

Best Practices - Themes

Establishing and Managing a Theme Area

Revised 12-02-2020

Theme Areas:

Because creating a long-term plan that includes all of our green areas is a daunting task, the Landscape Committee has broken this all-inclusive plan into theme areas. In this way, a separate plan can be created for each theme area, independently. Using this theme concept, the first theme is the Street Tree project. The Landscape Committee will continue to establish additional theme areas, each with their own approved plan, until all of the green areas are added creating an all-inclusive plan. This concept is intended to create detailed Best Practices guidelines for on-going management of these theme areas for optimum long-term community value and sustainability. It is recognized that this project is a lot of work, but these resulting guidelines should be easy to teach and follow. These Best Practices documents will be updated frequently as we learn.

1. Basic Theme Requirements:

- 1.1. Primary design goals
 - 1.1.1. Maximize value for minimum cost.
 - 1.1.2. Strive to meet modern urban forest goals.
 - 1.1.2.1. Reduce watering requirements
 - 1.1.2.2. Use reclaimed water whenever possible
 - 1.1.2.3. Minimize maintenance costs
 - 1.1.2.4. Maximize carbon capture (global warming)
 - 1.1.3. Theme is achievable and sustainable long-term
 - 1.1.4. Theme pallets are adjusted as required.
 - 1.1.4.1. Correct for species mortality issues
 - 1.1.4.2. Changes in infestations and disease resistance
 - 1.1.4.3. Changes in risk area compatibility.
 - 1.1.4.4. Environmental compatibility.
- 1.2. The theme must have a defined basic appearance
 - 1.2.1. Tree pallet
 - 1.2.2. Plant and shrub pallet
 - 1.2.3. Ground cover pallet
- 1.3. Irrigation plan
 - 1.3.1. Normal
 - 1.3.2. Young plantings
 - 1.3.3. Drought
- 1.4. Propagation management plan (Mortality Plan)
 - 1.4.1. Simulated Forest
 - 1.4.2. Street Tree
 - 1.4.3. Park
 - 1.4.4. Other - describe
- 1.5. Maintenance plan
 - 1.5.1. Tree maintenance plan
 - 1.5.1.1. Pruning

- 1.5.1.2. Inspection
- 1.5.1.3. Mulching
- 1.5.2. Plant and shrub maintenance plan
 - 1.5.2.1. Trimming
 - 1.5.2.2. Weeding
- 1.5.3. Soil Maintenance
 - 1.5.3.1. Testing
 - 1.5.3.2. Corrections
- 1.5.4. Mulch maintenance
- 1.6. Management budget
 - 1.6.1. Standard operating costs
 - 1.6.2. Propagation costs
 - 1.6.3. Reserve budget
 - 1.6.3.1. Mortality planning
 - 1.6.3.2. Irrigation replacement
 - 1.6.3.3. Upgrade budget

2. Defining or adjusting a theme

- 2.1. The current appearance of an area can be used to set the Theme for that area.
- 2.2. A radical change to the appearance of a Theme needs to be community defined and not chosen by the Landscape Committee. The Landscape Committee must seek community involvement in defining the new theme appearance providing it meets the basic theme requirements.
 - 2.2.1. Currently, this only applies to the street tree theme but will be helpful in other areas.
- 2.3. The defined theme must meet the Basic Theme Requirements in section 1.
- 2.4. The long-term management of a theme does not need community opinion to establish since this is a horticulture and arboriculture best-practices issue, not opinion based. The Landscape Committee will research, document, and recommend the Best Practices management for each theme.
- 2.5. Projects such as grass replacement and simulated forest plantings, can be considered minor adjustments to a theme for sustainability, cost reductions, drought adjustments, or other justified management reasons.
 - 2.5.1. These theme adjustments must consider the theme area as a community asset and therefore must improve the value of the theme area by improving sustainability, costs management, usefulness, and/or esthetic value (looks).
 - 2.5.2. These theme adjustments do not need community involvement but still require the HOA Board approval.
 - 2.5.3. All theme changes and adjustments will be announced to the community in advance through newsletters and web postings in an effort for full transparency.
- 2.6. All themes must have a long-term plan that includes tree mortality, risk hazards, budget estimates, and reserve planning. The Landscape Committee will review these as needed and update the projections for budget planning and management adjustments.

3. Current Theme Area Concepts.

- 3.1. Street Trees and Embankments, Paseo Sombra and Paseo Tranquilo
- 3.2. Abeto Park
 - 3.2.1. Abeto Pool Carrotwood trees

- 3.2.2. Abeto Street Trees
- 3.2.3. Abeto Grass
- 3.2.4. Abeto Park Embankment
- 3.3. Amapola Slopes
- 3.4. Sendero Channel
 - 3.4.1. Sendero Channel Embankments
 - 3.4.2. Sendero Channel Park
 - 3.4.3. Sendero Entrance
- 3.5. Lower Cypress Channel
- 3.6. Middle Cypress Channel
- 3.7. Upper Cypress Channel
- 3.8. Trabuco Embankments
- 3.9. Paseo Sombre Entrance
- 3.10. Paseo Sombra Entrance Park
- 3.11. Paseo Tranquilo Entrance
- 3.12. Clubhouse area
- 3.13. The main greenbelt needs to be divided up into smaller themes

4. Urban Forest Management Tools

- 4.1. Tree Inventory
 - 4.1.1. Updates from Work and Maintenance Orders
 - 4.1.2. Updates from Planting orders
 - 4.1.3. Updates from Tree Inspections
 - 4.1.3.1. Generates work requests
- 4.2. Maintain history on tree maintenance, issues, and growth.
 - 4.2.1. Save monthly inventor snapshots.
 - 4.2.2. Save all reports used to update inventory.
- 4.3. Punch Lists for tracking various projects and issues
 - 4.3.1. Work Order Tracking
- 4.4. Maintain schedules
 - 4.4.1. Mature Tree Maintenance schedules and issues
 - 4.4.2. Young tree Maintenance schedules and issues
 - 4.4.3. General Greenbelt Maintenance schedules and issues
 - 4.4.4. Other schedules and issues
- 4.5. Create and Maintain Best Practices Guides for consistency and improving practices
 - 4.5.1. Themes (This document)
 - 4.5.2. Irrigation
 - 4.5.3. Tree selection
 - 4.5.4. Planting
 - 4.5.5. Staking
 - 4.5.6. Young Tree Maintenance
 - 4.5.7. Mature tree maintenance
 - 4.5.8. Inspection
 - 4.5.9. Root barriers
 - 4.5.10. Slope barriers

- 4.5.11. V-Ditch maintenance
- 4.5.12. Pruning plans
- 4.5.13. Propagation (Mortality management) plans
- 4.5.14. Area Theme Development Plans and Guidelines
- 4.5.15. Budget and reserves management plan
- 4.5.16. Maintenance Plan
- 4.5.17. Irrigation Plan
 - 4.5.17.1. Drought Plan
- 4.5.18. Soil Testing Plan
- 4.5.19. Health Testing Plan
- 4.6. Annual Reviews - Full Report by August for Board Review.
 - 4.6.1. Inventory assessment
 - 4.6.2. Punch lists
 - 4.6.3. Best practices performance
 - 4.6.4. Theme progress
 - 4.6.5. Drought plan
 - 4.6.6. Irrigation efficiency
 - 4.6.7. Budget
 - 4.6.8. Reserve items periodic re-evaluation of life-expectancy estimates
 - 4.6.9. Non-Routine Projects