



Tree Inventory Plan Requirements

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

A contractor must be used to complete an inventory. Contractors shall have the requisite professional experience to do the work.

The goal of this project funding is for the community to have a professional tree inventory that includes GPS location, species, size, condition, etc.

- 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.
- Communities that do not have a full digital tree inventory or have inventory data that is older than 4 years will be given priority.
- An urban forest management plan that addresses the inventory results must be a major component of this inventory and management plan. Applications seeking only tree inventories will not be funded.

Tree Inventory Deliverables

1. Individual Tree Data Fields

- a. GPS coordinates
- b. Street address and relative location
- c. Growing space
- d. Species
- e. DBH (Diameter at Breast (standard) Height)
- f. Single or multi-stem designation
- g. Condition rating including defects (roots, wounds, rot, deadwood, etc.)
- h. Risk assessment or categorization including recommendations for trees that need additional assessment
 - i. Maintenance recommendations
 - j. General comments or notes
- k. Planting spaces (optional but highly encouraged)

2. At a minimum, the inventory shall be delivered as a digital spreadsheet, such as Excel.



Urban Forest Management Plan Requirements

Completion of a community-wide management plan based on the inventory is a requirement of this grant. A management plan's scope shall cover the entire community regardless of what has been inventoried, and have established priority goals to improve canopy in eligible 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.

Community-wide management plans must include:

- A significant and thoroughly explained and documented community engagement (seeking input to influence decisions).
- Strategies for improving service to eligible communities.
- A plan for follow up activities, solely in eligible communities/ census tracts.

A Contractor shall complete an urban forest management plan that is based on an up-to-date inventory. Communities that do not have an urban forest management plan that is based on 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 forest 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 Application in a document format that can be easily edited and updated, e.g. Microsoft Word or another similar program.

Requirements

Plan components shall include establishing one or more priority goals to improve canopy in eligible 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 section (b) through (g) 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.**
 - A description of the organization's urban forest canopy cover and composition.
 - Prioritized planting locations, including replacements and new plantings.
 - A cyclical pruning schedule and map.
 - Prioritized hazard abatement informed by inventory data.
 - A list of preferred species, prohibited species, and species to be planted in limited quantities.
 - How the urban forest inventory will be used to inform decision and how it will be updated.
 - A strategy for improving forest age and species structure.

- Short and long-term urban forest goals 2024- 2031
 - (B) Long term;
 - Urban forest management goals and risk mitigation.
 - Canopy cover goals.
 - Climate change response.
 - (C) Short term;
 - Tree pruning schedules.
 - A plan for replacement and removals.
 - A plan for hazard abatement.
 - Mitigation of pest and diseases.
 - Benchmarks to ensure progress towards long-term goals.
 - (D) Specifications for planting
 - Specifications for ANSI, ISA, and/or other nationally recognized standards for tree care (pruning, planting, etc.).
 - Establishing a pruning and maintenance cycle so that care is regularly scheduled.
 - Protection and standards for trees in construction zone.
 - (E) Required and recommended certifications, qualifications, and training for staff, contracted labor, and consulting
 - Formulating these requirements so as to mitigate and manage risk, including climate impacts.
 - (F) Material equipment, and budget considerations
 - Short and long-term budget projections and needs.
 - A plan for acquisition and replacement of equipment and resources.
 - (G) A program for education and outreach of residents
 - Engaging private landowners and managers within the organizations's boundaries.
 - Developing a marketing strategy for engaging residents so they are familiar with urban forestry in their community.

Quotes from TWO contractors should be included

- Contractors must submit proof of capacity to complete the plan within the time allotted,
 - including staff capacity committed to the project,
 - and the timeline for completion (consensus emerged on one growing season and extensions are possible if they need extra time if submitted in writing).

Training and Education

- Before the project starts, the contractor shall meet with the community to outline project goals and plans specific to the community receiving feedback from them, to make collaborative decisions.
- Immediately after the inventory is complete, the contractor shall ensure that the community understands how to use the inventory effectively, this includes at a minimum, a presentation to the City Council, and at least one additional community meeting to the public in an eligible area.
- Contractor shall provide a minimum of 8 hours of technical assistance to implement on the ground activities specifically in eligible areas, like tree planting, pruning, invasive species removal, etc.

The Applicant shall provide proof that the urban forest management plan was completed and submit a copy of the document to Trees Forever (Trees Forever will provide a copy to IDNR for your community file).