

Guidelines for Developing Urban & Community Forestry Plans

Strategic Plans & Management Plans

for Street and Park Tree Management



Adapted from:

"A Technical Guide to Developing Urban Forestry Strategic Plans & Urban Forest Management Plans"
Wisconsin Department of Natural Resources
Bureau of Forestry

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Introduction

Developing Strategic and Management Plans

This guide is intended to help local units of government and others develop urban forestry plans that: 1) address local needs, and 2) meet the standards of Vermont's 'Trees for Local Communities' grant program.

WHY PLAN?

Planning is key to effective management of any program. Good plans make the difference between cost-effective, pro-active management and costly crisis management. Plans establish focus and direction. They provide the framework for program implementation and a basis for consistent decision making. They are tools for determining budgets and other support needs.

WHAT ARE URBAN FORESTRY PLANS?

Urban forestry planning occurs on several levels. At the broadest level, *strategic* plans establish the overall goals and objectives of the organization's urban forestry efforts. Ideally, strategic planning is one of the first tasks undertaken in the establishment of a community forestry program. Also called long-range, comprehensive or master plans, strategic plans create a blueprint for administration and management of a community tree program. Strategic plans include input from local citizens, organizations, businesses, municipal staff and elected officials. They are integrated with other comprehensive community plans.

Urban forest *management* plans are specific to the field operations of the community tree program. Typically based on a detailed tree inventory, management plans identify and prioritize site-specific tree planting, maintenance and removal activities within a multi-year time frame.

Urban forestry planning also takes on a variety of other forms. Land use plans, greenway plans, site development plans, public landscape design and maintenance plans and similar planning efforts require input from those involved with public tree care.

PRE-PLANNING

Pre-planning is done to establish basic parameters for plan development. Pre-planning should identify such things as:

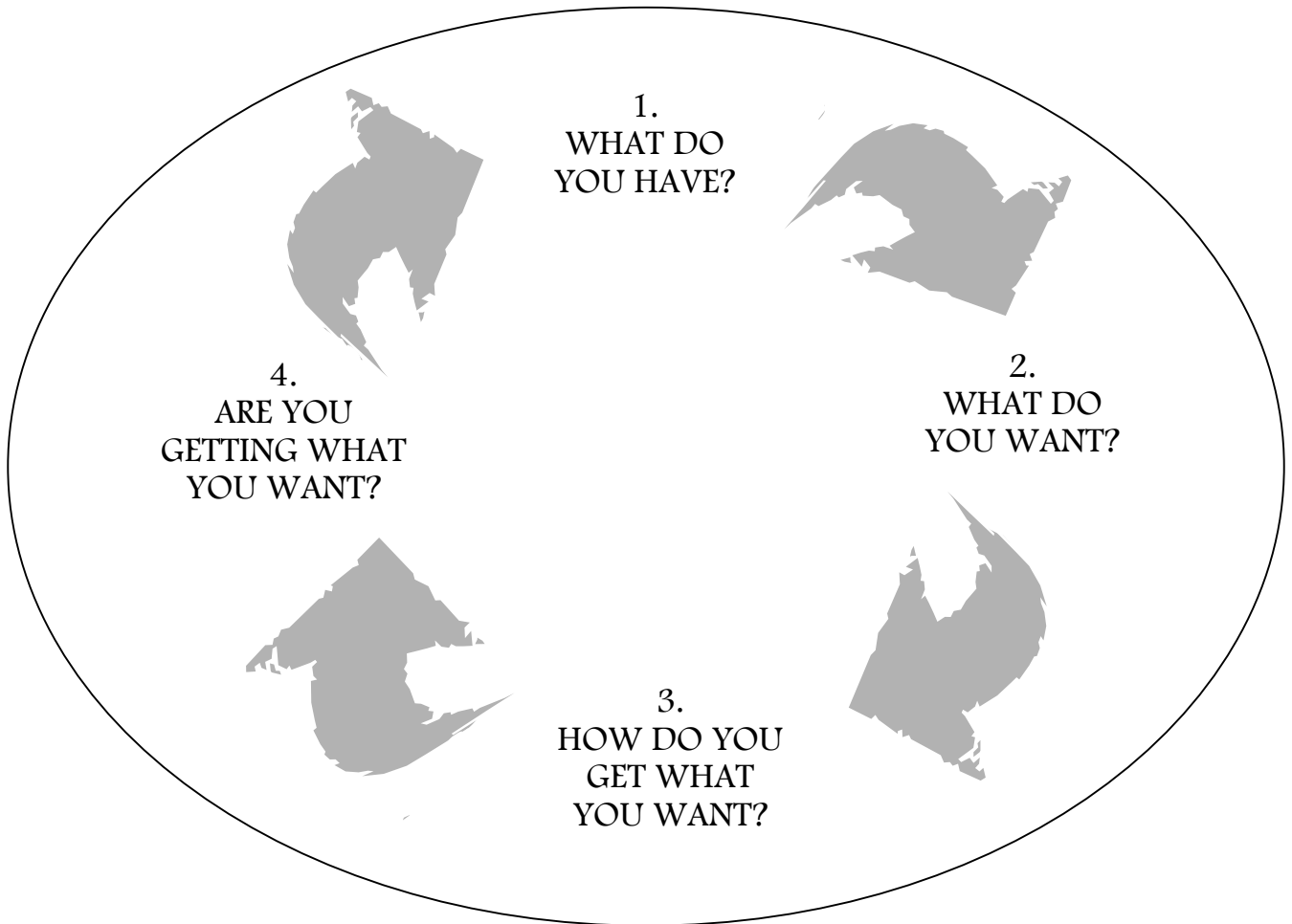
- what kind of plan is needed
- who will be involved in its development and at what stage
- how the plan will be used
- how awareness and support for the plan will be generated

Available interest, expertise, time and financial resources of the organization should be considered when determining how to develop the plan. Organizations lacking the necessary human resources might choose to hire an urban forestry consultant to prepare the plan.

'Trees for Local Communities' grants, administered by the Department of Forests, Parks & Recreation, are available for projects that develop or expand management capacity for sustained urban forestry programs at the local level. This cost-share program favors development of strategic and management plans; however other types of urban forestry plans may also be eligible for funding. Grant funded plans must meet Vermont Planning Standards (see pages 18-19).

THE PLANNING PROCESS

Planning is a continuous process that follows a logical sequence of steps. Four principal questions drive the process, regardless of the type of plan or its complexity:



HOW TO USE THIS GUIDE

The wide spectrum of community tree issues and planning considerations can make the task of developing an urban forestry strategic or management plan appear formidable, particularly to organizations lacking trained staff. This guide offers a "how to" approach to urban forestry planning, utilizing the four step process shown above. By following step-by-step through the guide, any organization can develop a thorough, functional urban forestry plan, regardless of community size or technical resources.

The examples contained in this guide are given merely to stimulate ideas and illustrate concepts. Because each community is unique, plans will differ from one community to another. Not all plans will need to address every point discussed. Some communities may wish to include information beyond that presented in the guide. There is no prescribed order, length, format or style for a plan. Organizations are encouraged to develop clear, action oriented plans that best suit their unique needs and circumstances. Above all, a plan must be *useful* or it won't get used!

The items with a box around them are specific to the development of Management Plans. For further planning assistance, contact the Program Coordinator or Community Involvement Coordinator.

Sample Outlines

Strategic and Management Plans

Strategic Plan

- I. Executive Summary
- II. Introduction
 - A. Statement of Purpose and Scope
 - B. Historical Background
 - C. Current Situation
 - 1. People
 - 2. Policies
 - 3. Funding
 - 4. Trees
- III. Goals
 - A. Administrative/Management
 - B. Public Awareness
 - C. Tree Resource
- IV. Strategies
 - A. Actions
 - 1. Regulation/Policy
 - 2. Public Awareness/Education
 - 3. Program Management
 - 4. Funding
 - B. Implementation Schedule with Budget
 - C. Budget Justification
- V. Evaluation Mechanism
- VI. Appendices
 - A. Community Map
 - B. Survey Summaries
 - C. Potential Funding Source(s)
 - D. Technical Resources
 - E. Tree City USA and/or VT Tree Town Information
 - F. Relevant Ordinances

Management Plan

- I. Executive Summary
- II. Introduction
 - A. Statement of Purpose and Scope
 - B. Historical Background
 - C. Current Situation
 - 1. Tree Planting & Care
 - a. Key Players & Roles
 - b. Contracted vs. In-house
 - c. Equipment Inventory
 - d. Funding
 - 2. Tree Inventory Summary & Analysis
- III. Goals: Forest
- IV. Strategies
 - A. Actions
 - 1. Tree and Stump Removal
 - 2. Maintenance
 - 3. Planting
 - 4. Administrative Support
 - B. Implementation Schedule with Budget
 - C. Budget Justification
- V. Evaluation Mechanism
- VI. Appendices
 - A. Map of Management Districts
 - B. Map of Utilities
 - C. Technical & Safety Standards
 - D. Species Lists
 - E. Equipment & Vehicle Rates
 - F. Inventory Documentation (data summary)
 - G. List of Vendors
 - H. Storm Management Plan

* Required elements for plans developed with funding from a "Trees for Local Communities" grant from Vermont's Urban & Community Forestry Program (see pages 18-19)

Combined Strategic and Management Plan

- I. Executive Summary
 - II. Introduction
 - A. Statement of Purpose and Scope
 - B. Historical Background
 - C. Current Situation
 - 1. People
 - a. Key Players & Roles
 - b. Town Support
 - c. Community Awareness
 - 2. Policies
 - 3. Equipment
 - 4. Funding
 - 5. Program Management
 - 6. Tree Inventory Summary & Analysis
- } What Do You Have?
- III. Goals
 - A. Administrative/Management
 - B. Public Awareness
 - C. Tree Resource
- } What Do You Want?
- IV. Strategies
 - A. Actions/Tasks
 - 1. Program Administration
 - a. Funding
 - b. Staffing
 - c. Equipment
 - d. Policies and Plans
 - 2. Public Awareness/Education
 - 3. Tree Resource/Program Management
 - a. Tree and Stump Removal
 - b. Maintenance
 - c. Planting
 - B. Implementation Schedule with Budget
 - C. Budget Justification
- } How Do You Get What You Want?
- V. Evaluation Mechanism
 - A. Monitoring & Evaluation Techniques
 - B. Schedule for Plan Updates
- } Are You Getting What You Want?
- VI. Appendices
 - A. Community Map
 - B. Survey Summaries
 - C. Potential Funding Source(s)
 - D. Technical Resources
 - E. Tree City USA &/or VT Tree Town Information
 - F. Relevant Ordinances
 - G. Map of Management Districts
 - H. Map of Utilities
 - I. Technical & Safety Standards
 - J. Species Lists
 - K. Equipment & Vehicle Rates
 - L. Inventory Documentation
 - M. List of Vendors
 - N. Storm Management Plan

* Required elements for plans developed with funding from a "Trees for Local Communities" grant from Vermont's Urban & Community Forestry Program (see pages 18-19)

Purpose and Scope

Strategic and Management Plan

Before beginning the four step planning process, establish the *purpose and scope* of your plan. Why are you developing this plan? What is it supposed to do? How will it be used? Document your intentions with written statements.

For example...

Purpose: The purpose of the Pleasantville Urban Forestry Strategic Plan is to lay the groundwork for the development of a comprehensive urban forestry program.

Scope: This plan provides a 20-year outline for achieving urban forestry administrative, policy, educational and management goals. It gives citizens of Pleasantville, community decision makers and staff a clear set of prioritized recommendations to accomplish these goals. The plan proposes a timetable of implementation and, where possible, provides estimated costs. This plan is intended to become part of Pleasantville's Community Master Plan.

For example...

Purpose: The purpose of the Pleasantville urban forest management plan is to recommend specific tree planting, maintenance and removal activities to cost-effectively improve the public tree resource.

Scope: This plan will make site-specific, prioritized, inventory-based recommendations for managing Pleasantville's public tree resource for a five-year time period. It will identify staffing and other support needs and will include projected annual budgets for the five-year planning period.

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Step 1: What Do You Have?

Background and Current Conditions

HISTORICAL BACKGROUND

A brief review of the history of your community's tree resource and its management adds useful perspective. Tracing the community back to its development, what has been the role of trees? What values were placed on them? What cultural influences shaped these values? Are there trees of historical significance in the community? Has tree planting been a part of the community's history? How have trees been taken care of in the past? Have there been events that have changed the public's attitude toward trees (e.g., Dutch elm disease, tree removal for road projects, etc.)?

CURRENT SITUATION

Assess your current situation in terms of:

- people: key players and roles, awareness and interest among community residents and officials
- policies
- equipment
- funding
- trees/status of the urban forest resource

This assessment may require some investigation. You might conduct a survey or hold a public meeting to determine residents' attitudes, preferences and level of knowledge about trees, tree care and public tree management. Are there organizations or individuals interested in community tree planting and care?

How do local elected officials and staff feel about public trees? Are public trees adequately cared for in your community? Is there an adequate budget for trees? How is it determined? Are there written policies or ordinances concerning trees? Are they adequate? Are they enforced? Is tree well-being considered in development and construction projects? ...in comprehensive community planning? ...in subdivision planning? Are the persons in charge of public trees trained in proper tree care practices? Is there an adequate budget for overall management of the tree program, including staff training, public education and administrative support? What equipment is available within the municipal fleet for forestry operations? Is tree care equipment available locally for lease? What is the availability and quality of commercial tree care service in the area?

Inventory Summary and Analysis

A recent inventory of tree and site information forms the basis for the management plan. A thorough summary and analysis of the inventory data will enable you to identify existing resource needs and anticipate future ones. Does any one species comprise a high percentage of the total public tree resource? ...a high percentage of trees of a certain age or size class? At what age or size are trees regularly developing structural problems? Does this vary by species? ...by location? Is width of tree lawn correlated with tree condition? Does this vary by species? Does tree condition vary by land use or location? Are there areas where trees are needed? Such questions are just a few examples of those you might consider in an inventory analysis.

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OTHER VARIABLES/CIRCUMSTANCES

What other circumstances are likely to influence your short-term resource management activities? Consider these examples:

- new subdivision under development
- tall-growing trees to be removed from beneath power lines by the local utility company
- stump grinding, previously contracted, now to be done by staff
- volunteer tree board forming

Step 2: What Do You Want?

Goals

GOALS

Develop broad goals. Steer away from vague statements such as, "improve the quality of life." Goals should be quantifiable so that progress can be measured.

For example...

1. The urban forestry program has community and political support.
 2. Residents are knowledgeable about proper tree planting and care.
 3. Trees are integral in all community planning decisions.
 4. Optimum tree cover is established and maintained.
 5. Community trees are maintained at optimum levels of stocking, health, age and species diversity, and are appropriate for the site.
 6. Conservation of tree resources is promoted.
 7. Street trees are appropriately selected, situated and maintained to minimize hazard, nuisance, hardscape damage and maintenance costs.
 8. Management of the urban forest is cost-effective and efficient.
 9. Management strategies are acknowledged, understood and cooperatively implemented by appropriate municipal departments.
- etc.

You might want to group goals into categories.

For example...

Public Awareness

- strong public awareness of the values and benefits of community trees
- local support for an urban forest management program
- understanding among residents about proper tree selection, planting and care

Administration & Management

- trained program staff
- updated municipal tree ordinance
- alternative sources of program funding
- active tree board

Tree Resource

- species and age diversity in population
- well-maintained public trees
- safe tree population

Step 3: How Do You Get What You Want?

Strategies and Implementation

STRATEGIES

Once goals are determined, start figuring out ways to achieve them. Recommendations should be in the form of specific strategies or objectives. If desired, strategies can be further broken down into specific actions and tasks.

For example...

Recommendations in a Strategic Plan might look something like this:

Strategy 1: Complete a community tree inventory.

Action: Determine how inventory will be conducted.

Action: Apply for Trees for Local Communities grant.

Action: Hire intern or consultant, as necessary.

Action: Conduct inventory.

Action: Analyze inventory findings.

Recommendations in a Management Plan might look something like this:

Strategy 1: Remove 14 hazardous trees

Strategy 2: Conduct safety pruning* on 45 trees

Strategy 3: Conduct training pruning* on 50 existing trees

Strategy 4: Conduct maintenance pruning* on 20 mature trees

Strategy 5: Fill 25 existing and 14 anticipated planting vacancies (from removals)

Management Plan strategies (the meat-and-potatoes of the plan) should consist of *site-specific, inventory-based recommendations* for accomplishing stated goals, to include:

Tree and stump removal

- priority (hazard) removals ... how many, rate of removal, where
- replacement needs
- wood residue utilization
- stump grinding, reseedling ... how many existing & anticipated, how many per year, where

Maintenance

- priority pruning (safety, health) ... how many, rate of removal, where
- other maintenance - watering, insect & disease control, mulching, cabling & bracing, fertilizing, stake removal, etc... what, where, what species, when/how often
- mature tree pruning (maintenance)... how many, where, when/how often
- young tree pruning (training)

Planting

- planting site assessment ... how many existing and anticipated planting sites, where, constraints & opportunities, new tree protection
- prioritized planting plan ... optimum stocking level, planting rate, citizen requests
- site specific evaluation of diversity, design & function
- site specific species recommendations

Administrative Support

- analysis of adequacy of current staffing levels and recommendations on any or all work to be done by staff, outside contractors, volunteers, or if additional staff is or will be needed
- equipment needs ... what type, how many, purchase or lease
- staff training/education
- storm damage & hazard tree plans; inspections
- policies re: citizen requests, permits for tree work, public notification of scheduled operations

Note: Recommendations should make reference to any existing policies and industry standards, as appropriate. Referenced policies and technical standards should be incorporated into the plan appendix.

IMPLEMENTATION SCHEDULE AND BUDGETS

Plans are unlikely to be implemented without a clear indication of who will do what, when, and at what cost. Develop an implementation schedule that identifies *who* is responsible for each strategy (and action), *when* each will be completed and what each will *cost*. Be sure to prioritize the implementation schedule. The implementation schedule worksheet and samples on pages 12-14 may be helpful.

Budgets should be based on real information (e.g., what does it cost to conduct "maintenance pruning" on a 14" tree?) The budget worksheet and instructions on page 15 will help you estimate the cost of planting, maintenance and removal activities specified in your plan.

When developing a management plan, consider the following priorities of activities:

1. Public Safety! Remove hazardous trees and limbs.
2. Maintain what you have.
3. Plant after maintenance needs have been met.

Remember also to build in funding for maintenance when you plant, just as you would for any other component of infrastructure (roads, bridges, utilities, etc.). According to the USDA Forest Service, new programs or those in which routine maintenance and removals have been neglected should spend approximately 80% of their operations budget on maintenance and removals. The remaining 20% is for planting and administration. Once the initial heavy maintenance and hazard tree removals have been performed, the following *IDEAL** budget is suggested:

	<u>IDEAL*</u>	<u>TYPICAL</u>
Pruning and other maintenance	45-50%	38%
Removals	20%	35%
Planting	20-25%	14%
Administration & supervision	10%	13%

Note that maintenance expenditures should be about twice those for planting. Also, *TYPICAL* expenditures for removals are much higher than *IDEAL*. With greater emphasis on maintenance, the tree population should become healthier and longer lived, decreasing removal costs.

*The "ideal" budget figures are offered as a guideline only. In all cases, forestry expenditures should be based on actual needs as determined from a tree inventory and other local circumstances.

Here's an example of how a portion of an implementation schedule might look:

GOAL #5: COMMUNITY TREES ARE MAINTAINED AT OPTIMUM LEVELS OF STOCKING, HEALTH, AGE AND SPECIES DIVERSITY, AND ARE APPROPRIATE FOR THE SITE

Strategy 1: Complete a community tree inventory

Priority - 1

<u>Recommended Actions</u>	<u>Cost/Funding Source</u>	<u>Performed By</u>	<u>Status/Completion Date</u>
Determine how inventory will be conducted	N/A	tree board	September, 1997
Apply for Urban Forestry Assistance grant	N/A	tree board	October, 1997
Hire intern or consultant	\$1000 - 4000	tree board	February, 1998
Perform inventory	urban forestry grant	& staff	
	N/A	intern or consultant	June - July, 1998
Conduct training, as necessary	N/A	technical advisor	June, 1998
Purchase equipment and materials, as necessary	\$0 - 500	tree board	June, 1998
Analyze inventory findings	urban forestry grant		
	N/A	intern or consultant & tree board	August, 1998

JUSTIFICATION OF RECOMMENDATIONS

Plans whose recommendations would require a substantial budget increase should include specific justification, either in the plan itself or in an attachment. You might address *how* implementation will improve public safety, customer satisfaction or cost-effectiveness. What problems will be solved or reduced? What alternative recommendations were considered and why were they rejected? It might be helpful to make a side-by-side comparison between existing and proposed program costs and benefits. Administrators and budget decision-makers are unlikely to endorse your plan or supply budget requests without a clear, convincing argument for doing so.

Step 4: Are You Getting What You Want?

Monitor/Evaluate Progress and Update Plan

MONITOR AND EVALUATE

How will you assess whether the strategies, once implemented, are moving you toward your goals? For example, to determine whether strategies for reaching sample goal #2 are working, you might look around the community at trees on private property. Are they being planted and cared for properly? Are you getting feedback on municipal tree planting and care practices? Has the quality of commercial tree care services changed? Are local commercial arborists certified? Are there other ways to measure tree knowledge among residents? Include specific monitoring recommendations in your plan.

TAKE CORRECTIVE ACTION

Include a schedule for reviewing and updating the plan. Goals, strategies and priorities may change over time. New program staff or volunteers may bring different ideas or priorities. Periodic review and updating are important to avoid wasted effort and to keep the plan a working document.

APPENDIX AND SUMMARY

Your plan should also include an appendix of reference information useful for plan implementation. Appropriate material might include: community map(s), relevant ordinances or tree policies, technical resources, potential sources of funding, summaries of surveys, etc. Finally, for a plan that is quite lengthy or detailed, it is helpful to include a one or two page "executive summary." For those who haven't the time or interest to read the entire plan, a short summary of its highlights should provide a fair idea of the plan's general direction and major recommendations.

Implementation Schedule Worksheet

Appendix A

The following worksheet can be copied and filled in as an implementation schedule for strategies developed in a strategic or management plan. A sample is provided as well.

Budget Worksheet to Estimate Costs

Appendix B

Diameter class is a measure of the size of the trees. Diameter is measured at 4.5 feet above the ground. The diameter classes shown may differ depending on the inventory program used.

For each activity, determine the *\$/tree* for accomplishing that activity in each diameter class. This amount will encompass the average time multiplied by the personnel and equipment costs required to complete that activity for that size class.

Immediate priority and High priority pruning is for *public safety* - removal of hazardous and/or potentially hazardous limbs (those which are dead, dying, diseased, decayed or structurally unsound). *Maintenance* pruning indicates trees that are pruned on a regular cycle. If trees have not been routinely pruned in the past, the first cycle of *Routine* pruning may involve more work and be more expensive due to the trees having many large branches, deadwood or poor form that must be corrected via pruning. The subsequent cycles of *Maintenance* pruning usually takes far less time than other pruning, since only minor corrections or deadwooding are needed. Some "maintenance prune" trees may not need any work even though according to the pruning cycle, they are due for pruning. Note that once the immediate priority and high priority pruning have been completed, all mature trees will fall within the routine pruning category. From that point on, each year should include one-sixth of the total mature tree population (for a 6 year pruning cycle) for maintenance pruning.

New tree maintenance includes several activities. It involves training pruning - the systematic corrective and directional pruning of newly planted trees, usually done twice in the first ten years (at 2-3 years and 5-7 years after planting). After this time they are incorporated into the routine pruning cycle. It also involves mulching, watering and other necessary activities.

Other maintenance can include a wide variety of activities, such as watering, mulching, insect & disease monitoring and treatment, fertilizing, cabling & bracing, etc. for all trees. You should modify this column to accommodate your anticipated maintenance needs. Although weather, pest outbreaks and similar circumstances can make it difficult to accurately project *other maintenance* costs, an estimate should be included in the budget. Enter the number of trees you expect to handle each year by activity and size class, then calculate the *total cost* for each year as follows: $\$/tree \times \# \text{ of trees} = \text{Total cost for each year}$.

The *number of trees to be planted each year* is determined as follows.

$$\frac{\text{Number of planting sites} + \text{number of removals}}{\text{Number of years to full stocking}} + \text{Number of trees that are expected to die each year} = \text{Number of trees to be planted each year}$$

Ideally, tree planting does not begin until the *high priority* and *maintenance* pruning is complete. Newly planted trees should be pruned at least twice within the first ten years of planting. For example, trees planted in 2000 could be pruned (*training pruning*) in 2003 and 2007. After this they should be placed on the five to six year pruning rotation with the other trees. *Training pruning* will eliminate 90% of all structural problems throughout the life of the tree. Pruning small trees with small limbs is far less costly to do and will save a lot of money long term, while greatly increasing the health and value of the community trees.

Note: Any tree service involved in municipal pruning should be able to supply average cost and time estimates.

Note that this table will only provide costs for the operations part of the program, typically what is covered within a management plan. Additional costs for public education, staff training, administering the program, equipment purchase and maintenance costs, etc. should also be calculated into the overall community forestry budget.

Planning Tips & Troubleshooting

Appendix C

A plan is not an end unto itself, rather it is the chosen route to a destination. Many impressive looking plans end up on a shelf gathering dust because there is no vehicle for reaching the destination, or because the vehicle becomes stalled along the way. A plan will be more useful and more likely to be implemented if:

- * it is ambitious but realistic, achievable within the abilities and constraints of the organization. A plan that might work well for one community or organization could be a "pie in the sky" for another.
- * it contains a full complement of *clear and specific recommendations for action* based on stated goals. Anyone who reviews the plan should be able to answer such questions as: What is the first step toward implementing this plan? Who is responsible for initiating that step? Who else will be involved? What equipment, training &/or technical resources are needed to take that step? What will it cost? What happens after that step is completed? A good plan provides enough information to give a clear idea of the next step(s) and the resources (time, dollars, people) needed to take that step.
- * it is used to develop annual work plans. Ideally, annual work plans are developed from *both* strategic and management plans. Prior to the start of a new year, establish a calendar of tasks based on recommendations in the strategic and management plans. Request a copy of *Guidelines for Developing Annual Work Plans* for more information.
- * it has a broad support base. Avoid the temptation to include only tree enthusiasts or insiders in the planning process. Identify and include all affected parties and adversaries.
- * plan development is a team effort. Regardless who prepares the plan, everyone who will be involved in its implementation should thoroughly review all drafts and provide objective input. The DNR Urban Forestry Coordinator serving your region is available to review and comment on drafts.
- * plenty of time is allowed for plan development and review. Urban forestry planning is a complex and protracted process. Anticipate numerous revisions, setting interim deadlines as needed. Regardless who prepares the plan, it is unlikely that a first draft, or even a second, will fully address your planning needs.
- * your community's elected officials are made aware of your planning effort. Their interest and support will help ensure integration with the plans and activities of other municipal departments and will increase the likelihood of plan implementation.
- * someone is given responsibility for overall plan development, implementation and evaluation. To help ensure thoroughness and continuity, responsibility is best given to someone with the time and interest to give the plan the attention it deserves.

Vermont Planning Standards

Required Components of 'Trees for Local Communities' Grant-funded Strategic and Management Plans



Adapted from:

"A Technical Guide to Developing Urban Forestry Strategic Plans & Urban Forest Management Plans"

Wisconsin Department of Natural Resources

Bureau of Forestry

Minimum Requirements for Grant-Funded Strategic Plans

Author of Plan: _____ Grant Number: _____

- ___ 1. Statement of Purpose and Scope of plan, to include intent, geographic area included in plan, and timeframe.
- ___ 2. Background and Current Situation (key players & roles, community awareness, political support, policies, funding, and key tree issues)
- ___ 3. Long-term Goals for shaping program direction, priorities & policies; these must address, at a minimum:
 - *tree resource*
 - *program administration*
 - *awareness & program support needs*
- ___ 4. Proposed Strategies to accomplish tree resource goals (i.e., a broad range of recommendations detailing how to develop and establish such things as: urban forest management plans; hazard tree management plans; tree health care plans; greenway &/or open space plans; tree inventories; technical standards & specifications; design standards; stocking objectives; species/site criteria; maintenance cycles & priorities; tree protection policy; tree removal criteria; etc.)
- ___ 5. Proposed Strategies to accomplish program administration goals (i.e., a broad range of recommendations detailing how to develop and establish such things as: funding sources; program budgets; staffing & staff training; tree board &/or other program volunteers; ordinances; policy & procedures for equipment procurement & disposal, contractual services, permits &/or licenses, public & worker safety, tree work documentation, accomplishment reporting & program evaluation, assessing & collecting tree damages, handling citizen requests, emergency response, abatement of public & private tree hazards, hardscape conflict resolution, wood waste utilization, etc.)
- ___ 6. Proposed Strategies to accomplish awareness & program support goals (i.e., a broad range of recommendations detailing how to develop and establish such things as: information & education programs for homeowners, schools, organizations, or neighborhoods; Arbor Day & other awareness opportunities; Tree City USA &/or Vermont Tree Town participation; recognition &/or awards programs; news media relationships; inter- and intra-departmental cooperation; political support; sources of technical assistance, communications, &/or partnerships with utilities, real estate developers & builders, businesses, green industry, Agency of Transportation, etc.)
- ___ 7. Implementation Schedule of all activities; must include:
 - a. priorities
 - b. who is responsible for each activity
 - c. target dates for completing each activity
 - d. projected costs
 - e. funding sources, as appropriate
- ___ 8. Mechanism for Evaluating & Updating Plan (i.e., who, when & how?)
- ___ 9. Plan must be fluent, functional, technically sound & appropriate to the needs of the community
- ___ 10. Plan must include a statement that credits the funding source on the front.

FOR DEPARTMENT USE ONLY

___ REVISION REQUIRED; letter to sponsor _____
(date)

___ PLAN APPROVED _____ by: _____
(date) (signature)

Comments

Minimum Requirements for Grant-Funded Management Plans

Author of Plan: _____ Grant Number: _____

- ___ 1. Statement of Purpose and Scope of plan, to include intent, geographic area included in the plan, and timeframe.
- ___ 2. Current Situation regarding program management and the tree resource. Inventory documentation (or comparable data) must be included in the appendix.
- ___ 3. Program management Goals sufficiently detailed to provide a basis for management activities for the duration of the planning period (typically 5 years).
- ___ 4. Proposed Strategies to accomplish management goals; must address planting, pruning, other maintenance, and removal needs identified through inventory summary and analysis, to include:
 - a. prioritized planting locations (by location, land use or other parameter)
 - b. site assessment for planting locations (where appropriate: physical characteristics & limitations; proposed site modifications; tree placement/siting considerations; species & size considerations)
 - c. prioritized pruning by location & type of pruning (e.g., safety, training, maintenance)
 - d. prioritized inspections & miscellaneous maintenance by type & location, as appropriate (e.g., re-inventory; hazard tree inspections; transplant survival checks; insect & disease monitoring & treatment; fertilizing; soil treatment; root treatment; grass/weed control; cabling/bracing; supplemental watering; removing stakes, ties & wrap; mulching)
 - e. prioritized tree & stump removal (by degree of hazard, species, size, location, land use or similar parameter); tree replacement or site restoration
- ___ 5. Proposed Strategies for administrative activities to support planting, pruning, other maintenance & removals, to include:
 - a. staffing needs (e.g., how many, type of position, contract vs. staff, training needs)
 - b. equipment needs (e.g., what kind, how many, where/how to obtain)
- ___ 6. Implementation schedule of all activities for at least 5 years; must include:
 - a. who is responsible for each activity
 - b. target dates for each activity
 - c. projected costs
 - d. funding sources, as appropriate
- ___ 7. Mechanism for evaluating & updating plan (i.e., who, when & how?)
- ___ 8. Plan must be fluent, functional, technically sound & appropriate to the needs of the community
- ___ 9. Plan must include a statement that credits the funding source on the front.

FOR DEPARTMENT USE ONLY

___ REVISION REQUIRED; letter to sponsor _____
(date)

___ PLAN APPROVED _____ by: _____
(date) (signature)

comments _____

For more information, contact:

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