



TreeVitalize Watersheds

Completing a Successful Grant Project

Krista Scheirer, Watershed Specialist



MONTGOMERY COUNTY
CONSERVATION DISTRICT

Selecting a Site

- ▶ Water quality impact
- ▶ Need for canopy, diversity, natives
- ▶ Engaged, invested landowner!



Application

- ▶ Project Bid Sheet
- ▶ Operation, Maintenance & Repair Plan
- ▶ Site Location Map (Google)
- ▶ Project Narrative/Letter
- ▶ Landowner Agreement Form/Letter
- ▶ Tree Tenders Requirement*

[SIGN UP](#)

[RESOURCES](#)



A PROGRAM OF THE PENNSYLVANIA HORTICULTURAL SOCIETY



<http://thefallser.com/category/about-our-residents/east-falls-tree-tenders/>

Google maps:

- Right-click on *downstream* end of site.
- Select “What’s here?” to get coordinates.

Tree Vitalize Watersheds Project Bid Form					
Please fill in all requested information					
Applicant name:					
Site Name:					
Location/Street Address:		Municipality:			
Latitude:		County:			
Longitude:					
Quadrangle name:		Square Footage			
Watershed/ Sub watershed:		Acreage:			
Creek or stream:		Aqua Pennsylvania Priority (circle) I, II, none			
Bid Worksheet					
Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Site Prep					
Debris Removal				\$0.00	\$0.00
Mowing				\$0.00	\$0.00
Invasive Removal				\$0.00	\$0.00
Herbicide				\$0.00	\$0.00
Other				\$0.00	\$0.00
Total Site Preparation Cost				\$0.00	\$0.00
Planting Materials					
Trees				\$0.00	\$0.00
Shrubs				\$0.00	\$0.00
Herbaceous				\$0.00	\$0.00
Seed				\$0.00	\$0.00
Total Plant Materials Costs				\$0.00	\$0.00
Staff and Labor				\$0.00	\$0.00
Conservation District fee				\$0.00	\$0.00
Total Staff and Labor Costs				\$0.00	\$0.00
Other (describe)					
Contracted Services				\$0.00	\$0.00
Volunteer Labor		\$21.37		\$0.00	\$0.00
Supplies:				\$0.00	\$0.00
Mileage		\$0.50		\$0.00	\$0.00
Shipping				\$0.00	\$0.00
Total Other Costs				\$0.00	\$0.00
TOTAL COST FOR THIS SITE			\$0.00	\$0.00	\$0.00
Name of Organization:		Contact Phone #:			
Organization Contact Person:					
Address:					
Date:		Contact email:			
Signature:		Title:			

Google maps:

- When creating your site map, draw a polygon around the planting area. Click on the polygon, and you will see its size listed on the bottom left of the info box.
- Convert to acres or square footage.

What you're requesting

What you're contributing

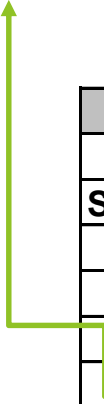
Grant request + match contribution

Bid Worksheet					
Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Site Prep					
Debris Removal				\$0.00	\$0.00
Mowing				\$0.00	\$0.00
Invasive Removal				\$0.00	\$0.00
Herbicide				\$0.00	\$0.00
Other				\$0.00	\$0.00
	Total Site Preparation Cost			\$0.00	\$0.00
Planting Materials					
Trees				\$0.00	\$0.00
Shrubs				\$0.00	\$0.00
Herbaceous				\$0.00	\$0.00
Seed				\$0.00	\$0.00
	Total Plant Materials Costs			\$0.00	\$0.00
Staff and Labor				\$0.00	\$0.00
Conservation District fee				\$0.00	\$0.00
	Total Staff and Labor Costs			\$0.00	\$0.00
Other (describe)					
Contracted Services				\$0.00	\$0.00
Volunteer Labor		\$21.37		\$0.00	\$0.00
Supplies:				\$0.00	\$0.00
Mileage		\$0.50		\$0.00	\$0.00
Shipping				\$0.00	\$0.00
	Total Other Costs			\$0.00	\$0.00
	TOTAL COST FOR THIS SITE		\$0.00	\$0.00	\$0.00

Total match must be at least 25% of total grant request.

Site Prep

Try to keep under \$1000



Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Site Prep					
Debris Removal				\$0.00	\$0.00
Mowing	3 hours	\$50.00		\$150.00	\$150.00
Invasive Removal				\$0.00	\$0.00
Herbicide	1 treatment	\$900.00	\$900.00	\$0.00	\$900.00
Other				\$0.00	\$0.00
	Total Site Preparation Cost		\$900.00	\$150.00	\$1,050.00

Get accurate quotes from contractors to use for application!

Planting Materials

Preferred *average* price is less than \$25.
BR and B&B max is \$100, but keep limited.

Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Planting Materials					
Trees	200	\$25.00	\$5,000.00	\$0.00	\$5,000.00
Shrubs	50	\$15.00	\$750.00	\$0.00	\$750.00
Herbaceous	500	\$0.79		\$395.00	\$395.00
Seed				\$0.00	\$0.00
Total Plant Materials Costs			\$5,750.00	\$395.00	\$6,145.00

Trees must account for at least 80% of the total requested cost of plant materials.

$$\$5,000 / \$5,750 = 87\%$$

What's a tree and what's a shrub?

"Small Trees"	"Shrubs"
Sweetbay Magnolia	Spicebush
Dogwoods over 15 ft (<i>e.g. Cornus florida</i>)	Arrowwoods
Serviceberry	Inkberry holly
Redbud	Blueberries
Black willow	Winterberry
Witch hazel	Chokeberries
Hackberry	Bayberry

Staff Costs


Grant will cover up to \$1000 of staff time for nonprofits only.

Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Staff and Labor Project Manager	35	\$28.00	\$980.00	\$0.00	\$980.00
Administrative Asst.	5	\$25.00		\$125.00	\$125.00
Conservation District fee			\$200.00	\$0.00	\$200.00
Total Staff and Labor Costs			\$1,180.00	\$125.00	\$1,305.00

Please add this to your bid sheets when you apply.
Keep in mind when you are awarded your grant, \$200 of that amount goes to the conservation district.

Other: Supplies, Shipping, Services

Grant will cover up to \$1000 in contractual/consultant services, but use the conservation district instead, if you can.



Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Other (describe)					
Contracted Services				\$0.00	\$0.00
Volunteer Labor	90	\$21.37		\$1,923.30	\$1,923.30
Supplies: Tree tubes	200	\$3.00	\$600.00	\$0.00	\$600.00
Mycorrhizal Fungi	70	\$1.50	\$105.00	\$0.00	\$105.00
Mileage	48	\$0.50		\$24.00	\$24.00
Shipping	1	\$100.00	\$100.00	\$0.00	\$100.00
		Total Other Costs	\$805.00	\$1,947.30	\$2,752.30

Other potential supplies:

Deer fencing

Stakes

Deer repellant spray

Tools to be reused (one-time cost)

Zip ties

Weed matting

Plant Delivery

ASK FOR WHAT YOU NEED

Mycorrhizal Fungi

- ▶ Symbiotic fungi naturally occurring in forested areas
- ▶ Aid trees in nutrient uptake
- ▶ Some brands include fertilizer and drought protection
- ▶ Highly suggested for disturbed sites



Bid Worksheet

Site/items	Units	Per Unit Cost	Grant Request	Match*	Total
Site Prep					
Debris Removal				\$0.00	\$0.00
Mowing	3 hours	\$50.00		\$150.00	\$150.00
Invasive Removal				\$0.00	\$0.00
Herbicide	1 treatment	\$900.00	\$900.00	\$0.00	\$900.00
Other				\$0.00	\$0.00
	Total Site Preparation Cost		\$900.00	\$150.00	\$1,050.00
Planting Materials					
Trees	200	\$25.00	\$5,000.00	\$0.00	\$5,000.00
Shrubs	50	\$15.00	\$750.00	\$0.00	\$750.00
Herbaceous	500	\$0.79		\$395.00	\$395.00
Seed				\$0.00	\$0.00
	Total Plant Materials Costs		\$5,750.00	\$395.00	\$6,145.00
Staff and Labor					
Project Manager	35	\$28.00	\$980.00	\$0.00	\$980.00
Administrative Asst.	5	\$25.00		\$125.00	\$125.00
Conservation District fee			\$200.00	\$0.00	\$200.00
	Total Staff and Labor Costs		\$1,180.00	\$125.00	\$1,305.00
Other (describe)					
Contracted Services				\$0.00	\$0.00
Volunteer Labor	100	\$21.37		\$2,137.00	\$1,923.30
Supplies: Tree tubes	200	\$3.00	\$600.00	\$0.00	\$600.00
Mycorrhizal Fungi	70	\$1.50	\$105.00	\$0.00	\$105.00
Mileage	48	\$0.50		\$24.00	\$24.00
Shipping	1	\$100.00	\$100.00	\$0.00	\$100.00
	Total Other Costs		\$805.00	\$2,161.00	\$2,752.30
	TOTAL COST FOR THIS SITE		\$8,635.00	\$2,831.00	\$11,252.30

Double-check your totals.
Use a calculator!

Red= Total Grant Request

Blue= Total Match Contribution
(must be 25% of total project)
 $\$2,831 / \$11,252.30 = 25\%$ ✓

Green= Total Value of Project
(Grant Request + Match)

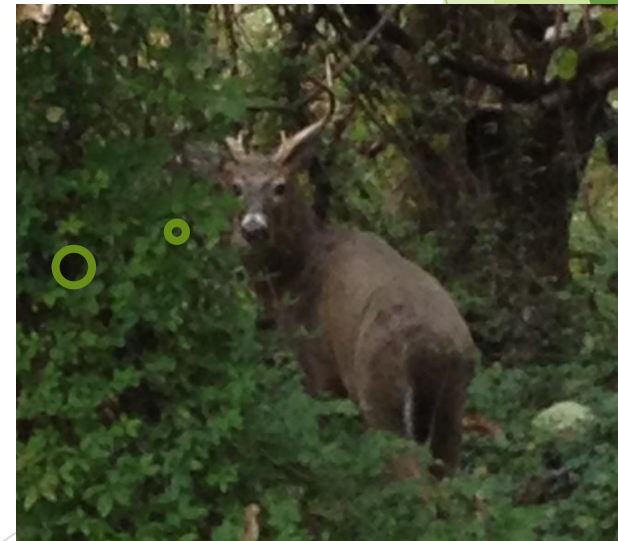
Operation, Maintenance & Repair Plan

You are responsible for maintaining the planting site to ensure tree survival!

- ✓ Project Tip: Have landowner commit to as much as possible.
- ▶ What activities will be completed?
- ▶ When or how often will they be completed?
- ▶ Who is responsible for each activity?

Fill out table on form provided.

Mmm! Who put
out the buffet?



Operation, Maintenance & Repair Plan

Activities to include:

- ▶ Watering
- ▶ Deer and rodent prevention
- ▶ Invasive species management
- ▶ Removing tree tubes after 3-6 years



Sierra Club

Site Location Map

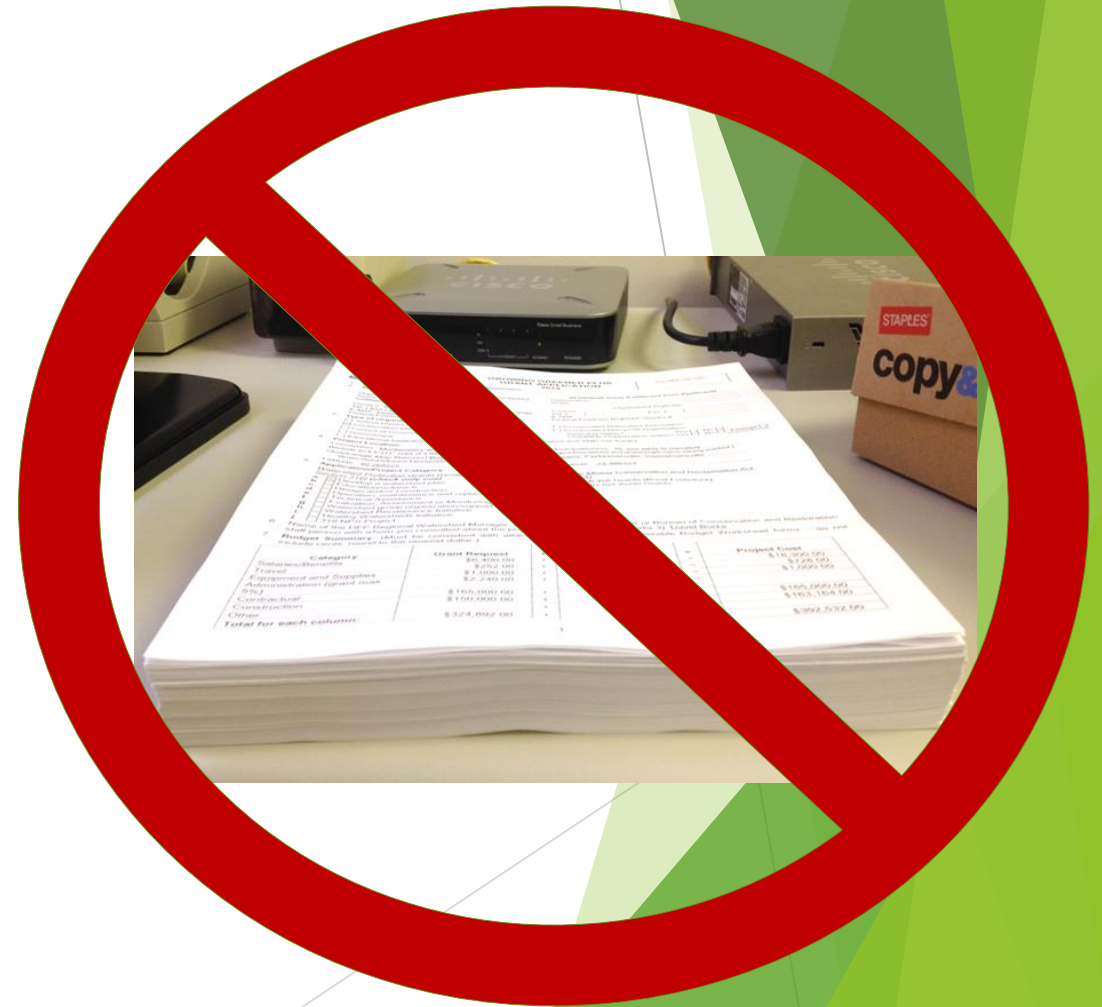
DEMO: how to make a Google map of your project site and use it to get important details like:

- ▶ coordinates
- ▶ project size
- ▶ buffer length/width (for Stream ReLeaf form)

Google Map Instructions available on MCCD website!

Project Narrative and Landowner Permission

- ▶ Keep it simple.
- ▶ Sign Landowner Agreement form provided with O&M form



**Congratulations! You've been awarded
a TreeVitalize Watersheds grant.**



Creating the Planting Plan

- ▶ Not just any natives...restore the natural plant community for your site.

<http://www.naturalheritage.state.pa.us/Communities.aspx>

- ▶ Form potential species list for site
- ▶ Consider:
 - ▶ Nursery availability
 - ▶ Budget
 - ▶ Use of property/specifications of landowner
 - ▶ Tree height (power lines?)
 - ▶ Bank stabilization
 - ▶ Habitat value



Power lines

Open space
used for events

Site of future
walking trail



Recruiting Volunteers

- ▶ Set date in advance
 - ▶ Weekdays are good for corporate volunteer days
 - ▶ Fridays, Earth Day, 9/11
 - ▶ Weekends for community volunteers
- ▶ Advertise
 - ▶ [VolunteerMatch.com](https://www.volunteermatch.com)
 - ▶ Newsletters
 - ▶ Press releases
 - ▶ Reach out to local church groups, scouts, etc.
 - ▶ Penn State Master Watershed Stewards!
- ▶ Create registration process- make it easy!
 - ▶ [VolunteerSpot.com](https://www.volunteerspot.com)



Volunteers are GREAT!

Other volunteer activities:

- ▶ Site prep
- ▶ Watering
- ▶ Site maintenance



Prepping the Site

- ▶ Treat invasive species early and appropriately
- ▶ Have budget changes approved
- ▶ Book tool trailer or borrow from PHS tool library housed at Lower Providence Township Building
- ▶ Perform PA One Call
- ▶ Post TreeVitalize sign



✓ Project Tip: Lay out trees ahead of time.



✓ Project Tip: Only use augers when necessary.



TIME TO PLANT!

- ▶ Correct planting technique is crucial for tree survival!
- ▶ Provide a demonstration
- ▶ Supervise volunteers



- ✓ Project Tip: Have an age requirement for volunteers.



- ✓ Project Tip: Perform a walk-through before leaving the site.



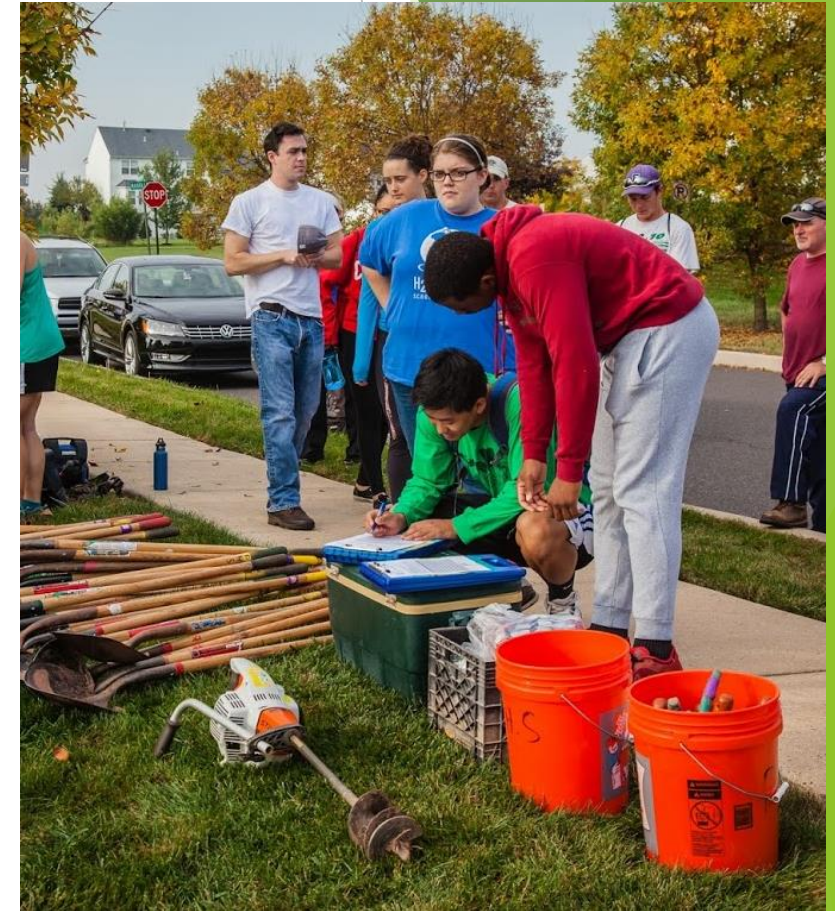
Make sure to...

- Credit funding source in all communications

“This restoration project was made possible by the TreeVitalize Watersheds Grant program, and the Plant One Million campaign, managed by the Pennsylvania Horticultural Society, with funding from the Pennsylvania Department of Environmental Protection’s Growing Greener program, as well as Aqua PA for projects located within its source water protection zones.”

- Record all landowner and volunteer time

- Save all invoices



Common Problems

- ▶ Improper planting
- ▶ Improper deer prevention
- ▶ Improper or lack of maintenance



Common Problems

- ▶ Need outreach to residents to prevent:
 - ▶ Yard waste dumping
 - ▶ Mowing
 - ▶ Vandalizing
 - ▶ Or just lack of understanding...



Solution:
Go back to your sites to assess and perform maintenance.



Final Report and Reimbursement

- ▶ Updated Project Bid Sheet
- ▶ Invoices/Match Documentation
- ▶ O&M Plan, again
- ▶ Updated Project Google Map
- ▶ Photographs (before and after)
- ▶ PA Stream ReLeaf Form

DEADLINES:

Spring projects: June 1

Fall projects: November 21

Updated Bid Sheet

- ▶ List actual costs of supplies (should match invoices)
- ▶ \$200 conservation district fee
- ▶ If project size changed, update top of sheet
- ▶ Provide request letter for any overages
- ▶ **Double-check your totals; use a calculator!**



How to break up invoices used for multiple projects?

If you can't request separate invoices for different projects...

- ▶ Submit all invoices with each project
- ▶ Indicate which items are being charged to each grant
 - ▶ Do not simply divide total cost by # TV projects (you can divide shipping/tax)
 - ▶ Label each invoice copy with the amount for that project
 - ▶ For multiple invoices, create a table
- ▶ Double-check that invoices match bid sheets
 - ▶ Make sure you are not “double-dipping”

Octoraro Native Plant Nursery, Inc.
6126 Street Road
Kirkwood, PA 17536
717-529-3160

INVOICE

Upper Perkiomen High School

Order Number:

9415

SOLD TO:

Upper Perkiomen High School
Attn: James Coffey
1 Walk Road
Pennsburg, PA 18073

SHIP TO:

Upper Perkiomen High School
0

Request Date:	Invoice Date:	Date Shipped:	Carrier:	Tax Exempt #:	Flag Colors:
0/02/2014	10/03/2014	10/03/2014	Octoraro Delivery	76-46860-5	Primary: UNKNOWN
Contact Person:	Phone Number:	Fax:	PO Number:	Terms:	Secondary: UNKNOWN
James Coffey	(215) 541-7103		Treevitalize Grant	Net 30 Days	

Ref	Ordered	Shipped	BO	Description	Size	Price	Extension
1	30	30	0	Betula nigra	6-8' #7 cont	31.50	945.00
				River birch			
2	20	20	0	Cercis canadensis	4-6' #3 cont	16.50	330.00
				Eastern redbud			
3	20	20	0	Cornus florida	4-6' #3 cont	16.50	330.00
				Flowering dogwood			
4	20	20	0	Nyssa sylvatica	3-4' #5 cont	21.50	430.00
				Black gum			
5	10	10	0	Platanus occidentalis	4-6' #7 cont	31.50	315.00
				American sycamore			
6	20	20	0	Quercus bicolor	4-6' #7 cont	35.50	710.00
				Swamp white oak			
7	20	20	0	Quercus rubra	4-6' #7 cont	35.50	710.00
				Red oak			

From date of delivery: 1 1/2% per month,
(18% per year) added to all accounts past

Per _____

Claims will receive consideration
only when made within 5 days
after delivery.

SubTotal: 3,770.00
Tax: 0.00
Freight: 190.00
TOTAL: 3,960.00

TREE VITALIZE
GRANT TOTALS
FOR TREES
UMJA - \$2535.00
MAIN BRANCH PARK - \$855.00
WEST BRANCH PARK - \$570.00
GRANT TOTAL - \$3960.00

Kulp and Yoder

Supplies	Company	Total Items	Price	Invoice/Item #	Shipping
Deer Repellent	Tree World	1	\$44.95	483-1869212	\$5.30
Tree Tube Twist Ties	A.M Leonard	1	\$3.99		
Tree Tubes (Black Mesh)	A.M Leonard	27	\$457.65	#SO14108009	\$23.99
Mic. Fungi	Behmerwalds	1	\$375.00	12300	
Total			\$881.59		\$29.29

Lodal Creek

Supplies	Company	Total Items	Price	Item #	Shipping
Deer Repellent	Tree World	1	\$44.95	483-1869212	\$5.30
Tree Tubes (White)	A.M Leonard	20	\$131.00	#SO14108005	\$23.99
Tree Tubes (Black Mesh)	A.M Leonard	0	\$0.00	#SO14108009	
Mic. Fungi	Behmerwalds	1	\$375.00	12345	
Total			\$550.95		\$29.29

Whittaker Park

Supplies	Company	Total Items	Price	Item #	Shipping
Deer Repellent	Tree World	1	\$44.95	483-1869212	\$5.30
Tree Tubes (White)	A.M Leonard	15	\$98.25	#SO14108005	\$23.99
Tree Tubes (Black Mesh)	A.M Leonard	3	\$49.50	#SO14108009	
Mic. Fungi	Behmerwalds	1	\$375.00	12345	
Total			\$567.70		\$29.29


Anderson Farm Park

Supplies	Company	Total Items	Price	Item #	Shipping
Deer Repellent	Tree World	1	\$44.95	483-1869212	\$5.30
Tree Tubes (White)	A.M Leonard	10	\$65.50	#SO14108005	\$23.99
Tree Tubes (Black Mesh)	A.M Leonard	3	\$49.50	#SO14108009	
Mic. Fungi	Behmerwalds	1	\$375.00	12345	
Total			\$534.95		\$29.29

* Remaining supplies (deer
repellent/ tree tubes) were
used on a project that is
not affiliated with Tree
Vitalize

Invoices & Match Documentation

- ▶ Staff time and mileage can be invoice format, but keep records
- ▶ Invoices for all costs
- ▶ Volunteer sign-in sheets with date and time in/time out
- ▶ Record of all other in-kind



Perkiomen
Watershed
Conservancy
Celebrating 50 years 1964-2014

PWC Tree Vitalize Kulp & Yoder
September 11, 2014

Thank you for volunteering to help the Perkiomen Watershed Conservancy affect positive changes in your community's natural area. By volunteering, you acknowledge that this effort will involve hard work in a natural terrain. All volunteers are advised to use extra caution while participating in this effort.

Waiver of Responsibility and Release - READ BEFORE SIGNING

In consideration of my participation in this volunteer effort and other good and valuable considerations, the receipt of which is hereby acknowledged, I, on behalf of myself, my heirs, executors, administrators and assigns, hereby waive all rights and release and forever discharge the Perkiomen Watershed Conservancy, Aqua Pennsylvania, Inc. or other event sponsors, their respective affiliated companies, directors, officers, agents, employees, volunteers, successors and assigns, and all landowners of the sites in which these efforts take place, of and from any and all claims, actions and demands whatsoever which I and/or my heirs, executors, administrators and assigns can and may have with respect to any injuries to me and my family members, and/or with respect to damage to or losses of any property incurred in connection with or as a result of this volunteer effort. I understand that this activity may be inherently dangerous, and I recognize my responsibility to exercise good judgment, to act responsibly and to obey all oral or written guidance, instructions (including signage) and warnings.

Photograph Release

I hereby grant permission to the Perkiomen Watershed Conservancy to use my image or likeness on its website or in any other publications without further consideration or compensation, at its discretion, at any time.

I have read and understood these promises and am voluntarily signing below intending to be legally bound.

	PARTICIPANT NAME (PLEASE PRINT CLEARLY)	PARTICIPANT SIGNATURE (PARENT/GUARDIAN IF UNDER 18)	EMAIL ADDRESS
1	Mae Thomas	<i>Mae Thomas</i>	
2	Maria Pascual	<i>Maria Pascual</i>	
3	Chris Wojtowicz	<i>Chris Wojtowicz</i>	chris@merck.com
4	Chris Miller	<i>Chris Miller</i>	christopher.miller@merck.com
5	Julie Jones	<i>Julie Jones</i>	julie.jones@merck.com
6	Joe Ferrera	<i>Joe Ferrera</i>	joseph.ferrera@merck.com
7	Jay Dzwil	<i>Jay Dzwil</i>	jay.dzwil@merck.com
8	Matt Filomaga	<i>Matt Filomaga</i>	matthew.filomaga@merck.com
9	Alex Lee	<i>Alex Lee</i>	Alexander.lee@merck.com
10	Kathleen O'Brien	<i>Kathleen O'Brien</i>	Kathleen.O'Brien@merck.com
11	Charles Ashley	<i>Charles Ashley</i>	charles.ashley@uihawaii.edu
12	Amelia Haley	<i>Amelia Haley</i>	amelia.haley@merck.com
13	Suzanne Decker	<i>Suzanne Decker</i>	Suzanne.decker@merck.com
14	Bruce Necker	<i>Bruce Necker</i>	bruce.necker@merck.com
15	Dawn Harrington	<i>Dawn Harrington</i>	Dawn.Harrington@merck.com
16	Brenda Bannister	<i>Brenda Bannister</i>	Brenda.Bannister@merck.com
17	Stephen Styr	<i>Stephen Styr</i>	Stephen.styr@merck.com
18	Bradley Kanaw	<i>Bradley Kanaw</i>	bradley.kanaw@merck.com
19	William Fuc	<i>William Fuc</i>	William.Fuc@merck.com
20	Joe Liebel	<i>Joe Liebel</i>	liebeljo@yahoo.com
21	Gina Antmayer	<i>Gina Antmayer</i>	gina-antmayer@merck.com
22	MARIANNE SATO	<i>Marianne Sato</i>	marianne-sato@merck.com

PA Stream ReLeaf Form

- NEW- submit online:

<http://www.ahs.dep.pa.gov/streamreleaf/newapplication.aspx>

- Make sure to enter all applicable data (use your Google map)
- Submit a copy of completed submission

Contact Information:

Name: Jon Musselman
Organization: Tookany/Tacony-Frankford Watershed Partnership, Inc
Address: 4500 Worth Street
City: Philadelphia
State: Pe
Zip: 19124
Telephone: 215-744-1853
Email: jon@tfwatershed.org

Project Location and Identification:

Project Start Date: 11/6/2015
Project Name: Ethel Jordan Park Riparian Buffer
Project Address: Jenkintown Road
Project City: Elkins Park
Project State: Elkins Park
Project Zip: 19027
County: Montgomery
Municipality: Abington
Stream Name: Jenkintown Creek
Land Ownership Type: Public
Watershed: Poquessing - Pennypack Creeks - Delaware
Latitude: 40° 5' 2"
Longitude: -75° 6' 42"
Associated Waterbody: Stream
Water Body Status: Impaired
Water Use Designation: WWF

Buffer Potential to become a Mature Forest:

Reason for Buffer: Grant
Buffer Perm Protected: Yes
Existing Buffer: No
BufferProtectionAgreement: Yes
Protection Status: Volunteer
Condition of Stream Bank: Needs Work
Health of Buffer: Poor
State after Project: Enhancement
% Canopy Cover: 80%
% Ground Cover: 20%

Buffer Characteristics:

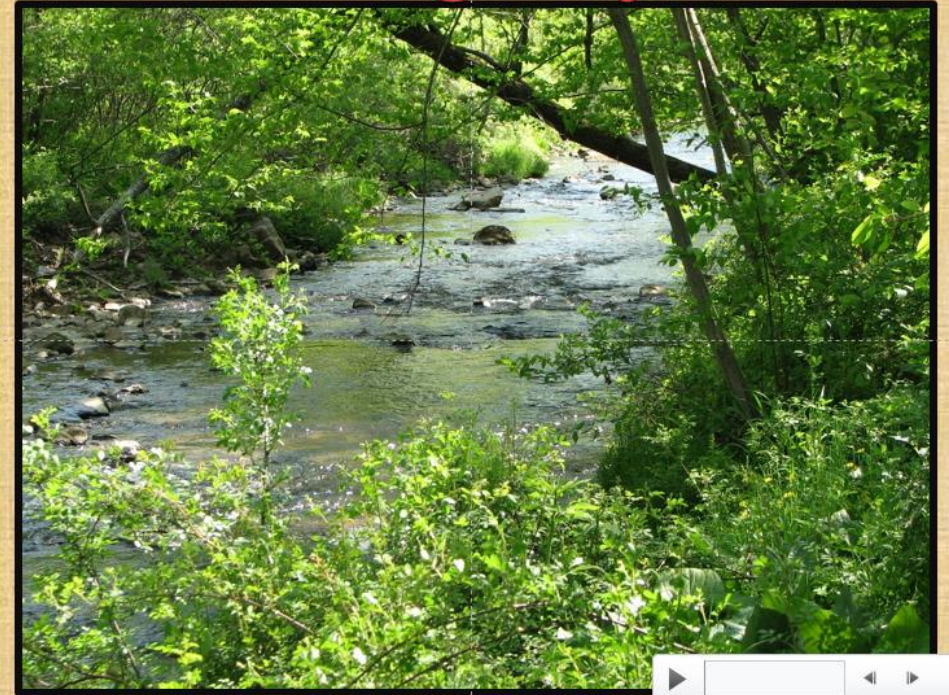
Adjacent Land Use: Grass (warm season)
Buffer Type: Trees/Shrubs
Length First Side: 350
Avg Width First Side: 35
Length Second Side: 350
Avg Width Second Side: 10
Sources of Funding: Other

Photos

- ▶ Before and after
- ▶ Submit CD or electronic copies
- ▶ Or get creative with a video!



Tree Planting Project 2014



UPHS Environmental Science Classes

For updated information, please visit:

<http://montgomeryconservation.org/watershed-management/treevitalize/>



15-year-old planting site

HAPPY PLANTING!