

# Tree Equity Grants for Disadvantaged Communities

## Application Form

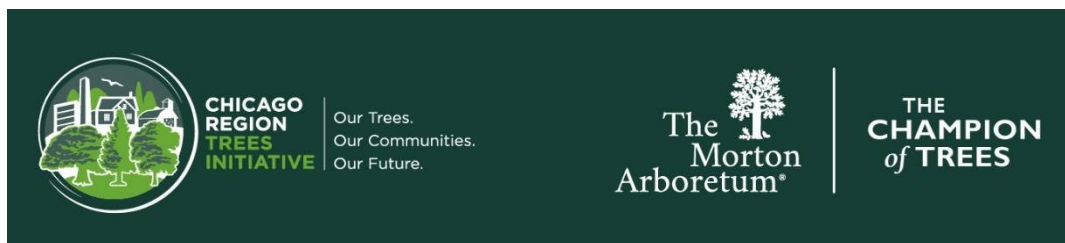
### General Instructions

- Grant contact: [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org)
- To ensure an efficient and streamlined application process, we request all potential applicants to submit a Notice of Intent (NOI) before the formal grant application. Please submit your NOI by August 16, using the form available [here](#), and see the [grant RFP](#) for more information.
- Fill out each page of this application. Please fill in the application electronically; handwritten applications are difficult for our reviewers to score. If you have questions or need assistance, please contact us.
- We do not wish for this application process to be a barrier to any interested applicant. If you would like assistance or have questions, please contact [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org) by August 16, 2024.
- **Please note that you are required to include a signed cover letter from your mayor (or chief executive equivalent in an organization or community other than a municipality).**
- Submit your application electronically via email to [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org). No hard copies will be accepted unless you contact The Morton Arboretum to make specific arrangements.

**Applications are due September 13, 2024, at 5:00 p.m.**

### Free Application Assistance

The Morton Arboretum offers free application assistance for communities applying to this grant program. Contact [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org) for more information. The Morton Arboretum is an equal opportunity provider.



## Application Table of Contents

General Instructions	1
Application Table of Contents	2
Grant Information and Funded Program Areas	2
Allowable Projects	3
Cover Letter from Chief Executive	4
Section 1: Applicant Background Information	5
Section 2: Project Overview (10 points)	9
Section 3: Purpose and Need (20 points)	11
Section 4: Scope of Work (15 points)	12
Section 5: Leveraged Benefits (20 points)	14
Section 6: Tree Protection Ordinance Creation or Update – Governmental Entities Only (10 points)	16
Section 7: Budget Details (15 points)	18
Section 8: Community Engagement and Sharing Knowledge and Outcomes (10 points)	22
Section 9: Timeline (10 points)	24
Final Instructions	27
Appendix A. Tree Inventory Maintenance Agreement	28
Appendix B. Tree Planting Plan	29
Appendix C. Tree Planting and Maintenance Agreement	36
Appendix D. Sample Partner Commitment Letter	38

## Grant Information and Funded Program Areas

These grant funds are provided by USDA Forest Service Urban and Community Forestry allocation from the Inflation Reduction Act, and the funds are made available through competitive subawards to disadvantaged communities for a variety of urban and community forestry-based activities including tree inventories, urban forest management plans, tree planting, urban wood utilization, urban food forests, and workforce development.

The total maximum allowable funding amount for any one organization is \$500,000. The minimum allowable funding amount is \$25,000. The grant period is approximately three years.

**No match is required for eligible projects.** One hundred percent of work must take place in, or benefit, disadvantaged communities. The USDA Forest Service wants these funds to be used in disadvantaged communities and therefore has waived match requirements. The match waiver must be passed on to any subawardees as described in the General Criteria section of the RFP.

Please reference the grant's Request for Proposals (RFP) for more details on this grant. You may access the RFP at <https://chicagorti.org/grants>

## **Allowable Projects**

Program areas funded through this proposal must include one or more of the following, as outlined in the RFP:

1. Increasing the percentage of land area covered by tree canopy in disadvantaged areas of communities
2. Improving forest health in disadvantaged areas of communities
3. Creating or improving community forestry programs that will benefit disadvantaged areas of the community

Opportunities may be combined or requested singly but must show thoughtful consideration of urban forest impact and benefit.

**All projects must directly benefit disadvantaged areas of the community.**

**No work shall start on the project until the applicant is awarded funding. All work shall be completed within the specified grant time period.**

## Cover Letter from Chief Executive

All applications must include a cover letter from your mayor or chief executive equivalent in an organization or community other than a municipality. Cover letters let us know that your entire organization is informed about, and committed to, the projects that you propose in your grant request.

**Applications that do not include a cover letter signed by the highest level executive at your organization will not be considered.**

Applicable executives include:

- mayor
- village president
- chief executive officer (CEO)
- park superintendent or executive director

Cover letters may not be signed by village or city managers, public works directors, operations managers, or other officials.

Cover letters must be submitted on your organization's letterhead, be one to two pages maximum, and should include:

- contact information
- a brief summary of your project and its relevance
  - Present the issue your project addresses.
  - Outline specific project objectives and goals.
  - Provide a high-level budget summary, stating the total funding requested.
  - Identify key partnerships related to the project.
  - Describe the outcomes you expect to attain.
- signature of the mayor or chief executive equivalent

You will add details in your application so you do not need to be extremely detailed in the cover letter. It should only hit the high points of your application.

## Section 1: Applicant Background Information

In this section, you tell us about your organization.

Organization name	
Organization type (Examples: municipality, county, park district, forest preserve district, township, 501(c)(3), community-based organization with a fiscal agent, public university)	
Federal Tax ID (EIN)	
SAM Unique Entity ID (UEI)  The UEI is a 12-character alphanumeric ID assigned to an entity by <a href="https://sam.gov">SAM.gov</a> . <b>You must have an active SAM registration at the time of grant award.</b> If you do not currently have a UEI, please add "in progress" in the box to the right and visit <a href="https://sam.gov">SAM.gov</a> and apply as soon as possible.	
Award amount requested	

<p>Please indicate any IRA-funded grant you have previously been awarded in the box to the right. Specify the amount and the funding agency.</p> <p>Note: Applicants who have been awarded IRA funding for urban and community forestry projects are eligible to apply for this grant, but will be considered after all applicants who have not yet received this funding. This includes direct grants from the USDA Forest Service, as well as all pass-through organizations such as Trees Forever, Faith in Place, The Morton Arboretum.</p>	<p>Amount:</p> <p>Funder:</p>	
<p>Will you perform site-specific projects or community-wide projects? Refer to the RFP's Eligible Program Areas for more information on criteria for site-specific projects and community-wide projects.</p>	<p>Site-specific</p>	
	<p>Community-wide (with on-the-ground implementation)</p>	
<p>All projects must directly benefit disadvantaged areas according to approved federal tools.</p> <p>Please list the census tracts that your project will directly benefit or take place in. Attach additional sheets as needed.</p> <p><a href="#">You may refer to this map to identify disadvantaged areas in your community.</a> Click on any block group or tract to see its ID number.</p>		

Applicant Contact Information			
Name		Title	
Mailing address			
Email		Phone number	
Project supervisor (if different)		Title	
Email		Phone number	

Tree Management Questions	Please specify your answer with a check	
Does your organization own or directly manage trees?	<p>Yes</p> <p>For example, your organization is a government entity or an NGO with a campus or property on which you manage trees.</p>	
	<p>No</p> <p>For example, your organization is a community organization that does not own land or is not actively managing trees.</p> <p><b>If you select no - please skip the rest of this section.</b></p>	
Does your organization have an inventory of its trees?	We have no inventory of public trees.	
	We have a full inventory.	

	We have a partial inventory or sample inventory.	
If your organization has an inventory, is it in a digital format or on paper?	Digital	
	Paper	
	Not applicable; we do not have an inventory.	
Has the organization’s tree inventory been updated in the last three years?  Eligibility: Only trees not inventoried or updated in the last three years are eligible for funding for an inventory.	No: Our inventory has not been updated in the last three years.	
	Partial: Parts of our inventory have been updated in the last three years.	
	Yes: Our inventory has been fully updated in the last three years.	
Does your organization have an urban forest management plan for your public trees?  Eligibility: Only applicants whose management plans are older than four years old and/or not based on an inventory are eligible to receive funding for a management plan.	Yes, and it is less than four years old.	
	Yes, but it is more than four years old.	
	No, my organization does not have a management plan.	
If your organization has an urban forest management plan, is it based on a tree inventory?	Yes, it is based on a full tree inventory.	
	Yes, it is based on a partial tree inventory.	
	No. We have a plan, but it is not based on an inventory.	
	Not applicable	
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	



## Section 2: Project Overview (10 points)

In this section, you will provide a summary of the entire project that includes the program areas, location, key partners, and expected accomplishments.

1. Which program areas will your project cover? Select all that apply.

Increasing the percentage of land area covered by tree canopy in disadvantaged areas of communities

- Diverse tree planting on public property (must include post planting care)

Improving forest health in disadvantaged areas of communities

- Tree pruning
- Dead tree removals
- Ash treatment
- Pest treatment
- Invasive tree or shrub removal
- Tree mulching
- Watering

Creating or improving community forestry programs

- Conducting tree inventories and writing accompanying urban or community forest management plans. Urban forest management plans shall include community engagement that collects input to identify strategies for increasing service to disadvantaged areas and one or more components specific to increasing the percentage of land area covered by tree canopy or improving tree canopy cover in disadvantaged areas of the community.
- Writing of urban or community forestry management plans based on an existing current, digital inventory. Urban forest management plans shall include one or more components specific to increasing the percentage of land area covered by tree canopy or improving tree canopy cover in disadvantaged areas of the community.
- Conducting an Urban Tree Canopy Assessment to identify portions of the community experiencing a low percentage of area covered by tree canopy.
- Assessing risk to forests from pests, disease, and adverse climate impacts and formulating adaptive management strategies to improve forest resilience.
- Increasing staff professionalism through education or credentialing. Staff who are supported through this grant must work to enhance the condition of tree canopy cover or increase the percentage of land area covered by tree canopy in disadvantaged areas.
- Contracting with a certified arborist for program development.
- Enhancing volunteer efforts such as formation of a tree board that includes representation from disadvantaged communities.
- Developing paid on-the-job training opportunities, including pre-apprenticeships and apprenticeships, to expand workforce development pathways for green careers in urban and community forestry for members of disadvantaged communities.
- Establishment of wood utilization programs.
- Aiding in planning, goal setting, and skill sharing with other professions such as urban planners, engineers, educators, recreational and public health officials to focus on improving service to disadvantaged areas.
- Improving preparation for severe storms to improve response and recovery in

disadvantaged areas.

- Creation of paid on-the-job training opportunities, including pre-apprenticeships and apprenticeships, to expand workforce development pathways for green careers in urban and community forestry.
- Ordinance development or revision, including significant and thoroughly explained and documented community engagement (seeking input to influence decisions) that does not result in overburdening disadvantaged communities.

Other

- Please specify \_\_\_\_\_

2. In two or three sentences, tell us where in your community your organization will do this work and why.

3. In a few sentences, provide a summary of the project. List the key partners and describe your expected accomplishments.

4. In two or three sentences, describe the key outcomes for disadvantaged areas in your community.

For example, improved professionalism and dedication of staff will result in improved tree health or size, which will ensure more benefits in disadvantaged communities. You may choose to consider topics covered in the [Benefits of Trees for Livable Sustainable Communities](#).

### Section 3: Purpose and Need (20 points)

In this section, you will describe your organization's or community's current forestry program and how the proposed projects address a financial or capacity need in your community.

1. In two or three sentences, describe your organization or community's current staff capacity and budget for forestry programming.

2. In two or three sentences, describe your community's current challenges (such as canopy loss, staff capacity, and training) and reasons why this grant is needed to address these specific challenges in disadvantaged areas of the community.

3. In three to five sentences, describe how the project will address the specific needs of disadvantaged areas in your community.

This grant focuses on areas of your community that are considered disadvantaged by federal tools. [You can view all eligible areas on this map](#), which combines all approved tools to determine eligibility (CJEST, HUD Opportunity Zones, and EJScreen). If you wish, you can reference other equity indicators (for example the [CRTI Priority Map](#), American Forest [Tree Equity Score](#)) to talk about the challenges faced by disadvantaged areas of your community. You could describe how part of your community has high particulate matter per EJScreen and how tree planting would help reduce that. You may choose to consider topics covered in the [Benefits of Trees for Livable Sustainable Communities](#).

4. In three to five sentences, explain how your project addresses goals of the [Justice40 Initiative](#), [Illinois Forest Action Plan](#) (especially Appendix A), the [Ten-Year National Urban and Community Forestry Plan](#), or other applicable plans.

#### **Section 4: Scope of Work (15 points)**

In this section, you will provide details about the activities and methods proposed to accomplish your project.

1. In three to five sentences, tell us the quantifiable scope of your project.

For example, list the number of trees planted, maintained, or inventoried, the type of management plan to be created, and the number of staff trained.

2. In two to three sentences, explain the expertise available to your community to address technical elements of the project or how your organization or community will seek out contractors with adequate expertise.

For example, tell us about your community or organization's staff qualifications related to trees (for example, Certified Arborists) or how you plan to identify qualified contractors if you plan to contract out parts of your project.

3. In three to five sentences, describe the role, training, and qualifications of any partner organizations, potential volunteers, or related groups in disadvantaged areas.

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 organization. A sample letter can be found in Appendix D.

4. In two to three sentences explain how your project is designed to increase resiliency to the effects of climate change and other ecosystem stressors.

For example, you could describe how a plan you will write addresses these issues, or how diverse tree planting would help your tree canopy's resilience in the future.

5. Projects that include tree planting will have their Tree Planting Plans reviewed with this section.

### **Section 5: Leveraged Benefits (20 points)**

In this section, you will summarize how the project will provide ongoing environmental benefits and outcomes for disadvantaged areas of your community after the end of this grant.

1. In three to five sentences, describe how this project goes above and beyond what your community is normally able to achieve.

Projects must be additive, meaning these funds cannot just replace money your community would normally spend on urban and community forestry projects.

2. In five to eight sentences, describe how this project helps your organization or community build capacity and contribute to a strong forestry program beyond the grant period.

For example, describe how the new or existing programs (such as volunteer or wood utilization) funded by this grant will be sustained past the grant period, how new staff, or staff training funded by this program, will contribute to a healthier urban forest in disadvantaged communities past the grant period, or how newly planted trees will be cared for and monitored after the grant period has ended. If you are hiring or training staff, describe strategies you will use for employee retention during and after the grant period.

3. In three to five sentences, describe how this project fits into your community’s long-term goals.

For example, is this project an established goal for your community? Is it tied to a comprehensive, climate, strategic, or other plan in your community?

4. In three to five sentences, describe how your organization will sustain community engagement from this project after the grant period.

## Section 6: Tree Protection Ordinance Creation or Update: Governmental Entities Only (10 points)

In this section, you will explain your organization’s work plan regarding the required tree protection ordinance or policy update. This section is only applicable to government entities, such as municipalities, park districts, townships, counties, forest preserves, conservation districts, and will not count toward any nonprofit, library, or public university applicants.

Prior to final reimbursement of funding, a tree protection ordinance related to your community’s public trees shall be approved by the municipality’s, county’s, or township’s governing body (for example, city council) that shall meet all the requirements detailed in the grant RFP. 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. A preexisting ordinance is not required to apply.

Communities that do not have a tree protection ordinance or that have one that does not meet the minimum criteria will receive priority. Communities that commit to going above and beyond the minimum requirements (for example, implementing additional components such as permits, required tree replacement, or species lists) will receive priority. For examples of additional components, please visit the [21st Century Ordinance Builder for Tree Protection](#).

Awarded applicants are eligible to receive assistance free of charge from The Morton Arboretum to develop an ordinance or board or commission approved policy. Communities in the seven-county Chicago region are always eligible for ordinance and policy assistance, regardless of award, through the Chicago Region Trees Initiative. Contact [crti@mortonarb.org](mailto:crti@mortonarb.org) with any questions.

Do you have a tree protection ordinance or policy that meets the minimum criteria in the grant RFP? (Mark with an X)	
<b>Yes</b>	Website or link to ordinance: _____
<b>No</b> , we will create or update tree protection policy and we would like assistance from The Morton Arboretum.	
<b>No</b> , we will create or update tree protection policy, and we don’t need assistance.	



1. In two to three sentences, describe the current status of your community's ordinance and whether you think the current ordinance fulfills the requirements of the grant or needs to be updated.

**Note: a preexisting ordinance is not required to apply.** Tell us about your current ordinance or desire to create one.

2. In two to three sentences, describe who will be responsible for communicating with The Morton Arboretum regarding the ordinance update and who will be responsible for coordinating with your community's board, commission, or council to ensure the tree protection ordinance requirement is met during the grant period.

3. **OPTIONAL:** Does your community wish to go above and beyond the minimum requirements with your ordinance update or creation? If yes, please explain in two to three sentences how your community will exceed the minimum requirements. Proposals for projects that include commitments to going above the requirements will receive higher scores.

## Section 7: Budget Details (15 points)

In this section, you will submit and explain a proposed budget as part of this application.

All funded work must take place in or benefit disadvantaged communities and, therefore, there is not requirement to raise matching funds.

Please take your time to fill in this table correctly and completely. The dollar amounts you indicate in this table will be a determining factor in how much your project is awarded. For free assistance in filling out this section, you can contact [Grants.CRTI@mortonarb.org](mailto:Grants.CRTI@mortonarb.org).

### Community-Wide Projects

As described in the RFP, only municipalities are eligible to complete community-wide projects. A grant-funded, on-the-ground implementation action (such as tree planting, maintenance, risk mitigation) in a disadvantaged area of your community is required for all community-wide projects. A portion of your grant funds must be allocated to carry out this implementation action item if you include a community-wide project in your application. For example, you could implement a portion of a grant-funded management plan's recommendations after the plan has been created.

Applicants with community-wide projects are required to submit a detailed budget that clearly outlines their funding needs for both the community-wide project and the associated on-the-ground action the organization plans to perform in a disadvantaged census tract, such as tree planting or risk reduction (for example, pruning, dead tree removal).

Although the specifics of the project may evolve as a result of the planning process, it is important to provide a reasonable estimate of expected outcomes at the time of application. This includes quantifiable metrics, such as the estimated number of trees to be planted, which should be based on a current understanding of costs, needs, and other existing information.

Please note that once grant awards are made, the funding allocation is fixed and cannot be changed. However, the community-wide project may uncover new insights, challenges, or opportunities that could necessitate adjustments to the on-the-ground action. In such cases, we encourage open communication with our grant administration team to discuss any necessary modifications to the project's outcomes. **Any modification must be proposed and approved in writing.**

The goal of this approach is to ensure that grant recipients have a clear plan and budget in place while allowing for flexibility and adaptation based on the evolving needs and discoveries that may arise during the project.

### Budget Table

<b>Item</b>	<b>Grant Funds Requested</b> Total grant funds must be between \$25,000 - \$500,000	For each section, provide a brief (one or two sentences or bulleted list) explanation of requested funding For example, which staff members will be paid using personnel funds, and what are the supplies you wish to purchase, etc.
<p><b>Personnel / Staff Labor Costs</b> Include all requested personnel (salary) costs for new and existing staff working on deliverables for this grant.</p>		
<p><b>Fringe Benefits</b> Include all fringe costs for new or existing staff working on deliverables for this grant (fringe costs are benefits related to employment, such as insurance and other benefits)</p>		
<p><b>Contracted Services</b> This is funding you plan to give to a vendor or contractor to complete a service as part of the project.</p> <p>You are encouraged to attach any estimates you've received to your application.</p>		

<p style="text-align: center;"><b>Item</b></p>	<p style="text-align: center;"><b>Grant Funds Requested</b> Total grant funds must be between \$25,000 - \$500,000</p>	<p style="text-align: center;">For each section, provide a brief (one or two sentences or bulleted list) explanation of requested funding For example, which staff members will be paid using personnel funds, and what are the supplies you wish to purchase, etc.</p>
<p><b>Supplies</b> Include any trees, soil, mulch, watering bags, and other supplies</p> <p>Note: Equipment is not allowed. Equipment is nonexpendable, tangible personal property with an acquisition cost greater than \$5,000 per unit and a useful lifespan of more than one year.</p>		
<p><b>Other, Including Subawards</b> Subawards are funding your organization plans to give to a partner organization to complete part of the project.</p> <p>Applicants that pass-through funding (subaward) for work in disadvantaged communities must also pass the waiver for matching funds to subawardees performing the work.</p> <p>Please identify and explain any other expenses.</p>		

<p style="text-align: center;"><b>Item</b></p>	<p style="text-align: center;"><b>Grant Funds Requested</b> Total grant funds must be between \$25,000 - \$500,000</p>	<p style="text-align: center;">For each section, provide a brief (one or two sentences or bulleted list) explanation of requested funding For example, which staff members will be paid using personnel funds, and what are the supplies you wish to purchase, etc.</p>
<p><b>Grant Request Total</b></p>		

1. In three to five sentences, provide an explanation on how you arrived at project costs (for example, quotes, previous projects).

2. If you have funding requests in the “Other” category above or need more space to explain the budgeted items above, please explain those expenses here in three to five sentences.

## Section 8: Community Engagement and Sharing Knowledge and Outcomes (10 points)

In this section, you will identify the strategies and methods your organization will take to create sustained and meaningful participation and engagement from community members in disadvantaged areas.

Commitment letters from participating partner organizations must be attached and should describe that entity's commitment to and role in this project. A sample letter of commitment can be found in [Appendix D](#).

1. In three to five sentences describe how your organization will include community involvement before, during, and after the project.

2. In two to three sentences, explain how your organization will share what is learned during the project with your broader community.

For example, will your organization plan on having educational sessions that talk about the results of your new inventory or classes on the importance of trees recently planted in your community?

3. In five to eight sentences, explain how your organization plans to implement thoughtful and intentional action steps to work with disadvantaged communities for sustained engagement.

For example, how will you work with community members to ask their opinions, encourage them to co-create with your team, and develop buy-in from residents and visitors? How will your organization incorporate the information received into the decision-making process for the project?

4. Potential barriers to community engagement can exist. In three to five sentences, how does your organization plan to address potential barriers to engagement in disadvantaged areas? What intentional efforts will your organization consider using?

For example, you may be planning to work with a local community group to help build trust with residents in your community and gain insights into their priorities and values.

## Section 9: Timeline (10 points)

In this section, you will provide an approximate schedule of intermediate steps and major milestones.

The timeline you specify in this application will be used to track your organization's grant progress. Communities will be expected to stick to this timeline as much as possible. Carefully consider realistic timeframes and potential barriers. The timeline presented should help the reviewers to understand:

- clear start and end dates for different phases or milestones of the project
- that your timeline is realistic and achievable given the resources and time available
- measurable milestones or checkpoints that will allow for progress tracking, evaluation, and reimbursement
- your sustained community engagement, especially in disadvantaged areas
- who will be responsible for each part of the project, including internal approvals.

A template for your timeline is available [here](#). Please complete your timeline in Microsoft Word or similar program and attach it to your application submission as either a Word document or PDF.

Suggested topics to cover in your timeline include but are not limited to:

- planning and preparation meetings
  - who from your organization will be involved
  - when will these meetings will take place
- timing and format of community engagement



- identification of the steps and actions in your project that need to be approved by your board or council
- ordinance or policy review, development, and adoption
  - who will participate
  - timeline for board or council review
  - board or council meetings (as appropriate) to approve items including an ordinance if applicable
- major project milestones
  - timing of bid requests, decisions to hire consultants, tree plantings, maintenance schedule
  - length of time required for individual project components (for example, inventory completion milestones as listed in the RFP, plan writing, and implementation action)
- finalizing the project and beyond
  - reporting and invoicing frequency, final report preparation

Below is an example format for your timeline This format must be used, and a [template](#) is available for you to download, edit, and submit with your application.

Grant Activities	2024		2025				2026				2027				2028
	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1
<b>[Activity 1 and responsible person(s)/required approvals]</b>		X	X	X											
Major Task 1 – [insert Major Task]		X													
Major Task 2 – [insert Major Task]			X												
Major Task 3 – [insert Major Task]				X											
<b>[Activity 2 and responsible person(s)/required approvals]</b>															
Major Task 1 – [insert Major Task]															
Major Task 2 – [insert Major Task]															
Major Task 3 – [insert Major Task]															
<b>[Activity 3 and responsible person(s)/required approvals]</b>															
Major Task 1 – [insert Major Task]															
Major Task 2 – [insert Major Task]															
Major Task 3 – [insert Major Task]															
<b>[Activity 4 and responsible person(s)/required approvals]</b>															
Major Task 1 – [insert Major Task]															
Major Task 2 – [insert Major Task]															
Major Task 3 – [insert Major Task]															
<b>[Activity 5 and responsible person(s)/required approvals]</b>															
Major Task 1 – [insert Major Task]															
Major Task 2 – [insert Major Task]															
Major Task 3 – [insert Major Task]															
<b>[Activity 6 and responsible person(s)/required approvals]</b>															
Major Task 1 – [insert Major Task]															
Major Task 2 – [insert Major Task]															
Major Task 3 – [insert Major Task]															

A template is available [here](#). Attach your timeline as a Word document or PDF to your application package.

## Final Instructions

Please be sure to include all of the following items in your application. Incomplete applications will not be scored. Once you have completed and collected all of these items, submit the application electronically, as one email, to [grants.crti@mortonarb.org](mailto:grants.crti@mortonarb.org) with the subject line: [your organization's name] Tree Equity Grants for Disadvantaged Communities Application.

Application Checklist	
Cover Letter signed by the mayor or chief executive	
Section 1: Applicant Background Information	
Section 2: Project Overview	
Section 3: Purpose and Need	
Section 4: Scope of Work	
Section 5: Leveraged Benefits	
Section 6: Tree Protection Ordinance Creation or Update: Governmental Entities Only	
Section 7: Budget Details	
Section 8: Community Engagement and Sharing Knowledge and Outcomes	
Section 9: Timeline	
Section 10: Bonus Points (optional) signed by Mayor or Chief Executive	
Tree Inventory Maintenance Agreement (if applicable) Appendix A	
Tree Planting Plan (if applicable) Appendix B	
Tree Planting and Maintenance Agreement (if applicable) Appendix C	
Letters of Commitment (from partners who you will work with to carry out this project).	

## Appendix A. Tree Inventory Maintenance Agreement

This agreement is required for projects that include tree inventory work.

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 after initial inventory completion, and will comply with the following requirements:

- The tree inventory shall be updated regularly to ensure that it reflects current conditions in the community. Tree data should be updated during cyclical pruning, or on another continuous basis.
- 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 timely, 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. (requires signature of forestry department director or equivalent)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

## Appendix B. Tree Planting Plan

This form is required for projects that include tree planting.

List species your organization intends to plant, proposed quantities, and any applicable cost estimates. If you wish to change your species selections during your grant term based on availability, new information, or cost, please contact your grant administrator for approval.

Maintenance contact name: \_\_\_\_\_

Maintenance contact email: \_\_\_\_\_

Year(s)/season(s) of planting: \_\_\_\_\_

Number of trees to be planted: \_\_\_\_\_

Type(s) of plant stock (for example, B & B, container, bareroot):  
\_\_\_\_\_

Size (average caliper; you will include details in table below): \_\_\_\_\_

Describe how activities below will be completed. If an activity is not applicable, briefly explain.

1. Identify the parties responsible for tree planting and maintenance during the grant period as well as long-term maintenance beyond the life of the grant. Describe the roles of each party.

2. Describe the experience level of tree planting and maintenance personnel. If volunteers, homeowners, or inexperienced staff will be involved, they should receive basic training and literature on proper maintenance techniques. Is training needed, and how will you provide it?

3. Describe your proposed planting locations. Will you plant on public property or private property? Attach a map if applicable.

4. When trees are planted on private property or planted on public property by an entity other than the owner (for example, an NGO planting on the city’s public right-of-way), the property owner should sign an agreement to confirm they will maintain and protect the trees and provide access to the organization responsible for planting and maintenance. If applicable, what steps have you taken to ensure maintenance of private property?

5. How will you periodically confirm tree maintenance work is performed correctly?

6. Describe in detail how trees will be watered, the time period and frequency of watering, and the source of the water at the planting locations (or how it will be delivered). For the first year, trees should be watered from the date of planting through September on a weekly basis and more frequently as needed during drought conditions. Watering may be reduced the second and third years, depending on rainfall and site conditions.

7. Describe how mulch or other ground treatments will be used to reduce competing vegetation and improve tree health. Identify quality control measures that will maintain proper mulch depth (2 to 4 inches for landscape trees) and keep mulch 1 to 2 inches away from the base of the tree trunk.

8. If staking is deemed necessary due to mowing, vandalism, or wind conditions, describe the staking and guying method and materials to be used. Also describe the timing and the responsible party for inspection and removal.

9. The grantee will check trees regularly (at minimum every 6 to 12 months) to identify and address tree health concerns. Indicate who will be inspecting the trees, the frequency of inspections, the tree inspection process, and what follow-up actions will occur.

10. Young trees may be easily damaged by human activity, animals, equipment, or competition from weeds and invasive plants. Describe how planted trees will be protected.

11. Newly planted trees should need little pruning if they were properly cared for at the nursery. In the first year after planting, remove only dead or broken branches. In later years, weakly attached limbs can be removed, and structural pruning can be done if needed. Describe how any needed pruning will be done.



12. Trees planted under contract should include a warranty for replacement (due to poor condition or mortality), unless otherwise stated in the grant narrative. Describe expected warranty conditions.

13. Grantees should be prepared to fully replace all trees that are in poor condition or die prior to the end of the project grant agreement, unless loss is due to natural disaster beyond the control of the project manager or is allowed for in the grant narrative. If your project anticipates some tree mortality within the establishment period, include a target survival rate. Tree replacement must occur if survival is below that rate. Describe target survival and tree replacement plans.

14. Provide a summary of planned tree plantings for the proposed project in the table below. Add lines as needed to capture groupings of trees with similar attributes (for example, species, size). This summary is not a substitute for a detailed planting plan developed by a qualified professional. The planting summary may be adjusted during project development, but diversity in the summary should be roughly representative of the final planting. Note that projects must avoid installing any

state-listed invasive species, including species listed as restricted, pending further review, nonrestricted, or on a watch list.

Species (common name)	Species (botanical name)	Number proposed	Size of Stock (inches for deciduous or feet for conifers)	Anticipated cost per tree, planted (\$)	Notes

15. In five to seven sentences, describe how the species your organization plans to plant will help increase the overall species diversity of the urban forest. If the information is available, discuss current species diversity and how this project will affect it.

## **Appendix C. Tree Planting and Maintenance Agreement**

**This agreement is required for projects that include tree planting.**

### **Tree Planting Agreement**

This is an agreement between The Morton Arboretum (Arboretum) and a grant applicant (Applicant) for the completion of a tree planting project and ongoing care of trees provided or purchased through this grant. This agreement is in effect only if the applicant is awarded funding through this program.

The following outlines the responsibilities of the designated Applicant:

1. Select species diversity to meet grant requirements.
2. Select species from nurseries that are licensed by the State of Illinois.
3. Contact JULIE (Joint Utility Locating Information for Excavators) (all locations other than the City of Chicago or DIGGER for 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 call 811 or 312-744-7000. For sites outside of the city of Chicago call 811 or 1-800-892-0123.
  - a. The landowner must call for utility locations to ensure the proposed planting sites are clear of utility lines.
  - b. Mark the proposed tree locations prior to the JULIE/DIGGER visit.
4. Care of the trees before, during, and after planting is the responsibility of the Applicant.
  - a. 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.
  - b. 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.
  - c. Store the trees in a protected location until they are planted.
  - d. All trees must be watered appropriately, before, during, and after they are planted. The Applicant 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 grant applicant (Applicant) certifies that the Applicant will provide customary and reasonable tree care and maintenance for three years after planting.

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

1. During the growing season approximately 10 to 15 gallons of water or 1 inch of water should be applied once weekly to the root ball of newly planted trees unless adequate soil moisture is present.

2. A 3- to 4-inch 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 Tree Planting and Maintenance Agreement, I will comply with these requirements. (requires signature of forestry department director or equivalent)

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Organization: \_\_\_\_\_

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

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

\_\_\_\_\_

## Appendix D. Sample Partner Commitment Letter

This template can be used by your partners to show their commitment to participating in your project. Partners should use their organization's letterhead, and edit any text in brackets. Edit any part of this template to fit your project scope and needs as desired.

[Date]

The Morton Arboretum  
4100 IL-53, Lisle, IL 60532

Re: Commitment to Support [Project Name] Grant Application in Disadvantaged Communities

Dear Morton Arboretum Grant Administrators,

We are delighted to extend our commitment to collaborate with [Applicant Organization's Name] in supporting the [Project Name] grant application, particularly with a focus on benefiting disadvantaged communities. As a dedicated partner, [Partner Organization's Name] is committed to contributing [specific details of support, for example, resources, expertise, contributions] to ensure the successful implementation of this impactful project that seeks to address the unique needs of underprivileged populations.

Our organization recognizes the profound impact the [Project Name] is poised to have on [mention the disadvantaged communities, beneficiaries, or relevant stakeholders], and we share your commitment to creating positive change in these areas. We firmly believe that our collaborative efforts will play a crucial role in addressing the challenges faced by these communities and fostering sustainable development. In alignment with our commitment, [Partner Organization's Name] pledges to provide the following support:

[Specify the nature and extent of support, if applicable, detail any contributions or resources being offered, and highlight any expertise, technical assistance, or personnel support that will be provided. If there is a subaward involved, please state it here]

This commitment is made with the understanding that our organizations will work closely together to achieve the mutual objectives outlined in the [Project Name], with a specific emphasis on promoting equity and well-being in disadvantaged communities. We are committed to conducting our collaborative efforts with sensitivity to the unique needs, challenges, and strengths of these communities.

We look forward to the opportunity to contribute to the success of the [Project Name] and to make a meaningful impact on the lives of those in disadvantaged communities. Please feel free to reach out to us if you have any questions or require further clarification regarding our commitment.

Thank you for considering our organization as a partner in this endeavor. We are enthusiastic about the prospect of working together to address the specific needs of disadvantaged communities and create lasting positive change.

Sincerely,

[Partner Representative Name]  
[Partner Representative Title]  
[Partner Organization's Name]  
[Partner Contact Information]