**2021 Urban and Community Forestry Funding Application**

**General Instructions**

* Grant contact: Zach Wirtz at [zwirtz@mortonarb.org](mailto:eokallau@mortonarb.org) (preferred) or 630-725-2498.
* Fill out each page of this application, as is applicable to you. In some cases, you may not be required to fill out that item.
* If you would like assistance in filling out the application or have questions, please contact Zach Wirtz by September 31, 2021.
* Please note that you are required to include a signed cover letter from your Mayor (or equivalent in communities other than municipalities).
* Submit your application electronically. No hard copies will be accepted unless you contact Zach Wirtz to make specific arrangements.
* **Applications are due** **Monday, November 1st, 2021 at 5:00 p.m.**

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# Part 1: Applicant Background Information

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Organization Name** |  | | | |
| **Federal Tax ID (EIN)** |  | | | |
| **Applicant Contact Information** | | | | |
| **Name** |  | | **Title** |  |
| **Mailing Address** |  | | | |
| **Email** |  | | **Phone Number** |  |
| **Project Supervisor**  (if different) |  | | **Title** |  |
| **Email** |  | | **Phone Number** |  |
| **Additional information**  **(as needed):** |  | | | |
| **BONUS:** Have you encouraged a peer community to apply for this grant? Or, has a peer community recommended that you apply for this grant? If so, please provide details. | |  | | |
| **BONUS:** Applicant commits to become a Tree City USA if not presently one, or a Tree City USA Growth recipient if presently a Tree City USA community. (A signed letter of commitment from Mayor or equivalent must be submitted with the application) | |  | | |
| **BONUS:** Applicant formally adds a commitment to form a tree board or other advisory group as part of this grants required deliverables. (A signed letter of commitment from Mayor or equivalent must be submitted with the application) | |  | | |

**Part 1: Applicant Background Information (cont.)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Community Questions** | **Yes (please specify with an X)** | | | **No** |
| Do you have an inventory of your public trees?  **Eligibility: only trees not inventoried or updated in the last 4 years are eligible for funding for an inventory.** | Full | |  |  |
| Partial | |  |
| Digital | |  |
| Paper | |  |
| Do you have an urban forest management plan for your public trees?  **Eligibility: only applicants whose management plans are older than 5 years old and/or not based on an inventory are eligible to receive funding for a management plan.** | Fewer than 5 years old | |  |  |
| More than 5 years old | |  |
| Based on a tree inventory | |  |
| Not based on a tree inventory | |  |
| Does your organization have someone legally responsible for and designated by an ordinance to care for trees on public property (i.e.: forester, city department, tree board)? If so, provide name, title, and email. | Name |  | |  |
| Title |  | |
| Email |  | |
| Does your organization spend at least $2 per capita per year on tree planting, pruning, removal, maintenance, etc.? |  | | |  |
| Does your organization hold an annual Arbor Day observance? Do you have an annually signed proclamation? |  | | |  |
| Are you a Tree City USA? If so, for how many years? If not and you would like more information, please contact Mike Brunk at [michael.brunk@illinois.gov](mailto:michael.brunk@illinois.gov) |  | | |  |

# Part 2: Project Plan & Ordinance Requirement

|  |  |  |  |
| --- | --- | --- | --- |
| **Please indicate whether you are applying for an inventory, management plan, and/or tree planting. Please place an X in any applicable selection box(s). Leave other sections blank.** | | | |
| **Project** | **details** | | **Selected (X)** |
| **Inventory** | Full Inventory | |  |
| **OR** | | |
| Partial Inventory | |  |
| What % of your trees will be inventoried? | | \_\_\_\_\_\_\_\_ % |
| Partial inventory – one neighborhood, stratified sample, or other? Please explain |  | |
| **Management Plan**  (Must be based on a digital inventory that was updated in the last 4 years)  Please use the chart to the right to indicate which components you would like included in your management plan. More complete details on each of these categories is available on pages 11 and 12 of the Request for Proposals. | Short- and long-term urban forest goals 2021-2031. | |  |
| Recommended and prioritized urban forest management action items, based on a tree inventory. (i.e., Prioritized planting locations, a cyclical pruning schedule, etc.).  **Required as explained on page 11 of the RFP.** | |  |
| Specifications for planting, pruning, removals, and construction protection. | |  |
| Required and recommended certifications, qualifications, and training for staff, contracted labor, and consultants. | |  |
| Material and budget projections and considerations. | |  |
| A program for education and outreach for residents. | |  |
| Other: | |  |
| (add additional sheet if needed) | |  |
| Have you received an estimate for your management plan? If so, how much is your plan expected to cost? | |  |

|  |  |  |
| --- | --- | --- |
| **Tree Planting** | Number of trees proposed: |  |
| Do you agree to the requirements on page 13 of the RFP, including maintenance for a minimum or three years? |  |
| Do you have a location selected for this planting? |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **MUNICIPAL ORDINANCE REQUIREMENT:** A tree preservation /protection ordinance that meets the criteria identified on pages 8 and 9 of the RFP must be passed before a municipality is eligible to receive its reimbursement at the end of the grant period. Park Districts and Forest Preserves shall submit board approved policies that stipulate natural resource protection with specific urban and community forest management guidance. Contact Zach Wirtz at [zwirtz@mortonarb.org](mailto:eokallau@mortonarb.org) with any questions.  **Do you have a tree preservation / protection ordinance?** | | | | |
| **Yes** |  | **OR** | **No**, and we would like assistance from The Morton Arboretum. |  |
| Website link for our tree ordinance, park district / forest preserve policy: | | **No**, but we don’t need assistance. |  |
| **Not a municipality, park district or forest preserve**/exempt from this requirement. |  |
| \*All Applicants, regardless of whether they are awarded, are eligible to receive assistance free of charge from The Morton Arboretum to develop an ordinance or board/commission approved policy. | | | | |

# Part 3: Proposed Timeline

Please provide a concise summary of how the work will take place. You may group activities by month or by quarter, as appropriate. You are welcome to create a numbered or bulleted list, or use the one below as a template. Include the following, as applicable.

* Planning / prep meetings
  + Who from your organization will be involved
  + When these meetings will take place
  + Which steps need to be approved by your Board / Council
* Ordinance review / development / passing
  + Who will participate
  + Timeline for Board / Council review
* Board or Council meetings (as appropriate) to approve items including the management plan and ordinance
* Finalizing the project & beyond
  + Reporting / invoicing
  + How will these items be updated or managed in the future
* Match activities
  + How, when, & what will you use as match
  + REMINDER: for inventory and management plan projects, only tree planting that occurs after the inventory is finalized, and that addresses the inventory/plan results, may be counted as match.

Type here; add additional sheets if necessary

|  |  |  |  |
| --- | --- | --- | --- |
| **Item** | **Grant Funds**  **(Must not Exceed 50% of total cost)** | **Match**  **(May not include any federal funds)** | **Total Cost**  **(Local Match + Grant Funds)** |
| **Personnel / Staff Labor Costs**  (Include any personnel costs for your grant and/or match activities.) |  |  |  |
| **Fringe Benefits** |  |  |  |
| **Volunteer personnel**  (Estimated hours and $ value per hour. Only counted for match.) | N/A |  |  |
| *Sub Total* |  |  |  |
| **Contracted services**  (Include any estimates you’ve received. If not, write the amount you are applying for and the amount you are able to match.) |  |  |  |
| *Sub Total* |  |  |  |
| **Materials**  (Include any trees, soil, mulch, etc. for inventory and management plan projects, Materials may only be used for match) |  |  |  |
| *Sub Total* |  |  |  |
| **Other**  (Please identify/explain the expense.) |  |  |  |
| *Sub Total* |  |  |  |
| **Grant Total** |  |  |  |

# Part 5: Budget & Match Worksheet

# Part 6: Statement of Need

Type here; add additional sheets if necessary

Please use this page to describe your organization’s economic and programmatic needs. These might include budget limitations, capacity and staff limitations, or other limitations that have prevented your community from accomplishing these goals.

# Part 7: Statement of Leveraged Benefits

Type here; add additional sheets if necessary **Maximum 1,500 words**

Describe, as appropriate:

* how the inventory and/or management plan will be used and updated regularly
* which components of the management plan you are incorporating, and why
* benefits of planted trees to the community
* your organization’s commitment to this project, including elected officials and your Board / Council
* local match efforts, financial or in-kind community organization support, and/or community contributions
* the role, training, and qualifications of any partners and/or potential volunteers.
* etc.

# Final Instructions

Please be sure to include all of the following in your application. Once you have completed and collected all of these items, send it to Zach Wirtz at [zwirtz@mortonarb.org](mailto:eokallau@mortonarb.org).

|  |  |
| --- | --- |
| **Application Checklist** | |
| Cover Letter signed by the Mayor or equivalent |  |
| Applicant Background Info |  |
| Project plan & ordinance requirement |  |
| Timeline & Proposed Work Plan |  |
| Budget – including match expenses |  |
| Statement of Need |  |
| Statement of Leveraged Benefits |  |
| Tree Inventory Maintenance Agreement (if applicable) Appendix A |  |
| Tree Planting List (if applicable) Appendix B |  |
| Tree Maintenance Agreement (if applicable) Appendix C |  |
| Letters of Support (from organizations who can attest to your capacity to complete this project) |  |

# Appendix A. Tree Inventory Maintenance Agreement

This Tree Inventory Maintenance Agreement between The Morton Arboretum and the Applicant certifies that regular and effective updates and maintenance will be **performed for a period of five years, and will comply with the following requirements:**

* The tree inventory shall be updated regularly to ensure that it reflects current conditions in the community.
* Inventory updates shall reflect new plantings, removals, replacements, pruning / trimming, condition updates, and maintenance recommendations.
* This work may be done in-house, by contractors, or by volunteers. However, everyone who is working on the update, whether as a paid or volunteer service, shall be qualified/certified or adequately trained to do so.
* Tree inventory updates shall result in periodic updates to prioritization and other action items in an accompanying Urban Forest Management Plan, if applicable.

I certify that, according to the above, my organization will comply with tree inventory maintenance requirements.

Applicant Contact Name:

Title:

Organization:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date

# Appendix B. Tree Planting List

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Species**  **(common name)** | **Species**  **(botanical name)** | **Number proposed** | **Anticipated cost per tree, planted** | **Notes** |
|  |  |  |  |  |
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|  |  |  |  |  |
| Add more lines as needed | | | | |

**Description of Proposed Planting Location (attach map if applicable)**

Type here; add additional sheets if necessary

**Statement of Tree Diversity**

Explain how this tree selection will improve diversity of your tree population:

Type here; add additional sheets if necessary

# Appendix C. Tree Maintenance Agreement

Community Partner Commitments and Tree Maintenance Agreement

This is an agreement between the Morton Arboretum (Arboretum) and a community partner or tree recipient (Partner) for the completion of a tree planting project and ongoing care of trees provided through this grant.

The following outlines the responsibilities of the designated Partner:

1. Select species diversity to meet grant requirements.
2. Select species from a state certified nursery.
3. Contact JULIE (Joint Utility Locating Information for Excavators) (all locations other than the City of Chicago) or DIGGER (all locations within the City of Chicago) two weeks before the planting event. These organizations check utilities before any digging occurs (811). For sites in the city of Chicago dial 811 or 312-744-7000. For sites outside of the city of Chicago call 811 or 1-800-892-0123.
   1. The landowner must call for utility locates to ensure the proposed planting sites are clear of utility lines.
   2. Mark the proposed tree locations prior to the JULIE/DIGGER visit.
4. Care of the trees before, during, and post planting is the responsibility of the Partner.
   1. Ensure that trees are protected during the delivery process so they are adequately covered in transit and watered to ensure the trees do not get dried out.
   2. Inspect trees upon arrival to make sure stem to root attachment is solid and no damage to bark, branches or roots has taken place.  Refuse trees that do not meet these requirements.
   3. Store the trees in a protected location until they are planted.
   4. All trees must be watered appropriately, before, during, and after they are planted.  The Partner will determine the water source and provide the water for the new trees on the day of planting and thereafter for a **minimum of three years**.

**Tree Maintenance Agreement**

This Tree Maintenance Agreement between The Morton Arboretum (Arboretum) and the Community Partner and/or Tree Recipient (Partner) certifies that the Partner will provide customary and reasonable tree care and maintenance three years post planting.

The Partner is responsible for mulching and watering the trees appropriately for three years to enable trees to become fully established and thrive. Following are the Partner’s responsibilities:

1. During the growing season approximately 10-15 gallons of water or 1” of water should be applied once weekly to the rootball of newly planted trees unless adequate soil moisture is present.
2. A 3” – 4” layer of organic, wood chip mulch will be maintained in a circular area around the base of the tree that is at least 3 feet in diameter, taking care that the mulch does not touch the trunk of the tree.
3. All tags, rope, and wire will be removed.
4. Trunk wrap may remain in place for the first winter season if necessary for thin-barked trees.
5. If trees are staked, stakes will only be used in windy locations and will be removed after one year.
6. All trees will be monitored for pests or other signs of stress, and conditions will be remedied when appropriate and possible.

I certify that, according to the above, I will comply with these requirements.

TREE PARTNER/RECIPIENT NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

PLEASE PRINT NAME\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_        DATE\_\_\_\_\_\_\_\_\_\_

If you would like tree care tips or tree related information please provide your email below:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_