A Technical Guide to Developing
Urban Forestry Strategic Plans
&
Urban Forest Management Plans

Wisconsin Department of Natural Resources
Division of Forestry

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This guide is intended to help local units of government and others develop urban forestry plans that: 1) address local needs, and 2) meet the standards of Wisconsin's Urban Forestry Assistance grant program.

Why Plan?

Planning is key to efficient management of any program. Good plans make the difference between cost-effective, proactive management and costly crisis management. Plans give focus and direction. They provide the framework for program implementation and a basis for consistent decision making. They are tools for determining budgets and other support needs.

What are Urban Forestry Plans?

Urban forestry planning occurs on several levels. At the broadest level, ***strategic*** plans establish the overall goals and objectives of the organization's urban forestry efforts. Ideally, strategic planning is one of the first tasks undertaken in the establishment of a community forestry program. Also called long-range, comprehensive or master plans, strategic plans create a blueprint for administration and management of a community tree program. Strategic plans include input from local residents, organizations, businesses, municipal staff and elected officials. They are integrated with other comprehensive community plans.

Urban forest ***management*** plans are specific to the field operations of the community tree program. Typically based on a detailed tree inventory, management plans identify and prioritize tree planting, maintenance and removal activities within a multi-year time frame.

Urban forestry planning also takes a variety of other forms. Land use plans, greenway plans, site development & reconstruction plans, public landscape design and maintenance plans and similar planning efforts need input from those involved with public tree care.

Pre-Planning

Pre-planning establishes parameters for plan development. Pre-planning should identify such things as:

- what kind of plan is needed
- who will be involved in its development and at what stage
- how the plan will be used
- how awareness and support for the plan will be generated

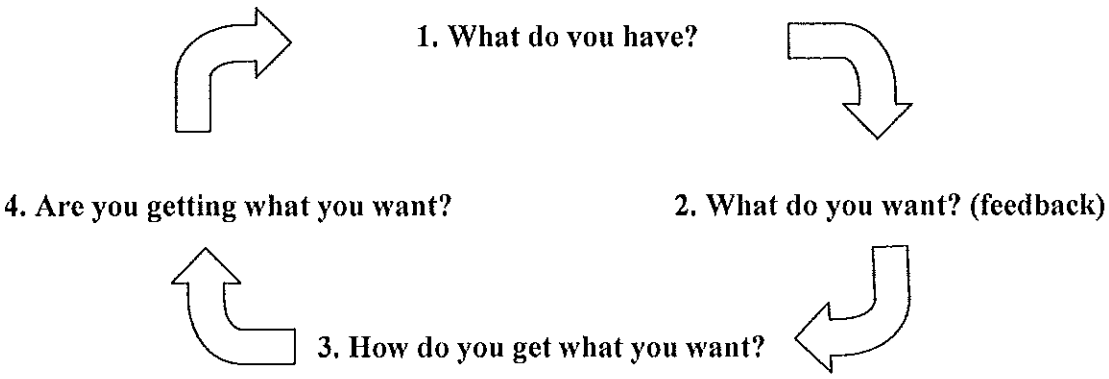
Available interest, expertise, time and financial resources of the organization should be considered when determining how to develop the plan. Plans can be developed by staff, program volunteers such as a citizen tree board, a hired consultant or some combination of these.

Urban Forestry Assistance Grants, administered by the Department of Natural Resources, are available on a competitive basis for projects that develop or expand capacity for sustainable urban forestry programs at the local level. This cost-share program favors development of strategic and management plans. Grant funded plans must meet Department standards (see pp.15&17).

Pre-planning should occur before applying for an Urban Forestry Assistance Grant. Pre-planning makes the application process easier and invariably results in a better project proposal.

The Planning Process

Planning is a continuous process that follows a logical sequence of steps. Four principal questions drive the process, regardless of the type of plan or its complexity:



How to Use This Guide

The wide spectrum of community tree issues and planning considerations can make urban forestry strategic or management planning seem formidable, particularly to organizations lacking trained staff. This guide offers a "how to" approach to urban forestry planning, utilizing the four-step process shown above. By following step-by-step through the guide, any organization can develop a thorough, functional urban forestry plan, regardless of community size or technical resources.

The examples given in this guide are merely to stimulate ideas and illustrate concepts. Because each community is unique, plans will differ from one community to another. Not all plans will need to address every point discussed or give the amount of detail shown. Some communities may wish to include information beyond that presented in the guide. There is no prescribed order, length, format or style for a plan. Organizations are encouraged to develop clear, practical, action-oriented plans that best suit their own needs and circumstances. Above all, a plan must be ***useful***! For further planning assistance, contact the DNR urban forestry coordinator serving your region.

Urban Forestry Strategic Plans

Before beginning the four-step planning process, identify the purpose and scope of your plan. Think back to your pre-planning assessment. Why are you developing this plan? What is it supposed to do? How will it be used? Document your intentions with written statements.

For example... Purpose: The purpose of the Pleasantville Urban Forestry Strategic Plan is to lay the groundwork for developing a comprehensive urban forestry program.

Scope: This plan provides a 20-year outline for achieving urban forestry administrative, policy, educational and management goals. It gives citizens of Pleasantville, community decision makers and staff a clear set of prioritized recommendations to accomplish these goals. The plan proposes a timetable of implementation and, where possible, provides estimated costs. This plan is intended to become a part of Pleasantville's Community Master Plan.

Step 1: What Do You Have?

a. historical background

A brief overview of the history of your community's tree resource and its management can add useful perspective. Tracing the community back to its development, what has been the role of trees? What values were placed on them? What cultural influences shaped these values? Are there trees of historical significance in the community? Has tree planting been a part of the community's history? How have trees been taken care of in the past? Have there been events that changed the public's attitude toward trees (e.g., Dutch elm disease, tree removal for road projects, etc.)?

b. current situation

Assess your situation in terms of:

- ✓ awareness and interest among community residents and officials
- ✓ administration and management of public tree planting and care
- ✓ general status of the urban forest resource

This assessment may require some investigation. You might conduct a survey to gauge residents' attitudes, preferences and knowledge about trees, tree care and public tree management. Are there local organizations, businesses or individuals interested in community tree planting and care? How do local elected officials and staff feel about public trees? Are public trees adequately cared for in your community? Is there an adequate budget for trees? How is it determined? Are there ordinances or policies concerning trees? Are they adequate? Are they enforced? Is tree wellbeing considered in development and construction projects? ...in comprehensive community planning? ...in subdivision planning? Are the persons in charge of public trees trained in proper tree care practices? Is there an adequate budget for overall management of the tree program, including ongoing staff training, public education and administrative support? Does the municipal fleet include appropriate equipment for forestry operations? Is tree care equipment locally available for lease? What is the availability and quality of commercial tree care service in the area? etc.

Step 2: What Do You Want?

a. needs

Various program needs will be evident from your assessment in Step 1. You might want to group needs into categories.

For example...

Awareness Needs

- increased public awareness of the values and benefits of community trees
- better local support for an urban forest management
- better understanding among residents about proper tree selection, planting and care

Administration & Management Needs

- more training and education for tree program staff
- updated municipal tree ordinance
- alternative sources of program funding
- creation of a tree board

Tree Needs

- more species and age diversity
- better maintenance for existing public trees
- fewer hazardous trees

b. goals

Develop broad goals that address the needs you have identified. Steer away from vague statements such as, "improve the quality of life." Goals should be quantifiable so that progress can be measured.

For example...

1. The urban forestry program has community and political support.
2. Residents are knowledgeable about proper tree planting and care.
3. Trees are integral in all community planning decisions.
4. Community trees are maintained at optimum levels of stocking, health, age and species diversity and are appropriate for the site. etc.

Step 3: How Do You Get What You Want?

a. strategies

Once goals are determined, start figuring out ways to achieve them. Recommendations should be in the form of specific strategies or objectives. If desired, strategies can be further broken down into actions and tasks. Look at sample goal #4, "community trees are maintained at optimum levels of stocking, health, age and species diversity, and are appropriate for the site." Recommendations might look something like this:

Strategy 1: Complete a community tree inventory.
Action: Determine how inventory will be conducted.
Action: Apply for Urban Forestry Assistance grant.
Action: Hire intern or consultant, as necessary.
Action: Conduct inventory.
Task: Conduct training, as necessary.
Task: Purchase equipment and materials, as necessary.
Action: Analyze inventory findings.

Strategy 2: Prepare a management plan based on inventory findings. etc.

b. time, responsibilities and budgets

Plans are unlikely to be implemented without a clear indication of who will do what, when, and at what cost. Develop an implementation schedule that identifies who is responsible for each strategy (action, task), when each will be completed and what each will cost. Be sure to prioritize the schedule so that, if time and budget become limiting, the most important work gets done first. Here's an example of how a portion of an implementation schedule might look:

GOAL #1: COMMUNITY TREES ARE MAINTAINED AT OPTIMUM LEVELS OF STOCKING, HEALTH, AGE AND SPECIES DIVERSITY, AND ARE APPROPRIATE FOR THE SITE			
Strategy 1: Complete a community tree inventory			**Priority - 1**
Recommended Actions & Tasks	*Cost/Funding Source*	*Performed By*	*Status/Completion Date*
Determine how inventory will be conducted	N/A (volunteers)	tree board	September 2011
Apply for Urban Forestry Assistance grant	N/A (volunteers)	tree board	October 2011
Hire intern or consultant	$4,000 DNR Urban Forestry Assistance Grant	tree board & staff	February 2012
Perform inventory	included in $4000 above	intern or consultant	June–July 2012
Conduct training, as necessary	included in $4000 above	intern or consultant	June 2012
Purchase equipment and materials, as necessary	$500 forestry budget	tree board or staff	June 2012
Analyze inventory findings	included in $4000 grant	intern or consultant & tree board	August 2012
Strategy 2: Prepare an inventory based management plan			**Priority - 1**

c. justify recommendations

Plan recommendations that depart from the current management level and/or entail a substantial budget increase need clear, compelling justification. How will implementation improve public safety, resident satisfaction or cost-effectiveness? What problems will be solved or reduced? What alternatives were considered and why were they rejected? What are the consequences of not implementing the recommendations? It might be helpful to make a side-by-side comparison between existing and proposed program costs and benefits. Administrators and budget decision makers are unlikely to support a plan or budget requests without a clear, convincing argument for doing so.

Step 4: Are You Getting What You Want?

a. monitor & evaluate

How will you assess whether the strategies, once implemented, are moving you toward your goals? For example, to determine whether strategies for reaching sample goal #2 are working, you might look around the community at trees on private property. Are they being planted and cared for properly? Are you getting feedback on municipal tree planting and care practices? Has the quality of commercial tree care services changed? Are there other ways to measure tree knowledge among residents? Include specific monitoring recommendations in your plan.

b. take corrective action

Include a schedule for reviewing and updating the plan. Goals, strategies and priorities may change over time. New program staff or volunteers may bring different ideas or priorities. Periodic review and updating are important to avoid wasted effort and to keep the plan a working document.

Appendix and Summary

Strategic plans should also include an Appendix of reference information useful for plan implementation. Appropriate material might include: community map(s), relevant ordinances or tree policies, technical resources, potential sources of funding, summaries of surveys, etc.

Finally, for a plan that is quite lengthy or detailed, it is helpful to include a one- or two-page executive summary. For those who haven't the time or interest to read the entire plan, a short summary of its highlights should give a sense of the plan's general direction, major recommendations and implementation costs.

Urban Forest Management Plans

The steps for developing a management plan are the same as for a strategic plan. Begin by defining the purpose and scope of the plan.

For example... Purpose: The purpose of the Pleasantville urban forest management plan is to recommend specific tree planting, maintenance and removal activities to cost-effectively improve the public tree resource.

Scope: This plan makes site-specific, prioritized, inventory-based recommendations for managing Pleasantville's public tree resource for a five-year time period. It identifies staffing and other support needs and projects annual budgets for the five-year planning period.

Step 1: What Do You Have?

a. inventory summary and analysis

A recent inventory of tree and site information forms the basis for the management plan. A thorough summary and analysis of the inventory data will enable you to identify existing resource needs and anticipate future ones. Does any one species comprise a high percentage of the total public tree resource? ...a high percentage of trees of a certain age or size class? At what age or size are trees regularly developing structural problems? Does this vary by species? ...by location? Is width of tree lawn correlated with tree condition? Does this vary by species? Does tree condition vary by land use or location? Are there areas where trees are needed? Such questions are just a few examples of those you might consider in an inventory analysis.

b. assessment of other circumstances

What other local circumstances are likely to influence your short-term resource management activities? Consider these examples:

- ✓ new subdivision under development
- ✓ tall-growing trees to be removed from beneath power lines by the local utility company
- ✓ stump grinding, previously contracted, now to be done by staff
- ✓ volunteer tree board forming
- ✓ emerald ash borer confirmed 50 miles away

Step 2: What Do You Want?

a. management needs

Identify needs based on your inventory analysis and assessment of other circumstances.

For example...

Remove _____ (#) hazardous trees
Conduct safety pruning* on _____ (#) trees
Conduct training pruning* on _____ (#) existing and _____ (#) future trees
Conduct maintenance pruning* on _____ (#) mature trees
Fill _____ (#) existing and _____ (#) anticipated planting vacancies
Improve diversity of street trees
Improve planting survival
Minimize new oak wilt infection centers

*Note: Various types of pruning are defined on p.12

b. management goals

Determine quantifiable goals based on needs.

For example...

1. Optimum tree cover is established and maintained.
2. Optimum level of age and species diversity is established and maintained.
3. Conservation of tree resources is promoted.
4. Street trees are appropriately selected, situated and maintained to minimize hazard, nuisance, hardscape damage and maintenance costs.
5. Management of the urban forest is cost-effective and efficient.
6. Management strategies are acknowledged, understood and cooperatively implemented by appropriate municipal departments. etc.

Step 3: How Do You Get What You Want?

a. strategies and action steps

This is the meat-and-potatoes of the management plan. Management plan strategies should consist of specific, inventory based recommendations for accomplishing stated goals, to include:

Tree and stump removal

- priority (hazard) removals ... how many, rate of removal, where (list or description)
- replacement needs wood
- residue utilization
- stump grinding, reseeding ... how many existing and anticipated, how many per year, where (list or description)

Maintenance

- priority pruning (safety, health) ... how many, rate of removal, where (list or description)
- other maintenance - watering, insect & disease control, mulching, cabling & bracing, fertilizing, stake removal, etc... what, where (list or description), what species, when/how often
- mature tree pruning (maintenance, routine)... how many, where (list or description), when/how often
- new tree maintenance program ... what, where (list or description), what species, when/how often

Planting

- planting site assessment ... how many existing and anticipated planting sites, where (list or description), constraints & opportunities, new tree protection
- prioritized planting plan ... optimum stocking level, planting rate, citizen requests
- site specific evaluation of diversity, design & function
- site specific species recommendations

Administrative Support

- analysis of adequacy of current staffing levels and recommendations on any or all work to be done by staff, outside contractors, volunteers, or if additional staff is or will be needed
- equipment needs ... what type, how many, purchase or lease
- staff training/education
- storm damage & hazard tree plans; inspections
- policies re: citizen requests for tree work, permits for tree work
- public notification of scheduled operations

Note: Recommendations should make reference to any existing policies and industry standards, as appropriate. Referenced policies and technical standards should be incorporated into the plan Appendix.

b. prioritizing operations

When developing your plan, consider the following priorities of management activities:

1. Public Safety! Remove hazardous trees and limbs.
2. Maintain what you have.
3. Plant after maintenance needs have been met.

Remember also to build in funding for maintenance when you plant, just as you would for any other component of infrastructure (roads, bridges, utilities, etc.).

According to the USDA Forest Service, new programs or those in which routine maintenance and removals have been neglected should spend approximately 80% of their operations budget on maintenance and removals. The remaining 20% is for planting and administration. Once the initial heavy maintenance and hazard tree removals have been performed, the following IDEAL* budget is suggested:

	IDEAL	(TYPICAL)
Pruning and other maintenance	45-50%	38%
Removals	20%	35%
Planting	20-25%	14%
Administration & supervision	10%	13%

Note that maintenance expenditures should be about twice those for planting. Also, *TYPICAL* expenditures for removals are much higher than *IDEAL*. With greater emphasis on maintenance, the tree population should become healthier and longer lived, decreasing removal costs.

*The "ideal" budget figures are offered as a guideline only. In all cases, forestry expenditures should be based on actual needs as determined from a tree inventory and other local circumstances.

c. time, responsibilities and budget

Develop an implementation schedule as described for strategic plans. Budgets should be based on real information (e.g., what does it cost to conduct "maintenance pruning" on a 14" tree?) The budget work sheet and instructions on pp.10-12 will help you estimate the cost of planting, maintenance and removal activities specified in your plan.

d. justification of recommendations

As for strategic plans, management plans whose recommendations call for a substantial budget increase should include specific justification, either as part of the plan or as an attachment to the plan.

Step 4: Are You Getting What You Want?

Monitor and evaluate progress, take corrective action and reset goals as described for strategic plans.
As for strategic plans, include an Appendix with information useful for plan implementation. Appropriate material might include: community map, map of utilities, technical & safety standards, list of vendors, recommended species lists, equipment & vehicle rates, etc. Also include an executive summary if needed.

Estimated Costs for a Five Year Urban Forest Management Program

Estimated costs for each activity			20__		20__		20__		20__		20__		Five year cost
Activity	Diameter Class	Cost/tree (in dollars)	# of trees	Total Cost	# of trees	Total Cost	# of trees	Total Cost	# of trees	Total Cost	# of trees	Total Cost	
Tree Removals (include any accelerated ash removal, if applicable)	1-6"												
	7-12"												
	13-18"												
	19-24"												
	25-30"												
	31-36"												
	Over 36"												
Activity Totals													
Stump Removal	1-6"												
	7-12"												
	13-18"												
	19-24"												
	25-30"												
	31-36"												
	Over 36"												
Activity Totals													
Immediate Priority Pruning	1-6"												
	7-12"												
	13-18"												
	19-24"												
	25-30"												
	31-36"												
	Over 36"												
Activity Totals													
High Priority Pruning	1-6"												
	7-12"												
	13-18"												
	19-24"												
	25-30"												
	31-36"												
	Over 36"												
Activity Totals													
Sub-Total This Page													

Estimated costs for each activity			20__		20__		20__		20__		20__		Five Year Cost
Activity	**Diameter Class / Sub-activity**	**Cost/tree** (in dollars)	**# of trees**	**Total Cost**	**# of trees**	**Total Cost**	**# of trees**	**Total Cost**	**# of trees**	**Total Cost**	**# of trees**	**Total Cost**	
Routine Pruning (may want to exclude some or all ash if planning accelerated removal)	1-6"												
	7-12"												
	13-18"												
	19-24"												
	25-30"												
	31-36"												
	Over 36"												
Activity Totals													
Tree Planting	site prep												
	tree purchase												
	planting												
Activity Totals													
New Tree Maintenance	training pruning												
	mulching												
	watering												
Activity Totals													
Other Maintenance	EAB insecticide												
	fertilization												
Activity Totals													
Sub-Total This Page													
Sub-Total Previous Page													
Totals per Year													

Completing the Budget Table

Use your inventory to identify and schedule tree planting, removal and maintenance for the 5-year planning period. Tree work should be prioritized based on public safety. Trees that present a risk to public safety (dead, dying, decayed, structurally unsound) should be treated or removed immediately, before undertaking other, non-emergency tree work.

Determine the ***cost per tree*** for each activity. Local tree services should be able to provide cost estimates. Breaking costs down by diameter class will result in more accurate estimates. Diameter is measured at 4.5 feet above ground. The diameter classes may vary depending on the inventory program used. For work to be performed in-house, calculations should be based on staff time and equipment costs.

Most inventories recognize three levels of tree risk. Trees classified as *Immediate Priority* (or *Priority One*) are those at highest risk to public safety and should be scheduled for treatment during the first year. If the entire tree requires removal, it should be shown in the appropriate ***Tree Removal*** row. If the risk can be mitigated through pruning, the tree should be shown in the appropriate *Immediate Priority Pruning* row.

Priority Two are trees that warrant action with regard to public safety, but are not in immediate danger of failing. Trees in this category should be removed or pruned as soon as possible after the *Priority One* work is complete, but before most other tree work, such as *Routine Pruning*, *Planting*, etc.

The third level of risk is ***Routine Pruning***, for mature trees that present no apparent public safety risk. These trees should be pruned on a regular, preventive-maintenance cycle of approximately once every five years. If trees have not received routine pruning in the past, the first cycle of *Routine Pruning* will likely involve more work (expense) due to the greater amount of corrective pruning required. Subsequent cycles of *Routine Pruning* usually involve far less work (expense), since only minor corrections or deadwooding are needed. Note that once the *Priority One* and *Two* pruning are completed, all mature trees will fall into the *Routine Pruning* category. From that point on, each year should schedule *Routine Pruning* for one-fifth of the total mature tree population (for a 5-year pruning cycle).

New Tree Maintenance includes several activities. It involves Training Pruning—the systematic corrective and directional pruning of newly planted trees, usually done three times in the first ten years. For example, trees planted in 2011 could receive Training Pruning in 2014 and 2017 and 2021. After this, they should generally be incorporated into the *Routine Pruning* cycle with the other trees. Training Pruning will eliminate most structural problems that would otherwise develop during the remaining life of the tree. Pruning small trees with small limbs is easier, faster, cheaper, safer and better for tree health than waiting to prune until problems develop. An investment in Training Pruning greatly increases the long-term health and value of the tree. *New Tree Maintenance* also includes mulching, watering, and removal of any wraps, stakes & guying material.

Other Maintenance can include a variety of as-needed activities, such as watering, mulching, insect & disease monitoring and treatment, fertilizing, cabling & bracing, etc. Communities planning to treat any ash trees with insecticide for emerald ash borer should include those treatment costs. Although weather, pest outbreaks and similar circumstances can make it difficult to project *Other Maintenance* costs, an estimate should be included in the budget.

Planting should become a regularly scheduled activity once *Priority One* and *Two* pruning is complete and *Routine Pruning* has begun. Planting can be phased in gradually as high-priority tree work is nearing completion. ***The number of trees to plant*** can be determined as follows:

$$\frac{\text{number of planting sites + number of removals +average annual mortality}}{\text{number of years to full stocking (or other canopy goal)}}$$

Note: The Table for Estimated Costs only includes costs for the forestry program's field operations. Additional costs for public awareness, staff training, program administration, equipment purchase and maintenance, etc. should also be calculated into the overall community forestry budget.

Sample Outlines for Strategic and Management Plans

STRATEGIC PLAN

I. Executive Summary
* II. Statement of Purpose and Scope
III. Historical Background
* IV. Current Situation
* V. Needs Statement
* VI. Goals
* VII. Objectives/Strategies (& Actions, Tasks)
* VIII. Implementation Schedule with Budgets
IX. Budget Justification (can be attachment to plan)
* X. Evaluation Mechanism
XI. Appendices
  - A. Community Map
  - B. Shade Tree Ordinance
  - C. Survey Summaries
  - D. Potential Funding Source
  - E. Technical Resources
  - F. Tree City USA Program Information Management Districts etc.

MANAGEMENT PLAN

I. Executive Summary
* II. Statement of Purpose and Scope
* III. Inventory Summary & Analysis
* IV. Assessment of Administrative & Public Awareness Needs
* V. Goals
* VI. Objectives/Strategies (& Actions, Tasks)
* VII. Implementation Schedule with Budgets
VIII. Budget Justification (can be attachment)
* IX. Evaluation Mechanism
X. Appendices
  - *A. Inventory Documentation (e.g., data summary)
  - B. Community Map with Management Districts etc.
  - C. Relevant Ordinances
  - D. Map of Utilities
  - E. Technical & Safety Standards
  - F. Species Lists
  - G. Equipment & Vehicle Rates
  - H. List of Vendors
  - I. Storm Management Plan etc.

* required elements for plans developed with funding from an Urban Forestry Assistance Grant (see pp.15 & 17)

Planning Tips & Troubleshooting

A plan is not an end unto itself, but a vehicle for reaching a destination. Many impressive-looking plans end up on a shelf gathering dust rather than being put to use. A plan is more likely to be implemented if:

- it is ambitious but realistic, achievable within the abilities and constraints of the organization. A plan that might work well for one community or organization could be a "pie in the sky" for another.

- it contains a full complement of ***clear and specific recommendations for action*** based on stated goals. Anyone who reviews the plan should be able to answer such questions as: What is the first step toward implementing this plan? Who is responsible for initiating that step? Who else will be involved? What equipment, training &/or technical resources are needed to take that step? What will it cost? What happens after that step is completed? **A good plan provides enough information to give a clear idea of the next step(s) and the resources (time, dollars, people) needed to take that step.**

- it is used to develop annual work plans. Ideally, annual work plans are developed from both strategic and management plans. Prior to the start of a new year, establish a calendar of tasks based on recommendations in the strategic and management plans.

- it has a broad support base. Avoid the temptation to include only tree enthusiasts or insiders in the planning process. Identify and include all affected parties and adversaries.

- plan development is a team effort. Regardless who prepares the plan; everyone who will be involved in its implementation should thoroughly review all drafts and provide objective input. The DNR Urban Forestry Coordinator serving your region is available to review and comment on drafts.

- plenty of time is allowed for plan development and review. Anticipate revisions, setting interim deadlines as needed. Regardless who prepares the plan; it is unlikely that a first draft, or even a second, will fully address your planning needs.

- your community's elected officials are made aware of your planning effort. Their interest and support will help ensure integration with the plans and activities of other municipal departments and will increase the likelihood of plan implementation.

- someone is given responsibility for overall plan development, implementation and evaluation. To help ensure thoroughness and continuity, responsibility is best given to someone with the time and interest to give the plan the attention it deserves.

If a consultant will be preparing your plan, be sure to request a copy of "Guidelines for Working with Consultants on Urban Forestry Grant Projects" from the Urban Forestry Coordinator serving your region

Minimum Requirements for Grant Funded Urban Forestry Strategic Plans

Sponsor of Plan: _____ Project Number: _____

___ 1. statement of purpose and scope of plan

___ 2. urban forestry background, current situation & key issues; overview of needs

___ 3. long-term goals for shaping program direction, priorities & policies; must address, at a minimum: *tree resource, program administration, & tree awareness & program support needs*

___ 4. proposed strategies (actions, tasks) to accomplish *tree resource* goals (i.e., a broad range of recommendations detailing how to establish, provide &/or develop such things as: urban forest management plans; hazard tree management plans; tree health care plans; greenway &/or land use plans; ecosystem management guidelines; tree inventories; technical standards & specifications; design standards; stocking & phasing objectives; species/site criteria; maintenance cycles & priorities; tree protection policy; tree removal criteria; etc.)

___ 5. proposed strategies to accomplish *program administration* goals & objectives (i.e., a broad range of recommendations detailing how to establish, provide &/or develop such things as: funding sources; program budgets; staffing & staff training; tree board &/or other program volunteers; ordinances; policy & procedures for equipment procurement & disposal, contractual services, permits &/or licenses, public & worker safety, tree work documentation, accomplishment reporting & program evaluation, assessing & collecting tree damages, handling citizen requests, emergency response, abatement of public & private tree hazards, hardscape conflict resolution, wood waste utilization, etc.)

___ 6. proposed strategies to accomplish *tree awareness & program support* goals & objectives (i.e., a broad range of recommendations detailing how to establish, provide &/or develop such things as: I&E programs for homeowners, schools, organizations, targeted populations or neighborhoods; Arbor Day & other awareness opportunities; TCUSA participation; recognition &/or awards programs; news media relationships; inter- and intra-departmental cooperation; communications &/or partnerships with utilities, real estate developers & builders, business community, green industry, DOT, etc; program promotion & publicity; political support; sources of technical assistance; etc.)

___ 7. implementation schedule of all activities; must include:
   a. priorities
   b. who is responsible for each activity
   c. target dates for completing each activity
   d. projected costs
   e. funding sources, as appropriate

___ 8. mechanism for evaluating & updating plan (i.e., who, when & how?)

___ 9. plan fluent, functional, technically sound & appropriate to needs of community

___ 10. funding credit statement

FOR DEPARTMENT USE ONLY

___ **REVISION REQUIRED;** letter to sponsor _____
(date)

___ **PLAN APPROVED** _____ by: _____
(date) (signature)

comments _____

_____

_____

_____

Minimum Requirements for Grant Funded Urban Forest Management Plans

Sponsor of Plan: _____ Project Number: _____

___ 1. statement of purpose and scope of plan
___ 2. assessment of tree resource, program administration and public awareness needs; assessment must be sufficiently detailed to provide a basis for management goals & activities for the duration of the planning period; inventory documentation (or comparable data) must be included in the appendix
___ 3. management goals based on needs assessment
___ 4. proposed activities (strategies, actions, tasks) to accomplish management goals; must address planting, pruning, other maintenance & removal needs identified through inventory summary and analysis, to include:

- prioritized planting locations (by location, land use or other parameter)
- site assessment for planting locations (e.g., physical characteristics & limitations; proposed site modifications; tree placement/siting considerations; species & size considerations; site-specific tree protection measures
- prioritized pruning by location & type of pruning (e.g., safety, training, maintenance, routine)
- prioritized inspections & miscellaneous maintenance by type & location, as appropriate (e.g., re-inventory; hazard tree inspections; transplant survival checks; insect & disease monitoring & treatment; fertilizing; soil treatment; root treatment; grass/weed control; cabling/bracing; supplemental watering; removing stakes, ties & wrap; mulching)
- prioritized tree & stump removal (by degree of hazard, species, size, location, land use or similar parameter); tree replacement or site restoration
- pest management, to include ash management consistent with *Reducing the Impact of Emerald Ash Borer: Guidelines for Managing Ash in Wisconsin's Urban Forests*; see http://dnr.wi.gov/forestry/UF/pdf/ManagingUrbanAsh8-3-10.pdf.

Note: Ash management recommendations are intended to complement, not preclude or replace, EAB readiness/response plans.

___ 5. recommendations for administrative activities to support planting, pruning, other maintenance & removals, to include:
staffing needs (e.g., how many, type of position, contract vs. staff, training needs)
equipment needs (e.g., what kind, how many, where/how to obtain)
wood residue utilization (if no policy already exists)

___ 6. implementation schedule of all activities for at least 5 years; must include:
who is responsible for each activity
target dates for each activity
projected costs
funding sources, as appropriate

___ 7. mechanism for evaluating & updating plan (i.e., who, when & how?)
___ 8. plan fluent, functional, technically sound & appropriate to needs of community
___ 9. funding credit statement

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___ REVISION REQUIRED; letter to sponsor _____ (date)

___ PLAN APPROVED _____ by: _____
(date) (signature)

comments_____