AN UPDATE:
UTILITY ARBORIST ASSOCIATION
UAA RESEARCH
ROW STEWARD ACCREDITATION PROGRAM

Philip Charlton
Executive Director, UAA
Our Mission is to be the leading North American organization for the enhancement of quality utility arboriculture and rights-of-way vegetation management.
VISION & GOALS

The UAA will be an essential part of the professional life of individuals involved in the practice of arboriculture and vegetation management within the energy industries by:

- providing educational materials and training opportunities
- developing and promoting best management practices and industry standards for safety, service reliability and environmental stewardship
- driving innovation through research
- playing an active role in shaping the future of utility arboriculture by being the recognized voice of the industry
- managing UAA operations with excellence
ORGANIZATION & OPERATIONS

501(c)3 Tax Exempt Non-Profit
By-Laws

Executive Committee

Committees

Strategic Plan
STRATEGIC TEAMS

Outreach
Training
Education
Safety
Research
Finance
BP / Summit
Editorial
Marketing Members
AD HOC TEAMS

- National Meeting
- Regional Meetings
- ROW 11 Symposium
- Regional Reps
- Utility Arborist Research Fund
- Pipeline
- A300
- Z133
- ISA Council of Representative
Accomplished in 2012-2013

- Facilitated 2013 Vegetation Managers Summit
  - FAC-003 – North American Transmission Forum partnership
  - Storm Response
- Identification of other BPs for Utility Industry:
  - Safety
  - Environmental Stewardship
  - Reliability
Top priorities for 2013-14

- Scheduling and development of agenda for 2014 Vegetation Managers Summit (Ft. Worth?)
- Development of other BMP topics identified in 2012-13.
Accomplishments in 2012-13:

- Established the Safety Committee
- Assisted in Xcel Energy to create the “Tree Worker Safety” video
- Developed the Utility Specialist workshops
- Spanish translations of the BMPs
- Revised the “Utility Pruning of Trees” pamphlet
Strategic Plan

- Make educational and training materials readily available to the membership
- 6 Quizzes/year on the website
- Develop ongoing informational and educational curriculum for students
- Other
Monthly public safety infraction photo
Safety quizzes on safety article for CEU
Safety tailboard
Monthly, seasonal and transitional information
Industry event calendar
OSHA bulletins, Z Committee updates
Safety Summits – 2x/year
SAFETY

What’s wrong with this picture?

Like us on Facebook
TRAINING

Accomplished in 2012-2013

- Webinars
  - Topics on Safety, IVM, Storm Response, and a very popular 3-part series on different aspects of EAB
  - Obtained an increased number of sponsorships
- Launched Utility Specialist Training Workshops
- Created a Regional Meeting Planning Template
Top priorities for 2013-14

- Virtual Library
  - Update materials on website for member access
- Work with Webinar Authors & Presenters to provide question for online CEU quiz’s and Newsline articles
- More Regional Meetings
  - Regions not currently served
  - Focus on areas of member interest and relevance
RESEARCH

- Recruit university researchers
- Raise funds for and complete top 3 research priorities
  - "Development of a Business Case for Scheduling Utility Vegetation Management on a Preventive vs. Corrective Maintenance Basis"
- Communicate results of past research
  - Website link
  - Newsline
- Help UARF create the $1M endowment
- Update the research priorities
2013 Formal Task List Assigned to Committee

- Ensure website and other technologies are effectively accomplishing the purposes, objectives, and goals of the UAA
- Educate regulators and legislators about UAA priorities
- Engage public, regulators and other stakeholders with educational and training materials
Outreach

Accomplished in 2012-2013

- Increase representation of utility members of Transmission and Distribution Companies.
- Developed 3 messages & leave behind documents for members and to support the upcoming DC trip.
- Redesigned the UAA Website.
- Discussion, Support Offered and Liaison with ROW Steward Initiative and MOU Land Agencies.
OUTREACH

Informing regulators and legislators

- **Outcome 1:** To make certain the individual understands the significance of the utility vegetation management industry
- **Outcome 2:** To position UAA as the best source of technical expertise related to utility vegetation management
- **Outcome 3:** To inform regulators and legislators of the industry’s concern about the unintended consequences of FAC 003-1 and 2 and the UAA’s response for the purposes of eliciting support for valid, scientifically based Best Management Practices
- **Outcome 4:** To develop a MOU with key federal land agencies
Voice for the future

11,000,000 acres of ROW
5,000,000 miles of distribution
Objectives:

- Produce the Newsline 6x per year
- Assist in the Development of UAA – T & D World Insert

Editorial Committee Results:

Produced six Newslines with special issues on:

- Fire, Social Media, Coops and Municipalities, Research

Special features on:

- Colleges, New Profiles, Profiles from the Past, GF Corner

T & D World Supplement Largest Insert and Sponsorship

Largest Insert and Sponsorship Ever
Future Goals of the Editorial Committee

- Encourage more Utilities to participate
- Keep a broad base of industry members

Potential Special Issues on

- Careers in Utility Vegetation Management
- UVM Around the World
- ISA National, UAA Regional and NADF Partners Meetings-What’s best for the membership and UAA
- Wildlife Benefits of IVM on Right of Ways
- Blast from the Past-stories and old photos of the last 50 years
- Regulatory Update
MARKETING COMMITTEE

Accomplished in 2012-2013

- Pipeline subcommittee – developed IVM BMP
- Engage members in UAA activities
  - Created Social Media: Facebook, LinkedIn Group
- Began to:
  - Address UAA need for member demographics
  - Address tree company membership
  - UAA directory
  - Focus on website support and sponsorship needs
MARKETING COMMITTEE

Top priorities for 2013-14

- Grow membership & maintain a 95% retention rate
- Increase website sponsorship revenue to provide additional monies to fund new initiatives in 2014.
- Develop marketing plan that includes
  - Target audiences: Pipeline, Tree Workers, Vendors, Students, Utilities (IOU’s, Co-Ops, Muni’s), etc.
  - Develop metrics and outreach programs to cultivate membership engagement
  - Strategy and rapid response plan for social media
Accomplishments in 2012-13
- Transitioned accounting to Quickbooks
- Completed review & update of all policies
- Managed 2\textsuperscript{nd} complete financial audit
- Prepared the 2013-14 budget

For 2013-14
- Bid out key contracts
- Better involve strategic plan committees in budgeting
- Monitor finances, audit and tax preparation
## 2013-14 BUDGET

<table>
<thead>
<tr>
<th>Projected Expenses</th>
<th>Amount</th>
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<tbody>
<tr>
<td>Administration</td>
<td>$183,000</td>
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<td>Newsletter/Directory</td>
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<td>Meetings/Webinars</td>
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<td>Contributions/Memberships</td>
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<td>A300/Z133/ISA meetings</td>
<td>$ 2,000</td>
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<td>Accounting/Taxes/etc.</td>
<td>$ 26,600</td>
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<td>ROW Proceedings</td>
<td>$ 40,000</td>
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<tr>
<td>Other</td>
<td>$ 16,200</td>
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<tr>
<td><strong>TOTAL EXPENSES</strong></td>
<td><strong>$391,250</strong></td>
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BE PART OF THE CHANGE

UAA Membership

- UVM Leadership: 100%
- UVM Staff: 35%
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Research Priorities

1. Preventive vs. Corrective Maintenance
2. Pruning practices
3. Hazard Trees (Risk Assessment)
4. Optimum Cycle/Scheduling Strategies
5. Rights-of-Way Maintenance: IVM, T&E Species, Biodiversity, Invasive Species,....
UAA and the TREE Fund established the UARF
- Seeded by APS & UAA: $100,000+
- Currently $250,000+

Goals
- $1M endowment by 2016
- $50,000/year in new research

The Request
- Designate Tree Fund contributions to the UARF
FIRST PROJECT COMPLETED

BIOCOMPLIANCE CONSULTING, INC.

DEVELOPMENT OF A BUSINESS CASE FOR SCHEDULING UTILITY VEGETATION MANAGEMENT ON A PREVENTIVE VS. CORRECTIVE MAINTENANCE BASIS

Phases I and II Final Report

John W. Goodfellow & Arkan Kayihan
9/7/2013
“Lay a foundation for an analytic approach to determine optimal vegetation maintenance spend and cycle times”
THE DESIRED OUTCOME

A framework for an analytic model to evaluate economic efficiency of vegetation maintenance practices that consider:

1. Costs (direct and indirect)
2. Performance (safety and reliability)
3. Customer satisfaction
\[ f(x) = a_0 + \sum_{n=1}^{\infty} \left( a_n \cos \frac{n\pi x}{L} + b_n \sin \frac{n\pi x}{L} \right) \]
THE MODEL VARIABLES

System variables
- Line miles, Voltage class, Site type & Stocking Density

Hazards
- Failure type, probability of occurrence, probability of preventing

Costs & Consequences
- Damage type, cost to repair, other direct costs (e.g., lost revenue), & indirect costs (e.g., cost to customers)
NEXT STEPS

Validate the model

1. Develop a “strawman” using existing industry data
2. Conduct a pilot at one or more utilities
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Electric
- 450,000 miles of ROW (35kV and above)
- 8,600,000 acres

Petroleum & Natural Gas
- 300,000 miles of ROW
- 2,100,000 acres
AUGUST 14, 2003

- 55 million affected
- 11 fatalities
- Cost of $10B
RESPONSE TO THE OUTAGE

- NERC establishes 2006 standards
- FERC adopts NERC standards giving them the force of law (FAC-003)
- FAC-003-02 becomes effective July 2014

Comparison of FAC-003 versions 1 & 2 now available on UAA’s website
GOOD NEWS – BAD NEWS

The Good
- Increased vigilance
- Improved reliability
- Reduction in the liability of potential regulatory citations

The Unintended Consequences
- Less efficiency – increasing costs
- More aggressiveness – Unnecessarily altering ROW ecosystems
- *Less IVM in practice today then in 2003?*
To create a means of recognizing excellence in the application and practice of IVM on the North American electric power grid

- UAA, EEI, EPRI
- Utilities, manufacturers, contractors, suppliers, consultants, and more
- ENGO: The Nature Conservancy, Pollinators Partnership, Wildlife Habitat Council and more
- EPA
- The Public
ROW STEWARDSHIP ACCREDITATION MODEL

1. An independent board of directors will provide oversight

2. Objective standards of accreditation will be established and form the basis of a formal application process

3. An independent audit will assess the degree to which an applicant’s IVM program is compliant with program requirements
1. Set objectives
2. Evaluate the site
3. Define action thresholds
4. Evaluate & select control methods
5. Implement control methods
6. Monitor/quality assessment

Integrated Vegetation Management
Laws, Standards & BMPs
Community & Worker Relations
Tenure & Use Rights & Responsibilities
# ROW STEWARD REQUIREMENTS

- **10 Principles**
- **32 Criteria**

<table>
<thead>
<tr>
<th>Member</th>
<th>Affiliation</th>
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<tbody>
<tr>
<td>John Goodfellow (chair)</td>
<td>BioCompliance Consulting, Inc.</td>
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<tr>
<td>Randy Miller</td>
<td>PacifiCorp</td>
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<tr>
<td>Geoff Kempter</td>
<td>Asplundh Tree Expert Co.</td>
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<tr>
<td>Rich Hendler</td>
<td>Dow AgroSciences</td>
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<td>Paul Appelt</td>
<td>Environmental Consultants Inc</td>
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<td>Harvey Holt</td>
<td>Purdue University (retired)</td>
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<td>Kevin McLoughin</td>
<td>NY Power Authority (retired)</td>
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<td>Jenny Arkett</td>
<td>Duquesne Light</td>
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<td>Rick Johnstone</td>
<td>IVM Partners</td>
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<tr>
<td>Ryan Aylesworth</td>
<td>Audubon International</td>
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<td>Steve Narolski</td>
<td>Bonneville Power Administration</td>
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ROW STEWARD PILOT UTILITIES

Completed

In Progress

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VERMONT ELECTRIC POWER COMPANY, INC.

New York Power Authority
Thank You