

# ROW Steward Technical Requirements High-level Updates



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**Companion Documents:**

*2024.09.09\_2024\_ROW Steward Technical Requirements\_Clean*

## GENERAL CHANGES

- 1) Title Change:
  - *Accreditation Standards for Assessing IVM Excellence > ROW Steward Technical Requirements*
    - TAC recognized that two versions of the technical requirements title existed and advised simplifying the accreditation program name to: ROW Steward Technical Requirements.
- 2) Addition of a sponsorship page to thank founding members, contributing partners, and ongoing sponsorship of ROWSC projects.
- 3) Addition of a 'Technical Requirements Revision History' table.
- 4) Terminology:
  - Vegetation management personnel hierarchy updated and standardized throughout document:
    - Vegetation Manager > Vegetation Management Leadership:
      - Director of vegetation management
      - General manager of vegetation management
    - ROW Asset Manager (no change in title):
      - Regional managers and supervisors
    - IVM Workers > IVM Practitioners:
      - Front line utility foresters
      - General forepersons
      - Work planners
    - IVM Contractors > IVM Production Workers:
      - Tree workers
      - Herbicide workers
      - Crew forepersons
  - 'Tolerance levels' and 'actions thresholds' standardized throughout document.
  - 'Control methods' vs 'vegetation maintenance treatments' standardized throughout document
    - 'Control methods' used to describe high-level methods (physical, chemical, cultural, etc.).
    - 'Vegetation maintenance treatments' replaces alternating uses of 'treatments' and 'techniques'.
- 5) Definitions:
  - Sought consistency with most recent version of the IVM BMP.
  - Added:
    - Action Thresholds
    - Compatible Vegetation
    - Control Methods
    - Culturally Important Areas
    - Non-selective IVM Treatments
    - Incompatible Vegetation
    - Integrated Vegetation Management
    - IVM Practitioner
    - IVM Production Worker
    - Protected Areas
    - ROW Asset Manager
    - Selective IVM Treatments
    - Tolerance Levels

- Utility Vegetation Management
- Vegetation Maintenance Treatments
- Vegetation Management Leadership

6) Scoring Guidelines changed from 'pass/fail' to 'achieved/not achieved' throughout the document.

## SPECIFIC CHANGES

### PRINCIPLE #1

Indicator 1.1.a:

- Deleted duplicative verifier, "*Records confirm that internal and contract personnel are trained with respect to applicable regulations and hold appropriate licenses and certificates.*" This verifier is duplicative to a verifier in 1.1.c.
- Moved required verifier, "*(REQUIRED) No observations of chronic or intentional violation related to vegetation management are made during field audits*" to 1.1.b where it is more appropriate.

### PRINCIPLE #2

Indicator 2.1.a:

- Deleted verifier 7, "*Field evidence that maintenance operations only occur within boundaries of authorized corridors.*"
- Deletion resulted in a reduction to the number of verifiers required to achieve the indicator.

Indicator 2.2.a:

- Deleted verifier 6, "*Policies specific to appropriate public recreational use and access*" because it is redundant.

Indicator 2.3.a:

- Indicator split into two:
  - Utilities that maintain permanent road access and those that do not.

### PRINCIPLE #3

Title Change:

- 'Community Relations' > 'Stakeholder Relations'. The later more accurately describes the criteria within this principle (internal and external outreach).

Indicator 3.1.a:

- Combined verifiers 1 &2:
  - "*Employee participation in community programs where employees promote the concepts and benefit of IVM and protecting natural resources.*"
  - "*Support of and representation in civic activities related to IVM and natural resource issues (e.g., Earth Day programs, Arbor Day celebrations, right-tree-right-place plantings, participation in Pollinator Week programs, etc.).*"
  - Verifiers were duplicative. Verifier 2 was deleted.

#### Criterion 3.2:

- Removed reference to 'social' effect of IVM because social effects are not well defined within the technical requirements.

#### Indicator 3.2.c:

- Revised verifier 1:
  - From: *"The results of public opinion surveys relative to vegetation management issues."*
  - To: *"Results of post vegetation maintenance customer surveys are available."*
- Deleted verifier 4, *"Public and private party correspondence."*
- Reduced the number of verifiers to achieve the indicator rating to 3.

#### Indicator 3.4.a:

- Rephrased required verifier 1 and split into 2 required verifiers for greater clarity:
  - From: *"(REQUIRED) Engagement procedures and tracking of stakeholder involvement in the vegetation management arena, specifically as related to the development of management objectives as part of the planning process."*
  - To:
    - *"(REQUIRED) Policies and procedures for engagement and monitoring of stakeholder involvement are present within the strategic IVM plan."*
    - *"(REQUIRED) Goals and objectives within the strategic IVM plan are reviewed and revised based on ongoing stakeholder input."*
- Deleted verifier 2 because the aforementioned change made it redundant.

### PRINCIPLE #4

#### Indicator 4.1.a:

- Added distinction between utility vegetation management (UVM) and integrated vegetation management (IVM); reflected within the definitions section and text.
- Deleted required verifier 2, *"(REQUIRED) A statement of commitment to IVM is included in the Strategic IVM Plan (See Criterion 6.2 Long Term Commitment to IVM),"* and added new Indicator 4.1.b:
  - Criterion 6.2 (Long-term Commitment to IVM) was moved to new Indicator 4.1.b because it is better represented within Principle 4.

#### Indicator 4.2.a:

- Deleted verifier 4 *"A statement of commitment to IVM is included in the Annual Vegetation Maintenance Plan."*
  - Commonly, annual vegetation maintenance plans are lists of locations and vegetation maintenance treatments exported from the planning software. If the strategic IVM plan is required to have a statement of commitment, then there is no need to require the same statement of commitment within annual vegetation maintenance plans.
- Modified the indicator rating accordingly.

#### Criterion 4.4:

- Moved to Principle 5 (new 5.1.b and 5.1.c) which address knowledgeable VM personnel. This is a more appropriate location for this requirement.

## PRINCIPLE #5

### Criterion 5.1:

- Title changed from “Knowledgeable Vegetation Managers” to “Knowledgeable IVM Personnel”.

Updated management hierarchy titles resulted in the following changes to applicable IVM personnel:

- Indicator 5.1.a: IVM Practitioners and Production Workers
- Indicator 5.1.b: IVM Practitioners and ROW Asset Managers
- Indicator 5.1.c: Vegetation Management Leadership

## PRINCIPLE #6

### Criterion 6.1:

- Verifiers 4 & 5 were updated to required verifiers:
  - *“(REQUIRED) Compatible and incompatible plants and/or vegetative cover types are documented within the Strategic IVM Plan, and form the basis for defining tolerance thresholds.”*
  - *“(REQUIRED) Tolerance levels and action thresholds are documented for use in identifying unacceptable risks from off- ROW vegetation.”*

### Criterion 6.2:

- Deleted from Principle 6 and became new Indicator 4.1.b.
- This criterion was better suited to Principle 4.

## PRINCIPLE #7

### Indicator 7.1.a:

- 2 verifiers were updated to required verifiers:
  - *“(REQUIRED) Documented use of multiple control methods and vegetation maintenance practices.”*
  - *“(REQUIRED) A variety of appropriate vegetation maintenance practices are observed during the field assessment.”*

### Indicator 7.2.a:

- Deleted verifier 3, “Documented account of treatment technique use over time and space” because it is redundant with 8.3.a.
- Verifier updated to required verifier:
  - *From: “Policy and procedure documents that commit the utility to predominant use of selective treatment methods.”*
  - *To: “(REQUIRED) The strategic IVM plan and supporting documentation commit the utility to the predominant use of selective vegetation maintenance treatments.”*

Indicator 7.3.a:

- Verifier 1 updated to a required verifier:
  - From: *“A quality assurance practice of verifying (sampling) herbicide mixtures being applied to incompatible ROW vegetation.”*
  - To: *“(REQUIRED) For utilities that do not employ closed chain of custody, the strategic IVM plan documents policies, procedures and practices to verify herbicide mixtures applied in the field.”*

PRINCIPLE #8

Criterion 8.2:

- Reorganization:
  - Previous order:
    - 8.2.a: aesthetic impacts
    - 8.2.b: important wildlife
    - 8.2.c: RT&E species
    - 8.2.d: invasive plants
    - 8.2.e: cultural resources
    - 8.2.f: water resources
  - Updated order:
    - ~~8.2.a: aesthetic impacts~~ (moved to 8.4 Holistic Assessment of Treatments)
    - 8.2.a: RT&E species
    - 8.2.b: important wildlife
    - 8.2.c: invasive plants
    - 8.2.d: protected areas and culturally important areas
    - 8.2.e: water resources

Indicator 8.2.a:

- Verifiers updated to required verifiers:
  - *“(REQUIRED) Documented policies and procedures for identifying habitats of RT&E species (as defined by the U.S. Endangered Species Act or the Canadian Species at Risk Act) within the utility’s area of influence.”*
  - *“(REQUIRED) Adherence to the U.S. Migratory Bird Treaty Act or the Canadian Migratory Bird Convention Act.”*
  - *“(REQUIRED) Observations during field audit of actions taken for protection of RT&E species.”*

Indicator 8.2.b:

- Updated verifier:
  - From: *“Documentation of efforts to mitigate issues associated with fragmentation and connectivity of habitats caused by the presence of the ROW.”*
  - To: *“Documented evidence of restoration plans for habitat enhancement are shared between the planning, construction, and operations functions of the utility.”*

Indicator 8.2.d:

- Included greater focus on management of cultural resource and protected areas:
  - Verifier 1 updated to a required verifier:

- *“(REQUIRED) Documented policies and procedures for identifying protected areas and culturally important areas within the utility’s area of influence.*
- Verifier 4 deleted because it was redundant with the required verifier.

Indicator 8.2.e:

- Verifier 1 updated a to required verifier:
  - *“(REQUIRED) Documented policies, procedures and practices indicating the impact of vegetation maintenance treatments on water resources.”*
- Deleted verifier 4:
  - *“Collaborations and demonstrations with stakeholders.”*

Indicator 8.3.a:

- Deleted 2 verifiers:
  - *“Documented account of selective treatment techniques over time and space.” (Duplicative)*
  - *“The deliberate introduction and establishment of compatible species on a site.” (Not indicator relevant and an uncommon practice)*
- Remaining (documented) verifier updated to a required verifier:
  - *“(REQUIRED) Documented patterns of native plant communities and herbicide use over time that show compatible plant communities are developed and maintained.”*

Indicator 8.4.a:

- Verifier 1 updated to a required verifier because all other verifiers are dependent upon it.
  - *“(REQUIRED) Documented policies, procedures and practices indicating that the visual impact of vegetation maintenance treatments is considered during planning and while completing annual operations. Examples of visually sensitive areas may include federal and provincial/state parks and forests, municipal parks, road crossings, etc.”*
- Verifier 4 is a list of examples of operations that may reduce visual impacts of vegetation maintenance treatments in visually sensitive areas.
  - Deleted verifier and moved examples to Verifier 1:
    - *“(REQUIRED) Documented policies, procedures and practices indicating that the visual impact of vegetation maintenance treatments is considered during planning and while completing annual operations. Examples of visually sensitive areas may include federal and provincial/state parks and forests, municipal parks, road crossings, etc.”*

PRINCIPLE #9

Updated terminology only.

PRINCIPLE #10

Indicator 10.1.a:

- Element b:
  - Split requirement into two elements:
    - 1) changes in plant community composition,



- 2) RTE and important wildlife habitat, the latter relating to changes made in 8.2 regarding the management of RTE species and important wildlife.
- Verifier 1 updated to a required verifier:
  - *“(REQUIRED) Written policy and procedures for monitoring that include Performance Indicators that are linked to management objectives (objectives are specific, measurable, accountable, relevant, and time-bound – all may be evaluated through monitoring).”*
  - If monitoring relates to the “Monitor Treatment and Quality Assurance” requirement found in ANSI A300 part 7 and ISA IVM BMP and is the foundation for adaptive management, then formalizing policy within the strategic IVM plan is appropriate.
- Deleted Verifier 5 and added SMART quantities to the required verifier.
- Deleted Verifier 6 as it was redundant to verifier 2.

Indicator 10.2.a:

- Deleted verifier 3 as it is redundant to verifier 2.
- Verifier 2 updated to a required verifier:
  - *“(REQUIRED) Periodic revision to strategic IVM plan and annual vegetation maintenance plans document changes based on the results of IVM monitoring.”*