

2024 - 2026 Urban and Community Forestry Grant - Tree Inventories and Invasive Species Removal

Request for Proposals

Funding provided by the United States Department of Agriculture Forest Service through direction of the Illinois Department of Natural Resources Urban & Community Forestry Program

Grant funding administered by The Morton Arboretum

Proposals Due: November 15, 2024 at 5:00 p.m



Illinois
Department of
**Natural
Resources**



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For more information
please contact Aidden Tapia grants.crti@mortonarb.org

Introduction & Allowable Costs

This request for proposals provides funding assistance to “communities” (public entities e.g., municipalities, park districts, counties, tribal governments, townships, forest preserves, and other units of government) to improve the urban forest. Funding is provided by the Urban and Community Forestry program of the United States Department of Agriculture Forest Service through the Illinois Department of Natural Resources. The Morton Arboretum is the grant administrator.

The total maximum allowable funding amount for any one organization is \$25,000. The minimum allowable funding amount is \$5,000. For all communities, a 1:1 match is required. Match spending is the use of local resources towards the project total and is explained in detail in the [“eligible and allowable match”](#) section of this document.

Assistance is available for any Applicant needing assistance to complete a proposal. Assistance can be provided by contacting Aidden Tapia at grants.crti@mortonarb.org. All requests for assistance must be received by October 11, 2024

Allowable Costs

Projects funded through this proposal must include activities related to improving urban forest health, through tree planting, invasive species removal and tree replacement, or creating/updating a tree inventory or management plan. **In addition, all funded projects must include the development or enhancement of a tree protection ordinance to meet the standard set in this RFP.** Projects may include one or more of the following:

1. Development or enhancement of a tree preservation ordinance without an additional project component; **(REQUIRED)** and/or,
2. An urban forest management plan that is based on a digital and current tree inventory;
3. An inventory of public trees in the community with an accompanying urban forest management plan that addresses some portion of the results;
4. Diverse tree planting on public property
5. Improving urban forest health through invasive species removal in managed or natural areas.

Projects that include items 1-3 in the list above will be prioritized for funding. Applicant communities may complete one, or a combination of the projects listed above by using qualified contractors, ‘in house’ staff, and/or volunteers (led by qualified staff). If using a qualified contractor, the Applicant shall use a competitive bid process to determine the best-qualified contractor. **No work shall start on the project until the Applicant is awarded funding. All work shall be completed within the specified grant time period.**

Funding for this grant program is contingent on a final agreement with the Illinois Department of Natural Resources (pending).

Grant Program Goals

The purpose of Illinois's Urban and Community Forestry program is to assist communities and other units of local government in the development and expansion of local urban and community forestry programs to better prepare Illinois urban forests for the 21st century environment.

Funding from this program is directed by the Illinois Department of Natural Resources to support communities and other units of local government to improve Urban and Community Forest Management, Maintenance and Stewardship, a primary goal of U.S. Forest Service's Urban and Community Forestry Program's Ten Year Plan.

The goal of the 2024 Illinois Urban and Community Forestry Grant Program is to provide local governments the resources to adequately manage their urban forest and improve forest health. This program shall also strive to improve the health and function of the urban forest to support healthy ecosystems and improved quality of life through:

1. Preservation and protection of trees.
2. An improved understanding of what forest composition and structure exists to support improved management and health.
3. Improved management and care of the urban forest, including pest and disease management, for the short and long term.
4. Increased health and growth of the urban forest.

The urban forest in the Chicago region is under threat from invasive species, development, climate change, lack of care – especially in communities with inequities, few or no tree related policies, and environmental impacts as outlined in the [Illinois Forest Action Plan](#).

This project will address goals of the Illinois Forest Action Plan by providing resources for communities to contribute to their urban forest by planting broadly diverse tree species, removing invasive tree species, taking inventory of their urban forest, and/or identifying areas in need of management. This project will also educate decision makers to strengthen policies and professionalism of the urban forest, assist decision makers to manage current and future threats, and will build a foundation of resources (e.g. tree inventories, management plans, and improved policies) that will support urban forest health beyond the end of this program, to improve urban forest care and resilience in Illinois.

As needed, CRTI will work with elected officials, staff, and community members to increase awareness of the importance of a healthy urban forest tree canopy, learn community concerns and values, help them develop a project and project plan, apply for funding, and help them carry out their projects to successful completion.

General Criteria

1. The maximum allowable funding amount per eligible organization is \$25,000. The minimum grant request is \$5,000.
2. For all communities, a 1:1 match is required.
3. The deadline for completed applications is November 15, 2024. Applications must be submitted through the online portal.
4. Organizations eligible for funding shall be units of government other than federal or state. These include:
 - a. Municipalities, townships, and county governments, Tribal governments
 - b. Forest preserves and/or conservation districts
 - c. Park districtsNon-eligible entities include not-for-profits, schools, libraries, and other groups.
5. All applications shall be submitted electronically through the online application portal system through Submittable, which is available here. All applications shall be submitted by November 15, 2024 at 5:00 p.m.
6. **Technical Assistance is available to help you write the grant application and/or develop a proposal. Please contact Aidden Tapia at grants.crti@mortonarb.org no later than October 11, 2024.**
7. It is expected that all applicants will be notified of their award status via email by January 15, 2025.
8. The funding period is approximately 19 months. All work related to this grant, except for the final report, must be completed by **July 1, 2026**. Final reporting and reimbursement must be submitted by **August 1, 2026**.
9. **Ordinance requirement:**
 - a. **Prior to reimbursement of funding, all awarded municipal, township, and county governments must have a council/board approved tree protection/preservation ordinance that meets or exceeds the criteria listed on page 8. An existing tree protection/preservation ordinance/policy is not required to apply.**
 - b. Awarded park districts, conservation districts and forest preserve districts shall submit board-approved policies that stipulate natural resource protection with specific urban and community forest management guidance similar to the criteria listed on page 8. Please contact Aidden Tapia at grants.crti@mortonarb.org for details on this requirement.
 - c. The Morton Arboretum can provide technical assistance to complete this requirement at no cost to the Applicant – whether awarded or not. Awarded Applicants wishing to receive assistance shall indicate on their application if they require assistance with this requirement.
10. All aspects of all categories of this proposal shall meet or exceed the most current American National Standards Institute (ANSI), International Society of Arboriculture (ISA), and/or other nationally recognized specifications and/or standards.
11. No part of the grant funding can be used to pay for land or to purchase equipment (Equipment is any item that costs over \$5,000 that has a useful life of over 1 year. Equipment is considered more permanent and longer lasting than supplies, which are used up quickly).
12. Funding will be awarded based on score, need, and alignment with the grant’s program goals. Tree inventory and urban forest management plan projects will be prioritized for funding. Incomplete applications will not be scored.

13. **Awarded Applicants shall publish in an organization announcement, publication, newsletter or website, recognizing the source of the funding for this project.**

Financial Information

1. The minimum award for this grant is \$5,000 and the maximum is \$25,000.
2. This award requires that 50% (or 1:1) of the project total consist of local match spending, based on reimbursable costs and/or in-kind service. This means for every dollar awarded, there is a dollar required in match. Match is further defined in the “Eligible and Allowable Match” section. For example:

| Requested Funding Amount (50%) | Local Match (50%) | Total Project Cost (100%) |
|-----------------------------------|----------------------|------------------------------|
| \$10,000 | \$10,000 | \$20,000 |

3. Only non-federal and non-state money may be used for the match.
4. **The awarded community is responsible for paying all expenses upfront and submitting for reimbursement at the completion of the project.**
5. The Applicant’s labor cost, using its qualified employees to implement grant activities, can be reimbursed. Volunteer time may be included in the in-kind match but will not be reimbursed with grant funds. Supporting documentation must be included for reimbursement. Approved documentation includes time cards, man-power records or other paperwork.
 - a. An hourly proration for the share of fringe benefit costs paid by the Applicant may be included in the labor cost.
 - b. The skills and/or qualifications of individuals completing the work, including Contractors, shall meet nationally recognized standards and certifications.
 - c. The Applicant will submit records for employee hours, and shall include the base rate of pay for the employee(s).
6. All Contractors and suppliers completing grant projects must meet nationally recognized training and certification requirements, and evidence is required for reimbursement.

Eligible and Allowable Match

Match spending for a grant can be understood as *splitting the bill for your project with the funder*. Your project will cost a specific dollar amount, and a portion of the total will be made up of the Requested Funding Amount, and a portion will be Local Match. For this grant, match can be accomplished in two ways:

Direct Cash Match where you pay for part of the project, such as tree planting, and the grant pays for part of the project, and

In-Kind Match where you put your community’s existing resources to work. This includes using staff time to work on the grant, in-house maintenance on trees after a new inventory or management plan, volunteer efforts, and other activities.

Match may be a direct cash contribution toward the project or an in-kind contribution.

Supporting documentation for the Applicant's match spending must be included with reimbursement. Approved documentation includes: paid invoices, cleared checks, timecards, and/or other paperwork. **Allowable costs for the match shall not start before award execution and cannot extend beyond July 1, 2026.** Eligible match is as follows:

1. Direct cash match for contracted services related to a tree inventory, management planning, tree planting, or invasive woody species removal.
2. Volunteer labor hours which must be counted at or below industry standard rate for the work being completed.
3. Tree pruning, planting, care, maintenance, or removal directly related to activities undertaken with grant funding including:
 - a. Materials or supplies e.g. trees or mulch.
 - b. Tree maintenance, pruning, site preparation, and modifications including tree removal and stump grinding in preparation for tree planting projects*.
 - c. Labor and material costs for tree maintenance based on a new inventory/management plan up to July 1st, 2026*

***Unless associated with site preparation for planting funded by this grant, the maintenance, management, or removal of trees may only be used as a match if identified as a need in a new or updated inventory and/or management plan. Work may only count as match if completed after said inventory and/or management plan has been completed. Any trees to be removed for match must present significant harm/hazard to the community and documentation for such must be provided. For non-planting projects, tree maintenance or removals must be identified as an action to address the management plan's priorities.**

4. Directly related administrative costs, including time spent by staff, officials, volunteers, and others who develop or approve bid documents, contracts, supervise contractors, conduct site visits, determine planting locations, provide legal review of the tree protection ordinance and/or other related tasks.
5. Additional inventory features including software subscriptions that are beyond the scope of the grant.
6. Communities wanting to become a Tree City USA community for the first time may include a request, with your grant proposal, for guidance to complete a 2024 or 2025 Tree City USA application and use the staff time spent on completing a 2024 or 2025 Tree City USA application as part of the community match.

Tree Protection / Preservation Ordinance Requirements

Prior to reimbursement of funding, a tree protection/preservation ordinance shall be approved by a municipality's, county's, or township's governing body (e.g. city council) that shall meet all the requirements in the chart below (items 1-16). Awarded Park Districts and Forest Preserve Districts shall submit board-approved policies that stipulate natural resource protection with specific urban and community forest management guidance similar to these criteria.

| | | |
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| 1. | Purpose | Statement of purpose for the tree protection/preservation ordinance. |
| 2. | Statement of Value | Clear statement of the value and service of the urban forest. The Statement of Value must name trees in your community as "infrastructure." |
| 3. | Definitions | Clear definitions of terms related to trees within your code |
| 4. | Applicability/scope of ordinance | Clear scope of protection, preservation, management, removals, care and pruning, selection, and planting requirements. |
| 5. | Authority / Enforcement | Identified individual and/or specific department responsible for making decisions about trees and enforcement of the ordinance. Includes skill requirements or certifications for individuals/organizations managing trees for the community. |
| 6. | Tree Planting and Maintenance Standards | Clear specifications standards referencing the most current American National Safety Institute, International Society of Arboriculture, National Association of Nurserymen and/or other nationally recognized organizations, or a reference to such in an accepted urban forest management plan for the following: a) tree production (nursery source production standards) b) tree planting c) tree care d) tree pruning e) species restrictions, e.g. under utilities, use of invasive species |
| 7. | Species restrictions | Specifications for planting under or near utilities and prohibition of use of invasive species |
| 8. | Requirements for contracted tree maintenance | Requirements for contracted tree maintenance including skill and insurance requirements |
| 9. | Establishment of a Tree Board <i>(Optional -Mandatory only if selected as a voluntary bonus</i> | Formation and qualifications, responsibilities, and terms for a Tree Board or other advisory group responsible for trees. |

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| | <i>in the application; see page 17)</i> | |
| 10. | Permits | Tree permit requirements and clear penalties and enforcement mechanisms (See item 14: Penalties). |
| 11. | Protection of trees during construction | Tree protection of public trees from construction impacts, and associated fees and penalties (See Section 14: Penalties). |
| 12. | Relocation or replacement | Relocation and/or replacement requirements, fees, and penalties for trees removed, damaged or killed. |
| 13. | Appeals | Procedure to follow for appealing a citation, and civil remedies |
| 14. | Penalties | Clear penalties for failure to comply with the provisions of the ordinance |
| 15. | Species Lists | Restricted/Prohibited/Undesirable species lists and Desirable/Approved species lists or a reference to such lists in tree management plan |
| 16. | Exceptions | Variance, such as decisions that may change due to heavy storms or safety hazards |
| 17. | Severability | Statement of severability (this may exist in a related Code) |

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| It is recommended but not required that the tree protection/preservation ordinance include: | |
| 1. | Tree risk assessment protocol and frequency |
| 2. | Education, outreach, and/or assistance to private property owners on tree planting, management and assessment. |
| 3. | Incentives or regulations for trees located on private property. |

(*The Morton Arboretum provides ordinance revision assistance free of charge to communities. Please contact Aidden Tapia at grants.crti@mortonarb.org.)

Urban Forest Management Plan Requirements

Completion of a new or updated management plan is allowed as a project for this grant. It may accompany a tree inventory or be a proposal on its own – as long as it is based on an inventory that was updated **no more than four years ago**. A management plan’s scope may cover the entire community, or appropriate subsections of a community, such as an Ash Tree Preservation / Replacement plan, risk abatement plan, cyclical pruning plan, community tree planting plan, etc. Urban Forest Management Plans are further described in Appendix A of this document.

Qualified staff and/or a Contractor shall complete a management plan that is based on an up-to-date inventory and shall include the following services.

Eligibility: only applicants whose existing management plans are older than 5 years old and/or not based on an inventory are eligible to receive funding for a management plan.

Management Plan Deliverables:

This plan shall be developed to outline the future standards, specifications, and goals for management of the community’s trees and forests over the next 5 to 7 years. This plan shall include prioritized action items for a 5 to 7 year period to ensure the Applicant can effectively and efficiently manage their trees. This plan shall be delivered in a document format that can be easily edited and updated, e.g. Microsoft Word or another similar program.

Plan components may include some of the following, as needed and appropriate, for each community. At least **one component from item (A) is REQUIRED**.

A. Recommended and prioritized urban forest management action items, based on an inventory. At least one component from this list is required.

- a. A description of the organization’s urban forest canopy cover and composition. (Canopy cover data can be provided to organizations in Will, Lake, Kane, Kendall, Cook, DuPage, and McHenry by the Chicago Region Trees Initiative)
- b. Prioritized planting locations, including replacements and new plantings. A cyclical pruning schedule and map
 - i. Prioritized hazard abatement informed by inventory data
 - ii. A list of preferred species, prohibited species, and species to be planted in limited quantities
 - iii. How the urban forest inventory will be used to inform decisions and how it will be updated.
 - iv. A strategy for improving forest age and species structure.
- c. Short and long-term urban forest goals 2022 – 2029.
 - i. Long-term goals such as:
 1. Urban forest management goals and risk mitigation,
 2. Canopy cover goals
 3. Climate change response

Additionally, your plan may contain the following. All of these components are recommended to be contained in your plan:

B. Short-term goals (e.g. annual goals) such as:

- a. Tree pruning schedules

- b. A plan for replacement and removals
- c. A plan for hazard abatement
- d. Mitigation of pests and diseases
- e. Benchmarks to ensure progress towards long-term goals
- C. Specifications for planting, pruning, removals, and protection**
 - a. Specifications from ANSI, ISA, and/or other nationally recognized standards for tree care (pruning, planting, etc.)
 - b. Establishing a pruning and maintenance cycle so that care is regularly scheduled.
 - c. Protection and standards for trees in construction zones
- D. Required and recommended certifications, qualifications, and training for staff, contracted labor, and consulting.**
 - a. Formulating these requirements so as to mitigate and manage risk, including climate impacts.
- E. Material equipment, and budget considerations**
 - a. Short- and long-term budget projections and needs.
 - b. A plan for acquisition and replacement of equipment and resources.
- F. A program for education and outreach of residents**
 - a. Engaging private landowners and managers within the organization's boundaries.
 - b. Developing a marketing strategy for engaging residents so they are familiar with urban forestry in their community.

Training and education

If a Contractor is used, before the project starts, the Contractor shall meet with the community to outline project goals and plans specific to the community.

The Contractor shall provide a minimum of 3 hours, as needed, of outreach and education to ensure that the community is able to use the management plan effectively.

The Community shall provide proof that the management plan was completed and submit a copy of the document to The Morton Arboretum (the Arboretum will provide a copy to IDNR for your community file).

Tree Inventory Requirements

A tree inventory is a database containing specific, standardized information recorded for individual trees in an identified area of the community. The inventory must inform management decisions and be regularly updated. The inventory may contain information about the immediate area surrounding a tree, as necessary for tree management and planning. Sample size must be statistically appropriate to provide accurate conclusions for management recommendations.

Eligibility: Only applicants whose inventory has not been updated in the last 3 years are eligible for funding for an inventory. An Urban Forest Management Plan that addresses some part of the inventory results must accompany the inventory. Inventories must cover between 15%-100% of the community's public tree population.

A contractor and/or qualified staff and/or volunteers may be used to complete a new or expand an existing inventory. Staff, contractors, or volunteers shall have the requisite professional experience to complete the work. Verification of this training and skills is required. All work completed through this grant shall meet the nationally recognized requirements and standards. All data collected must be submitted as one compiled inventory (new and old data) to receive reimbursement. Additional services, beyond the deliverables listed below, are not a reimbursable cost but may be used as match, e.g. software subscription fees that run concurrent with the grant, etc.

Tree Inventory Deliverables

The inventory must include the following data fields for each tree included in the inventory:

- a. GPS Coordinates
- b. Street Address and Relative Location
- c. Land use (i.e., residential, business zone, natural area, park, etc.)
- d. Growing space (i.e., parkway, park, etc.)
- e. Species
- f. DBH
- g. Single or multi-stem designation
- h. Condition rating (such as a 5 point scale or other consistent system)
- i. Risk assessment (such as TRAQ or other consistent system) with a 360 degree walk around.
- j. Defects (roots, wounds, rot, deadwood, etc.)
- k. Maintenance Recommendation
- l. General comments or notes
- m. Plantable spaces (optional)

At a minimum, the inventory shall be delivered as a digital spreadsheet, such as Excel. A Tree Inventory Maintenance Agreement must be signed (see application for details)

Training and Education

If a contractor is used, before the project starts, the contractor shall meet with the community to outline project goals and plans specific to the community. Immediately after the inventory is complete, the contractor shall provide a minimum of 3 hours of technical assistance to ensure that the community understands how to use the inventory effectively. Following the initial 3 hours, the contractor shall provide an additional minimum of 3 hours of assistance, as needed.

The Applicant shall provide a dated copy of inventory and Urban Forest Management Plan to the IDNR before reimbursement of grant expenditures. The Morton Arboretum requests a copy of the completed inventory to facilitate its development of outreach materials that assist communities in managing their trees. (Please contact Colette Copic at ccopic@mortonarb.org for more information about how inventory data is used by the Arboretum or to waive Morton Arboretum's request.)

Tree Planting Requirements

Tree Planting, on public property within the Applicant's boundaries, may be completed as a project. Trees planted must meet minimum quality metrics, and be planted as described below and in Appendix C. A Tree Planting List and Maintenance Agreement is required for all tree planting projects.

Requirements:

1. Trees planted shall be between 1" and 2.5" caliper measured at 6" above the root flare.
2. Tree planting projects must be planned and executed to promote the long-term survival of the trees.
3. Tree species selected must be a diverse selection appropriate to your community. A statement of diversity explaining how the selected species will improve tree diversity in your community is required as part of the tree planting plan.
4. Shrubs (species that do not grow beyond 10 feet in height) are not eligible for reimbursement.
5. An International Society of Arboriculture certified arborist must approve the accompanying tree planting plan for all trees funded through this proposal or with match. (See below.)
6. The Applicant must attest to properly caring for trees purchased through this program by including a maintenance plan. The plan must identify who and frequency for watering and mulching trees over the **required three years post-planting period**. (A copy of the proposed maintenance plan must accompany the application.)
7. Trees must be planted according to the ANSI, ISA, and/or other nationally recognized planting specifications.
8. All trees purchased through this proposal shall meet the ANSI American Standard for Nursery Stock (ANSI Z60).
9. All trees must have the **burlap, rope, and wire basket removed (or be a low-profile basket) at time of planting**.
10. All trees shall receive a 2 to 3-inch layer of hardwood mulch over the root ball and not touch the bark of the tree.
11. Tree planting shall take place in the spring or fall of the duration of the grant period.
12. Tree species to be planted must be specified in the grant application. Species selected and site conditions must be identified. Grant participants are encouraged to plant native species.
13. Trees must be purchased from Illinois Nursery Inspection Program Certified Nurseries.
14. A Tree Maintenance Agreement and Partner Commitment Agreement are required and are available within the application portal.
15. **Newly planted trees must be digitally inventoried, or recorded, at planting. Communities may use a Microsoft Excel spreadsheet, or their own inventory software of choice.**
Information that must be collected includes:
 - a. A photo of each planted tree
 - b. GPS coordinates
 - c. Tree species
 - d. Tree size (DBH)
 - e. Tree condition

The Arboretum may periodically conduct site visits to ensure the accuracy of this digital inventory.

Invasive Species Removal Requirements

Invasive species removal, on public property within the Applicant's boundaries, may be completed as a project. Tree replacement is required for all invasive species removal projects. The removal process must meet minimum quality standards as described below. **Tree replacement must meet the tree planting standards described in Appendix C.** A Tree Planting List and Maintenance Agreement is required for all projects.

1. The only woody invasive species eligible for removal with grant funding are:
 - a. Buckthorn (glossy and common buckthorn): *Rhamnus cathartica*, *Fraxinus alnus*
 - b. Honeysuckle: *Lonicera maackii*, *Lonicera tatarica*, *Lonicera morrow*
 - c. Callery pear (Bradford pear): *Pyrus calleryana*, other *Pyrus* varieties
2. Invasive species removed from a managed area (e.g. street trees) that are not dead or high risk to public safety must be replaced at a rate of at least 2:1 (that is, you must plant more stems than you remove). **Replacement trees must be planted in accordance with the tree planting standard on page 21.**
3. Invasive species removed from a natural area does not require 2:1 replacement, but must be coupled with tree planting activities that ensure long-term canopy percentage retention or growth.
4. A plan for proposed maintenance activities, number of trees to be removed, and cost estimates for the work must be submitted with application.
5. Proof of completion for invasive removal, which may include a site inspection, will be required.

Work may be completed by qualified in-house staff or by a qualified contractor. Proof of qualifications to complete tree work, such as arborist certification, is required upon selecting a contractor.

Proposal Scoring

Your proposal will be evaluated and ranked by a scoring committee. The criteria listed below will be used to score each proposal. In the event of a tie, the following additional factors will be used to score proposals: Applicant need and leveraged benefits; Orderliness of the overall application.

| Criteria: | Highest Possible Score |
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| <p>Project Overview-</p> <ul style="list-style-type: none"> ● The Applicant completes the questions correctly and thoughtfully. ● The Applicant provides a detailed summary of the project. ● The Applicant identifies who will be involved in the project and where it will occur. | 10 |
| <p>Purpose and Need-</p> <ul style="list-style-type: none"> ● The Applicant provides a short narrative on the long term impact for this project and describes how this project will contribute to the community's canopy and/or contribute to a vibrant and healthy urban forest over the long term. ● The applicant understands their current programmatic capacity to carry out the project. ● The applicant clearly describes the community's unique challenges (for example, tree canopy loss, staff capacity and training) and identifies reasons why this grant is needed to address these specific challenges. | 10 |
| <p>Scope of Work-</p> <ul style="list-style-type: none"> ● The Applicant indicates a clear scope of the project that includes key numeric deliverables (e.g., number of trees planted, number of management plan sections, etc.) ● The applicant shows capability and clear plans for carrying out the project and maintaining long-term project benefits. ● The applicant and/or partners show adequate expertise to address technical elements of the project or will seek out contractors with adequate expertise. If applicable, the Applicant describes the role, training, and qualifications of any partners and/or potential volunteers. ● The project is designed to be resilient to the effects of climate change and other ecosystem stressors. ● The Tree Planting List contains a diverse group of species that will do well in this region (tree planting projects only). ● The Applicant indicates how trees will be protected and maintained (tree planting projects only). | 15 |

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| <p>Leveraged Benefits-</p> <ul style="list-style-type: none"> ● The Applicant shows clear intention that the project will benefit their forestry program or community for the long term. ● The Applicant provides details on how the project will be maintained after the grant period. ● The Applicant describes how they will engage with the public to ensure the project benefits a wide audience. | <p>20</p> |
| <p>Tree Protection Ordinance Creation or Update-</p> <ul style="list-style-type: none"> ● The Applicant shows clear understanding of their current tree protection ordinance. ● The Applicant provides details who will be responsible for coordinating the tree protection ordinance update (if applicable). | <p>10</p> |
| <p>Budget Details</p> <ul style="list-style-type: none"> ● The budget indicated in this table is balanced and the match is present and realistic. ● The Applicant provides a clear explanation on how they arrived at project cost (e.g., quotes, previous projects). ● The Applicant describes all local match, both in-kind and direct, including contracted services, personnel salary and fringe, material purchases, volunteer efforts, community organization support and/or community contributions. ● The Applicant details any “other” expenses listed in the budget matrix (if applicable). | <p>20</p> |
| <p>Timeline</p> <ul style="list-style-type: none"> ● The Applicant’s timeline is clear and realistic. ● Major milestones and required approvals are detailed. ● Match activity timing is considered and clear. ● The Ordinance Update is accounted for and appropriately timed (if applicable). ● Tree and Maintenance is appropriately timed. | <p>15</p> |
| <p>Total Possible Points</p> | <p>100</p> |

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| <p>Bonus Points</p> | <p>Highest Possible Score</p> |
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| Bonus: if an Applicant encourages a peer community to apply and both apply, both will receive extra points. (As identified in both applications. Be sure to state this in your application.) | 2 |
| Bonus: if an Applicant commits to become a Tree City USA if not presently one or commits to receiving a Tree City USA Growth Award if presently a Tree City USA community (requires a signed letter from Mayor to be submitted with the application). | 2 |
| Bonus: if Applicant adds a commitment to form a tree board or other advisory group as part of this grants required deliverables. See Appendix B for a description of applicable options to fulfill this requirement (requires a signed letter from the Mayor or chief executive to be submitted with the application). | 2 |
| Total Possible Bonus Points | 6 |

Award and Execution of Agreement

1. All completed proposals shall be submitted electronically, including all attachments, through the Morton Arboretum grant application portal system, Submittable, November 15, 2024. Any Applicant requiring assistance either to complete the application or to submit it electronically shall contact Aidden Tapia at grants.crti@mortonarb.org no later than October 11, 2024.
2. Each proposal will be scored according to stated criteria by independent grant reviewers. The highest scoring proposals will be recommended for funding. Partial funding is possible.
3. Applicants will be notified by January 15, 2025 of funding status.
4. The Applicant must notify any applicable contractor(s) to receive an estimate of cost. **THE AWARDED COMMUNITY IS RESPONSIBLE FOR PAYING ALL EXPENSES UPFRONT AND SUBMITTING FOR REIMBURSEMENT AT THE COMPLETION OF THE PROJECT.**
5. Awarded Applicants will be provided an Award Agreement via email. This agreement must be executed by the Applicant’s Executive Authority and returned via email **no later than 15 business days from receipt. Failure to return a signed agreement by the due date may cause the funding award to be revoked.**
6. Once executed by The Morton Arboretum, the Agreement will be sent via email to the Applicant. Once received, the Applicant may begin work as outlined in the approved proposal.

NO WORK SHALL BE STARTED PRIOR TO THE APPROVAL AND EXECUTION OF THE AGREEMENT, INCLUDING MATCH COSTS.
7. Applicants are required to report quarterly on project progress. Emailed reminders with reporting templates will be supplied quarterly. Failure to comply with this requirement may result in cancellation of the current grant, loss of all funding, and potential for disqualification from future grants.

8. Applicants will be required to submit a final report with their reimbursement report which will include a budget form and match documentation worksheets.
9. All work related to this grant, except for the final report, must be completed by July 1, 2026.
10. **Final report and reimbursement materials must be received by August 1, 2026.**

Payment

1. The Applicant is responsible for all expenses and will receive reimbursement at the end of the grant period.
2. The Applicant can expect payment within 30 days after The Morton Arboretum has received and approved the fully completed reimbursement report containing valid invoices and valid proof of payments.
3. The Applicant shall review the reimbursement materials and all reporting requirements to ensure that all materials are ready for reimbursement by the grant deadline – including all payments and proof of payment.
4. Only one reimbursement payment will be made to the Applicant upon completion of all phases of the grant project(s). Once payment is made the grant project is considered complete.

Appendix A: Urban Forest Management Plan Description

Intent: Developing, using, and periodically updating a management plan demonstrates a community's commitment to the comprehensive management of its community tree and forest resources.

Definition:

- a) A detailed document or set of documents that identify and prioritize action items based on professionally-based, relevant inventories and/or resource assessments, that outline the future management of the community's trees and forests. At a minimum, the plan must address public trees. The plan must be actively used by the community to guide management decisions and/or resource allocation and updated as needed to incorporate new information.
- b) A plan for trees in a portion of the community, as long as it includes a written explanation of why there is a focus on that area (i.e., the importance of that space to the community) and action items regarding the establishment, protection, conservation, and maintenance of public trees.
- c) Management plans for forested tracts may be counted if they meet the above and the forest meets all the following criteria:
 - i. located in or near a town/municipal/community population center, business district, or residential area,
 - ii. primarily managed for the benefit of the residents and to keep the land forested, and iii. owned by the local government (i.e., in public ownership).

Examples: (Examples include but are not limited to items on this list. Anything counted must meet the definition above.)

- An Urban Forest Master Plan, based on satellite imagery/GIS or other inventories and assessments, that sets goals for tree canopy cover, recommends areas for reforestation, recommends areas for preservation, promotes community education and outreach efforts, recommends tree maintenance policies for town/city/county properties and provides action

items for the management of trees and forests (such as establishment, protection, and maintenance).

- A Public Tree Planting and Maintenance Plan based on an inventory of trees and open spaces in street rights-of-way and parklands. These plans include information such as a prioritized list of tree pruning and removals, a prioritized list of replacements and new tree plantings, a recommended yearly budget, and a recommended list of tree species for replanting.
- A community's comprehensive Land Use Plan that incorporates specific management recommendations for the community's trees and forest resources.
- A Tree Risk Reduction and Replanting Plan based on an inventory of community trees.
- A tree inventory with recommended action items for managing public trees and forests (i.e., establishment, conservation, protection, and maintenance) that is actively being used.
- Other plans, such as those below, as long as they address the required elements in the definition: Urban Canopy Master Plan; Open Space Plan; Long-Term Tree Planting Plan that addresses planting and care; Pest, Storm, or Disaster Preparedness Plan that addresses trees; Town Forest Management Plan; Urban Forest Management Plan for a downtown business district; Community Wildfire Protection Plan; Community Development Plan that has an urban forest management component

Appendix B: Tree Board / Advisory Group Description

Intent: Many local UCF programs began through the efforts of local community groups, and these groups often serve as a catalyst to encourage active local urban forest resource management for the long term. This performance element aims to ensure that community residents and program stakeholders are informed, educated, and engaged in the development and implementation of a sound community forestry program at the local level.

Definition:

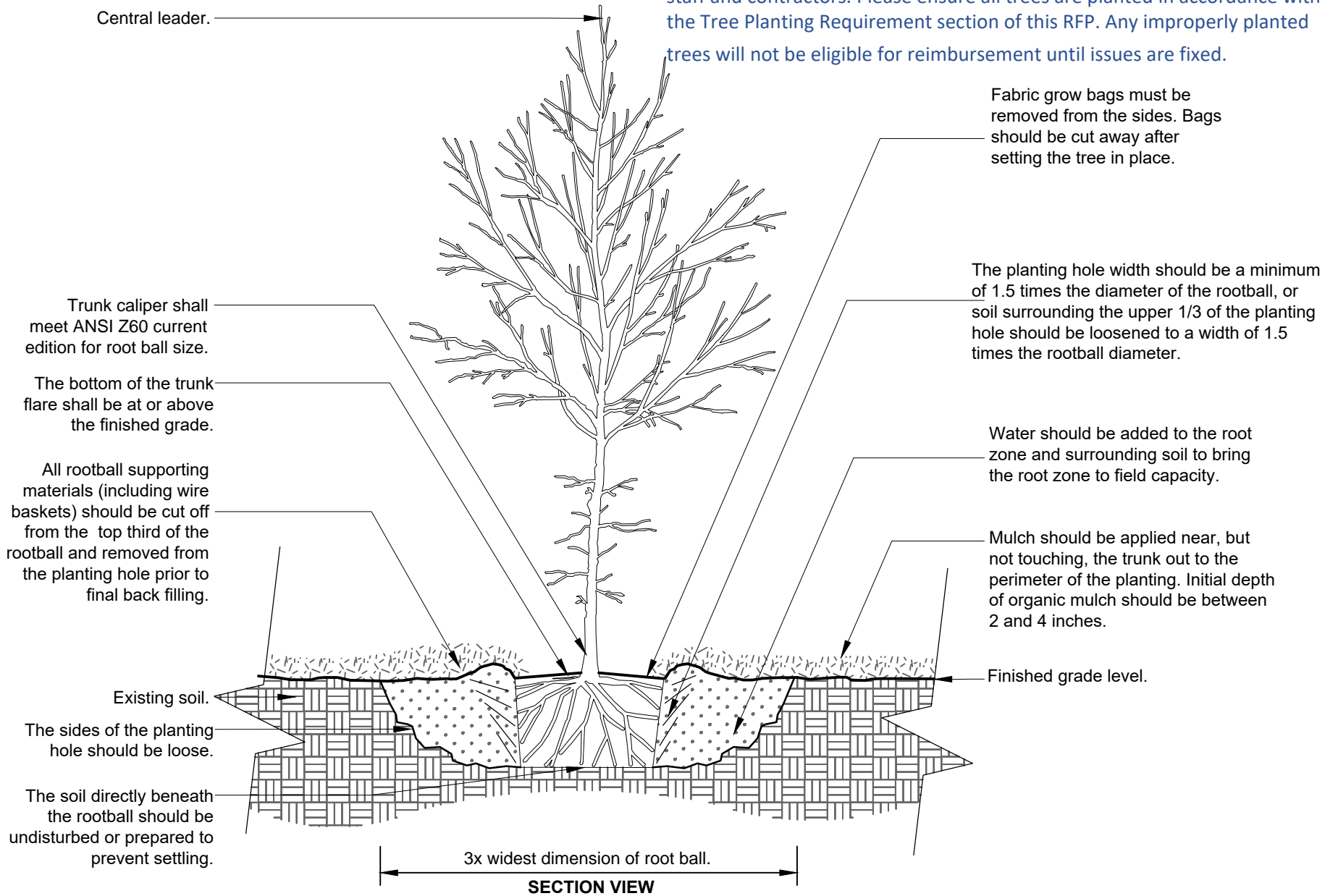
- a) **Advisory Groups:** Organizations that are formalized or chartered (i.e., organizations established by the local government) to advise (during the reporting year) on the establishment, conservation, protection, and maintenance of urban and community trees and forests.
- b) **Advocacy Groups:** Non-governmental organizations active in the community that advocate or act for the establishment, conservation, protection, and maintenance of urban and community trees and forests during the year.

Examples: (Examples include but are not limited to items on this list. Anything counted must meet the definition above.):

- A board of community members appointed by local elected officials to advise policymakers on tree ordinances, policies, and management.
- A volunteer group such as "City ReLeaf" that is active in advocating for tree planting, preservation, and management in communities.
- A local Conservation or Environmental Commission that has an urban forestry sub-group or has urban and community forestry included in the organization's action plan or charter and organizes at least one tree- or urban forestry-related activity during the year.
- A non-profit organization that advocates for community trees in multiple communities, as long as citizens in each community are engaged in the organization's urban and community forestry advocacy or activities during the reporting year.

Appendix C: Example Tree Planting Standard

This example tree planting standard may be used when you are working with staff and contractors. Please ensure all trees are planted in accordance with the Tree Planting Requirement section of this RFP. Any improperly planted trees will not be eligible for reimbursement until issues are fixed.



P-X

TREE w/ BERM (EXISTING SOIL NOT MODIFIED)

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