

Careful and early planning of a tree-planting project is the key to success.

Plan the Project

The first step in planning a successful tree-planting project is putting together a team with leaders who can focus on the planting.

Make sure your team includes:

- Site partners, including those responsible for maintenance and those with authority over the land the project is on.
- People of various ages and backgrounds.
- People with the needed knowledge and skills.

Assigning specific tasks to members of your team will help spread the workload and avoid burnout among committee members.

Set a Date for the Event

Select a date and time when volunteers are able to participate. If a school is involved, you will most likely need to plant during a weekday rather than in the evening. If outside youth groups, civic organizations, or people who work during the week are to be involved, evenings or weekends will work better. Always select a rain date when you set the date and be sure you have a system in place to notify participants if the weather does not allow planting.

Create a Planting Design

Key issues to keep in mind when you design your planting and select tree species include:

- Available space, site characteristics, and purpose of the planting (*the right tree in the right place*)
- Soil conditions, moisture, sun
- Disease resistance
- Species diversity
- Maintenance issues
- City requirements
- Aesthetics

See our [Developing a Planting Project](#) and [Selecting Tree Species](#) resource guides for details on how to create a planting design and how to pick appropriate species for your site(s).



Make a Plan for Long-term Maintenance.

As you make plans for your planting project, it is important to determine how the newly planted trees will be cared for, especially in those first few critical years after planting:

- Who is responsible for maintenance?
- What maintenance is needed and when?
- What tools/resources are needed? Do you have them?
- Who will follow-up to make sure the maintenance is being done?

See our [Tree Care Guide](#) for maintenance information.

Order Trees and Supplies

It is important to order trees early so you are able to get the species and sizes you want.

To order trees and supplies, you will need to know:

- Species or cultivars
- Size
- Root stock options (bare-root, container-grown, balled & burlapped)

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- Quantity
- Date available
- Possible delivery fees
- Policy on guaranteeing trees
- Other supplies

Consider ordering mulch at this time or look for inexpensive or free local sources of mulch. Also order or find stakes and ties if needed (for bare-root planting stock or windy areas.)

See our [Purchasing Trees](#) resource guide to learn more about purchasing trees, including developing a bid sheet.

Recruit Volunteers and Event Participants

Well-trained and enthusiastic volunteers can be the most important part of your event and project. Being organized will help ensure a good experience for your volunteers as well as helping to ensure a successfully installed tree planting.

- Make sure you have enough volunteers for the scale of your planting.
- Are there any special guests you want to invite (tree board members, the mayor, city council members, teachers, school district staff)?
- Determine how/when you will train your volunteers. It works best to do this before the actual planting day. Identify any volunteer leaders, task assignments, etc.
- Assign experienced volunteers to partner with less experienced volunteers or youth.
- Remember the needs of volunteers (water, bathrooms, snacks).
- Make it a fun event!

See also our [Recruiting and Coordinating Volunteers](#) resource guide.

Plan Media and Advertising

There are several reasons to work with your local media prior to your event:

1. To help recruit volunteers.
2. To encourage the media to cover your event in person.



3. To run educational stories in conjunction with your planting (e.g., stories explaining the benefits of trees, the need for diversity of species in your community, or the benefits of involving youth in tree-planting events).

Keep the following in mind when publicizing your event:

- Determine who should receive media releases (newspapers, radio, TV, magazines, cable, etc.)
- Meet the media's deadlines for publication.
- Send media alerts in a timely manner – not too far in advance of your event, but early enough to give adequate notification to volunteers and others about the event.
- Have copies of the press release to hand out at the planting.
- Consider issuing a post-planting press release with photos.
- Are there social media outlets you should use?
- Reach out via social media such as Facebook, Twitter, etc. or through civic organizations, church groups, church bulletins, fliers in stores. Use your imagination!

See our [Using Media Effectively](#) resource guide for more information.

Mark the Planting Location and Locate Utility Lines

In preparation for the planting day you will need to mark tree locations and contact “One Call” to locate utility lines at least 48 hours before digging.

- Flag the location of each tree and/or mark the ground with marking paint (this is helpful in case the flags are removed before the utilities are located).
- Numbers or colors can be assigned to each tree species, or the tree species can be written on the flags.
- **Call your state’s utility locator service at least 48 hours before planting, and early enough that you have time to change your planting design if it conflicts with utility locations. In Iowa, call “Iowa One Call” at 800-292-8989 or 811; in Illinois, call “JULIE” at 800-892-0123 or 811.**
- Check utility markings made by the utility locator service. Change your design if needed by reflagging tree locations and changing your map/plan. The edge of the hole you dig for your tree should be at least 18 inches from where the utility line runs.

Planting Preparation/Site Set-Up

On the day of the planting it is important to be organized so the event runs smoothly:

- Place trees next to the planting sites and have water and mulch ready to go.
- Make sure you have enough tools and equipment and that they are ready for use.
- If you want a banner (for *Branching Out* or *Power of Trees* plantings) or a “volunteers working” sign for your event, contact the Trees Forever office or your field coordinator.
- Have information for volunteers set up (sign-in sheets, Trees Forever brochures, other handouts.)
- Name tags.
- First-aid kit.
- Any give-away gifts for volunteers.
- Port-a-Potty or other restroom access.
- Compost/trash bin.
- Map of the planting sites if scattered around the site or town.
- Refreshments.

Planting Day Equipment Checklist	
	Shovels
	Hole-diggers/augers (if needed)
	Water source and equipment (hoses, five-gallon buckets, pull-behind water tanks)
	Stakes and strapping (if needed) such as soft, flexible fabric and scissors to cut it
	Stake driver (post pounder)
	Hay hooks for balled & burlapped (B&B) trees (if needed)
	Old pruning saws to cut circling roots on containerized trees (if needed)
	Hand pruners to prune broken branches and double leaders
	Tarps to place dirt on when digging holes (makes clean-up easier)
	Rakes to help with clean-up and mulch spreading
	Utility knives to cut burlap back around B&B trees
	Wire cutters/bolt cutters to cut back wire baskets around B&B trees
	Wheelbarrows (if mulch is not in bags)
	Heavy-duty dolly to move heavy trees (if needed)
	Tape measure
	Garden claws to remove excess soil on top of roots

Planting Event Kickoff and Planting Demonstration

It is often desirable to have a short gathering or program before the planting begins.

1. Create an agenda for the event ahead of time, and provide the opportunity for sponsors, Trees Forever staff, local leaders, partners, etc. to speak.
2. Start with orientation and any ceremonial activities (thank volunteers, etc.).
 - Provide a PA system/portable microphone if speaking to a large group.
 - Demonstrate proper planting, watering, mulching, and staking.
 - Discuss two or three of the most relevant benefits your project will provide, such as energy efficiency, environmental, and social benefits.
 - Include safety measures and reminders.
3. Plant and take pictures.
 - Be sure to check camera battery beforehand!
4. Provide a break time for refreshments.
 - Water, ice, cups
 - Snacks
 - Be mindful of weather conditions and the possible need for more breaks.
5. Clean up!

Reports and Documentation

Sponsors or funders usually require reporting and documentation of your project. Having this information will also help you get organized next year.

- Use sign-in sheets to record the time you and others spend volunteering; include the time you spend *planning* the planting as well as the time you spend on the actual planting day. Be sure to get volunteers' contact information.
- Keep your Trees Forever field coordinator informed of the schedule.

Redbuds Don't Play With Maples

The Trees Forever field coordinators have come up with a handy way to remember the basic things to cover in a planting demonstration:

R = Roots

Check for depth of root flare and circling roots.

D = Depth

Be sure trees are not planted too deeply; the root flare just be visible and right at ground level.

P = Plant

Plant at correct depth and backfill.

W = Water

Water trees in well at planting time and briefly go over basic water recommendations.

M = Mulch

Mulching is a critical part of planting that keeps the area moist, eliminates competition with turf grass, and protects trees from mowers and weed whips.

- Make sure funding is appropriately used for approved projects.
- Keep receipts and take photos.

Celebration and Reflection Meeting

When the event is over celebrate the project! The planning team should meet for a debriefing to reflect on what went well, and what could have been better. Talk about future involvement and other project ideas. And be sure to write thank-you notes to participants, sponsors, or local partners.

Join Trees Forever on its mission to plant and care for trees and the environment by empowering people, building community and promoting stewardship.

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