

Special Points of Interest:

- CTPA, TREE Fund join forces to fund research
- Heritage Oaks Society offers “Legacy” opportunities, tax benefits
- APS saving trees, funding research with “paperless” campaign
- Jim Barborinas is 2008 TREE Fund Volunteer of the Year

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TREE Fund Report

CREATING YOUR LEGACY

By: Rob Fanno,
Fanno Saw Works Owner and TREE Fund Trustee



Rob Fanno

People who take the time to plant and care for a tree are creating a legacy of beauty, shade, cleaner air and many other things. People who make “planned gifts” to a charity of their choice are also creating a legacy.

The Heritage Oak Society of the Tree Research and Education Endowment Fund is a special group of people who have made arrangements to include the TREE Fund in their estate plans. They are creating a legacy by making a “planned gift” to help arboriculture research and education in the future while maintaining control over their assets during their lifetime. These people play a significant role in shaping the future of arboriculture and urban forestry by providing funds that will make a lasting difference.

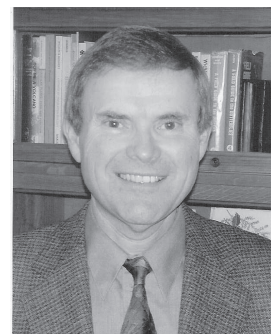
In describing her reason for making a planned gift, ISA Director of Educational Goods and Services Sharon Lilly said, “My entire career has been based on my passion for trees and our profession of caring for them. When the Heritage Oak **Cont. Pg 3 >**

SERENDIPITY WORKS FOR US

By: Janet Bornancin, Executive Director

The meeting of two groups of people passionate about tree care is turning into an exciting new opportunity for everyone involved.

For some time the TREE Fund Board of Trustees has wanted to find a way to get research done on specific topics of our own choosing – topics we knew would be important to arborists and urban foresters. The Board recently committed to establishing a TREE Fund Research Fellowship that would accomplish that goal and began working on ways to fund the program.



Dr. Mark McClure, Ph.D.

At about the same time, the Connecticut Tree Preservation Association (CTPA) had decided to honor their long-time leader, Dr. Mark McClure, by establishing a research fund in his name. Fundraising was begun, but administrative issues had stalled the project in its infancy. In an almost uncanny alignment of objectives and opportunity, it was easily seen that the TREE Fund Research Fellowship program could meet the goals of the Mark McClure Fund.

Subsequently the CTPA, led by Chris Donnelly, committed to raising a minimum of \$100,000 to create the Mark S. McClure Research Fund to support the TREE Fund Research Fellow Program. To date they have raised almost \$28,000! **Cont. Pg. 2 >**

Continued from cover - SERENDIPITY WORKS FOR US

The TREE Fund will manage the fund and issue Research Fellow grants once the full \$100,000 has been raised.

Dr. McClure is a native of Massachusetts and earned his B.S. in biology at the University of Massachusetts. He showed his promise early, winning the Walter V. Balduf Award of Excellence for his graduate research while earning his masters and doctoral degrees in entomology at the University of Illinois. In 1975 he joined the Connecticut Agricultural Experiment Station in New Haven and became Chief Scientist of the Station's Valley Laboratory in Windsor in 1987. As a research entomologist he investigated five introduced species of scale insects and adelgids, which are pests of hemlock and pine, and several leafhoppers that spread X-disease of peach trees. He was awarded the Station's Board of Control Lectureship in 1981 for his work there.

Dr. McClure traveled to China and Japan to investigate scales and adelgids in their native habitats. He introduced and experimented with predators and parasitic wasps that he found attacking red pine scale and hemlock woolly adelgid in Asia. He discovered and named a previously unknown ladybird beetle, which has become the most promising candidate for biological control of hemlock woolly adelgid. Millions of Dr. McClure's beetles have been reared and released to save hemlock forests throughout the eastern United States. He is a world-renowned expert on the biology and control of this serious pest problem.

Dr. McClure also studied the efficacy of pesticides and fertilizers on the control of insect pests in forests and ornamental landscapes. He has published more than 130 articles in scientific and practical journals, including an integrated pest management guide for hemlock woolly adelgid, and he has co-authored two books on plant-feeding insects.

Throughout his distinguished career, Dr. McClure has been an active leader in the Connecticut Tree Preservation Association. He has mentored many arborists and foresters and befriended even more -- evidenced by the group of passionate CTPA members who came together to create the Mark S. McClure Research Fund. The CTPA said

they are "very pleased to be able to honor the lifelong efforts of Dr. Mark S. McClure." Maryjane Aresnault, CTPA president calls Mark McClure "a true friend of all who practice tree care." Through this Fund, he will be remembered by the CTPA and others in arboriculture and urban forestry for his generosity, commitment and strength of vision in support of tree care research and education.

Although retired, Dr. McClure retains a keen interest in the future of arboriculture. He says grant funding is the only thing that makes science careers possible for most researchers.

"Young scientists and graduate students often possess amazing insight, remarkable skills, and extraordinary perseverance, but lack the necessary financial support to attain their goals. I would not have had an accomplished scientific career if not for timely funding at several critical stages in my life. I grew up in a disadvantaged household, and would not have been able to attend college and graduate school without financial support. Without funding to support my research endeavors here and abroad, I would not have been able to establish my pioneering research on the hemlock woolly adelgid and other exotic piercing and sucking insect pests that attack our natural and urban forests.

Knowledge gained from original scientific investigation is invaluable to the arboricultural industry. My findings on the ecology and control of hemlock woolly adelgid and scale insects have been directly applicable to strategies adopted by tree care professionals for saving hemlocks from these destructive pests. It is tragic when young scientists and graduate students must compromise their research mission because of a lack of basic financial support. Contributing to the Dr. Mark S. McClure Research Fund is contributing to the development of a young creative mind, and to important scientific discovery. It is beneficial to the profession, and it is a wise investment in the future of tree care."

A primary goal of the TREE Fund Research Fellowship is to enable candidates who are pursuing advanced academic degrees to conduct research on problems or issues that are important in arboriculture and urban forestry. Through this partnership, Dr. McClure's dream of assisting researchers to do their work becomes his legacy. The TREE Fund thanks CTPA for their commitment and passion for the Mark S. McClure Research Fund.

If your group is interested in partnering with the TREE Fund to manage your funds, please contact me at jbomancin@treefund.org or call me at 630-369-8300.

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Continued from cover - CREATING YOUR LEGACY

Society was formed, it took me about two seconds to decide to participate. I'm proud to have the opportunity to make a difference for generations to come."

You may be wondering, what exactly is a planned gift? Well, it may take the form of:

Bequests – Historically, two thirds of all planned gifts come in this form and are usually part of a will. If this option interests you, please talk to your attorney and consider using the language provided here →→

Gifts of Appreciated Stock -- This allows you to take a charitable deduction for the full market value on your income tax form. The TREE Fund gets the full value of the security and nobody has to pay capital gains tax on the appreciation.

Beneficiary Designations – Two common options are listed below. Please see the shaded box for additional advice.

IRAs and Retirement Plans - Uncle Sam loves you to have them, but hates for you to leave them to heirs. Tax attorneys tell us that the estate tax on these instruments is 45% and your heirs may pay up to 35% income tax. By designating the TREE Fund as the beneficiary, these tax issues will be avoided.

Insurance Policies – The donor designates the TREE Fund as a beneficiary of his or her life insurance policy, usually a whole life policy with cash surrender value.

Charitable Gift Annuities - This is a contract between you (the donor) and the TREE Fund. The donor irrevocably transfers assets to the TREE Fund. Then, the TREE Fund pays a fixed dollar amount at regular intervals to the donor for life. The gift's amount and the age of donor determine the payout amount.

A planned gift helps you make a contribution that can provide for your own security, take advantage of certain tax benefits and allow you to make a difference, all at the same time.

In 2000, the TREE Fund (formerly ISA Research Trust) invited individuals to become founding members of the Heritage Oak Society. Many people responded to the invitation. Some chose to become founding members and others simply asked for more information. Since the Founders' Drive, more people have joined the Society and we will be featuring members' stories in the TREE Fund newsletter throughout the year.

As part of the TREE Fund's 2008-2010 Endowment Campaign, we are inviting you to join this group of special people. If you have already made a provision for the TREE Fund in your estate plan, please let us know so that we can include you in the Heritage Oak Society, and thank you.

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Please consider a legacy gift to the Tree Research and Education Endowment Fund. Consult your estate planning attorney who can assist you in adding one of the following paragraphs to your will:

"I hereby give and bequeath \$_____ to the Tree Research and Education Endowment Fund to be used (for its general purposes) (for [specific purpose])."

or,

"I hereby give, devise and bequeath (_____% of the residue) of my estate to the Tree Research and Education Endowment Fund to be used (for its general purposes) (for [specific purpose])."

If you are leaving the proceeds of an insurance policy or IRA assets to the TREE Fund, please be sure to indicate this on the insurance or IRA beneficiary forms and not in your will. That is because the insurance proceeds or IRA assets will only be disposed of by the terms of the insurance policy or IRA document, not by your will.

TREE FUND FUNDRAISERS TOP \$375,000

Thanks to the generosity of ISA members, corporate sponsors and many others, 50-plus cyclists have raised over \$287,000 so far in the 2008 TREE Fund Tour des Trees Campaign. The riders joined with local and state organizations and more than 200 children to plant 10 trees in five public awareness events during the Tour. In addition to TV, radio and newspaper coverage before and during the Tour, more than 900 media outlets clicked on our national press release that was sent just after the Tour ended in St. Louis, spreading the TREE Fund's message that research and education are critical to improving the health of trees in our communities.



Fabulous live auction and silent auction items donated by ISA chapters, companies and individuals brought in more than \$80,000 in the "Raise Your Hand For Research" Gala Auction this year, and the Asplundh Tree Expert Co. Golf Outing to benefit the TREE Fund was a fun and successful event, raising more than \$18,000 for tree research and education.

Chapter involvement and volunteerism from our growing network of friends was critical to this year's fundraising success. The TREE Fund staff and Board extend to all who helped to make these events so successful a heartfelt "thank you". For a detailed list of sponsors and Chapter Challenge rankings look for our ad in October's "Arborist News".

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New TREE Fund Liaison Recognized

The TREE Fund's newest ISA Chapter Liaison, Tammy Kovar of Florida, is rising to the mutual challenges of business ownership and enthusiastic support of the TREE Fund. Kovar's company, Biological Tree Services, was named Manatee County's Small Business of the Year in 2008, and selected by Bayer Environmental Science as one of the winners in their 2008 Green Space Renovation Contest. In addition, Tammy rode her first Tour des Trees this summer, raising \$3500 in donations to support the TREE Fund. We applaud BTS's success, and Tammy's dedication to advancing the mission of the TREE Fund by her generous contributions of her time and energy. Way to go, Tammy!



“SAVE A TREE” CAMPAIGN SAVES TREES AND MORE FOR THE TREE FUND

You’ve probably seen the inserts in your own bills: “Go Paperless – Save a Tree.” Banks, phone companies and others are asking you to sign up for e-billing. Dedicated folks at Arizona Public Service went a step further and offered an incentive. Thanks to the advice of Mike Neal, manager of APS Forestry and Special Programs, former ISA President and TREE Fund trustee, for every customer who agreed to stop getting paper bills in the first three months of the campaign, APS promised to donate a dollar to the TREE Fund. Nearly 17,000 Arizonans stepped up to the plate and APS generously rounded up the numbers to give the TREE Fund \$20,000 to invest in arboricultural research and education.

APS says the plan is good for everybody. Customers get convenience. The environment gets the double benefit of the saved paper and dollars invested in arboricultural research and education. And the utility saves, too. “We use 455,000 pounds of paper in just one year for printing and mailing bills to our 1.1 million customers,” said Kelley Ryan, APS Department Leader, Customer Programs. “With almost 17,000 customers canceling their paper bill, each year 80 trees will be saved and 7,258 pounds of solid waste and 45,388 gallons of wastewater will be avoided.”

Interested in doing something like this in your own company? Contact TREE Fund Executive Director M. Janet Bornancin, jbarnancin@treefund.org.

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TREE FUND NAMES JIM BARBORINAS “2008 VOLUNTEER OF THE YEAR”

On July 27, 2008, at the opening ceremony for the 84th Annual ISA Conference in St. Louis, the TREE Fund recognized one of its most dedicated supporters, Jim Barborinas, with the “Ken Ottman Volunteer of the Year Award”. Jim has been actively engaged in raising money for the TREE Fund (previously the ISA Research Trust) since 1992, when he took on the role of PNW Chapter Liaison. During his tenure in that role he was instrumental in developing the Chapter’s annual auction as a fundraiser for the TREE Fund and until just last year he has been the driving force behind its success. He has participated in several Tour des Trees rides, including the original 1000-mile Tour from Seattle to Oakland in 1992. Through articles in the PNW Chapter’s newsletter Jim encourages his fellow Chapter members to contribute their time and money in support of his favorite cause. He also served for several years as a member of the TREE Fund’s Board of Trustees. Just

recently, Jim and his wife Annie have taken a leading role in helping to develop the TREE Fund’s “big picture” initiatives. They joined the ranks of the Heritage Oak Society and stepped up as one of four lead donors in the TREE Fund Endowment Campaign.

Jim owns and operates Urban Forest Nursery, Inc. and Urban Forestry Services, Inc., a thriving tree nursery and consulting service in northwest Washington State, where he daily puts into practice the knowledge gained from research funded by the TREE Fund.

“The only thing that makes us experts in our field, he has said, “is the application of methods or techniques that have been proven by unbiased third parties. I feel that TREE Fund research grants are the best way to make all of us real experts.” Congratulations, Jim!

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Jim & Annie Barborinas

Trees are the best monuments that a man can erect to his own memory. They speak his praises without flattery, and they are blessings to children yet unborn.

- Lord Orrery,
1749

Blue sky, golden cloud ...

What a feeling of forever!

The languid tree-tops

lithely remain mysterious.

A sign, you would think.

- Alberto Blanco,
First Star

I am the Lorax, I speak for the trees, for the trees have no tongues.

- Dr. Seuss

HAZARD TREE IDENTIFICATION PROTOCOL PROJECT (HTIP)

By: Ward Peterson, Davey Resource Group and TREE Fund Trustee

Hazardous trees represent a significant liability to the general public, utilities, cities, counties, utilities, and state and federal agencies.. If left unmanaged, hazard trees can cause personal injuries and fatalities, damage to public and private property, power outages, and threats to the nation's critical infrastructure. In fire-prone states, hazard trees can also fall onto power lines and become the source of damaging wild-land fires.

Through the TREE Fund, the UAA has begun the development of industry accepted procedures for identifying hazard trees during power line rights-of-way inspections. The intent is to build recognized reasonable and prudent procedures to efficiently identify potential hazard trees in a large population of trees. This project is part of the UAA's continuing research and development program.

Initially, these procedures will be developed to address hazard tree issues in fire-prone states. In the long-term, these procedures may be modified and adopted as either national or international guidelines for inspections of hazard trees on rights-of-way.

In December 2007 the HTIP working group met and began the development of these procedures. The working group is made up of western utilities, line insurance contractors, agencies, large private land owners, and academia.

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TREE FUND GRANTEES PUBLISH DROUGHT STUDY RESULTS

The following article appeared recently in [The Buckeye Arborist](#)

“Challenges in the Establishment of Newly Transplanted Trees.”

By: Grant Jones, Technical Advisor and Dr. Bal Rao, Manager of Research and Development, Davey Tree Co. 1500 N. Mantua Rd, Kent, Ohio 44240

Drought stress is an important issue facing anyone planting and maintaining trees in landscapes and urban environments. Often a majority of the absorbing roots in field dug trees are severed during transplanting. With this reduced root system, it is difficult for plants to absorb adequate water during the recovery and establishment period. Water is a vital ingredient for all physiological processes including photosynthesis. As a result, drought stress can directly reduce the tree's sugar production, create nutrient deficiencies and adversely affect plant health. Stomata open to release water through transpiration and regulate the exchange of oxygen and carbon dioxide, which affects respiration and photosynthesis respectively. Under drought conditions, stomata close or can be damaged disrupting normal gaseous exchange. Therefore, a reduced root system may impair sugar production and complicate the recovery and establishment of plants. This results in reduced growth and often predisposes trees to increased insect and disease activity possibly leading to tree mortality.

Arborists and landscapers generally use mulch, fertilizer and irrigate as needed to aid in establishment of urban trees. In some situations practitioners may incorporate mycorrhizal inoculum during planting. Reports indicate that in nursery and landscape

settings supplemental mycorrhizal inoculation application can increase root biomass and improve absorption of water and nutrients.

Many undisturbed, fertile soils contain mycorrhizae which benefit trees through their symbiotic association by increasing water and nutrient uptake. Urban soils are frequently disturbed and the activity of naturally occurring mycorrhizae may be minimal. Incorporating supplemental mycorrhizae into these soils during transplanting may improve moisture and nutrient absorption and aid in the recovery and establishment of plants. However, very little information is available about the role of mycorrhizae in the establishment of newly transplanted trees in the urban environment. Therefore, in April 2007, we initiated a study to determine the role of mycorrhizae in establishing newly transplanted red oaks and redbuds.

This research will continue and we intend to present the results at an Annual ISA Conference in the future. We appreciate the cooperation and assistance of the City of Strongsville, Ohio, their forester Jennifer Milbrandt and Plant Health Care, Inc. with this project. We also thank the TREE Fund for awarding funding to support this project.

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“Understanding Water Needs and Drought Tolerance in Mature Trees Used in Urban Landscapes”

By: Dr. Lisa Samuelson, School of Forestry and Wildlife Sciences, Auburn University, Auburn, AL 36849
(2005 Hyland Johns Grant Recipient)

Growth and development of urban trees is greatly influenced by soil moisture but species are often selected based on aesthetic characteristics and not drought tolerance and species-site compatibility. To better evaluate water needs in urban environments, whole tree water use was measured in 12-year-old sawtooth oak (*Quercus acutissima*), swamp chestnut oak (*Quercus michauxii*), white oak (*Quercus alba*), Nuttall oak (*Quercus nuttallii*), northern red oak (*Quercus rubra*), Chinese elm (*Ulmus parvifolia*), green ash (*Fraxinus pennsylvanica*) and eastern redbud (*Cercis canadensis*). Total summer water needs increased exponentially with stem diameter measured at 4.3 feet and could be predicted by: gallons per tree = $25.22 * (\text{diameter}^{1.53})$. For example, a 5 inch diameter tree required 296 gallons compared to 4 times more in a 15 inch tree and 20 times more in a 35 inch tree. Chinese elm, sawtooth oak and Nuttall oak were the highest water users and required up to 1 gallon of water per inch of stem diameter a day and 143 gallons per inch of diameter a summer. Northern red oak and eastern redbud were the lowest water users and suffered more drought stress. Relationships between water use and stem diameter can be used to better estimate water needs of mature trees in urban settings and better match species to planting site. This project was funded by the TREE Fund.



Dr. Lisa Samuelson

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AND THE WINNER IS....

The TREE Fund congratulates Bob Richens, manager of ArborMetrics Solutions of Hendersonville NC, on purchasing the winning 50/50 raffle ticket at the 2008 Raise Your Hand for Research Auction in St. Louis July 28.

Bob is a long-time supporter of the TREE Fund, a seven-time Tour des Trees rider, a former TREE Fund Liaison for the Southern Chapter of ISA and a generous contributor to past Raise Your Hand for Research Auctions. He and his wife, Stuart (who joined him on the UK Tour des Trees in 1998) raise goats and livestock guardian dogs on their 25-acre retreat in western NC, Banks Mountain Farm. He'll use his \$2400 windfall to purchase hay for the livestock this winter. Congratulations to Bob, and to TREE Fund Trustee Ruth Stein, who sold the winning ticket.



TREE FUND

Tree Research & Education Endowment Fund

The TREE Fund Mission

To identify and fund projects and programs that advance knowledge in the field of arboriculture and urban forestry to benefit people, trees and the environment.

www.treefund.org

Important Dates:

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|----------------|--------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------------------------------|
| Oct. 1 | TREE Fund Committee Budgets Due | Nov. 4 | “TREE Fund Presentation at Illinois Arborists Assoc. Conference” |
| Oct. 3 | TREE Fund Office moves to:
552 S. Washington St., Ste 109
Naperville, IL 60540
630-369-8300 (fax: 630-369-8382) | Nov. 13-15 | TCIA Expo, Milwaukee, WI |
| Oct. 30 | TREE Fund Budget Workshop | Nov. 15 | “Bandit Chipper Auction to benefit the TREE Fund” |
| Nov. 1 | “John Z. Duling Grant Application Deadline” | Dec. 1 | “TREE Fund Research Fellowship Application Deadline” |
| | | Dec. 4-6 | “TREE Fund Trustees and Liaisons Winter Retreat, Naperville IL” |

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If you want to save a tree and go “e” ... please send your request to treefund@treefund.org

www.treefund.org

Tree Research and Education Endowment Fund

Newsletter

To: