



Patrick Hannah ISA CA FL-6275 A
PHCA LLC.
3052825051

ADDENDUM – BUILDING PHASE

TREE RELOCATION FEASIBILITY + ROOT PRUNING + PRUNING SPECIFICATIONS

Property: 11901 SW 63rd Ave, Pinecrest, FL 33156

Prepared by: Patrick Hannah Certified Arborist LLC.

ISA Certified Arborist FL-6275A, TRAQ/PPQ

Addendum Date: December 15, 2025

1. Assignment & Purpose

This addendum documents construction-phase recommendations for the viability, feasibility, and sustainability of relocating Trees #18, #35, and #38, and for managing construction-interface impacts to Tree #36 (proposed to remain). It also includes root pruning specifications, canopy pruning specifications (Tree #36), planting/installation requirements, post-work irrigation schedules, soil amendment protocol, monitoring requirements, a keywords glossary, and a scientific references section.

2. Standards Referenced

- ANSI A300 (Part 5) – Management of Trees During Site Planning, Site Development, and Construction
- ANSI A300 (Part 6) – Planting and Transplanting (Relocation)
- ANSI A300 (Part 8) – Root Management (Root Pruning / Root Zone Work)
- ANSI A300 (Part 1) – Pruning (Reduction / Clearance Pruning)
- ISA Best Management Practices (BMPs) – Tree Transplanting and Tree Pruning (as applicable)

3. Summary of Conclusions

- Trees #18, #35, and #38 are viable for relocation, provided that minimum root ball sizes are maintained, handling is performed correctly (root ball supported/cradle rigged), and aftercare (irrigation + soil restoration) is implemented.
- Tree #36 is proposed to remain. At the current proposed building threshold (southern canopy to patio/overhang = 15'-4"), only minor roots ($\approx$ 2-inch diameter) are anticipated. Root pruning is feasible just north of the proposed construction limits when performed using careful hand excavation and/or air-spade methods and clean cuts per ANSI A300 (Part 8).
- Tree #36 requires a limited clearance/reduction pruning dose on the southern canopy to reduce canopy-to-structure conflict while preserving primary architecture and avoiding excessive stress.

4. Minimum Root Ball Sizes (Project Requirements)

Chart 1. Minimum Root Ball Sizes (Project Requirements)

Tree No.	Disposition	Minimum Root Ball Diameter
18	Relocate	14 feet (14')
35	Relocate	20 feet (20')
38	Relocate	16 feet (16')

5. Tree #36 – Construction Interface Root Pruning (Tree to Remain)

Tree #36 is proposed to remain in place. The closest proposed structure to the east (patio with overhang) is approximately 15'-4" from the southern side of the canopy. At this threshold, only small roots ($\approx$ 2-inch diameter) are anticipated at the interface. Root pruning is recommended just north of the proposed construction limits prior to excavation and construction of this portion of the house.

- Root exposure method: Carefully expose roots along the approved pruning line using hand excavation and/or air-spade excavation. Avoid indiscriminate trenching with an excavator.
- Cut quality: Roots shall be cut cleanly using clean, sharp hand tools (handsaw/loppers). No tearing or ripping is permitted.
- Standards: All root work shall be performed under the direction of an ISA Certified Arborist and shall comply with ANSI A300 (Part 8).
- Backfill and protection: Immediately backfill the exposed area with suitable soil, water-in to settle, and apply 3–4 inches of mulch (keep mulch off the trunk flare).
- Stop-work trigger: If larger-than-anticipated structural roots are encountered, pause work and notify the project arborist for an on-site determination.

6. Tree #36 – Canopy Pruning Specification (Clearance / Conflict Reduction)

Pruning system: Clearance / conflict reduction on the southern side of the canopy. Install 4–6 reduction cuts to the ends of first-order branches on the southern canopy margin, targeting cuts approximately 4–6 inches in diameter, reduced back to the nearest appropriate lateral branch union that is at least one-third (1/3) the diameter of the limb being cut.

Limitations for this pruning dose:

- All pruning must be performed by an ISA Certified Arborist proficient in ANSI A300 (Part 1) standards.
- No canopy thinning.
- No removal cuts of any first-order branches.
- No heading cuts.
- Remove deadwood greater than 1 inch in diameter.
- Use reduction cuts to appropriate laterals; smaller cuts are preferred when feasible to minimize wounding and stress.

7. Relocation BMPs – Trees #18, #35, #38 (ANSI A300 Part 6 + Part 8)

Relocation work shall be planned and executed to preserve root ball integrity, avoid desiccation, and minimize site disturbance.

1. Pre-work coordination meeting: Confirm staging areas, equipment routes, soil protection (mulch + mats/plywood), and receiving pit locations.
2. Pre-relocation root pruning / root ball formation: Where required, establish the root ball perimeter with careful excavation and clean cuts to minimize tearing; comply with ANSI A300 (Part 8).

3. Acclimation period (required): After root pruning and/or root ball formation, trees shall remain in place for 90–180 days prior to relocation to allow feeder root reinvigoration within the formed root ball.
4. Receiving pit preparation: Excavate and confirm pits prior to extraction where feasible; verify utilities and grades.
5. Extraction and handling: Maintain an intact root ball; protect the ball from cracking/drying. Keep root balls shaded and moist as needed during staging.
6. Rigging and lifting: All trees shall be cradle rigged by supporting the root ball; trees shall not be choked at the trunk. No pinning of the stem is allowed (do not clamp, chain, or press equipment against the trunk).
7. Transport and installation: Set trees at the original planting depth with trunk flare at or slightly above finish grade. Correct orientation as needed.
8. Backfill and stabilization: Backfill with suitable soil; settle in lifts and water-in. Stake/brace only as necessary and using non-damaging methods.

8. Planting Pit Requirements (Receiving Locations)

Receiving pits for relocated trees shall be sized and constructed as follows:

- Diameter/width: 1.5 to 2.0 times the root ball diameter.
- Depth: root ball height only—do not over-excavate. Provide firm, undisturbed soil under the root ball to prevent settling.
- Trunk flare: Set trunk flare to grade or slightly above grade; do not show soil/mulch against the trunk.
- Watering ring: Form a low berm at the outer edge of the root ball footprint to retain irrigation during establishment.
- Mulch: Apply 3–4 inches of wood chip mulch over the root zone and keep mulch pulled back from the trunk flare.

9. Soil Amendment Protocol (Root Invigoration) – Post Root Pruning + Post Relocation

The following protocol is intended to restore soil structure, improve drainage/oxygenation, and support root recovery in sandy, rapidly draining urban soils.

- Mulch: Maintain a 3–4 inch wood chip mulch layer over the root zone (keep mulch 12 inches off the trunk flare).
- Decompaction / aeration (where feasible): Use air-spade radial trenching or vertical mulching outside the trunk flare to reduce compaction and improve infiltration.
- Organic matter + biochar amendment: Topdress the root zone with screened compost and incorporate biochar (Mirimichi Carbonize) per manufacturer recommendations; integrate gently with air-spade/vertical mulching where feasible to avoid root damage.

- Soil drench sequence (per label and by qualified applicator):
- Subdue Maxx (mefenoxam) – soil drench targeted to oomycete root pathogens risk (e.g., Pythium/Phytophthora) when conditions warrant; apply strictly per label.
- K-Phite (potassium phosphite) – soil drench to support plant defense response and root health; apply per label.
- Gator Excel (humic acid) – soil drench to support soil aggregation, nutrient retention, and root function; apply per label.

Important: Pesticide/fungicide applications must comply with all label directions and applicable licensing requirements. Rates, intervals, and compatibility must be verified on product labels and adjusted to site conditions and observed symptoms.

10. Watering Schedules (Post Root Pruning + Post Relocation)

Irrigation should be delivered as deep, slow applications designed to wet the formed root ball/root zone uniformly. Use soil moisture checks (probe/hand test) to confirm that the root ball is moist but not saturated, and adjust for rainfall and drainage.

Approximate irrigation volume reference (for planning only): 1 inch of water over the root ball footprint equals:

Chart 2. Irrigation Planning Reference (1-inch Water Equivalent over Root Ball Footprint)

Tree No.	Root Ball Diameter	~Gallons per 1-inch water equivalent
18	14'	≈ 96 gal
35	20'	≈ 196 gal
38	16'	≈ 125 gal

10A. Tree #36 – Watering After Root Pruning (Tree Remains)

- Weeks 1–2: 2–3 deep irrigations per week. Target uniform wetting of the interface area and adjacent root zone.
- Weeks 3–6: 2 irrigations per week, adjusting for rainfall.
- Weeks 7–12: 1 irrigation per week (or as needed to prevent drought stress).
- Months 4–6: every 10–14 days during dry periods.
- Moisture targets: keep the upper 6–12 inches of soil in the active root zone consistently moist; avoid prolonged saturation.

10B. Trees #18, #35, #38 – Watering After Root Pruning (90–180 Day Acclimation Period)

During the acclimation period, the objective is to maintain uniform moisture within the formed root ball so feeder roots regenerate inside the future transplanted mass.

- Weeks 1–4: 3 irrigations per week. Apply ~1.0–1.5 inches water equivalent per event (adjust based on infiltration and soil moisture checks).
- Weeks 5–8: 2 irrigations per week. Apply ~1.0–1.5 inches per event.
- Weeks 9–12: 1–2 irrigations per week depending on weather; apply ~1.0 inch per event.
- Months 4–6: weekly during dry periods; taper to every 10–14 days if trees demonstrate stable canopy and soil moisture remains adequate.

10C. Trees #18, #35, #38 – Watering After Relocation (Establishment)

- Weeks 1–2: 3 irrigations per week, focused on the root ball (uniform wetting) plus the immediate backfill interface.
- Weeks 3–6: 2 irrigations per week.
- Weeks 7–12: 1–2 irrigations per week (based on rainfall and drainage).
- Months 4–12: weekly during dry periods; taper gradually to every 10–14 days as the tree stabilizes.
- Monitoring: inspect for wilting, leaf drop, canopy thinning, cracking/settling of root ball, and staking/brace performance; adjust irrigation accordingly.

11. Monitoring & Documentation

- Post root pruning: inspect weekly for the first month, then biweekly through the acclimation period. Document soil moisture, canopy condition, and any pest/disease indicators.
- Post relocation: inspect weekly for the first month, then monthly for 12 months (minimum).
- Stop-work triggers: significant canopy wilt, root ball cracking, unexpected structural root loss, standing water/saturation, or instability in bracing/anchoring.

12. Keywords Glossary

- DBH (Diameter at Breast Height): Trunk diameter measured at 4.5 feet above grade.
- CRZ (Critical Root Zone): Approximate area of root influence, often used for planning and protection.
- TPZ (Tree Protection Zone): Protected area around a tree where disturbance is restricted during construction.
- Root Pruning: Cutting roots cleanly along a defined line to manage conflicts and/or encourage new feeder root growth inside a future root ball.

- Feeder Roots: Fine, absorptive roots responsible for most water and nutrient uptake.
- Reduction Cut: A pruning cut that shortens a branch back to a lateral branch large enough (commonly $\geq 1/3$ the diameter) to assume terminal function.
- Heading Cut: A non-standard cut that shortens a branch to a stub or small lateral; generally discouraged due to weak regrowth and increased risk.
- First-Order Branch: A primary scaffold branch attached directly to the main trunk.
- Clearance Pruning: Pruning performed to provide separation from structures/vehicles/pedestrians while preserving architecture.
- Root Ball: The mass of roots and soil to be moved during relocation.
- Cradle Rigging (Root Ball Cradle): Lifting method that supports the root ball with straps/slings rather than choking the trunk.

13. Scientific Studies & References

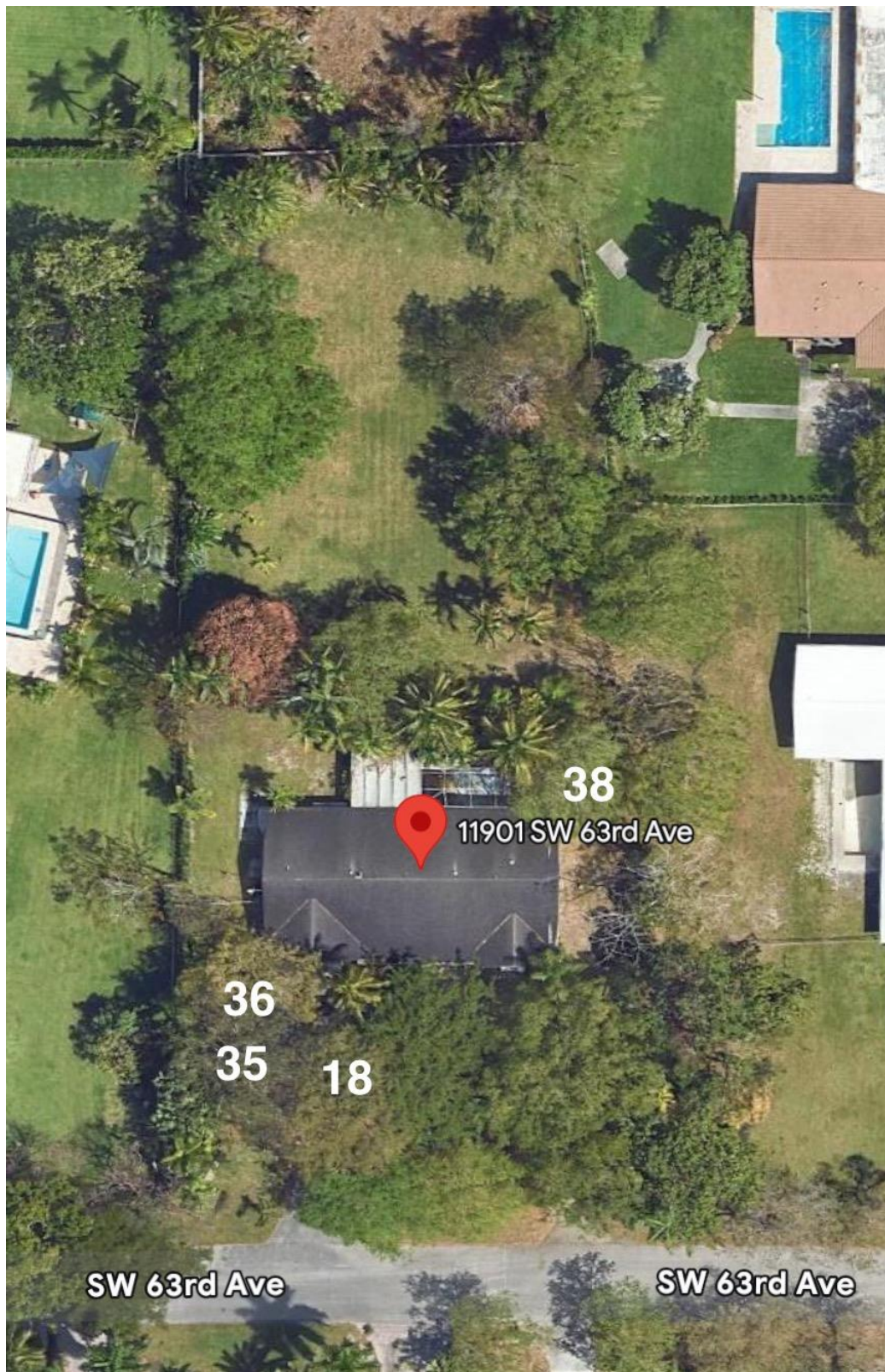
Applicable references include (not exhaustive):

- ANSI A300 (Part 1) – Pruning; ANSI A300 (Part 5) – Construction Management; ANSI A300 (Part 6) – Planting/Transplanting; ANSI A300 (Part 8) – Root Management.
- Watson, G.W., & Himelick, E.B. (1997). Principles and Practice of Planting Trees and Shrubs. International Society of Arboriculture.
- UF/IFAS (Edward F. Gilman) resources describing reduction cuts to laterals $\geq 1/3$ diameter for structural and reduction pruning.
- Penn State Extension (2023/2025) guidance describing root pruning and the goal of developing new feeder roots within the future root ball prior to moving.
- Rutgers Cooperative Extension guidance indicating that planting holes should be dug to correct depth and wider than the root ball to support establishment.
- UF/IFAS EDIS publications on biochar as a soil amendment and on organic amendments improving soil physical properties in compacted/urban soils.
- ISA Arboriculture & Urban Forestry research on biochar soil amendment effects on woody plant growth and on humic acid applications influencing transplant survival (as applicable).
- Penn State Extension (2025) overview of phosphonate/phosphite products for plant disease defense support (as applicable).

14. Limiting Conditions

This addendum supplements the original Level 1 Assessment report and provides performance-based specifications consistent with ANSI A300 standards. Tree response varies with species, site conditions, weather, construction means-and-methods, and aftercare quality; therefore, no guarantee of survival is expressed or implied.

15. Existing Location of Subject Trees



16. Photo Documentation of Subject Trees









ASSUMPTIONS AND LIMITING CONDITIONS:

1. Any legal description provided to the PHCA LLC. is assumed to be correct. Any titles and ownerships to any property are assumed to be good and marketable. No responsibility is assumed for matters legal in character. Any and all property is evaluated as though free and clear, under responsible ownership and competent management.
2. Care has been taken to obtain all information from reliable sources. All data has been verified insofar as possible; however, PHCA LLC. can neither guarantee nor be responsible for the accuracy of information provided by others.
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7. This report and values expressed herein represent the opinion of PHCA LLC., and PHCA LLC.'s fee is in no way contingent upon the reporting of a specified value, a stipulated result, the occurrence of a subsequent event, nor upon any finding to be reported.
8. Sketches, diagrams, graphs, and photographs in this report, being intended as visual aids, are not necessarily to scale and should not be construed as engineering or architectural reports or surveys unless otherwise specified.

9. Unless expressed otherwise: (1) information contained in this report covers only those items that were examined and reflects the condition of those items at the time of inspection; and (2) the inspection is limited to visual examination of accessible items without dissection, excavation, probing, or coring. There is no warranty or guarantee, expressed or implied, that problems or deficiencies of the plant or property in question may not arise in the future.

CERTIFICATE OF PERFORMANCE:

1. I have verified tree and environmental conditions located at the site referred to in this report on the dates indicated and have stated my findings accurately to the best of my knowledge. The extent of the evaluation is stated in the attached report and the Limits of the Assignment.
2. I have no current or prospective interest in the trees or the property that are the subject of this report and have no personal interest or bias with respect to the parties involved.
3. The analysis, opinions, and conclusions stated herein are my own and are based on current scientific procedures and facts.
4. My analysis, opinions, and conclusions were developed, and this report has been prepared according to commonly accepted arboricultural practices.
5. No one provided significant professional assistance to me, except as indicated within the report.
6. My compensation is not contingent upon the reporting of a predetermined conclusion that favors the cause of the client or any other party nor upon the results of the assessment, the attainment of stipulated results, or the occurrence of any subsequent events.

7. I am a member in good standing of the International Society of Arboriculture as a certified arborist. I have been professionally involved in the field of arboriculture for a period of more than 15 years.



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by PATRICK J
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