ARBORIST REPORT

Creating effective reports for your clients is a great way to enhance clarity and solve problems. Putting your observations in words can also earn you a wider audience.

Arborists approach tree work with passion, confident in their knowledge and abilities. But when it comes to writing reports, that confidence and passion is replaced by fear and loathing. The challenge of organising our observations and conclusions and putting them into words can intimidate the most fearless arborist. Without boundaries our thoughts will wander, and be impossible to follow. Successful reports start with an assignment that contains our thoughts, and trains them into coherent communication. This article will be framed around commercial consulting, but the same principles apply to municipal and contracting work.

Defining the assignment is about collaboration. The professional's first job is to clarify the client's problem and need. Next, describe a course of action to solve the problem and meet the need. That course of action is the assignment. It's up to the professional to make sure the client understands what the job is. Very often, tree owners want specific answers to general questions, and the challenge is to gently let them know what is possible. You can satisfy the desires that drove them to call you without overpromising. Clients can't always get what they want, but with our help they just might find they get what they need.

During these critical conversations, repeat the main points, and listen carefully to the responses. Then reword the assignment, repeat the conversation, and gain their agreement. This process

"Trees must be touched to be understood" – A. Shigo. The arborist conducts a close inspection of this *Quercus sp.* and its fungal colonist, *Ganoderma sp.*

may sound like a headache, but consider the alternative. "The customer is always right" may apply to selling shoes, but it can lead to real problems when contracting or consulting. There's that "c" word. Like it or not, when you are supplying information in the course of your job, or selling your opinions, you are consulting. But that is not a bad thing. If your opinions are defendable they can prevail, from the landscape to the courtroom.

Liability transfers from the tree owner to the consultant occurs when recommendations are made, or the flow of information diverges. When new consultants just cut-and-paste the client's wishes as the assignment, as if it were removing a dead tree, the case gets out of control. When experienced consultants consciously or unconsciously impose their bias (and all opinions are biased), bad things happen. You might *think* that they are following you but they're not, so their expectations will differ from yours.

If the clients want to know all about their ancient tree, or what management is needed for their entire landscape, all in an hour's time, they are asking for the impossible. Too often, valuable trees are condemned because mitigation does not get adequate consideration. Some advisers recommend the removal of every tree we look at, to cover our aspirations to minimise liability – or sell tree removal. But that ploy is transparent, and damages credibility. We can give trees a chance, as long as we back up what we say with facts. Pointing to related research is not enough – until the actual data (not opinions) are connected to the case in point in a meaningful way. Above all, avoid fake news; what some call "alternative facts". Our competitors, and curious clients, will call us out, and kill our credibility. We may not always be right, but we can know what to include when the assignment is clear.

Limitations must be disclosed in every report. The process of determining what you can do starts with determining what you cannot do. List everything that may keep you from doing a better job – lack of time, money, equipment, information, expertise, and other resources all can hinder your performance. Your clients need to know this. Don't thread the needle when writing assignments. Disclosing your limitations keeps you from being held responsible for any deficiencies that may be found in your report, and also keeps you from trying to do too much with too little. Limitations are sometimes listed in an appendix, but may be better placed upfront, right after the assignment.

Keep the assignment adequate to do the job. Insufficient information constrains conclusions. There are four reasons reports fall flat:

1. The assignment was never spelled out.
2. The report missed the assignment.
3. The client (or reporter) misunderstood the assignment.
4. One or both parties changed their minds. In rare cases, legal requirements or government regulations constrain your assignment. Look closely at these constraints, and don't exaggerate their reach or rigidity. By closely reading and working with these laws you'll see they are not as limiting as some might think. More typically, client and consultant work out the details, and agree on a deadline.

Specified treatments, expected results, monitoring, timeline. The assignment determines which of the three different formats to follow. The form report uses a preprinted form with checkboxes and lines for comments, like the forms companies use to ensure a systematic approach to monitoring in plant health care, risk assessment, and other tasks. Filling out a form may not seem like report writing, but it is. Using a standardised form has many advantages. A form report is the simplest format, and fits many jobs. The letter report can be one page or several, and is the most commonly used format. It may be handwritten in the field, but is usually typed. Highly complex assignments call for a booklet report that is separated into sections. A cover letter goes in front, supporting information in the back.

Close inspection shows that this crack was closed, then opened up after pruning caused imbalance in the crown. This history was key information for specifying restoration.

Recommendations are not essential, according to industry standards and experts. As much as Ken James knows about tree biomechanics, he relies on close inspection, and does not make recommendations. "The answer is predetermined by the tree," he says. "I just report information to the client. I let them figure out what to do with it."

When clients need information on simple tasks like pest control or pruning or root invigoration, that need is met by listing practical management options. Then the clients can choose which treatments to budget for. Sometimes clients want similarly specific directions on managing more complex issues, like managing the risk and benefits associated with large old trees, but don't want to pay for the work needed to give them the details they ask for. Clarify what is needed. Your clients can understand that information is the goal, and they only need to understand practical management options.

Background and history, describing key events that led to the current situation, come first in the report, ▶

Maximise health, value, safety, and longevity. Minimise liability and maintenance.			
Site & mgt. History, exposure, associates	**Benefits, functions, conflicts, ecosystem**	**Strengths**	**Weaknesses**
		Roots	Roots
		Roots	Roots
		Flare	Flare
		Trunk	Trunk
		Forks	Forks
		Branches	Branches

Often tree owners want specific answers. Clients can't always get what they want, but with our help they just might find they get what they need.

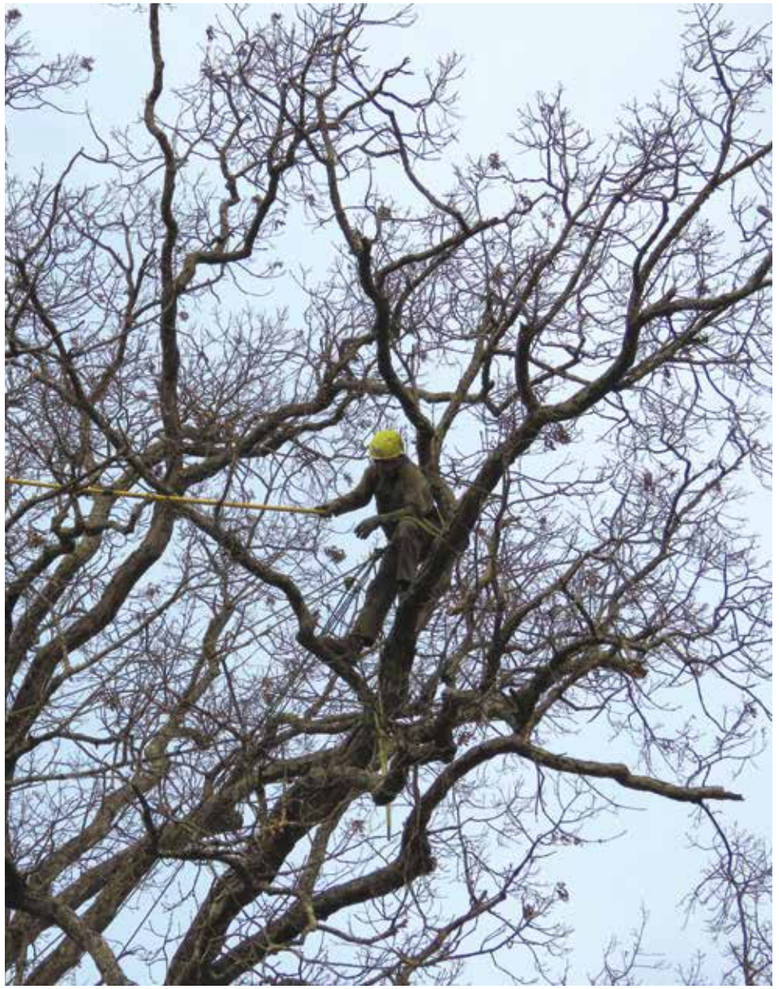
followed by Assignment, Limitations, and Observations, information gained on site. Keep chronological order, and take good notes. With practice, dictation software can save a lot of time and headaches. Timelines can be helpful organisational tools, and powerful evidence if needed. If the report is incomplete or late, it may be inadmissible, and useless. The shortest delay can mean all that work is down the drain, and may well go unpaid.

Discussion is combined with observations in most reports. Avoid losing the reader by repetition, or going off on tangents.

Research, Testing, and Analysis of any samples or data that may have been gathered. What we have read or learned from other sources goes here, or in Observations. I include it in both sections, depending.

Conclusions follow: Stating what you have learned from what you have observed, discussed, and analysed? Remember, there is no need to draw a singular conclusion, unless that was spelled out in the assignment. More often, there are a series of statements based on the facts. Management options flow from Conclusions. Describe how the client can apply the information gained. These may be listed in order of importance as the consultant sees it, but the decisions belong with the clients. After the signature goes the supporting information, as references or appendices. Be sure to properly attribute the sources that you use. This gives credit where credit is due, and builds your own credibility.

Organise your material before attacking the task of writing. Use the headers of the sections to build your outline and structure. Maybe draft a bullet list under each topic. Insert images as needed to illustrate key conditions. Order events as they happened by following the outline, so you can relive the whole experience as you report on it. Which can be very entertaining. Get comfortable with all the information, get into a comfortable space, and let it flow. If you panic at the prospect of writing, as I often do, find new tools that will do your writing for you. After installing dictation software on a device such as a mobile phone, you can speak into it as you observe trees in the field. Back in the office, download the files into a text document. After minor editing ▶



Illustrations communicate better than words. The line points to a graft, which upon close inspection appears to provide a strong connection between trunk and limb.

the first draft of the observations is done, and you're on the way.

Use active, personal, simple, everyday language. Writing too often is done in a passive third-person voice, with long words where short ones will do. This "academese" diminishes the usefulness of scientific papers – Shigo railed against the "barbed-wire barrier of words" that blocks communication between scientists and practitioners – and it can positively choke reports. Remember, a written report is just talking to your client, but in print. Compare the text to your notes from fieldwork and research, making sure you have not left out anything important. If your statements lack support, either seek it out or soften them. Internet searches are good, but require cross-checking to verify. Books are better, and documented field experience can also be powerful.

Don't stop to edit while writing – if the automatic editor is distracting, turn it off. Write until you get too tired to continue, and then take a break. When you return, skim the report through without editing, to get a sense of what you have done so far. It may help to print out a copy and hold it in your hands. Scan the whole thing, and grasp its entirety. Note any weak areas and questions. Break up those long sentences – less commas and more periods.

Revising your report into a form that satisfies you and your client makes many reach for the aspirin, or harder stuff. Don't obsess – it can never be perfect. Written language is a tool. Learning to use this tool is easier when the information is visualised as bits, like bytes. Look at phrases and sentences and paragraphs as floating balloons, which you can cut and paste and shift around into a shape that makes the most sense. You are the master of all you survey on the screen. Pick up and move entire sections and drop them where you please. Glue them together with connecting phrases until it starts to flow for you. At this point, it's time to get more eyes on it. Friends and family can facilitate, but for frank feedback run it by a mentor or colleague. Don't take comments personally – this is a work in progress. Interact with your reviewers; make sure you really understand their comments, and they understand your responses.

Proofreading gets you to the finish line – review grammar, and check spelling. It's ready to go. An Executive Summary is often useful for "cutting to the chase," and describing the job in a nutshell. Some readers may lack the time or interest in the details; they only need a synopsis. Summarising the job into a short paragraph and inserting it after the Assignment can also be an excellent way for the writer to feel at ease, knowing that what needed to be done was done.

Arboriculture has too long been restricted to too narrow an audience. As you communicate your passion and knowledge about trees, that audience – and your own list of satisfied clients – will expand exponentially. You can't solve every case successfully, but you can solve more problems for clients and trees by systematically creating effective reports.

***A Consultant's Guide to Writing Effective Reports.Writing and Defending your Expert Report* (Babitsky and Mangraviti 2002).**
The Guide for Plant Appraisal 9th Ed.(CTLA 2000) **AA**