



Date: January 11, 2018

To: Jim Ingram, President and COO, Bartlett Tree Experts  
Paul Fletcher, Vice President, New England Division Manager, Bartlett Tree Experts

Fm: J. Eric Smith, President and CEO, TREE Fund

Re: Meetings at Bartlett Tree Research Laboratories in December 2018

On behalf of everyone at TREE Fund, I again want to express my gratitude for your invitation to host TREE Fund's annual Trustee/Liaison Meeting (essentially our Annual Meeting of the Corporation) at the Bartlett Tree Research Laboratories on Monday and Tuesday, December 10 and 11, 2018. I also appreciate the opportunity to discuss whether a Research Summit to follow the Annual Meeting would be a possibility of benefit to Bartlett Tree Experts, TREE Fund, and the overall industry we serve.

Personnel involved in the Annual Meeting are as follows:

- TREE Fund's Trustees: 15 regular members, plus two non-voting *ex officio* members (myself and Alan West, representing TREE Fund to the ISA Council of Representatives) for a total of 17 participants. The Trustees are a nationally-based volunteer body who collectively bear the ultimate responsibility for the activities and health of our organization. The Chairman of the Board of Trustees is Steve Geist, Senior Consulting Arborist with Swingle Tree/SavATree.
- TREE Fund's Liaisons: 21 regular members. The Liaisons are elected or appointed representatives from all of the ISA Chapters in the United States. The Chairman of the Liaison Committee is Randy Miller, Director of Research, Development and Industry Intelligence, CN Utility Consulting.
- TREE Fund Staff: Three professional employees, in addition to me.

For planning purposes, our typical meeting schedule would be as follows:

- Monday morning: Trustee Travel Time (some may need to arrive Sunday night)
- Monday, Noon: Working luncheon for the Trustees, followed by:
- Monday, 12:30 PM to 5:30 PM: Annual Meeting of the Board of Trustees
- Monday, 6:00 PM: Joint Dinner for the Trustees and Liaisons, with educational component
- Tuesday, 8:00 to 10:00 AM: Joint Meeting of the Trustees and Liaisons; Trustees may depart upon completion of this meeting
- Tuesday 10:00 AM to 3:00 PM: Annual Meeting of the Liaison Committee, with working lunch at Noon; Liaisons may depart upon completion of this meeting

We can adapt this schedule as necessary to best fit with the opportunities presented to us by being at the Laboratories, and we would be honored if you and/or Robert or your designees were available to meet with us at any time during the proceedings. It would be outstanding and greatly appreciated by everybody in attendance if a tour of the labs was available during the times when both Trustees and Liaisons are onsite, e.g. early Monday evening, or Tuesday morning during the normal Joint Meeting Time. I will be happy to work with your team to set up the best and most expeditious way to achieve maximum benefit and exposure for Bartlett and its research staff in the least obtrusive manner possible.

Regarding the possibility of the Research Summit, I would envision this being an additional meeting to be held on Wednesday, December 12. The goal of such a summit would be to hone TREE Fund's Research Priorities for a period of three to five years to ensure we award the highest possible number of meaningful grants for the benefit of tree care professionals and their clients.

By way of background and explanation: for many years, TREE Fund has identified five key areas of interest for grant applications:

- Root and soil management
- Tree planting and establishment
- Plant health care
- Risk assessment and worker safety
- Urban and community forest management

While these are adequate, they are so broad and vague that virtually any tree-related research project could be slotted into one of them, whether it had any real, practical benefit to tree care professionals or the communities in which they work. In the years since those areas of interest were established, ISA has conducted a research needs assessment, NUCFAC has issued its new ten year plan – and our organizational response has been to look at these five areas and essentially say “Yes, they still work.” Which, of course, they would – because they are so broad and vague.

In October 2017, TREE Fund awarded a \$20,000 grant to Drs Andrew Koeser (University of Florida, Gulf Coast) and Richard Hauer (University of Wisconsin, Stevens Point) to evaluate all TREE Fund research grants from 2002 to 2017 to assess the actual impacts, outputs, and outcomes that have emerged across the tree care industry as a result of the \$3.0+ million in awards we have issued. We will have the results of their study in November 2018.

I see the Research Summit as providing the opportunity to evaluate their findings and other research needs assessments identified above (or others to be identified) to create a meaningful, more detailed list of research priorities aligned with TREE Fund's grant lines (some endowed, some not) for 2019 to 2021, with options for extension in 2022 and 2023. I do not see it being a particularly large group: representatives from TREE Fund's Research Committee, Bartlett Research Laboratories, Davey Institute, ISA's Science and Research Committee, UAA's Research Committee, plus a select group of TREE Fund research recipients who have issued particularly insightful and impactful work over the past decade. 15 participants plus staff support would seem to be a viable target number, and I believe the group could achieve its goals over the course of a normal working day.

The results of such a summit could serve to both increase the quality of the grant applications that TREE Fund receives, and also provide stronger marketing and fundraising materials as we seek to “expand the circle” of supporters beyond those who have sustained us over the past 15 years, Bartlett key among them. That said, I obviously do not wish to overstep the bounds of your generous invitation to come to Charlotte in December, so I look forward to discussing this with you both, with gratitude.

Best regards,

A handwritten signature in black ink, appearing to read "John Smith", with a long horizontal flourish extending to the right.