

Boston Tree Alliance Project Planning Guide

This table displays a template for suggested budget breakdown for tree planting projects. Not all projects are the same and budget needs will vary depending on project scope, staff and maintenance needs



	Labor	Materials
Planning	5-20% - Determine goal of project - Decide on location, number of trees and maintenance plans - Call DigSafe to ensure trees are not interfering with existing utilities - Follow plans as they were outlined on BTA application, reach out to BTA for advice or with any major revisions to project details - Attend required BTA tree planting orientation - Leave a portion of your budget for unexpected “miscellaneous” items that may arise, or to replace trees if they die before 2 years IF USING FISCAL SPONSOR: reserve 10% of budget Admin fees must be capped at 10%	0-50% (Depending on extent of site preparation) - Research into selecting the right tree species for your site - Improper tree selection can lead to replacement costs later - If de-paving, green infrastructure, or tree removals are part of your project, ensure this is completed before tree planting is conducted and that any necessary permitting is completed or in place before application submission
Tree Planting	10-30% - Labor compensation for any staff, contracted arborist/landscaping teams - Check in with any contractors get hourly rate or total quote to budget costs - At least one person at day of planting should have previously attended BTA tree planting orientation	20-50% - Select quality nursery stock and make sure you are purchasing the correct species - Purchase any necessary materials for soil amendments, mulching, staking, and watering equipment - Provide tree species list and stock size information on your application - If trees are purchased without a warranty, leave a portion of your budget to cover the cost of replacing any tree that may die in the two years after planting
Maintenance	10-20% - Report survey data to BTA at 6month, 1 year, and 2 years - Ensure trees are watered on routine schedule to ensure establishment - Check in on trees consistently and	5-10% - If labor is not being contracted out, having a sharp set of pruners and saws to perform pruning tasks will be necessary - Remember to sanitize your tools

	report any major health changes or damages to BTA Prune as necessary to develop branch structure, remove dead, diseased or dying material, and directional guidance	with rubbing alcohol in between trees and after each use to avoid spreading disease
Project Engagement	5-10% ● Reach out to neighbors, surrounding organizations to talk about how the BTA can help to “green up” neighborhoods and communities	0-5% ● Create signage/pamphlets/door hangers etc. to promote tree planting initiatives and give information on how to get involved

Boston Tree Alliance: Grant Applicant Checklist for Project Planning Application

- ☐ Review the Notice of Funding Opportunity and Grant Attachments and Guidelines
- ☐ Determine eligibility to apply for funding
- ☐ Determine season(s) for planting and review deadlines
- ☐ Determine eligibility of project
- ☐ [optional] Request a site visit or a technical assistance meeting
- ☐ Determine species list
- ☐ Determine necessary site preparation and any permits that may need to be obtained
- ☐ Submit application for Boston Tree Alliance grant funds

Review and Award Process

- ☐ Initial proposal and attachment read-through by the Alliance project review team
- ☐ Receive and respond to proposal feedback and any comments from the Alliance
- ☐ Re-submit project proposal with changes
- ☐ Perform landowner outreach for tree siting, ensure space is able to plant on
- ☐ Finalize tree planting and care/maintenance plan
- ☐ Alliance approves proposed care/maintenance plan
- ☐ Receive overall project approval from Alliance
- ☐ Submit required forms and documentation
- ☐ Collect signature for landowner access/maintenance agreement(s)
- ☐ Return landowner agreements to Boston Tree Alliance
- ☐ Send in required insurance documentation
- ☐ Sign Memorandum of Agreement (MOA) with Mass Audubon
- ☐ Submit invoice to Mass Audubon (with W-9) from approved budget
- ☐ Receive funds

Project Implementation

*If planting in spring, should be done before end of March if possible. If planting in fall, should be done during summer months

- ☐ Attend orientation for grantees
- ☐ Implement any site preparation work needed before trees can be planted
- ☐ Execute tree planting plan
- ☐ Hire a certified arborist, if needed
- ☐ Order trees as specified on project application
- ☐ Call DigSafe (2-3 weeks before planting date), adjust tree location if utility conflict is found
- ☐ Plant the trees in your project according to best management practices
- ☐ Document the planting, location, and requested details about trees on TreePlotter
- ☐ Follow-up with the Boston Tree Alliance within 2 weeks of planting
- ☐ Provide pictures and planting data for tree tracking database
- ☐ Care for trees according to approved care/maintenance plan
- ☐ Report back to the Boston Tree Alliance TreePlotter account after 6 months, 1 year, and 2 years with updates, issues, tree health/status, photos of trees, updated landowner contact information.

Considerations for projects with different personnel capabilities

Working with staff

- Staff should have formal training in tree planting and any other necessary tree care
- At least one person on site on day of planting shall have attended a BTA planting orientation
- It is helpful to have one designated staff member in charge of tree planting projects who can attend trainings and relay information accurately to rest of the team

Working with volunteers

- Working with volunteers is an excellent way to reduce labor costs and improve community relationships
- Volunteers will require thorough training and observation during tree planting projects to ensure no mistakes are made
- Project lead shall have attended BTA orientation and be able to provide accurate guidance for volunteers on the project

Working with contractors

- Working with contractors can ensure and hold liable to a properly completed planting project, but is the costliest option
- This option works best for organizations who do not have the time, planning capacity, or physical resources for completing projects on their own
- Ensure that either contractor or project lead attends BTA planting orientation and can relay all grant requirements

For more information, reach out to bostontreealliance@massaudubon.org

