

# Tree Inventory and Management Plan Grant for Communities over 75,000 Residents

## Request for Proposals

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

Grant funding administered by The Morton Arboretum, an equal opportunity provider

**Proposals Due: March 1, 2024**

The Morton Arboretum  
4100 IL Route 53  
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Contact [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org)



Illinois  
Department of  
**Natural  
Resources**



The  
Morton  
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THE  
CHAMPION  
of TREES

## Table of Contents

|   |    |
|---|----|
| Table of Contents                                     | 2  |
| Introduction & Allowable Projects                     | 3  |
| Applicant Eligibility                                 | 3  |
| Grant Program Goals                                   | 4  |
| General Criteria                                      | 4  |
| Financial Information                                 | 5  |
| Required Grant Deliverables                           | 6  |
| Tree Inventory Requirements                           | 6  |
| Urban Forest Management Plan Requirements             | 7  |
| Management Plan Implementation in Disadvantaged Areas | 10 |
| Tree Planting Requirements                            | 10 |
| Tree and Forest Health Maintenance Requirements       | 11 |
| Proposal Scoring                                      | 12 |
| Award and Execution of Agreement                      | 14 |
| Payment   | 16 |
| Appendix A: Urban Forest Management Plan Description  | 17 |
| Appendix B: Tree Planting Methods                     | 18 |

**For more information, please visit:**

**<https://chicagorti.org/grants>**

**Or please contact [grants.crti@mortonarb.org](mailto:grants.crti@mortonarb.org)**

## Introduction & Allowable Projects

These grant funds are from the USDA Forest Service Urban and Community Forestry's allocation of the Inflation Reduction Act, and are to be made available through competitive sub-awards to nature-deprived populations and disadvantaged communities. This request for proposals provides funding assistance to large disadvantaged municipalities (>75,000 residents) and their associated park districts to conduct inventories of public trees within the applicant's boundaries, and create Urban and Community Forest Management Plans based on the inventory that includes one or more components of focus on maintaining and/or improving tree canopy in disadvantaged areas of the community. Projects must also contain an accompanying implementation action based on the new inventory and plan.

A total of \$5,616,709 in funding is available. The total maximum allowable funding amount for any application is \$3,000,000.

100 percent of work must take place in, or benefit, disadvantaged communities and, therefore, match is waived. This match waiver must be passed on to any sub-awardees as described in the [General Criteria](#) section.

**All funded projects must be completed by September 1, 2027.**

**Assistance is available for any Applicant needing assistance to complete a proposal. Assistance can be provided by contacting [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org). All requests for assistance must be received by February 2, 2024.**

### Applicant Eligibility

Municipalities with over 75,000 residents and their associated park districts that are considered disadvantaged in the Illinois [Municipal IRA Screening Tool \(MIRA-Tool\)](#) are eligible to apply.

While these projects may benefit the whole community, they must focus their engagement, outcomes, and action on disadvantaged areas. **All projects must be accompanied by a request for funding for on-the-ground implementation work in disadvantaged areas of the community, based on the new management plan.**

Municipalities and park districts may use the [Climate and Economic Justice Screening Tool \(CEJST\)](#), the [EPA Environmental Justice Screening Tool \(EJScreen\)](#)\* and HUD Opportunity Zones to determine areas that are considered disadvantaged. A map of disadvantaged areas that combines all three of these tools can be [found here](#).

\*Census tracts that are in the environmental justice index percentile range of 80-100 on the EJScreen are considered disadvantaged.

Municipalities and their associated park districts are encouraged to both apply for funding using the same contractor(s) to reduce costs of inventory work and gain a more complete picture of the publicly owned tree canopy in the area. Each government entity must submit an independent application.

**All communities must specify the disadvantaged census tracts in which work will be performed in their application.**

## Grant Program Goals

The purpose of Illinois' 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 21<sup>st</sup> century environment.

Funding from this proposal is directed by the Illinois Department of Natural Resources to support disadvantaged communities and other units of local government to improve urban and community forest management, maintenance and stewardship in disadvantaged areas of communities, a primary goal of the Inflation Reduction Act and the U.S. Forest Service's Urban and Community Forestry Program's Ten Year Plan.

The purpose of this grant program is to provide disadvantaged local governments the opportunity to develop up to date tree inventories and management plans which include components to improve canopy in disadvantaged areas.

By updating tree inventories paired with urban forest management plans, and implementing this work to benefit disadvantaged areas of the community, this program strives to improve the health and function of the urban forest, to support healthy ecosystems and improved quality of life through:

1. Improved canopy cover in disadvantaged areas of the community.
2. Improved understanding of what forest composition and structure exists to support improved management and health.
3. Improved management and care of the urban forest for the short and long term.
4. Increased health and growth of the urban forest.

## General Criteria

1. The maximum allowable funding amount for an eligible application is \$3,000,000. All municipalities and park districts must submit independent applications.
2. Only municipalities with over 75,000 residents that are considered to be disadvantaged are eligible for program funding. See [Applicant Eligibility](#) for more information.
3. Projects with the largest positive impact on disadvantaged communities will be prioritized for funding.
4. Park Districts associated with a disadvantaged municipality may be eligible for funding, and are subject to review.
5. The deadline for receipt of applications is March 1<sup>st</sup>, 2024 at 5pm.
6. All applications shall be submitted electronically to [grants.crti@mortonarb.org](mailto:grants.crti@mortonarb.org).
7. Technical Assistance is available to help you develop a proposal. Please contact [grants.crti@mortonarb.org](mailto:grants.crti@mortonarb.org) no later than February 2<sup>nd</sup>, 2024.
8. The funding period is approximately 3.5 years. All work related to this grant, including completion of the urban forest management plan, except for the final report, must be completed by September 1<sup>st</sup>, 2027. Final reporting and reimbursement must be submitted, by October 1<sup>st</sup> 2027.
9. Applicants that include contributing partners must clearly describe the relationship between the applicant and the "partner(s)." Partner organizations from disadvantaged communities must be full partners in the project. A letter of commitment is required to be submitted by each contributing partner.
10. Applicants that pass-through funding (sub-award) for work in disadvantaged communities must pass the match waiver to subawardees performing the work.

11. All aspects of all categories of this proposal shall meet or exceed the most current American National Safety Institute (ANSI) or Best Management Practices from the International Society of Arboriculture (ISA).
12. No part of the grant funding can be used to pay for land or to purchase equipment.
13. Funding will be awarded based on score, need, and fulfillment of the grant's program goals.
14. Incomplete applications will not be scored.
15. **Awarded Applicants shall publish in an organization announcement, publication, newsletter or website, recognizing the source of the funding for this project (USDA Forest Service and Inflation Reduction Act through direction of the Illinois Department of Natural Resources).**

## Financial Information

1. The maximum award for this grant is \$3,000,000.
2. Only proposals focused on disadvantaged communities will be considered. **An organization that is unsure on if you are eligible can reach out to [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org) to clarify if your community is eligible.**
3. This grant is reimbursement based, meaning the awarded communities are responsible for all up-front costs which will be reimbursed upon completion of approved milestones and during acceptable reimbursement periods. See the [Payment](#) section on page 16 of this RFP for more information.
4. These inventories are unique because of their size, skill required to do them and time constraints for completion. We anticipate a professional company will be contracted to do this work with supporting services provided by qualified staff. The labor cost of the Applicant using its qualified employees to implement grant activities can be reimbursed. 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. Awardees will submit records for employee hours to be reimbursed, and shall include the base rate of pay for the employee(s).
5. All contractors and suppliers completing grant projects must meet nationally recognized training and certification requirements, and evidence is required for reimbursement.
6. When using a qualified contractor, the Applicant must collect at least three quotes to determine the best-qualified contractor for any contract over \$10,000 and follow any applicable State and Federal laws, and the community's purchasing regulations and policies.
7. No part of the grant funding can be used to pay for land or to purchase equipment (Equipment is any item that costs \$5,000 or more. Equipment is considered more permanent and longer lasting than supplies, which are used up quickly).

## Required Grant Deliverables

### Tree Inventory Requirements

A tree inventory is a database containing specific, standardized information recorded for individual trees in an identified area of the community. **Inventories must result in a full digital inventory that includes 100% of the community's public tree population.** Partial inventory projects are acceptable so long as the project adds to existing information and results in a full, communitywide, up to date (less than 4 years old) tree inventory. Park districts may inventory 100% of trees in their managed areas (i.e. they are not required to inventory 100% of natural areas, but sample inventory of these areas is encouraged). **An urban forest management plan that addresses the inventory results must accompany the inventory.** See [urban forest management plan requirements](#) section for more information.

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. Communities that do not have a full digital tree inventory or have inventory data that is older than 4 years will be given priority.

A contractor and/or qualified staff must be used to complete a new or expand an existing inventory. Contractors and in-house support staff shall have the requisite professional experience to complete the work. Verification of this training and skills is required. **It is anticipated that a contractor will be used for these inventories because of the scale of work associated.** If your community wishes to complete the inventory using staff, a clear outline and explanation of capacity and expertise to complete the inventory project within the parameters of the grant, will be required. The goal of this project funding is for the community to have a professional tree inventory that includes GPS location, species, size, condition, etc. within the four-year period of this funding. 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 final reimbursement. Additional services, beyond the deliverables listed below, are not a reimbursable cost.

Additional inventory features including software subscriptions that run concurrent to the grant term are eligible for funding. All costs for subscriptions must be paid by the end of the work period. Grant funds cannot be retained past the grant period for future subscription payments.

### Tree Inventory Deliverables

1. Individual Tree Data Fields
  - 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., single family home, parkway, park, etc.)
  - e. Species
  - f. DBH (Diameter at Breast (standard) Height)
  - g. Single or multi-stem designation
  - h. Condition rating including defects (roots, wounds, rot, deadwood, etc.)
  - i. Risk assessment or categorization including recommendations for trees that need additional assessment
  - j. Maintenance recommendations
  - k. General comments or notes
  - l. Planting spaces (**optional**, but highly encouraged).
2. At a minimum, the inventory shall be delivered as a digital spreadsheet, such as Excel.
3. Awardees must submit a copy of their request for proposals used to identify a contractor before it is publicly posted to ensure the above requirements are contained therein. Awardees must submit proof

of capacity of the contractor to complete the inventory within the time allotted, including staff capacity committed to the project, and the timeline for completion.

4. Training and education
  - a. Before the project starts, the contractor shall meet with the community to outline project goals and plans specific to the community.
  - b. Immediately after the inventory is complete, the contractor shall provide a minimum of 8 hours of technical assistance to ensure that the community understands how to use the inventory effectively.
  - c. Following the initial 8 hours, the contractor shall provide an additional minimum of 8 hours of assistance, as needed.
5. The Applicant shall provide a dated copy of inventory summary and urban forest management plan to the IDNR before final 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 [grants.crti@mortonarb.org](mailto:grants.crti@mortonarb.org) for more information about how inventory data is used by the Arboretum or to waive Morton Arboretum's request.)
6. A Tree Inventory Maintenance Agreement must be signed (see application for details).

### Urban Forest Management Plan Requirements

Completion of a new or updated community-wide management plan **based on the inventory** is a requirement of this grant. A management plan's scope shall cover the entire community, and have established priority goals to improve canopy in disadvantaged areas of the community, and may also include 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.

**Community-wide management plans must include significant and thoroughly-explained and documented community engagement (seeking input to influence decisions). The plan must include strategies for improving service to disadvantaged communities.**

**Applications must include funding requests for implementation of one or more management strategies on-the-ground, solely in disadvantaged communities/census tracts as described in the [Management Plan Implementation in Disadvantaged Areas](#) section.**

**Qualified staff and/or a Contractor shall complete an urban forest management plan that is based on an up-to-date inventory and shall include the following services. Communities that do not have an urban forest management plan that is based on a current, full inventory will be given priority.**

#### **Urban Forest Management Plan Deliverables:**

The management 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 and 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 made available to the Applicant in a document format that can be easily edited and updated, e.g. Microsoft Word or another similar program.

## Urban Forest Management Plan Requirements

Plan components shall include establishing one or more priority goals to improve canopy in disadvantaged areas of the community and may include some of the following, as needed and appropriate, for each community. **At least one component from section (a) is REQUIRED. Other components from sections (b) through (f) are highly recommended to be included as additional sections in your plan.**

- a. **Recommended and prioritized urban forest management action items, based on an inventory. At least one component from this list is required.**
  - i. **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)**
  - ii. **Prioritized planting locations, including replacements and new plantings.**
  - iii. **A cyclical pruning schedule and map**
  - iv. **Prioritized hazard abatement informed by inventory data**
  - v. **A list of preferred species, prohibited species, and species to be planted in limited quantities**
  - vi. **How the urban forest inventory will be used to inform decisions and how it will be updated.**
  - vii. **A strategy for improving forest age and species structure**
- b. **Short and long-term urban forest goals 2024 – 2031.**
  - i. **Long-term goals such as:**
    1. **Urban forest management goals and risk mitigation**
    2. **Canopy cover goals**
    3. **Climate change response**
  - ii. **Short-term goals (e.g. annual goals) such as:**
    1. **Tree pruning schedules**
    2. **A plan for replacement and removals**
    3. **A plan for hazard abatement**
    4. **Mitigation of pests and diseases**
    5. **Benchmarks to ensure progress towards long-term goals**
- c. **Specifications for planting, pruning, removals, and protection**
  - i. **Specifications from ANSI, ISA, and/or other nationally recognized standards for tree care (pruning, planting, etc.)**
  - ii. **Establishing a pruning and maintenance cycle so that care is regularly scheduled**
  - iii. **Protection and standards for trees in construction zone.**
- d. **Required and recommended certifications, qualifications, and training for staff, contracted labor, and consulting**
  - i. **Formulating these requirements so as to mitigate and manage risk, including climate impacts**



- e. Material equipment, and budget considerations
  - i. Short- and long-term budget projections and needs
  - ii. A plan for acquisition and replacement of equipment and resources
- f. A program for education and outreach of residents
  - i. Engaging private landowners and managers within the organization's boundaries
  - ii. Developing a marketing strategy for engaging residents so they are familiar with urban forestry in their community

Awardees must submit a copy of their request for proposals used to identify a contractor before it is publicly posted to ensure the above requirements are contained therein. Awardees must submit proof of capacity of the contractor to complete the plan within the time allotted, including staff capacity committed to the project, and the timeline for completion.

### **Training and education**

- a. Before the project starts, the contractor shall meet with the community to outline project goals, plans specific to the community, and timeline for completion, including milestones (e.g. 25% of the community completed in first six months, 50% completed in 12 months, 75% completed in 18 months, 100% completed in year two, etc.)
- b. The contractor shall provide a minimum of 8 hours, as needed, of outreach and education (that is separate from required inventory outreach) to ensure that the community is able to use the management plan effectively.

**The Applicant shall provide proof that the urban forest 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).**

## Management Plan Implementation Action in Disadvantaged Areas

**All projects funded by this grant must include funds for at least one implementation action of the management plan to increase tree canopy and/or forest health in disadvantaged communities.**

Municipalities and park districts may use the [Climate and Economic Justice Screening Tool \(CEJST\)](#), the [EPA Environmental Justice Screening Tool \(EJScreen\)](#)\*, or HUD Opportunity Zones to determine areas that are considered disadvantaged. A map of disadvantaged areas that combines these tools can be [found here](#). These on-the-ground projects must implement part of the management plan and occur solely in disadvantaged areas of the community. Hiring new or existing staff to carry out educational work in disadvantaged communities is an acceptable implementation action if the management plan identifies this as a priority.

## Tree Planting Requirements

Tree Planting, on public properties located within disadvantaged areas determined by the approved tools (See [Grant Program Goals](#)) and within the Applicant's boundaries, may be completed as an implementation project. Trees planted must meet minimum quality metrics, and be planted as described below. These projects must include specific consideration for increasing tree species diversity. A commitment to care for newly planted trees is required as described below. Projects that foster individuals, groups, and organizations in the communities served to become engaged participants in planting are encouraged. A Tree Planting List and Maintenance Agreement (located in the grant application) is required for all tree planting projects. The Tree Planting List may change based on information from the new inventory and management plan upon the approval of the Morton Arboretum grant coordinator.

1. Trees must be planted on public property.
2. Trees planted shall be between 1" and 2.5" caliper measured at 6" above the root flare.
3. Tree planting projects must be planned and executed to promote the long-term survival of the trees.
4. Tree species selected must be a diverse selection appropriate to your community.
5. Shrubs (species that do not grow beyond 10 feet in height) are not eligible for reimbursement.
6. Tree species to be planted should be specified in the grant application. Species selected and site conditions must be identified. Grant participants are encouraged to plant nativespecies. The planting tree list and plan may be subject to change based on new information you receive during the grant period (e.g. an updated inventory indicates a need for different species, etc.). Any changes from the original proposal must be approved by the Morton Arboretum prior to implementation.
7. Tree species that have invasive qualities shall not be planted under this program. Prohibited species includes:
  - a. Callery pear (Bradford pear) or other exotic pear species - *Pyrus spp.*
  - b. Tree-of-heaven - *Ailanthus altissima*
  - c. Autumn olive - *Elaeagnus umbellate*
  - d. Mimosa – *Albizia julibrissin*
  - e. Norway maple - *Acer platanoides*
8. An International Society of Arboriculture Certified Arborist must approve the accompanying tree planting plan for all trees planted on public property that are funded through this proposal (See below). If you do not have a certified arborist on staff or know of one a list can be found on the [Illinois Arborist Association](#) website. CRTI may be able to assist in planting plan approvals upon request.
9. The Applicant must attest to properly caring for trees purchased through this program by including a maintenance plan. The plan must identify who will water 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. A Tree

Maintenance Agreement and Partner Commitment Agreement is required and is attached to the Application packet.) Trees must be planted according to the ANSI, ISA, and/or other nationally recognized planting specifications.

10. All trees purchased through this proposal shall be from nurseries that are licensed by the [Illinois Nursery Inspection Program](#). Trees must be purchased from entities which are compliant with all applicable State and Federal regulations including spongy (gypsy) moth compliance agreements, pesticide licensure, etc.
11. All trees must have any packaging such as **burlap, rope, and wire baskets removed (or be a low-profile basket) at time of planting and must be planted in accordance with the ANSIA300 Standard.** (also see [Appendix B](#) for a planting standard example).
12. Immediately after planting, all trees shall receive a 2 to 3-inch layer of hardwood mulch over the root ball. Mulch shall not touch the bark of the tree.
13. Tree planting shall take place in the spring or fall.
14. 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 photo of each planted tree, GPS coordinates, Tree species, Tree size (DBH), Tree condition. This information must be submitted prior to reimbursement.

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

#### Tree and Forest Health Maintenance Requirements

*Including: pruning, dead tree removals, ash treatment, tree mulching, watering, and recovery of damaged or deteriorated landscapes to more healthy and resilient conditions.*

Tree maintenance activities in disadvantaged areas determined by the approved tools (See [Grant Program Goals](#)) within the Applicant's boundaries, that improves the health of individual trees, public safety, canopy cover, etc. may be completed as an implementation project. All tree maintenance activities must be identified as an action step in the new management plan and occur in disadvantaged areas only. This includes maintenance, such as pruning, removal of standing dead trees and high risk/hazard trees, removal of invasive species, treatment of ash trees not already infested with EAB, mulching of trees, and watering of trees planted within the last 2 years. These projects encourage proactive and systematic maintenance and monitoring of urban trees and forested natural areas to improve forest health through pruning, mulching, watering, and caring for trees.

1. All tree care/maintenance work must be completed in accordance with the ANSI A300 and Z133 standards.
2. A plan for proposed maintenance activities and the census tract number of the census tract where works is to be performed must be submitted with the grant application, including number of trees to be planted/pruned/removed, and cost estimates.
3. All tree care/maintenance work must be completed in accordance with the ANSI A300 and Z133 standards.
4. A plan for proposed maintenance activities and the census tract number of the census tract where works is to be performed must be submitted with the grant application, including number of trees to be planted/pruned/removed, and cost estimates.

5. Only trees on public property and in disadvantaged areas are eligible.
6. Any tree removed with grant funding or as a match activity must:
  - a. Present a significant harm or hazard to the communities, as documented by an ISA Certified Arborist\*, OR
  - b. Be an invasive exotic tree or shrub species included in the following list:
    - i. European buckthorn (common buckthorn) - *Rhamnus cathartica*
    - ii. Amur honeysuckle - *Lonicera maackii*
    - iii. Morrow's honeysuckle - *Lonicera morrowii*
    - iv. Callery pear (Bradford pear) - *Pyrus calleryana*
    - v. Tree-of-heaven - *Ailanthus altissima*
    - vi. Autumn olive - *Elaeagnus umbellata*
    - vii. Mimosa - *Albizia julibrissin*
    - viii. Norway maple - *Acer platanoides*
7. 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.

\*Documentation shall be submitted by an ISA Certified Arborist and approved by The Morton Arboretum prior to removal.

## Proposal Scoring

Your proposal will be evaluated and ranked by an independent 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 according to federally approved equity indicators and leveraged benefits; Orderliness of the overall application.

| Criteria:  | Highest Possible Score |
|--|------------------------|
| <b>Required-</b> <ul style="list-style-type: none"> <li>● Proposal clearly states how the inventory and urban forest management plan are to benefit the disadvantaged areas of the community</li> </ul>  | Met/<br>Not Met        |
| <b>Project Overview-</b> <ul style="list-style-type: none"> <li>● 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.)</li> <li>● The Applicant identifies who will be involved in the project</li> <li>● 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.</li> </ul> | 10                     |

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| <p><b>Purpose and Need-</b></p> <ul style="list-style-type: none"> <li>● The application clearly describes the community’s unique challenges (e.g. canopy loss, staff capacity and training, etc.) and identifies reasons why this grant is needed to address these specific challenges.</li> <li>● The Applicant describes the connection between project activities and priorities of applicable strategic plans, or urban forest goals.</li> <li>● The application demonstrates attention to equity and environmental justice, supported by information such as The Climate and Economic Screening Tool, EPA Environmental Justice Screening Tool, or HUD Opportunity Zones. Projects that are in and include participation of disadvantaged and nature-deprived communities experiencing low tree canopy cover, extreme heat and frequent flooding will be prioritized.</li> </ul> | 20 |
| <p><b>Scope of Work-</b></p> <ul style="list-style-type: none"> <li>● The applicant shows capability and clear plans for carrying out the project and maintaining long-term project benefits.</li> <li>● 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.</li> <li>● The project is designed to be resilient to the effects of climate change and other ecosystem stressors.</li> </ul>   | 15 |
| <p><b>Leveraged Benefits-</b></p> <ul style="list-style-type: none"> <li>● The project includes elements that will provide ongoing support to benefit the community’s disadvantaged areas.</li> <li>● The applicant describes how the inventory and management plan will be updated regularly and used after the grant period.</li> <li>● The applicant describes what kind of management plan will result from the inventory.</li> <li>● The applicant demonstrates the organization’s commitment to the project.</li> <li>● The proposal shows clear intention that the project will benefit their forestry program or community for the long term.</li> <li>● Projects that can describe how this grant would expand your urban forestry efforts (not just supplement) will receive higher scores.</li> </ul>   | 20 |
| <p><b>Management Plan Implementation –</b></p> <ul style="list-style-type: none"> <li>● The applicant has a clear and realistic plan for implementing an on-the-ground action based on the management plan recommendations.</li> <li>● This implementation action will directly result in increasing tree canopy or improving forest health in disadvantaged areas.</li> <li>● Proposed implementation will occur in disadvantaged census tracts.</li> </ul>   | 10 |
| <p><b>Budget details-</b></p> <ul style="list-style-type: none"> <li>● The budget indicated in this table is balanced and realistic.</li> <li>● The Applicant provides a clear explanation on how they arrived at project cost.</li> <li>● The Applicant describes all expenditures including contracted services, personnel salary and fringe, material purchases, community organization support community contributions and details “other expenses” in budget matrix.</li> </ul>   | 15 |

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| <p><b>Community Engagement and Sharing Knowledge and Outcomes -</b></p> <ul style="list-style-type: none"> <li>● Applicant clearly identifies strategies for engaging the community to collect input that influences how the project is implemented.</li> <li>● The project includes outreach to and engagement with the community before, during, and after project implementation.</li> <li>● Support letters are required from any partner entity completing a portion of the project and should describe that entity’s commitment to and role in this project. The project includes efforts to share knowledge, tools, or innovations that have practical application beyond the grant period.</li> </ul> | <p>10</p>         |
| <p><b>Timeline -</b></p> <ul style="list-style-type: none"> <li>● The Applicant’s timeline is clear, realistic, and achievable.</li> <li>● Major milestones and required approvals are detailed.</li> </ul>   | <p>10</p>         |
| <p><b>Total Possible Points</b></p>   | <p><b>110</b></p> |

| <p><b>Bonus Points</b></p>   | <p><b>Highest Possible Score</b></p> |
|--|--------------------------------------|
| <p><b>Bonus:</b> if a municipality and its associated park district both apply, both will receive extra points. (As identified in both applications. Be sure to state this in your application.)</p>   | <p>2</p>                             |
| <p><b>Bonus:</b> if an Applicant commits to becoming a 2024 and 2025 <u>Tree City USA</u> community if not presently recognized or commits to receiving a 2024 and 2025 <u>Tree City USA Growth Award</u> if presently a Tree City USA community (requires a signed letter from Mayor or equivalent be submitted with the application), or if a community has been recognized as a Tree City USA Growth recipient for 10+ years.</p> | <p>2</p>                             |
| <p><b>Total Possible Bonus Points</b></p>  | <p>4</p>                             |

## Award and Execution of Agreement

1. All completed proposals shall be submitted electronically, including all attachments, to [grants.crti@mortonarb.org](mailto:grants.crti@mortonarb.org) by **March 1, 2024 @ 5:00 p.m.** Any Applicant requiring assistance either to complete the application or to submit it electronically shall contact Grants.CRTI@mortonarb.org no later than February 2, 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. The Morton Arboretum maintains the authority to withhold funds for future allocations in the event that an insufficient quantity of high-quality projects, which adhere to the stipulated grant criteria and demonstrate meritorious attributes, are submitted.
3. The Applicant must notify any applicable contractor(s) to receive an estimate of cost. **THE AWARDED COMMUNITY IS RESPONSIBLE FOR PAYING ALL EXPENSES AND SUBMITTING FOR REIMBURSEMENT.**
4. 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.**
5. Once executed by The Morton Arboretum, the Agreement will be sent via email to the Applicant. Once received by the Applicant, the Applicant may contact any awarded contractor to begin work as outlined in the approved proposal. **NO WORK SHALL BE STARTED PRIOR TO THE APPROVAL AND EXECUTION OF THE AGREEMENT.**
6. Applicants shall submit a realistic timeline with major milestones listed which will be used to track progress throughout the grant term. Failure to complete deliverables and milestones that jeopardized on-time completion of the project may result in cancellation of the current grant.
7. Applicants are required to report quarterly on project progress. Emailed reminders with reporting templates will be supplied quarterly. Recipients will be required to implement and demonstrate measurable progress within 12 months of award and make continual progress throughout the grant period. 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 **August 1, 2027.**
10. **Final report and reimbursement materials must be received by September 1, 2027.**

## Payment

Reimbursement and payment procedures:

1. The Applicant is responsible for all expenses until submitting for reimbursements. Reimbursements requests are available during two periods of the year: December 1st-December 15th and March 1st - March 15th of the grant periods. Exceptions will be determined on a case by case basis.
2. The Applicant can expect payment 45-60 days after The Morton Arboretum has received and approved the fully completed reimbursement report containing valid invoices and canceled checks.
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. **Awarded Communities may submit for reimbursement twice a year (December 1st - December 15th and March 1st - March 15th) upon the completion of approved deliverable milestones. Projects must show proof of adequate deliverable completion and proof of spending to be approved for reimbursement. Examples of approved milestones include:**
  - a. Completion of 25% of the inventory, 50% of the inventory, 75% of the inventory, 100% completion of the full inventory, completion of the urban forest management plan, and completion of the action step in disadvantaged communities. Final payment will only be allowable after completion of the tree planting or maintenance project in disadvantaged areas.

The Morton Arboretum is dedicated to the success of these projects and the support of disadvantaged communities. If you have any questions about this RFP, the application process, or any part of the grant, please reach out to [Grants.CRTI@Mortonarb.org](mailto:Grants.CRTI@Mortonarb.org) for assistance.



## 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 detailed document or set of documents that identify and prioritize action items based on professionally-based, relevant inventories, 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 and may include:

**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 and 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).

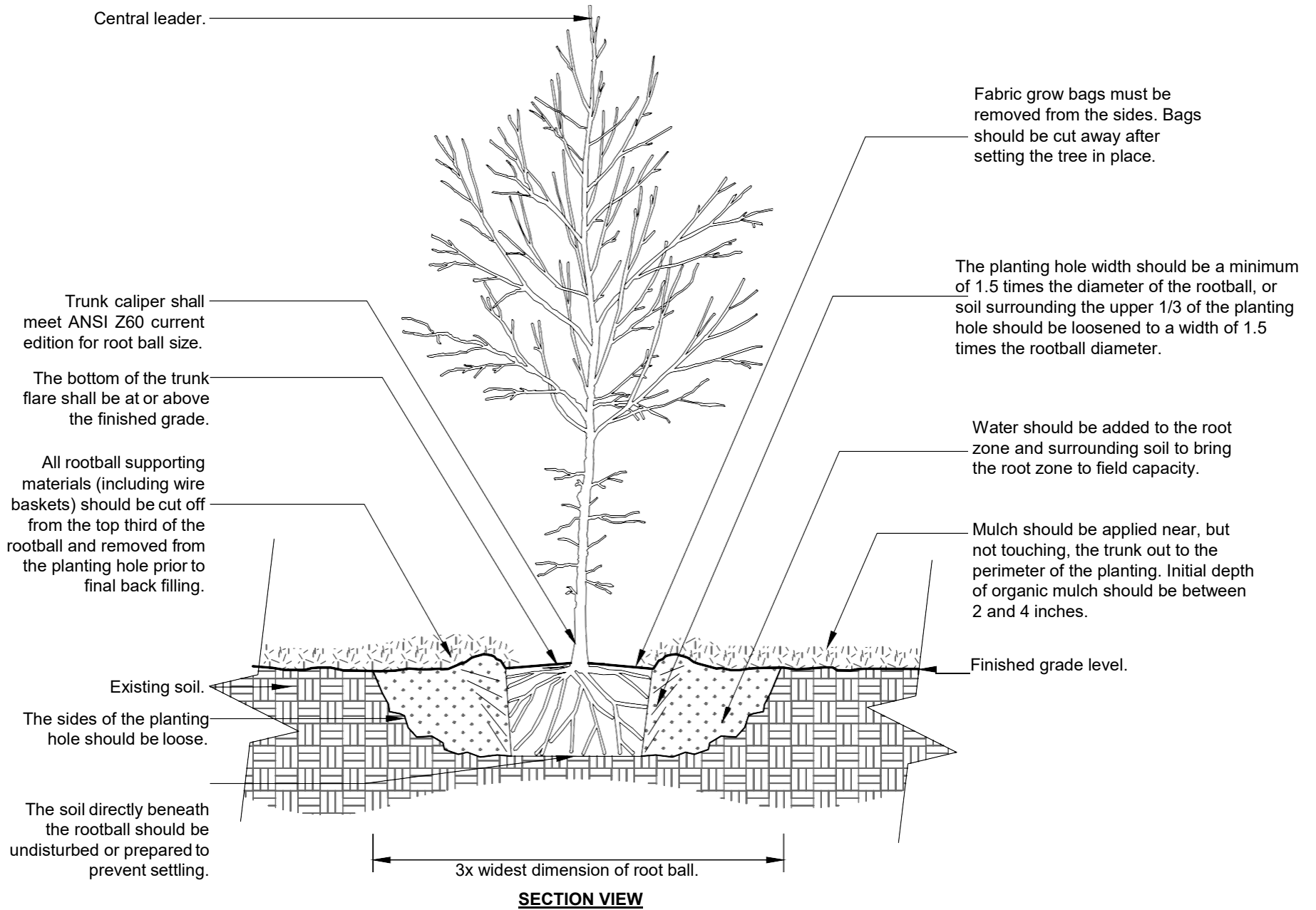
A Public Tree Planting and Maintenance Plan based on an inventory of trees and open spaces in street rights-of-way and parklands. These plans include information such as a prioritized list of tree pruning and removals, a prioritized list of replacements and new tree plantings, a recommended yearly budget, 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.

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- Example Tree Planting Standard



P-X

## TREE w/ BERM (EXISTING SOIL NOT MODIFIED)

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