MONTGOMERY COUNTY HISTORIC PRESERVATION COMMISSION
STAFF REPORT

Address:	9 Chevy Chase Circle, Chevy Chase	**Meeting Date:**	9/17/2025
Resource:	Master Plan Site #35/13-001A **Newlands-Corby Mansion**	**Report Date:**	9/10/2025
Applicant:	Adrienne Arsht Revocable Trust (CAS Engineering, Agent)	**Public Notice:**	9/3/2025
Review:	HAWP	**Tax Credit:**	No
Case Number:	1130413	**Staff:**	Laura DiPasquale
Proposal:	Tree removal and expansion of driveway apron		

STAFF RECOMMENDATION

Staff recommends that the HPC **approve with one (1) condition** the HAWP application with final approval delegated to staff:

1. The new driveway apron concrete must be tinted beige or a darker neutral, not bright white.

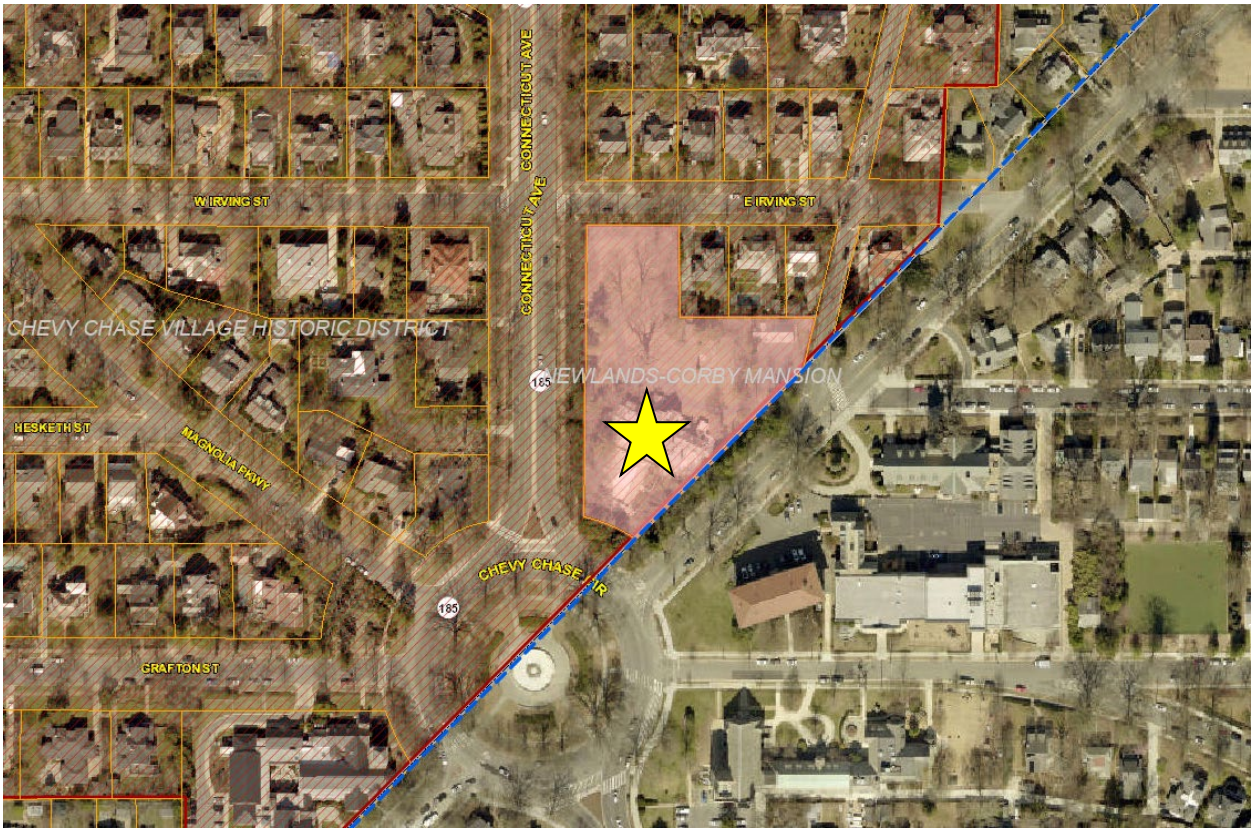


Figure 1:The subject property, indicated with a gold star, with the surrounding Chevy Chase Village Historic District hatched in red.

ARCHITECTURAL DESCRIPTION

SIGNIFICANCE:	Master Plan Site #35/13-001A, Newlands-Corby Mansion; Outstanding Resource within the Chevy Chase Village Historic District
STYLE:	Tudor Revival
DATE:	1894, with circa 1909-1914 renovations
ARCHITECT:	Leon E. Dessez (1894); Arthur Heaton (c. 1909-1914)

Figure 2: View from the driveway of the Newlands-Corby mansion towards the north elevation (Source: Dwell).

Figure 3: View north from Chevy Chase Circle towards Connecticut Avenue, with the Newlands-Corby mansion on the far right, c. 1900-1910. From Slideshow of Minnie E. Brooke's Historic Postcards, (Chevy Chase Historical Society).

PROPOSAL

The applicants propose to remove two trees (18-inch and 12-inch diameter willow oaks) flanking the driveway entrance along Connecticut Avenue (a state road) and to widen the driveway apron from 19-feet to 30-feet. The proposed work is located within the Maryland Department of Transportation right-of-way and also subject to review by the Maryland Department of Natural Resources and Chevy Chase Village.

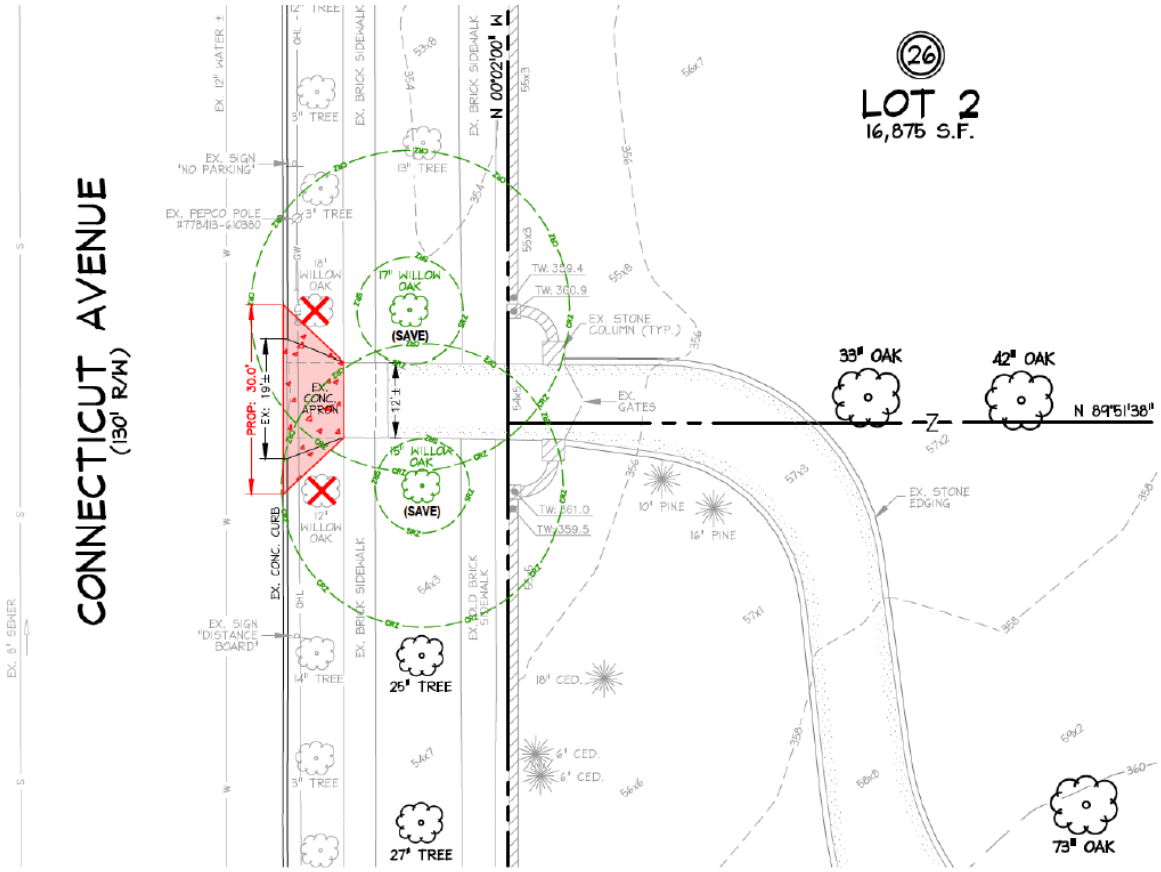


Figure 4: Site plan detail showing the existing trees in the vicinity of the Connecticut Avenue driveway entrance, the trees proposed for removal, and the proposed driveway apron widening.

APPLICABLE GUIDELINES

In accordance with section 1.5 of the Historic Preservation Commission Rules, Guidelines, and Procedures (Regulation No. 27-97) ("Regulations"), in developing its decision when reviewing a Historic Area Work Permit application for an undertaking at a Master Plan site the Commission uses section 24A-8 of the Montgomery County Code ("Chapter 24A"), *the Secretary of the Interior's Standards for Rehabilitation* ("*Standards*"), and pertinent guidance in applicable master plans.

Montgomery County Code; Chapter 24A-8

(b) The commission shall instruct the director to issue a permit, or issue a permit subject to such conditions as are found to be necessary to insure conformity with the purposes and requirements of this chapter, if it finds that:
   (1) The proposal will not substantially alter the exterior features of an historic site or historic resource within an historic district; or
   (2) The proposal is compatible in character and nature with the historical, archeological, architectural or cultural features of the historic site or the historic district in which an historic resource is located and would not be detrimental thereto or to the achievement of the purposes of this chapter.
   (3) The proposal would enhance or aid in the protection, preservation and public or private utilization of the historic site or historic resource located within an historic district in a manner compatible with the historical, archeological, architectural or cultural value of the historic site or historic district in which an historic resource is located; or
   (4) The proposal is necessary in order that unsafe conditions or health hazards be remedied; or
   (5) The proposal is necessary in order that the owner of the subject property not be deprived of reasonable use of the property or suffer undue hardship; or
   (6) In balancing the interests of the public in preserving the historic site or historic resource located within an historic district, with the interests of the public from the use and benefit of the alternative proposal, the general public welfare is better served by granting the permit.

Secretary of the Interior's Standards for Rehabilitation:

The Secretary of the Interior defines rehabilitation as "the act or process of making possible a compatible use for a property through repair, alterations, and additions while preserving those portions or features, which convey its historical, cultural, or architectural values." Because the property is a Master Plan Site, the Commission's focus in reviewing the proposal should be the *Secretary of the Interior's Standards for Rehabilitation*. The applicable *Standards* are as follows:

2. The historic character of a property shall be retained and preserved. The removal of historic materials or alteration of features and spaces that characterize a property shall be avoided.

9. New additions, exterior alterations, or related new construction shall not destroy historic materials that characterize the property. The new work shall be differentiated from the old and shall be compatible with the massing, size, scale, and architectural features to protect the historic integrity of the property and its environment.

STAFF DISCUSSION

Staff supports the proposed alterations and finds that they will not substantially alter the exterior features of the historic site, per Chapter 24A-8(b)(1). The applicants argue that the current width of the driveway apron and trees proposed for removal create unsafe conditions for vehicles turning off and onto Connecticut Avenue, which is three lanes of north-running traffic wide with no shoulder at the driveway entrance, per Chapter 24A-8(b)(4). Although 20 feet is standard for residential driveway apron width, staff finds that, given the absence of other neighboring driveways along this stretch of Connecticut Avenue and the scale of the subject property, the widening of the apron will have a limited impact on the historic resource, per Chapter 24A-8(b)(1), but staff recommends that the concrete be tinted a beige or darker neutral color to minimize the visual impact of the new work and be more consistent with historic paving materials and compatible with the paving on and around the site, per Chapter 24A-8(b)(2) and *Standard* 9. Staff notes that a relatively recent extension/repair of the apron flare to the right of the driveway, which was completed between October 2019 and July 2022 in un-tinted concrete, remains conspicuous in 2025.

Figure 5: September 2017 view of the driveway apron (Google Streetview).

Figure 6: July 2022 view of the driveway apron (Google Streetview).

Figure 7: September 2025 view of the driveway apron (Historic Preservation Office).

The applicants also call for removal of the two trees closest to the street flanking the driveway. The application includes a detailed tree assessment from a licensed arborist which describes the condition of the two trees proposed for removal (Willow Oak #1 and #3) as follows: "Willow oaks #1 and #3 were positioned under power lines and in small planting beds situated between the sidewalk, the driveway, and Connecticut Avenue. These restrictions on the trees growth on all sides including vertical growth give these two trees a location value of poor because the location is ill suited for this species of tree. The trees have been topped to maintain clearance from the power lines and have lost the good structure of a strong central stem. These trees are ill suited for preservation and investment."

Figure 8: Map of trees identified in the Tree Risk Assessment Report.

Figure 9: View looking east towards the trees flanking the Connecticut Avenue driveway entrance.

Figure 10: View north on Connecticut Avenue with Willow Oak #3 in the center foreground, and Willow Oak #1 behind (September 2025, Historic Preservation Office)

Figure 11: View south from the sidewalk parallel to Connecticut Avenue (July 2025, Bartlett Tree Experts).

Staff finds that, per Chapter 24A-8(b)(1), while the Newlands-Corby mansion MP site derives significance in part from its landscape design, at 12 and 18 inches, the trees proposed for removal are not original to the site and its original landscape design, and their removal will not substantially alter the exterior features of the site, per Chapter 24A-8(b)(1). Staff finds that, absent the trees proposed for removal, the remaining Willow Oaks (# 2 and #4) situated closer to the property wall, which are only approximately 15 feet away, would have additional room for canopy spread over the adjacent sidewalk and that the property will retain its historic character, per *Standard* 2. Since the trees are located within the MDOT right-of-way, staff recommends that the applicants work with MDNR and Chevy Chase Village to determine whether and what species of trees are appropriate for replanting.

STAFF RECOMMENDATION

Staff recommends that the Commission **approve with one (1) condition** the HAWP:

1. The new driveway apron concrete must be tinted beige or a darker neutral, not bright white.

under the Criteria for Issuance in Chapter 24A-8(b)(1) and (2), having found that the proposal, as modified by the condition, will not substantially alter the exterior features of the historic resource and is compatible in character with the district and the purposes of Chapter 24A;

and with the *Secretary of the Interior's Standards for Rehabilitation* #2 and #9;

and with the general condition that the applicant shall present an electronic set of drawings, if applicable, to Historic Preservation Commission (HPC) staff for review and stamping prior to submission for the Montgomery County Department of Permitting Services (DPS) building permits;

and with the general condition that final project design details, not specifically delineated by the Commission, shall be approved by HPC staff or brought back to the Commission as a revised HAWP application at staff's discretion;

and with the general condition that the applicant shall notify the Historic Preservation Staff if they propose to make **any alterations** to the approved plans. Once the work is completed the applicant will contact the staff person assigned to this application at 301-495-2167 or laura.dipasquale@montgomeryplanning.org to schedule a follow-up site visit.

HAWP APPLICATION: MAILING ADDRESSES FOR NOTIFING

[Owner, Owner's Agent, Adjacent and Confronting Property Owners]

Owner's mailing address	**Owner's Agent's** mailing address
Adrienne Arsht Revocable Trust Chevy Chase, MD 20815	CAS Engineering 10 South Bentz Street Frederick, MD 21701

Adjacent and confronting Property Owners mailing addresses

1 E Irving Street, Chevy Chase MD 20815	6900 Connecticut Ave, Chevy Chase MD 20815
1A E Irving Street, Chevy Chase MD 20815	5810 Connecticut Ave, Chevy Chase MD 20815
3 E Irving Street, Chevy Chase MD 20815	5808 Connecticut Ave, Chevy Chase MD 20815
4 E Irving Street, Chevy Chase MD 20815	5804 Connecticut Ave, Chevy Chase MD 20815
6 E Irving Street, Chevy Chase MD 20815	5800 Connecticut Ave, Chevy Chase MD 20815
8 E Irving Street, Chevy Chase MD 20815	

Description of Property: Please describe the building and surrounding environment. Include information on significant structures, landscape features, or other significant features of the property:

The house is a three story Tudor Revival style house with an rough-cut ashlar stone on the first level that has been painted, and typical Tudor style timber-framed stucco exterior walls on second and third levels. The windows are double hungs and casements, made with wood frames and either wood or leaded divisions and single-paned glass. The roof is slate and formed largely by intersecting prominent gables with highly decorative wood rake boards and exposed rafter ends. There are gabled and shed dormers, as well as a porte cochere covering the entry door. The house was built for Senator Newlands by architect Leon Dessez and was one of the first houses built by the Chevy Chase Land Company . William Corby acquired the house in 1909 and renovated the house and garage extensively to its present state under the hand of architect Arthur Heaton.

Description of Work Proposed: Please give an overview of the work to be undertaken:

Removal of 18" willow oak and 12" willow oak located on either side of the driveway apron on Connecticut Avenue.

Widening the driveway apron on Connecticut Avenue from 19' to 30'.

Work Item 1: Tree Removal

Description of Current Condition:	Proposed Work:
Existing 18" willow oak and 12" willow oak on either side of existing 19' driveway apron accessing Connecticut Avenue	Remove existing 18" willow oak and 12" willow oak in order to widen 19' driveway apron accessing Connecticut Avenue

Work Item 2: Widen Apron

Description of Current Condition:	Proposed Work:
Existing 19' driveway apron accessing Connecticut Avenue	Widen existing 19' driveway apron accessing Connecticut Avenue to 30' in order to provide safer access to and from the property

Work Item 3: _____

Description of Current Condition:	Proposed Work:

Driveway Apron Widening Justification

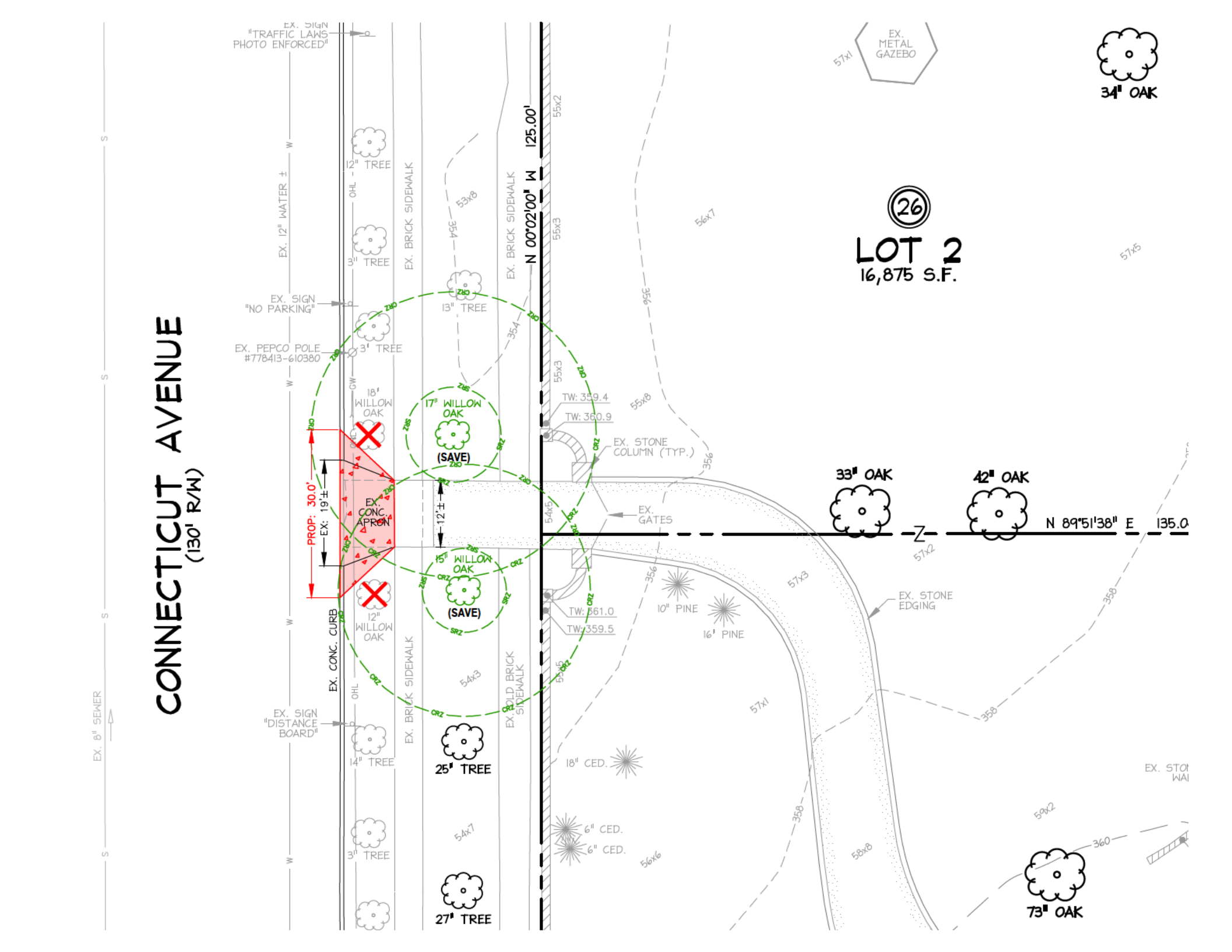
Our client owns the property at 9 Chevy Chase Circle. Primary vehicular access is from Connecticut Avenue, just north of Chevy Chase Circle and the District Line—a heavily traveled section of roadway.

Currently, larger vehicles such as limousines, box trucks, and SUVs have significant difficulty entering the narrow driveway apron. Because they cannot swing widely into adjacent travel lanes without risking a collision, these vehicles must slow dramatically and nearly come to a complete stop before turning in. This maneuver disrupts the flow of traffic, increases the risk of rear-end collisions when following drivers do not anticipate the sudden deceleration, and often causes rear tires to mount the southern curb. In turn, this condition puts pedestrians crossing the driveway at risk and contributes to curb, landscape, and vehicle damage.

The existing apron is approximately 19 feet wide at the flare tips, while the driveway itself is only 12 feet wide. The entry is further constrained by four large willow oaks within the public right-of-way and by historic entry pillars, which prevent widening of the actual driveway pavement.

Although widening the driveway to 20 feet was considered, doing so would require removal of all four willow oaks. Our client prefers to preserve the two healthier trees farther from Connecticut Avenue. An arborist's evaluation confirmed these two trees are in good condition, while the two closest to Connecticut Avenue are in decline.

Accordingly, the preferred solution is to widen only the driveway apron flares to approximately 30 feet, while maintaining the driveway at its current 12-foot width. This modification would improve turning radii for larger vehicles, reduce congestion along Connecticut Avenue, and enhance overall safety for both drivers and pedestrians. At the same time, it preserves the historic entry pillars, maintains the healthier willow oaks, reduces curb and vehicle damage, and provides more reliable access for residents and service vehicles in this high-volume corridor.


CONNECTICUT AVENUE
(130' R/W)
EX. SIGN "TRAFFIC LAWS PHOTO ENFORCED"
EX. 12" WATER ±
EX. SIGN "NO PARKING"
EX. PEPCO POLE #778413-610380
EX. CONC. CURB
EX. SIGN "DISTANCE BOARD"
EX. 8" SEWER
EX. BRICK SIDEWALK
EX. COLD BRICK SIDEWALK
OHL - 12"
12" TREE
3" TREE
3' TREE
14" TREE
18' WILLOW OAK
12" WILLOW OAK
17" WILLOW OAK (SAVE)
15" WILLOW OAK (SAVE)
13" TREE
25" TREE
27" TREE
PROP: 30.0'
EX: 19'±
12'±
EX. CONC. APRON
N 00°02'00" W 125.00'
TW: 359.4
TW: 360.9
TW: 361.0
TW: 359.5
EX. STONE COLUMN (TYP.)
EX. GATES
EX. STONE EDGING
EX. METAL GAZEBO
34" OAK
33" OAK
42" OAK
73" OAK
10" PINE
16' PINE
18" CED.
6" CED.
6" CED.
N 89°51'38" E 135.0
26
LOT 2
16,875 S.F.

Gibson Homes | Four Willow Oaks

Tree Risk Assessment Report

PREPARED FOR:

Gibson Homes
5772 River Road #600
Bethesda, MD 20816

PREPARED BY:

Micah Hewitson
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ISA Certified Arborist #MA-6591A
ISA Tree Risk Assessment Qualified
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Bartlett Tree Experts
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PROVIDED BY:

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ISA Tree Risk Assessment Qualified
Maryland Licensed Tree Expert #1823
Bartlett Tree Experts
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Gaithersburg, MD 20878

BARTLETT TREE EXPERTS
SCIENTIFIC TREE CARE SINCE 1907

Tree Risk Assessment Report

Gibson Homes
Four Willow Oaks
Level 2 Tree Risk Assessment Report
9 Chevy Chase Circle
Chevy Chase, MD 20815
August 11, 2025

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Map of Trees

Summary

In July 2025, Gibson Homes agreed to the recommendation of completing a Level 2 basic assessment of tree risk on four willow oaks (*Quercus phellos*), located outside the gate at the Connecticut Avenue entrance to determine the tree part with the highest risk rating for each tree. The four trees will be referred to as willow oak #1, #2, #3 and #4 according to the map above.

I visited the property to assess the trees on July 24, 2025. My basic assessment indicated possible branch failure in willow oaks #1 and #3 and the possible presence of a cavity in the lower trunk of willow oak #3. The likelihood of failure for root, stem, or branch failure for Willow oaks #2 and #4 were improbable. Using the methods outlined in this report and the results of the assessments of these trees, it is my professional judgment that the overall risk rating of willow oaks #1 and #3 are moderate and willow oaks #2 and #4 are low.

Options to mitigate the risk associated with the four willow oaks are listed below.

Willow Oak #1

- Option One:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will

be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

- Option Two:
  If you elect not to remove the tree, I recommend mitigation pruning to remove dead branches, and to reduce the overall size of the crown will reduce the risk of branch failure to low.

- Option Three:
  If you elect to not remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a moderate risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

Willow Oak #2

- Option One:
  I recommend performing mitigation pruning to remove dead branches, and to reduce the overall size of the crown resulting in a overall residual risk rating of low.

- Option Two:
  If you elect not to remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a *low* risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

- Option Three:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

Willow Oak #3

- Option One:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

- Option Two:
  If you elect not to remove the tree, I recommend mitigation pruning to remove dead branches, and to reduce the overall size of the crown will reduce the risk of branch failure to low.

- Option Three:
  If you elect to not remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a moderate risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

Willow Oak #4

- Option One:
  I recommend performing mitigation pruning to remove dead branches, and to reduce the overall size of the crown resulting in a overall residual risk rating of low.

- Option Two:
  If you elect not to remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a *low* risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

- Option Three:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

If the oaks should remain, I recommend a re-assessment interval of every three years and re-evaluation after major storm events. A re-evaluation may result in an additional tree risk assessment recommendation.

Additional tree care recommendations for the willow oaks are listed below, should they remain:

- Perform root invigoration on willow oaks #2 and #4 to repair damaged soils and promote an efficient soil environment which optimizes fine root performance.
- Apply nutrients based on the results of a soil sample to all four trees to encourage root growth and overall tree vitality
- Apply summer stress relief soil injections to all four trees to promote greater resistance in the tree to pathogens and increase tolerance to temperature extremes/drought
- Apply preventative borer treatments to all four trees to prevent deadly attacks from wood-boring insects

Tree risk assessment definitions are provided at the end of this report to help with understanding the terminology and with selecting the level of risk you are comfortable with when making decisions on your tree care needs.

Introduction

The property managed by Gibson Homes was located in Chevy Chase, Maryland. In July 2025, Gibson Homes requested that Bartlett Tree Experts conduct a tree risk assessment for four willow oaks lining the Connecticut Avenue entryway to help determine future management. The result of the project would be a written report describing our observations, findings, and recommendations.

My assignment was to:

1. Perform a ground-based Level 2 basic assessment of the four willow oaks and site to determine each tree's or tree part's likelihood of failure, likelihood of impact to targets, and the consequences of failure and impact, in order to determine tree risk.
2. Provide a written report that documents each tree's conditions of concern/defects detected, specific targets assessed, results of the assessments, risk ratings, mitigation options with estimated residual risk, and a recommended assessment interval.

Assessment Procedures

The risk of root, root collar, trunk, crown, and branch failure for all four willow oaks via a ground-based basic assessment were performed. The assessments occurred on July 24, 2025 and followed the *International Society of Arboriculture's (ISA) Best Management Practices for Tree Risk Assessment* and *American National Standards Institute A300 Tree Risk Assessment Standard).*

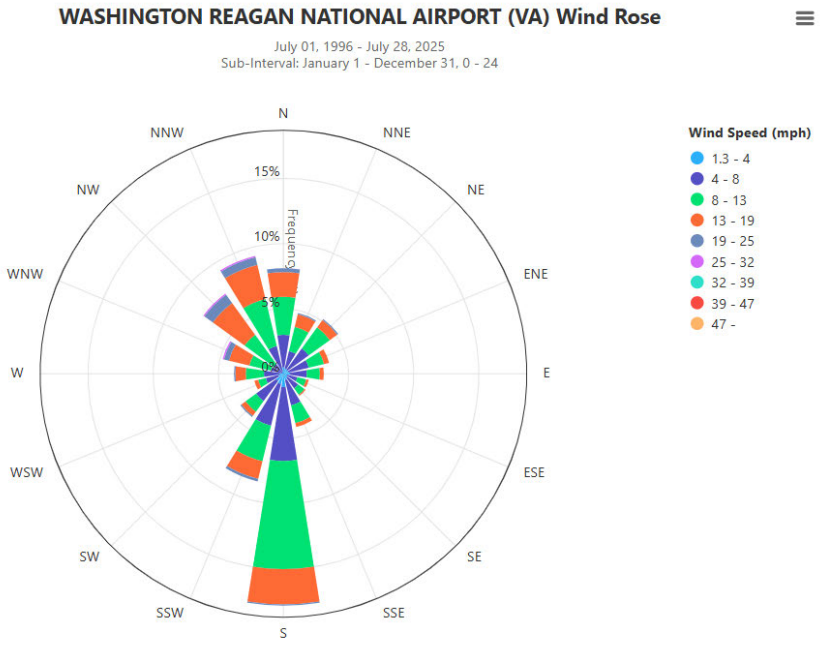
Tree risk ratings are derived from a combination of three factors: the likelihood of failure, the likelihood of the failed tree part impacting a target, and the consequences of the target being struck. These factors are then used to categorize tree risk as *extreme, high, moderate,* or *low*. The factors used to define your risk rating are identified in this report.

Tools used in the assessment included a sounding mallet to detect concealed internal cavities or decay, a diameter tape to measure the diameter of the tree at 4.5 feet above grade, a laser rangefinder/hypsometer to estimate the tree height, a probe to measure soil compaction, and a measuring tape to measure the distance of the tree from targets.

Observations

The willow oaks were located on outside of the property wall, on the west boundary of the property. The trees lined the entrance to the property. Willow oaks #1 and #3 were in a five-foot wide planting strip between Connecticut Avenue and a sidewalk with one oak on each side of the driveway. Willow oaks #2 and #4 were in a lawn area approximately 20 feet across, between the sidewalk and the property wall with one tree on each side of the driveway. The trees were

growing on level grade with turf occupying the root zones. According to the Midwestern Regional Climate Center's cli-MATE wind rose tool, the majority of the annual wind comes from the south.



The canopy of willow oak #1 was supported by one vertical stem that was topped at approximately 25 feet above grade to provide clearance to overhead power lines. Due to the loss of apical dominance in a central stem, a majority of branches have extended west over Connecticut Avenue creating an unbalanced canopy. The stem and roots did not display any signs of loss of integrity and had solid tones when sounded. The soil was compact when tested with a probe and the root zone was confined to a small planting area between the sidewalk and road. The overall vitality of the tree was low; with diminished shoot growth and canopy density and the location and condition of this tree was poor.

The canopy of willow oak #2 was supported by one vertical stem. The tree's form and structure were broad, open, and typical of the species. The canopy was balanced, and the overall vitality of the tree was normal. The soil around the oak was somewhat compact when probed. The location and condition of this tree were good.

The canopy of willow oak #3 was supported by one vertical stem that was topped at approximately 25' above grade due to power lines. Due to the loss of apical dominance in a central stem, multiple branches have over-extended past the canopy, several of which are growing west over Connecticut avenue which also led to an unbalanced canopy to the west. The stem had a somewhat higher tone when sounded which is indicative of a minor loss of structural integrity, and the soil was compact when probed. The root zone was confined to a small planting area between the sidewalk and road. The overall vitality of the tree was low; with diminished shoot growth and canopy density and the location and condition of this tree were poor.

The canopy of willow oak #4 was supported by one vertical stem. The tree's form and structure

were broad, open, and typical of the species. The canopy was balanced, and the overall vitality of the tree was normal. The soil around the oak was somewhat compact when probed. The location and condition of this tree were good.

Tree Risk Assessment

Based on the site's usage and **occupancy rates** throughout the course of the year, combined with my observations during the assessment, I determined that within each tree's **target zone**:

Tree	Targets	Occupancy	Likelihood of impact	Consequences of failure
Trees #1 and #3	Vehicle on Street	Frequent	Low	Minor to Significant
Trees #1 and #3	Overhead Lines	Constant	High	Minor
All Four Trees	People on Sidewalk	Infrequent	Very Low	Significant to Severe

In determining the risk ratings, I considered a tree or tree part failure impacting a person to have one of the highest consequences, either **significant** or **severe**. I considered a tree or tree part failure impacting a vehicle as having minor to significant consequences.

I used a time frame of three years when I assessed the likelihood of tree or tree part failure. Following industry standards, the time frame is one factor used in the equation to determine tree risk. Trees and sites change on a daily basis. You should not consider this time frame a "guarantee period" for the risk assessment or that the tree will not fail or is safe within this time frame.

The main concerns observed during the assessment and their associated risk ratings are provided in the following table. Information not specifically summarized in the table was not considered a significant factor at the time of assessment.

Tree	Tree Part of Concern	Condition of Concern	Target	Likelihood of Failure	Likelihood of Impact	Likelihood of Failure & Impact	Consequences	Risk Rating
Tree #1	Branch	Weak Connection to Central Stem	Vehicles	Possible	Medium	Somewhat Likely	Significant	Moderate
Tree #1	Branch	Weak Connection to Central Stem	People	Possible	Very Low	Unlikely	Severe	Low
Tree #2	Roots	Loss of structural integrity	People	Improbable	Very Low	Unlikely	Severe	Low
Tree #3	Branch	Weak Connection to Central Stem	Vehicles	Possible	Medium	Somewhat Likely	Significant	Moderate
Tree #3	Branch	Weak Connection to Central Stem	People	Possible	Very Low	Unlikely	Severe	Low
Tree #3	Trunk	Loss of structural integrity	Vehicles	Improbable	Medium	Unlikely	Significant	Low
Tree #3	Trunk	Loss of structural integrity	People	Improbable	Very Low	Unlikely	Severe	Low
Tree #4	Roots	Loss of structural integrity	People	Improbable	Very Low	Unlikely	Severe	Low

Using the methods outlined in this report and the results of the assessments of the four willow oaks, it is my professional judgment that:

- Willow oak #1 had a *low* risk rating for root collar, trunk, branch and crown failure within the next three years.
- Willow oak #2 had a *moderate* risk rating for branch failure within the next three years.
- Willow oak #3 had a *low* risk rating for root collar, trunk, branch and crown failure within the next three years.
- Willow oak #4 had a *moderate* risk rating for branch failure within the next three years.

If these levels of risk are not acceptable to you, then mitigation actions should be taken as soon as practical to reduce the risk to an acceptable level.

Discussion

Willow oaks #1 and #3 were positioned under power lines and in small planting beds situated between the sidewalk, the driveway, and Connecticut Avenue. These restrictions on the trees growth on all sides including vertical growth give these two trees a location value of poor because the location is ill suited for this species of tree. The trees have been topped to maintain clearance from the power lines and have lost the good structure of a strong central stem. These trees are ill suited for preservation and investment.

Willow oaks #2 and #4 were in open areas with adequate root zones and no vertical restrictions on their growth. The trees had good form, structure, and vigor. These two trees are well suited for preservation.

Risk Mitigation Options

Options to mitigate the risk associated with the willow oaks are listed below. Please make sure the estimated overall residual risk rating is acceptable to you before deciding on a specific option.

Willow Oak #1

- Option One:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

- Option Two:
  If you elect not to remove the tree, I recommend mitigation pruning to remove dead branches, and to reduce the overall size of the crown will reduce the risk of branch failure to low.

- Option Three:
  If you elect to not remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a moderate risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

Willow Oak #2

- Option One:
  I recommend performing mitigation pruning to remove dead branches, and to reduce the overall size of the crown resulting in a overall residual risk rating of low.

- Option Two:
  If you elect not to remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a *low* risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

- Option Three:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk,

crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

Willow Oak #3

- Option One:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

- Option Two:
  If you elect not to remove the tree, I recommend mitigation pruning to remove dead branches, and to reduce the overall size of the crown will reduce the risk of branch failure to low.

- Option Three:
  If you elect to not remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a moderate risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

Willow Oak #4

- Option One:
  I recommend performing mitigation pruning to remove dead branches, and to reduce the overall size of the crown resulting in a overall residual risk rating of low.

- Option Two:
  If you elect not to remove the tree, or prune to remove dead branches and reduce the relative size of the crown, the tree will remain a *low* risk for root collar, trunk, crown or branch failure. The tree's risk may increase in the future as a result of not performing mitigation.

- Option Three:
  I recommend removing the tree entirely to remove the risk of root, root collar, trunk, crown, and branch failure. Grind the resulting stumps and back fill the holes. There will be no residual risk for the trunk, crown, or branches, but there may be a tripping hazard with the remaining roots, stump, or grindings that you will need to address.

If the oaks should remain, I recommend a re-assessment interval of every three years and re-evaluation after major storm events. A re-evaluation may result in an additional tree risk assessment recommendation.

Additional tree care recommendations for the willow oaks are listed below, should they remain:

- Perform root invigoration on willow oaks #2 and #4 to repair damaged soils and promote an efficient soil environment which optimizes fine root performance.
- Apply nutrients based on the results of a soil sample to all four trees to encourage root growth and overall tree vitality
- Apply summer stress relief soil injections to all four trees to promote greater resistance in the tree to pathogens and increase tolerance to temperature extremes/drought
- Apply preventative borer treatments to all four trees to prevent deadly attacks from wood-boring insects

All recommended work should be performed by qualified arborists and in accordance with industry accepted standards and best management practices set forth by the *American National Standards Institute* and the *International Society of Arboriculture.*

Limitations

Assignment

My ground-based assessments of the designated trees on Gibson Homes's property were based on a single site visit on July 24, 2025. All photographs, samples, and readings, if applicable, were taken at the time the assessments were performed.

The assessments were limited to visible and accessible portions of the root collar and canopy.

Tree Risk Assessments

It is important for the tree owner or manager to know and understand that all trees pose some degree of risk from failure or other conditions. The information and recommendations within this report have been derived from the level of tree risk assessment identified in this report, using the information and practices outlined in the *International Society of Arboriculture's Best Management Practices for Tree Risk Assessment* and *Assessment* and *American National Standards Institute A300 Tree Risk Assessment Standard*, as well as the information available at the time of the assessment. However, the overall tree risk rating, the mitigation recommendations, or any other conclusions do not preclude the possibility of failure from undetected conditions, weather events, or other acts of man or nature. Trees can unpredictably fail even if no defects or other conditions are present. Tree failure can cause adjacent trees to fail resulting in a "domino effect" that impacts targets outside the foreseeable target zone of this tree. It is the responsibility of the tree owner or manager to schedule repeat or advanced assessments, determine actions, and implement follow up recommendations, monitoring and/or mitigation.

Bartlett Tree Experts can make no warranty or guarantee whatsoever regarding the safety of any tree, trees, or parts of trees, regardless of the level of tree risk assessment provided, the risk rating, or the residual risk rating after mitigation. The information in this report should not be considered as making safety, legal, architectural, engineering, landscape architectural, land surveying advice or other professional advice. This information is solely for the use of the tree owner and manager to assist in the decision-making process regarding the management of their tree or trees. Tree risk assessments are simply tools which should be used in conjunction with the owner or tree manager's knowledge, other information and observations related to the specific tree or trees discussed, and sound decision making.

Thank you for the opportunity to provide this information. Please contact me if you wish to review these results or discuss the next steps to take with mitigation, or if I can be of any other service in the management of your landscape.

Micah Hewitson
Field Consulting Arborist
ISA Certified Arborist #MA-6591A
ISA Tree Risk Assessment Qualified
Maryland Licensed Tree Expert #2563

Attachments. **Photographs**

Tree Risk Assessment Definitions

Photographs

Photo 1: View of all four willow oaks, labeled.

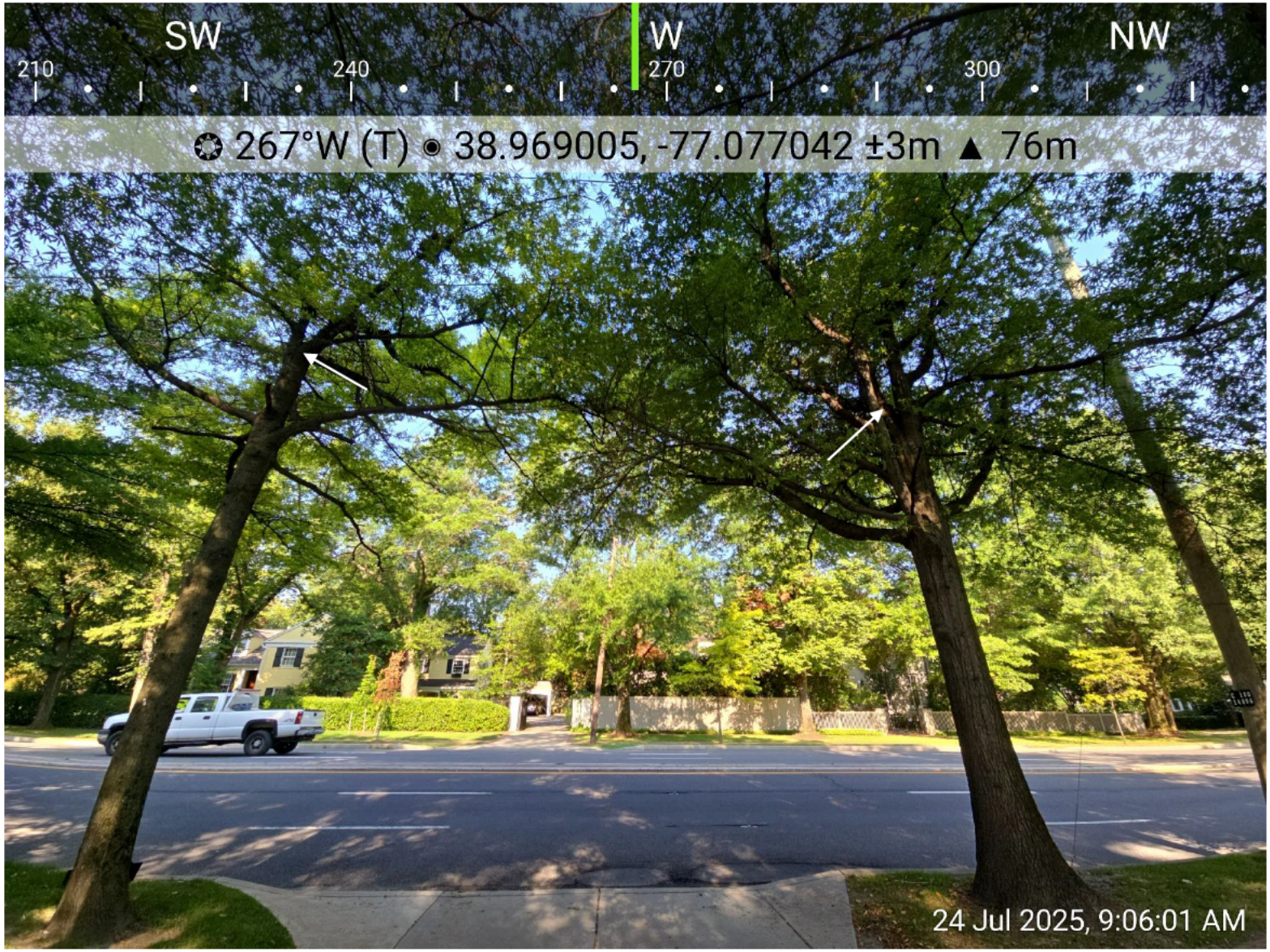


Photo 2: View of oaks #1 and #3 looking south. Topping cuts are pointed out, power lines are visible within canopies.

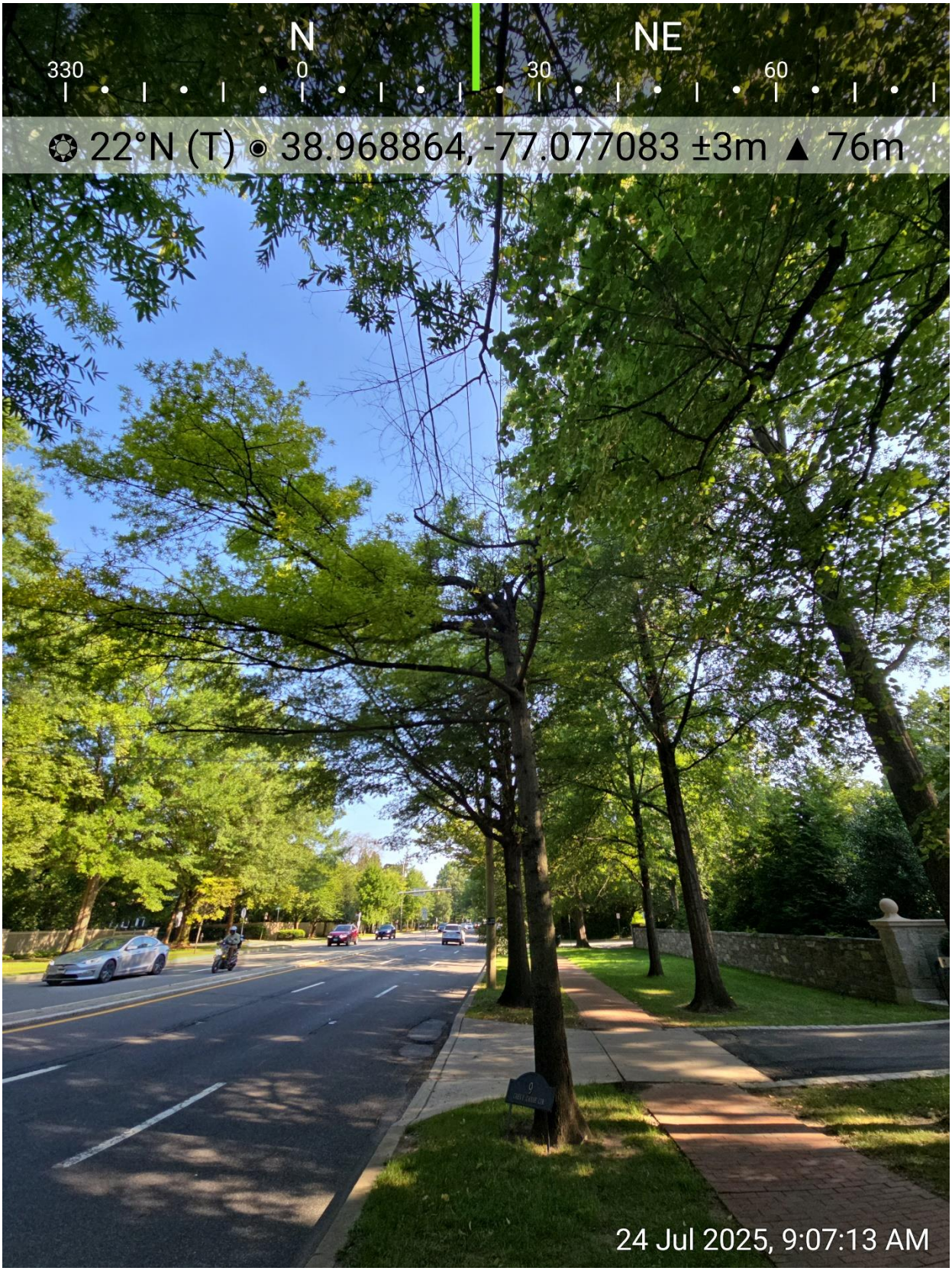


Photo 3: View of oaks #3 and #1, displaying topping cuts, uneven crowns, and overextend branches west towards Connecticut avenue.

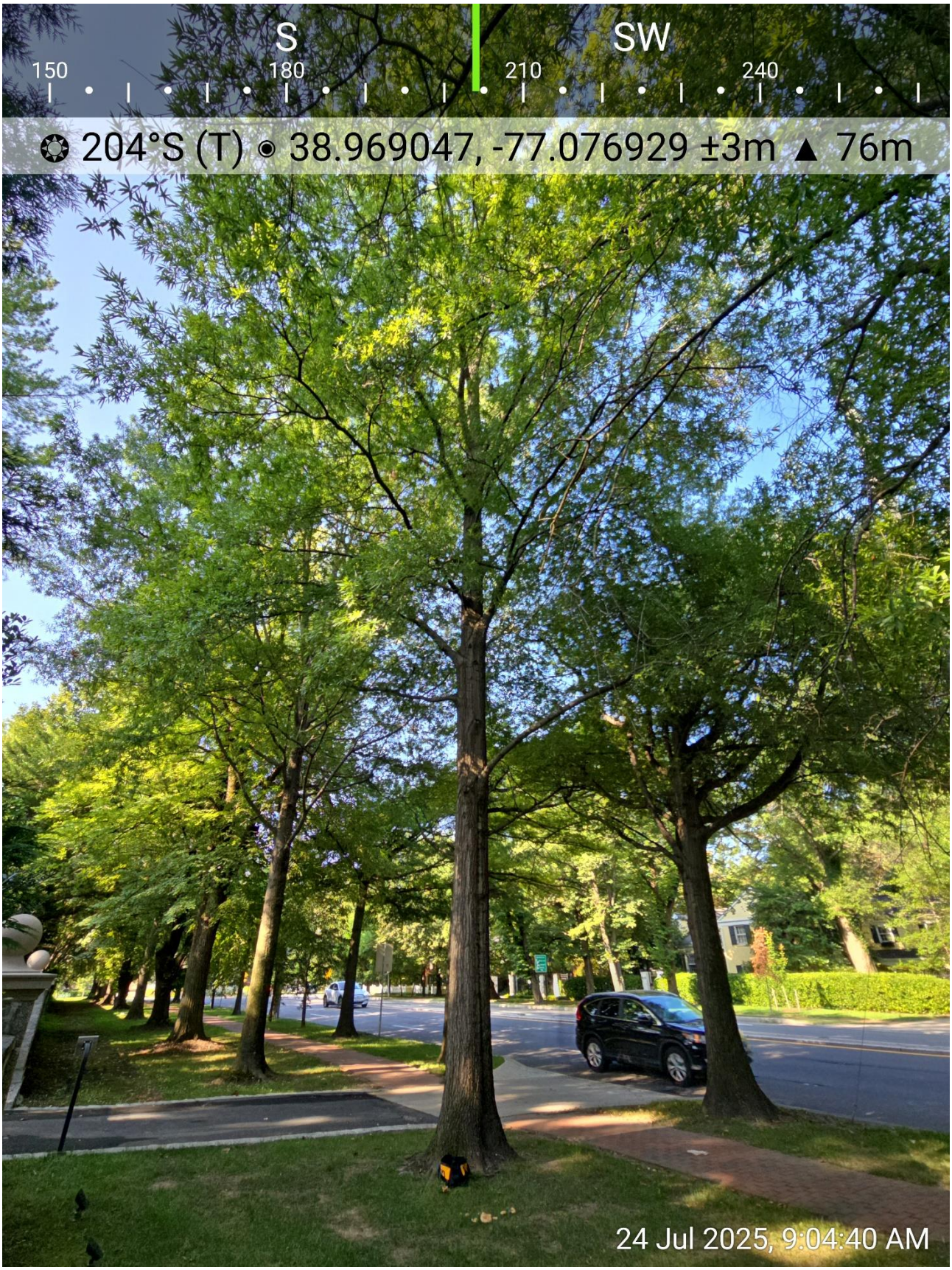


Photo 4: View of oak #2.

Photo 5: View of tree #4.

Tree Risk Assessment Vocabulary

Tree risk assessment has a unique set of terminology with specific meanings. A complete list of tree risk vocabulary and procedures may be found in the International Society of Arboriculture's (ISA) *Best Management Practice (BMP) for Tree Risk Assessment* or the American National Standards Institute (ANSI) *A300 Tree Risk Assessment Standard*. The following information is provided to assist the owner/client with understanding some of the common industry phrases or language, and some of the procedures and methodologies associated with the industry language used in the proposal and/or report.

Vocabulary Used Throughout Proposals and Reports

Inspection interval is the recommended amount of time between inspections or assessments.

Occupancy rates categorize the estimated time a target is physically within a target zone. Occupancy rate is classified as rare, occasional, frequent, or constant.

Overall risk rating is the highest individual risk identified for the tree.

Residual risk is the estimated level of risk that will remain after the recommended mitigation efforts to reduce the risk have been made. This estimate is provided to help the client understand that some level of risk may still exist and plan appropriately for future risk management.

Risk is the likelihood of an event and its consequences.

Risk rating for a tree or tree part is the combination of the likelihood of failure, the likelihood of impact, and the consequences.

Time frame is the period the assessor uses in which to estimate the likelihood of failure in all categories except the "imminent" category. The use of a time frame is meant solely to help the assessor better determine the portions of the risk analysis which are time dependent. The owner/client should never consider the time frame a "guarantee period" for the risk assessment or that the tree will not fail or is safe within the stated time frame.

Targets are people, property, or activities that could be injured, damaged or disrupted by a tree or tree part failure.

Target occupancy rates are typically identified based on information obtained from the owner/client prior to conducting the assessment, as well as information gained during the limited time the assessor evaluates the tree and site. Targets, target zones, and occupancy rates may be adjusted based on observations during the assessment.

Target zones are the areas where a tree or tree part is likely to land if it were to fail. The target zone(s) is determined in the field at the time of the assessment.

Trees can generally be defined as a woody perennial plant with a single trunk, defined crown, and will reach a minimum height of 15 feet at maturity.

Tree parts include branches, fruit, and trunks.

Tree risk is the likelihood of a tree failure impacting a target and the severity of the consequences.

Vocabulary Used Throughout Proposals and Reports

Tree risk assessment is the systematic process used to identify, analyze, and evaluate tree risk. Tree risk assessments are conducted to assist the tree owner or client in better understanding the risk their trees pose so they can make management decisions to reduce or minimize those risks. Tree risk assessments focus on evaluating the structural integrity of the tree crown, branches, trunks, and roots and root collar.

Tree risk assessors are trained arborists or qualified professionals with experience in performing tree risk assessments.

Vocabulary Used to Communicate Occupancy Rates

Constant indicates a target is present in the target zone at nearly all times, 24 hours a day, seven days a week.

Frequent indicates a target is present in the target zone for a large portion of the day or week.

Occasional indicates a target is present in the target zone infrequently or irregularly.

Rare indicates a target zone that is not commonly used by people or other mobile/movable targets.

Vocabulary Used to Communicate the Likelihood of Failure

Imminent indicates that failure has started or is most likely to occur in the near future, even if there is no significant wind or increased load.

Probable indicates that failure may be expected under normal weather conditions within the specified time frame.

Possible indicates that failure could occur, but is unlikely under normal weather conditions within the specified time frame.

Improbable indicates that failure is not likely during normal weather conditions, and it may not fail in extreme weather conditions within the specified time frame.

Vocabulary Used to Communicate the Likelihood of Impacting a Target

High indicates that a failed tree or tree part will most likely impact a target.

Medium indicates the failed tree or tree part could impact the target but is not expected to do so.

Low indicates that the failed tree or tree part is not likely to impact a target.

Very low indicates that the likelihood of a failed tree or tree part impacting the specified target is remote.

Vocabulary Used to Communicate the Likelihood of a Failure Impacting a Target

Very likely to impact a target is reached by an imminent likelihood of failure and high likelihood of impact.

Likely to impact a target can be reached by an imminent likelihood of failure and medium likelihood of impact; or probable likelihood of failure and high likelihood of impact.

Somewhat likely to impact a target can be reached by one of the following combinations; an imminent likelihood of failure and low likelihood of impact; probable likelihood of failure and medium likelihood of impact; or possible likelihood of failure and high likelihood of impact.

Vocabulary Used to Communicate the Likelihood of a Failure Impacting a Target

Unlikely to impact a target can be reached by one of the following combinations; a possible or probable likelihood of failure and low likelihood of impact; possible likelihood of failure and medium likelihood of impact; improbable likelihood of failure with any likelihood of impact rating; or any likelihood of failure rating with very low likelihood of impact.

Vocabulary Used to Communicate the Consequences of Failure and Impact

Severe consequences could involve serious personal injury or death, high-value property damage, or major disruption to important activities.

Significant consequences are those that could involve substantial personal injury, property damage of moderate to high value, or considerable disruption of activities.

Minor consequences are those that are believed will only cause minor personal injury, low-to-moderate-value property damage, or small disruption of activities.

Negligible consequences are those that are believed will not result in personal injury, will only involve low-value property damage, or disruptions that can be replaced or repaired.

Vocabulary Used to Communicate Overall Risk Ratings

Extreme risk applies in situations in which failure is imminent, there is a high likelihood of impacting the target, and the consequences of the failure are severe.

High risk situations are those for which consequences are significant and likelihood is very likely or likely; or consequences are severe and likelihood is likely.

Moderate risk situations are those for which consequences are minor and likelihood is very likely or likely; or likelihood is somewhat likely and consequences are significant or severe.

Low risk situations are those for which consequences are negligible and likelihood is unlikely; or consequences are minor and likelihood is somewhat likely.

Explanation of Tree Risk Levels

The three levels of tree risk assessment defined in the *ANSI A300 Tree Risk Assessment Standard* are:

I. Level 1: Limited Visual Assessment

This level of assessment provides a visual assessment from a defined perspective (e.g., from the sidewalk, street, or aerial view) of an individual tree or population of trees to assess risk to specified targets from obvious defects or specified conditions.

Level 1 assessments are typically performed to quickly assess large populations of trees or conduct a rapid assessment of an individual tree. The assessor views only one side of the tree while walking on a sidewalk, being unable to access a neighboring property, looking from a slow-moving car, or from above with a drone, helicopter, or airplane.

A Level 1 assessment requires the client to identify the location and/or selection criteria of trees to be assessed. The assessor may:

1. Determine the most efficient route and document the route taken.

2. Assess the tree(s) within the area from the defined perspective (e.g., walk-by or drive-by).
3. Record the location of trees that meet the defined criteria (e.g., significant defects or other conditions of concern).
4. Evaluate the risk (risk rating is optional).
5. Identify trees requiring a higher level of assessment (Level 2 or Level 3) and/or prompt action.
6. Submit risk mitigation recommendations and/or a report.

Limitations: Level 1 assessments are the least thorough means of assessment. They are typically from one perspective, such as a walk-by, a drive-by, or aerial view. This level of assessment is most commonly used to prioritize higher-risk trees within larger groups of trees when there are budgetary, time, or other management constraints. Some defects or conditions will not be visible to the tree risk assessor, nor will all conditions visible at all times of the year; therefore, not all higher-risk trees will be accurately identified. In addition, the assessment may not provide enough information to assign a risk rating, make a risk mitigation recommendation, or determine residual risk.

II. Level 2: Basic Assessment

A Level 2 assessment is a detailed visual inspection of a tree and its surrounding site and a synthesis of the information collected. It requires a 360° ground-based inspection around a tree, including the site conditions, visible buttress roots, trunk, branches, and crown.

The Level 2 assessment may include using tools such as binoculars, mallet, or probe at the discretion of the assessor or at the request of the owner/client.

At this level, the assessor may:

1. Locate and identify the tree or trees to be assessed.
2. Determine the targets and target zone for the tree or tree part(s) of concern.
3. Review the site history and conditions, and species failure profile.
4. Assess potential load on the tree and its parts.
5. Assess general tree health.
6. Inspect the tree visually which may include the use of common tools such as binoculars, mallet, probes, and/or shovels, as specified in the Scope of Work.
7. Record observations of site conditions, defects, indicators of internal defects, and response growth.
8. If necessary, recommend a Level 3 advanced assessment.
9. Analyze data to determine the likelihood of failure, likelihood of impact, and consequences of failure to evaluate the degree of risk.
10. Develop mitigation options and estimate residual risk for each option.
11. Recommend a re-assessment interval.
12. Prepare and submit a report.

Limitations: Level 2 assessments only include conditions and defects that can be detected from a ground-based visual observation on the day of the assessment. Below-ground, internal, or upper-crown conditions, decay, and defects may not be detected.

III. Level 3: Advanced Assessment

A Level 3 assessment is performed to provide detailed information about specific tree parts, defects, targets, or site conditions. These are usually conducted in conjunction with or after a Level 2 assessment with owner/client approval. Specialized equipment, data collection and analysis, and/or expertise are usually required for Level 3 assessments.

At this level, the assessor may:

1. Locate and identify the tree or trees to be assessed.
2. Determine the targets and target zone for the tree or tree part(s) of concern.
3. Review the site history and conditions, and species failure profile.
4. Assess potential load on the tree and its parts.
5. Assess general tree health.
6. Inspect the tree and/or site using advanced techniques as specified in the Scope of Work.
7. Record results from advanced techniques.
8. Analyze data to determine the likelihood of failure, likelihood of impact, and consequences of failure to evaluate the degree of risk.
9. Develop mitigation options and estimate residual risk for each option.
10. Recommend a re-assessment interval.
11. Recommend other advanced assessments, if necessary.
12. Prepare and submit a report.

*Items 1-5 may be included in the associated Level 2 assessment.

Procedures and Methodologies Often Used For Level 3 Assessments

Level 3 procedures and methodologies, which are referred to as technologies, may include:

Procedure	Methodology
Aerial assessment and evaluation of structural defects in upper stems and branches	• visual observation from within the tree crown or from a lift • unmanned aerial vehicle (UAV) photographic inspection • decay testing of branches
Detailed target analysis	• property value of anything potentially impacted by tree failure • use and occupancy statistics • potential disruption of activities such as road blockage or an electrical outage
Detailed site evaluation	• history evaluation • soil profile review to determine root depth • soil mineral and structural testing
Decay and wood analysis	• increment boring • drilling with small-diameter bit • resistance-recording drilling • single path sonic (stress) wave • sonic tomography • electrical impedance tomography • radiation (radar, X-ray) • advanced analysis for pathogen identification
Health evaluation	• tree ring analysis (in temperate zone trees) • shoot length measurement • detailed health/vigor analysis • starch assessment

Procedure	Methodology
Root observation and evaluation	• root and root collar excavation • root decay evaluation • ground-penetrating radar
Storm/wind load analysis	• detailed assessment of tree exposure and protection • computer-based estimations according to engineering models • wind reaction monitoring over a defined interval
Measuring and assessing the change in trunk lean	• visual documentation • digital level
Load testing	• hand pull • measured static pull • measured tree dynamics

Limitations: Level 3 assessments that include specialized technologies may have uncertainty and require qualified estimations. Exact measures may not be feasible.

Conclusion

Regardless of the level of assessment conducted, every assessment is limited to the trees identified in the scope of work, conditions detectable at the time of the assessment, the level of communication with the owner/client, and other conditions that affect the assessor's ability to collect information. Not all defects and conditions are detectable, and not all tree failures can be predictable. Trees are living organisms, and as such, every tree's structural conditions change over time.