methods, techniques, schedules, sequence, or procedures, or for contractor safety or any other related programs; or another's failure to complete the work per the plans and specifications.

## **PURPOSE**

This tree Assessment/Forest management report is prepared for this parcel due to proposed construction activities that are intent on improving the vacant site located at 3 Wild Turkey Run, Carmel, CA 93923. The purpose of the site visit was to give an independent assessment of the existing trees that are on-site and to determine if any of the trees will be affected by the proposed project. Oak trees are considered protected trees as defined by the County of Monterey, Title 21 Monterey County Zoning Ordinance.

## GOAL

The goal of this plan is to protect and maintain the Greater Monterey Peninsula Area's forested resources through the adherence to development standards, which allow the protection, and maintenance of its forest resources. Furthermore, it is the intended goal of this Arborist report to aid in planning to offset any potential effects of the proposed development on the property while encouraging forest stability and sustainability, perpetuating the forested character of the property and the immediate vicinity.

## INTRODUCTION

This forest management plan is prepared for Mr. David Fehrman owners of the lot located at 3 Wild Turkey Run, Carmel, CA 93923 by Ono Consulting, Urban Foresters, and Certified Arborists due to construction. Monterey County's Zoning Ordinance Sec. 21.64.260D requires a forest management plan when tree removal is necessary of native trees six inches in diameter or greater to preserve and maintain the forest and its beneficial uses. The County identifies native oak trees as native tree species that require special consideration for management.

## SITE DESCRIPTION

- 1) Assessor's Parcel Number: 239-051-039-000.
- 2) Location: 3 Wild Turkey Run, Carmel, CA 93923.
- 3) Parcel size: 4.29 Acres
- 4) Existing Land Use: The parcel is vacant and is zoned RC/40-D-S for development in a resource conservation, design control, and site plan review district.
- 5) Slope: The parcel is at the foot of a slope. Slopes range from 2% to over 30%. No development is planned on slopes above 25%.
- 6) Soils: Potential development is located on soils classified by the Natural Resource Conservation Service as Sheridan coarse sandy loam about 40 inches deep. Paralithic bedrock is generally found at a depth of 39-43 inches. Runoff is medium and erosion hazard is low.
- 7) Vegetation: The vegetation is of the transitional Coast live oak forest type. It is a mixture of Big leaf maple (*Acer macrophyllum*), Madrone (*Arbutus menziesii*), and various native oak species overstory trees with a coastal scrub and native and nonnative grass understory present.
- 8) Forest Condition and Health: The forest's condition and health are evaluated with the use of the residual trees and those of the surrounding oak forest as a stand. The overall condition of the forest is healthy and vigorous with most of the trees in fair to good condition with some small amount of dieback observed. Several trees onsite are in poor condition with have minor defects including bark beetles, decay, and suppressed growth form.

## **BACKGROUND/PROJECT DESCRIPTION**

We (Ono Consulting) were contacted by Mr. James Smith of James Newhall Smith Architect, Inc. who requested that we visit the site owned by Mr. David Fehrman for an assessment of trees within the buildable homesite area adjacent to a proposed building site. Mr. Smith requested the findings from the review and assessment of trees that occupy the land at 3 Wild Turkey Run, Carmel, CA 93923 that are adjacent to the proposed design development be prepared and documented in a report that would work in conjunction with other conditions for approval of the building permit application.

A site visit was taken to the property where trees were assessed for health and condition at that time. The assessment focused on incorporating the preliminary location of site improvements coupled with consideration for the general goals of site improvement desired by the landowner. During this site visit, the proposed improvements assessed included preserving trees to the greatest extent feasible, maintaining the viewshed, and general aesthetic quality of the area while complying with county codes. A study of the individual trees was made to determine the treatments necessary to complete the project and meet the goals of the landowner. As a result, trees within and immediately adjacent to the proposed development area were located, measured, inspected, and recorded. The assessment of each tree concluded with an opinion of whether the tree should be removed, or preserved, based on the extent and effect of construction activity on the short and long-term health of the tree. All meetings and field reviews were focused on the area immediately surrounding the proposed development.

## **OBSERVATIONS/DISCUSSION**

The following list includes observations made while on-site and summarizes details discussed during this stage of the planning process.

- The site is forested mainly with Coast live oak trees with scattered madrone, maple, and valley oak trees present.
- 12 trees would be required to be removed for the current set of plans.
  - Three (3) Coast live oaks in fair condition in the 6–11-inch diameter class.
  - Six (6) Coast live oaks in fair condition in the 12-23-inch diameter class.
  - One (1) Coast live oak greater than 24-inches in fair condition.
  - One (1) Valley oak in the 12-23-inch diameter class in poor condition.
  - One (1) Valley oak greater than 24-inches in poor condition.
- Eight (8) trees will potentially be impacted by the proposed construction. Care will be needed when excavating around their root zones.
  - Trees #1021 - #1024 are adjacent to the proposed driveway.
  - Trees #1030, #1031, #1063, and #1064 are adjacent to the proposed motor court.
- There is a decommissioned road that extends to the southeast from Wild Turkey Run. There is a row of planted trees lining the road on the east side with one (1) small tree proposed for removal due to crowding and clearance for fuel mitigation (tree is factored into tree removal count). The remaining trees should experience minor impacts from excavation as the compaction should have lessened root growth in that area.
- Tree spacing is on average 5-40 feet and there are estimated to be between 75 and 125 trees on the site

## **PROJECT ASSESSMENT/CONCLUSION**

Due to the high number of total trees on the site and surrounding sites and the low number of protected trees in the proposed home area, future development should minimally impact the landscape. While tree removal and pruning will be necessary to complete the project, the high number of trees on this parcel and their relatively high vigor will allow the forest to continue to exist and regenerate over time. Most of the property contains tree cover, which will remain undisturbed. No watercourses are near the planned construction. Whenever construction activities take place near trees, there is the potential for those trees to experience a decline in the long term as well.

### Short Term Impacts

Site disturbance will occur during driveway and home construction. The shallow slope upon which the construction is planned is a factor in minimizing the disturbance that must take place for the construction. Short-term site impacts are confined to the construction envelope and immediate surroundings where trees will be removed and trimmed and root systems reduced. The pruning of tree crowns and reduction of root area may have a short-term impact on those trees treated, including a reduction of growth, dieback, and potentially death. Every attempt has been made to recommend removing those trees likely to experience severe decline and death because of planned activities.

### Long Term Impacts

No significant long-term impacts to the forest ecosystem are anticipated due to the large amount of area designated as Open land Easement, and the relatively small amount of area that will be occupied by the proposed residence and driveway. No significant erosion or water quality issues are expected due to shallow slope the majority of the construction is planned on and existing ranch road downhill from the proposed house. The project as proposed is not likely to significantly alter air movement or noise pollution and will not significantly reduce the availability of wildlife habitat over the long term.

## **RECOMMENDATIONS**

### **Tree Removal**

There are 12 trees to be removed with the design as currently proposed. The tree removal contractor shall verify absence of active animal or bird nesting sites prior to any tree removal. If any active animal or bird nesting sites are found prior to tree removal, work shall be stopped until a qualified biologist is consulted for further recommendations. All work shall be performed in adherence to the ANSI A300 and Z133 Tree Work and safety Standards.

### Replanting

The County of Monterey through the Greater Monterey Peninsula Land Use plan has tree replacement conditions as part of a tree removal permit when sufficient space exists to replant that does not create an overcrowded vegetated situation. Currently in the Santa Lucia Preserve, the County requires a 3:1 replacement for removed trees protected by code which measure under 24" and a 5:1 replacement ratio for trees 24" or larger in diameter at breast height. But due to the smaller homeland on the property and fuel



management concerns, it is recommended replanting be at a 1.5:1 ratio for a total of 18 five- or 15-gallon trees (15 Coast live oaks and three (3) Valley oaks as shown in landscape tree mitigation plan). In addition, the County and the Preserve also require independent monitoring of replanted trees to ensure replanting is successful (the term of monitoring is at County discretion, typically one –five years dependent on the type of permit).

### **Best Management Practices**

The health of trees remaining should not be affected if the following practices are adhered to:

- A) Do not deposit any fill around trees which may compact soils and alter water and air relationships. Avoid depositing fill, parking equipment, or staging construction materials near existing trees. Fill placed within the dripline may encourage the development of oak root fungus (*Armillaria mellea*). As necessary, trees shall be protected by fencing or other materials to delineate protection zones.
- B) Pruning shall be conducted so as not to unnecessarily injure the tree. General principals of pruning include placing cuts immediately beyond the branch collar, making clean cuts by scoring the underside of the branch first, and for live oak, avoiding the period from February through May.
- C) Native live oaks are not adapted to summer watering and may develop crown or root rot as a result. Do not regularly irrigate within the drip line of oaks. Native, locally adapted, drought resistant species are the most compatible with this goal.
- D) Root cutting should occur outside of the springtime. Late June and July would likely be the best. Pruning of the live crown should not occur February through May.
- E) Oak material greater than 3 inches in diameter remaining on site more than one month that is not cut and split into firewood should be covered with black plastic that is dug in securely around the pile. This will discourage infestation and dispersion of bark beetles.
- F) A mulch layer up to approximately 4 inches deep should be applied to the ground under selected oaks following construction. Only 1 to 2 inches of mulch should be applied within 1 to 2 feet of the trunk, and under no circumstances should any soil or mulch be placed against the root crown (base) of trees. The best source of mulch would be from chipped material generated on site.
- G) If trees along near the development are visibly declining in vigor, a Professional Forester or Certified Arborist should be contacted to inspect the site to recommend a course of action.

## **Tree Protection (During any Future Construction)**

Prior to the commencement of any construction activity the following tree protection measures shall be implemented and approved by a qualified arborist or forester:

- Trees located adjacent to the construction area shall be protected from damage by construction equipment by the use of temporary fencing set out to tree drip lines and through wrapping of trunks with protective materials. No stripping of topsoil or grubbing of understory shall occur in tree preservation zones.
- Fenced areas and trunk protection materials shall remain in place during the entire construction period. Should access to the area be necessary a Professional Forester or Certified Arborist must be contacted to inspect the site for a recommended course of action.
- Fencing shall consist of chain link, hay bales, or plastic mesh reinforced with dimensional lumber. Again, fencing shall be set to the tree dripline unless previously approved by a qualified professional.
- Fencing is not to be attached to the tree but free-standing or self-supporting so as not to damage trees. Fencing shall be rigidly supported and shall stand a minimum height of four feet above grade and should be placed to the farthest extent possible from the base of the trees to protect the area within the trees drip line (no closer than 10-12 feet away from the base of a tree or 5 times (5X's) the trunk diameter, whichever is furthest).
- In cases where access or space is limited for tree protection it is permissible to protect the tree within the 10–12-foot distance after determination and approval by a qualified forester or arborist.
- Soil compaction, parking of vehicles or heavy equipment, stockpiling of construction materials, cleaning of concrete or plaster, and/or dumping of spoils or materials shall not be allowed adjacent to trees on the property especially within or near fenced areas.

During grading and excavation activities:

- All trenching, grading, or any other digging or soil removal that is expected to encounter tree roots shall be monitored by a qualified arborist or forester to ensure against drilling or cutting into or through major roots. Again, no stripping of topsoil or grubbing of the understory shall occur in tree preservation zones.
- The project architect and/or qualified arborist shall be on-site during excavation activities to direct any minor field adjustments that may be needed.
- Trenching for retaining walls or footings located adjacent to any tree shall be done by hand where practical and any roots greater than 2 inches diameter shall be bridged or pruned appropriately.
- Any roots that must be cut shall be cut by manually digging a trench and cutting exposed roots with a saw, vibrating knife, rock saw, narrow trencher with sharp blades, or other approved root pruning equipment.
- Any roots damaged during grading or excavation shall be exposed to sound tissue and cut cleanly with a saw.

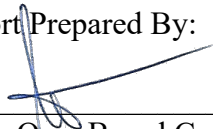
If at any time potentially significant roots are discovered:

- The arborist/forester will be authorized to halt excavation until appropriate mitigation measures are formulated and implemented.
- If significant roots are identified that must be removed that will destabilize or negatively affects the target trees negatively, the property owner will be notified immediately and a determination for removal will be assessed and made as required by law for treatment of the area that will not risk death decline or instability of the tree consistent with the implementation of appropriate construction design approaches to minimize affects, such as hand digging, bridging or tunneling under roots, etc..

### **Tree Pruning**

It is understood that the pruning of retained trees will be expected for this site, especially where any proposed building is to be constructed. All pruning shall be performed by a qualified arborist or under the supervision of an ISA Certified Arborist or Tree Worker. Tree services are required to have a State of California Contractors License for Tree Service (C-61/D49) and provide proof of worker's compensation and general liability insurance. All pruning shall be in accordance with the Tree Pruning Guidelines (International Society of Arboriculture) and/or the ANSI A300 Pruning Standard (American National Standard for Tree Care Operations) and adhere to the most recent edition of ANSI Z133.1. Tree wood and clippings are to be disposed of consistent with current California Department of Forestry guidelines which include stockpiling of material on-site or disposal at an approved refuse site. Following construction, a qualified forester/arborist should monitor trees adjacent to the area of the improvement and if any decline in health that is attributable to the construction is noted, additional trees should be planted on the site.

Report Prepared By:

  
Justin Ono, Board Certified Master Arborist #9388BM  
ASCA Registered Consulting Arborist #744

November 25, 2022

Date

Recommendations Agreed to by landowner:

\_\_\_\_\_  
Landowner

\_\_\_\_\_  
Date

Forest Management Plan approved by:

\_\_\_\_\_  
Director of Planning

\_\_\_\_\_  
Date

## Lot 75 Santa Lucia Preserve

Tree #	Species	DBH	Health	Structure	Remove	Impacted	Height	Crown	CRZ	Comments
1021	Coast live oak	15	Fair	Fair		x	40	20	10	
1022	Coast live oak	20	Fair	Fair		x	40	30	15	
1023	Coast live oak	20	Fair	Fair		x	50	25	15	
1024	Coast live oak	15	Poor	Fair		x	40	20	10	Beetles
1025	Coast live oak	13	Fair	Fair			40	15	8	
1026	Coast live oak	19	Fair	Fair			40	20	10	
1027	Coast live oak	7	Fair	Fair			25	15	8	
1028	Coast live oak	6	Fair	Fair			25	15	8	
1029	Coast live oak	7	Fair	Fair			45	20	10	
1030	Coast live oak	24	Fair	Fair		x	50	40	20	
1031	Coast live oak	24	Fair	Fair		x	50	40	20	
1032	Maple	8	Fair	Fair			50	20	10	
1033	Madrone	6	Fair	Fair			35	12	10	
1034	Coast live oak	23	Fair	Fair			50	40	20	
1035	Valley oak	24	Fair	Fair			50	20	20	
1036	Black oak	40	Fair	Fair			40	40	20	wound at base
1037	Maple	20	Fair	Fair			35	20	10	
1038	Valley oak	42	Fair	Poor			50	40	20	
1039	Valley oak	19	Fair	Fair			40	20	15	
1040	Coast live oak	42	Fair	Fair	x		75	40	20	Grading
1041	Maple	50	Fair	Fair			40	60	30	
1042	Coast live oak	39	Fair	Fair			70	50	25	
1043	Coast live oak	28	Fair	Fair			45	20	10	
1044	Coast live oak	19	Fair	Fair			45	20	10	
1045	Coast live oak	19	Fair	Fair	x		50	30	15	Grading
1046	Coast live oak	17	Fair	Fair	x		50	20	10	In Building
1047	Coast live oak	12	Fair	Fair	x		45	20	10	In Building
1048	Coast live oak	12	Fair	Fair	x		45	20	10	In Building
1049	Coast live oak	18	Fair	Fair	x		50	30	15	In Building
1050	Coast live oak	11	Fair	Fair			30	15	10	

## Lot 75 Santa Lucia Preserve

Tree #	Species	DBH	Health	Structure	Remove	Impacted	Height	Crown	CRZ	Comments
1051	Coast live oak	38	Fair	Fair			65	50	25	
1052	Coast live oak	37	Fair	Fair			65	50	25	
1053	Madrone	24	Fair	Poor			40	20	10	Lean
1054	Coast live oak	11	Poor	Poor	x		30	15	8	suppressed, planted tree
1055	Coast live oak	27	Fair	Poor			40	30	15	suppressed
1056	Coast live oak	32	Fair	Fair			45	50	25	
1057	Coast live oak	20	Fair	Fair			35	20	10	
1058	Valley oak	22	Fair	Poor	x		45	30	15	Decay, in house
1059	Coast live oak	7	Fair	Fair	x		30	10	8	In house
1060	Coast live oak	22	Fair	Fair	x		45	20	10	In house
1061	Coast live oak	6	Fair	Fair	x		30	10	8	In house
1062	Coast live oak	5	Poor	Fair			20	5	5	Beetles
1063	Coast live oak	25	Fair	Fair		x	55	30	15	
1064	Coast live oak	31	Fair	Fair		x	55	40	20	
1065	Maple	13	Fair	Fair	x		50	25	15	In driveway
1066	Valley oak	27	Poor	Poor	x		50	20	15	In driveway, decay
1067	Valley oak	45	Fair	Fair			55	50	25	
1068	Coast live oak	12	Fair	Fair			30	15	10	



## PHOTOGRAPHS



View south west towards the proposed building site.



View southwest towards the proposed building site.





Tree #1040 is proposed for removal.





View of decommissioned road and building site where the majority of tree removal will occur.



View of driveway and motor court area.



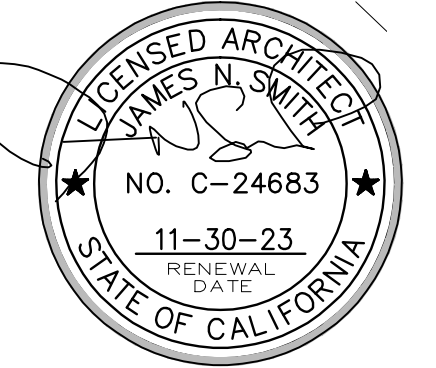


Trees #1031 and #1030 are located adjacent the motor court and will need to be protected.



View of driveway, motor court, and garage area.





## SITE PLAN

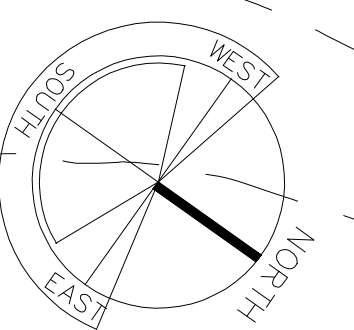
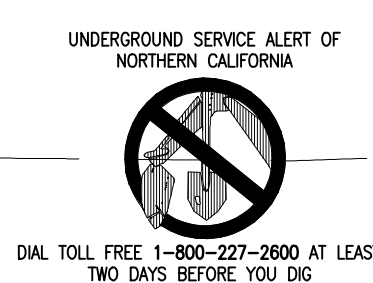
ISSUE	REVISIONS
02-02-23	PRELIMINARY DESIGN REVIEW
02-15-23	PRELIMINARY DESIGN-AMENDED
02-22-23	FLOOR RAISED 12"
05-04-23	FINAL DRB SUBMITTAL

TE  46

PROJECT NUMBER

SHEET NUMBER

# A1.0



SCALE :  $1/4" = 1'-0"$

