**Trees for Schools**

**Maintenance Plan Guidelines**

This [Maintenance Plan](https://www.sustainablejerseyschools.com/fileadmin/media/Grants_and_Resources/Trees_for_Schools/Phase_2/T4S_Maintenance_Plan_Template.docx) must submitted with the [Detailed Planting Plan](https://www.sustainablejerseyschools.com/fileadmin/media/Grants_and_Resources/Trees_for_Schools/Phase_2/T4S_Detailed_Planting_Plan_Template.docx) and the [Detailed Budget](https://www.sustainablejerseyschools.com/fileadmin/media/Grants_and_Resources/Trees_for_Schools/Phase_2/T4S_Detailed_Budget_Template.xlsx) on the grants portal by **November 22**. However, Section III., the tree inventory, should not be completed until *after* the trees have been planted. (The Maintenance Plan will be approved initially with Section III left blank). The inventory data can then be transposed into this plan from the Planting Report. The actual plantings may end up varying somewhat from what was in the initial plan as recorded in the Detailed Planting Plan, since, e.g., lack of market availability may require species substitutions.

Please copy (or re-enter) the grantee and project location information from the Detailed Planting plan below (sections I. & II.)

1. **Grantee Information**

* **School District, College or University name**
* **Address** (main office)
* **Project Team:** Name and contact information, including title or affiliation, email address and phone numbers for the following people:
* Primary Contact for grant reporting and communications.

*The primary contact must be a college, university, or school district employee. This person is responsible for keeping all the members of the project team informed.*

* + Project Manager

*The project management contact should be whoever is taking the lead on managing the project and can answer project-related questions. (This can be the same person as the primary contact or may be the consultant).*

* + Professional consultant (if any)
  + Fiscal Contact

*The fiscal contact must be a person authorized to manage official funds.*

1. **Project Sites: Location**

**Site Information**

Number and list name(s) of each site, i.e., the school, college campus, or other property (e.g., municipal street or park, off-campus facility) where trees will be planted. Provide the following information for each site:

1. Site Name

* Street address
* GPS Coordinates (latitude and longitude) of one point per site
* Landowner/jurisdiction if other than school district or college/university

*Continue with any other sites, numbering each.*

1. **Tree Inventory**

Complete the tree inventory after the trees have been planted. The inventory data can then be transposed into this plan from the Planting Report.

1. **Tree Maintenance Activities, Responsible Parties and Timeline**

Attentive maintenance of the trees after planting is essential to the success and positive impact of this project! Planning and care for project trees should be integrated with stewardship of the campus landscape as a whole. Please refer to the references cited in the Resources section below and consult with your project consultant, contracted arborist, and/or facilities staff regarding best practices in tree maintenance: watering, mulching, pruning, and regular inspections for health and safety (hazard assessments). The [**ANSI A300 standards**](https://treecareindustryassociation.org/business-support/ansi-a300-standards/)and corresponding best management practices are the generally accepted industry standards for tree care.

For each site, complete a maintenance activity [template](https://www.sustainablejerseyschools.com/fileadmin/media/Grants_and_Resources/Trees_for_Schools/Phase_2/T4S_Maintenance_Plan_Activities_Template.xlsx) for key management activities: watering, mulching, pruning, and regular inspections for health and safety, including follow-up care. It is critical to assign responsible party, name and position (or team), who will be accountable for either doing the work or seeing it gets done. Student and volunteer groups may play a role, but it is staff who must take ultimate responsibility. Particularly when it comes to watering during the summer months, trees may be forgotten, sometimes with fatally wasteful results.

When project trees are planted on municipally controlled property, such as along streets and in parks, agreement between your institution and the municipality (often the Department of Public Works) about who will be responsible for watering and other maintenance during the project period and beyond must be made explicit. You will have uploaded a letter or memo to this effect to your application, and this maintenance plan will be attached to the conservation restriction that must be executed before the grant closes to memorialize this agreement.

Tree protection activities -- such as staking and installing deer guards, which would be implemented as part of tree-planting -- are not listed as a separate activity. However, ongoing protection of trees from deer browsing and antler rub, foot traffic, vandalism, and careless groundskeeping (watch out for weed whackers and lawn mowers!) is obviously critical to their longevity and health.

It does happen that, despite best efforts, some trees will fail to thrive, and some will die.

* *Trees that do not survive in viable condition until the end of the grant period (two years after planting) must be replaced.*

Most tree-planting contracts include the provision that trees that do not survive the first 12 months in viable condition will be replaced by the contractor at no cost, so grantees should be sure to avail of that provision in a timely manner. Nurseries may also offer a warranty on their stock.

1. **Plan Approval**

This Maintenance Plan, along with the Detailed Planting Plan and Budget, must be submitted together with a signed “Transmittal form” (the template can be found in the Grant Agreement). This signatures on this form will serve as a documentation of the fact that the primary parties responsible for successfully completing the grant project have reviewed the detailed planting plan, maintenance plan, and budget and thereby commit to implement and support the project as described.

Upon approval of the detailed planting plan, maintenance plan, and final budget, the grant recipient is eligible to invoice the SI@TCNJ for the second progress payment of up to 40% of the final approved budget.

1. **Monitoring and Reporting**

Final monitoring data on tree survival and condition must be collected two years after the planting date (Spring 2026). The final report will be submitted via the grants portal and shall include a site map showing location of all living trees that were planted by the project, numbers of trees planted by species, condition of the trees, two or more photos of the site, and summary of expenses charged to the grant with supporting documentation.

Specific guidance for the post-planting report, due by July 31, 2024, will be provided closer to the time*.* Grantees will be eligible to receive the final grant payment upon approval of the final report and the conservation restriction. Refer to the application information packet for these and other program rules.

* If the tree establishment rate falls below **85%**, justification must be provided, or partial funding may be withheld.

The standard for establishment is higher than mere survival. The following criteria will be used to determine that a tree is established. Trees for Schools staff will make the final determination:

* The terminal or topmost shoot, the central leader, of the tree is alive
* Two-thirds (2/3) or more of a tree’s canopy is alive and healthy. A branch or shoot is dead when no live cambium is present in the stem.
* There are no major wounds on the truck or root collar. A major wound occurs when one-third or more of the cambium is injured over the circumference of the bole.
* There is no major insect, disease or fungal infestation or affliction.

Trees for Schools staff will perform inspections of 20% of the funded projects to verify tree survival and establishment. Projects to be inspected will be randomly selected. Selected grantees will be notified in advance.