

# URBAN FORESTRY CONSULTANTS: THEIR NEED AND SELECTION

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**Abstract.** Managing the urban forest is sometimes best accomplished with the help of an urban forestry consultant. Careful consideration in determining the need for such a consultant and the selection process which follows will derive optimum results from a contract.

The social and economic benefits that a well maintained urban forest offers is evident to us in arboriculture. Over the past two decades we have been working toward educating the public about these benefits.

The urban forest consists of those trees usually growing along streets and near homes, in an urban situation. The urban forest has a unique set of environmental conditions to cope with which are unlike those of the typical forested area. Cities and towns usually afford a warmer and dryer environment for their trees when compared to trees growing in the surrounding countryside. Urban trees may also be affected by overhead and underground utilities, sidewalks, driveways, signs, signals, and buildings. Salt and lawn herbicides also affect them.

Trees can reduce air and noise pollution and moderate the climate around them. They can increase the value of property. People see healthy, attractive trees as an indication of a desirable community in which to live. Many communities are beginning to encourage their local governments to take a more active role in protecting and maintaining urban trees.

When questions relating to urban trees arise increasing numbers of municipalities have begun to rely upon urban forestry consultants for answers. Most consultants are experts in their fields, and are ready to provide a wide range of services tailored to meet specific needs of a community.

The decision to hire an urban forestry consultant may be based on certain criteria, such as when the staff of a city is not qualified or if it would be more cost effective to contract a specific job to a consultant. Then, too, perhaps a specific

schedule must be met, or an independent assessment or expert testimony is needed. Whatever the reason, once the decision has been made to seek the service of a consultant, an understanding of what is involved to get the most out of the consultant is important.

**Roles of client and consultant.** Careful consideration must be given to the respective roles of the client and consultant. Basically, the consultant's role is one of stimulating, creating, and implementing change. The consultant may assist in identifying problem areas, selecting and evaluating courses of action, and in identifying specific actions. Consultants can also coordinate and implement a course of action arising from recommendations. The consultant works independently, but is not isolated from normal activities of the client.

The client's role is threefold. First, he must maintain normal operations until acceptance of the consultant's recommendations and an implementation plan has been prepared. Secondly, the client must supervise activities of the consultant and provide data and support as needed. Finally, the client must coordinate the consultant's activities with other city or related services that might affect or be affected by the scope of the work planned.

**Defining the problem.** Before approaching an urban forestry consultant, a definition of the problem facing a municipality is critical to successfully executing a consulting project. The purpose, scope, and limits of a problem must be clearly stated. If, for example, a street tree inventory is requested, when a complete street tree management plan is actually needed, both client and consultant will be disappointed with the results.

To do this, the consultant and client must ask the right questions and be prepared to spend sufficient time to ensure the questions needing answers are correct before proceeding. If the pur-

pose is vague or the scope too broad, desired results may not be achieved and the cost may be excessive. Likewise, a specific purpose with too narrow a scope may require such specialized knowledge that few may be qualified to handle it, thus increasing the cost to the point at which the benefits are overshadowed.

Ideally, the project should be stated broadly enough to encourage the consultant's creativity, while indicating limits to the scope of services. If problems are very numerous or complex, a municipality should consider hiring a consultant to aid in finding a consultant by preparing an overall plan of action and isolate specific problems that can be solved one at a time. This consultant may also act as a reviewer and advisor as the work progresses. Furthermore, the consultant may act as a client's agent before a contract is made, when a complex urban forestry project is presented.

**Selecting a consultant.** Determining the most appropriate consultant is best accomplished by first selecting a group of urban forestry consultants for a detailed evaluation. One way to find consultants is through the use of directories and advertisements in trade and professional publications. However, they provide no indication of a consultant's experience and no measure of the quality of work provided to clients. A better way to find consultants is to contact officials in nearby municipalities who may have similar problems. Also, utilities and many telephone companies trim thousands of street trees each year and may be able to provide names of consultants with local experience for particular urban forestry needs. Such personal contacts can also provide information on the general skills and reputations of each consultant being considered.

Next, capabilities and references should be requested from each consultant in a preliminary group chosen. Two or three of the references provided by the consultant should be investigated in depth. The basic information to obtain during the reference check includes:

- Did the consultant's work relate to the problem?
- Were the recommendations carried out?
- Were real benefits obtained?
- Would the same consultant be contracted again?

After reviewing results of this reference check, a short list of no more than three to five consultants should be developed.

A request for proposals which identifies project objectives, scope, and limits should then be prepared and sent to each consultant on the short list. When consultants' proposals are submitted, they should be reviewed until fully understood. Ask questions and/or clarify points. If the project deals with very complex or confusing issues (such as selecting the proper microcomputer for urban forestry work), it may be advisable to engage a third party consultant, as previously mentioned, for advice in the final selection. Select proposals on the basis of the consultant's knowledge, clarity of presentation, and candidness in discussing sensitive issues.

Do not select a consultant on the basis of fee alone. Reliable consultants proposing clearly presented objectives should present similar cost proposals. In a short list of three to five consultants, one cost proposal much lower than the others may indicate a consultant did not fully understand the scope of the work. Very low initial estimates usually mean very high cost for changes in scope and additional work.

### Summary

The urban forest may confront municipalities with certain management problems which could be best solved by the aid of an urban forestry consultant. After determining the need for such a consultant, the process of selecting one begins with an understanding of the client-consultant relationship. Next, a clear and concise statement of the problem must be prepared. A group of consultants should be chosen, and their experience and references evaluated.

From this evaluation, a short list of consultants is developed and a request for proposals sent to each. Selection of a final proposal and consultant should be based on the consultant's knowledge and experience, clarity of presentation and candidness in discussing issues.

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