



# Tree Care Grant

## Programs & Guidelines

**Apply by October 2<sup>nd</sup>, 2023** - Applications will not be accepted if submitted after the deadline.

### Overview

Charlotte takes pride in having one of the most expansive tree canopies in the country. We couldn't achieve this without the hard work of Charlotte residents like you! In order to celebrate the rich biodiversity found in our urban forests, educate the public on how to take action to maintain our canopy, and protect our forest for years to come, Landscape Management and Housing & Neighborhood services are proud to present this year's Tree Care Grant.

**Eligible organizations citywide can apply for matching grants of up to \$3,000 for tree care initiatives** including canopy opportunity assessment, small tree pruning, ivy and invasive plant removal, bark scale treatment, and education and tree focused community events. Please see Appendix A for a complete list of eligible projects.

### Program Eligibility – Who Can Apply?

#### Eligible Organizations

Neighborhood associations within Charlotte's city limits when all of the following apply to the organization:

- Active, established for at least six months
- Registered on [city neighborhood organization contact list](#).
- Created and managed by residents within the neighborhood
- Open for membership to everyone in the neighborhood
- 75% of association members live in the neighborhood.
- Has a duly elected board and established by-laws or governing documents
- Holds regular meetings and maintains records via agendas and meeting minutes

Other Neighborhood Based Groups, including book clubs, gardening clubs, sports leagues, and civic clubs are eligible for Neighborhood Matching Grants when all of the following apply:

- Active and established for at least six months
- 80% of the group members live in the neighborhood
- Holds regular meetings and maintains records via agendas and meeting minutes
- Proposed project promotes the greater good of the neighborhood
- Has a signed letter of agreement or other documentation shows a collaborative partnership with or support from the neighborhood association

## Ineligible Organizations

The City recognizes that there are many groups that contribute to neighborhood quality of life. Ineligible organizations are encouraged to partner with organizations that meet the eligibility criteria. Please note that the eligible organization **MUST** be the lead entity in project planning and implementation. Organizations that discriminate on the basis of race, nationality, ethnicity, religion, creed, or disability are ineligible to apply.

## Ineligible Purchases

Grantees may not use funds for personal use items, entrance fees, raffle items, annual plants, mulch, pine straw, grass, operating expenses, alcoholic beverages, and for projects already funded through the Neighborhood Matching Grants program.

## Match Requirements – How Can Organizations Meet Their Match?

Organizations are required to match awarded funds 1:1; meaning for every dollar granted, a matching amount must be provided through one or more of the methods below:

- 🍃 A minimum of 50% of must be matched through volunteer time (valued at \$29.95 per hour)
- 🍃 A minimum of 25% of the required match must be contributed by the applying organization

Match Types	Documentation – forms are available at <a href="http://charlottenc.gov/treecaregrant">charlottenc.gov/treecaregrant</a>
<b>Cash Contribution</b>	<ul style="list-style-type: none"> <li>▪ Document planned cash contributions from the applying organization, individuals or supporting community partners (businesses, non-profits, etc.)               <ul style="list-style-type: none"> <li>○ Contribution Template (see Appendix C)</li> </ul> </li> </ul>
<b>In-kind Contribution</b>	<ul style="list-style-type: none"> <li>▪ Goods and/or services received for free or at reduced cost               <ul style="list-style-type: none"> <li>○ Contribution Template (see Appendix C)</li> </ul> </li> </ul>
<b>Volunteer Time</b>	<ul style="list-style-type: none"> <li>▪ Volunteer Time must be pledged using the ‘Volunteer Pledge Sheet’ found in the appendix below</li> <li>▪ Volunteer time is calculated at \$29.95 per person per hour</li> <li>▪ <u>Up to 20 hours</u> of related pre-application activities may be counted towards your match, completed Volunteer Sign-In Sheets are required (see Appendix C)</li> </ul>

Volunteer activities may include, but are not limited to:

- 🍃 Removal of ivy and invasive plants
- 🍃 Promotion of the tree care opportunity to residents (door to door canvassing, public meetings)
- 🍃 Neighborhood clean ups and/or street adoption
- 🍃 Community events (documentary film screenings, educational workshops, and other community building events such as pancake breakfasts, ice cream socials, holiday gatherings, etc.)
- 🍃 Implementation of other neighborhood improvement projects (hours can’t overlap with those committed as part of an active Neighborhood Matching Grant).



## Application Process – How Can We Apply?

<b>1</b>	<b>Review Program Materials</b> – review the guidelines and attend a required pre-application workshop in person or via Zoom prior to the application deadline. The meeting schedule can be found at <a href="http://charlottenc.gov/neighborhoodtraining">charlottenc.gov/neighborhoodtraining</a> , or by calling 704-432-4802.
<b>2</b>	<b>Begin Application-</b> prepare by reviewing the application questions and tips provided at the end of this document. Complete the required budget and volunteer pledge worksheets which can be found at <a href="http://charlottenc.gov/treecaregrant">charlottenc.gov/treecaregrant</a> , or by calling 704-432-4802.
<b>3</b>	<b>Create Account</b> – <a href="http://charlottenc.gov/treecaregrant">Access the grant portal</a> by clicking “Apply/submit your online application here” at <a href="http://charlottenc.gov/treecaregrant">charlottenc.gov/treecaregrant</a> . Previous applicants may use existing Tree Care grant or NMG credentials. New users will need to create an account.
<b>4</b>	<b>Complete Application</b> – Submit the application by 11:59 p.m. on October 1 <sup>st</sup> . Applicants who are unable to complete the application online may call 704-432-4802 to request support or to learn of alternative application options.

## Process & Timeline

**The application deadline is October 2<sup>nd</sup>, 2023 by 11:59 p.m.**

Applicants will receive a confirmation email upon application submittal. Applications are reviewed and scored based on the criteria below. After a review, applicants will be notified of their status: approved, denied, or approved with contingencies.

Approved applicants will be invited to the contract signing and orientation meeting on October 30<sup>th</sup>. **Projects may begin only after the contract is executed.**



Scoring Criteria	Max Points
<b>Application requirements</b> <ul style="list-style-type: none"> <li>▪ Submitted a letter of support from applying organization (10)</li> </ul>	<b>10</b>
<b>Project budget</b> <ul style="list-style-type: none"> <li>▪ Completed budget worksheet provided with clear estimate of project expenses and match contributions (15)</li> <li>▪ Submitted quotes from vendor(s) or supplier(s) with sales tax included (15)</li> </ul>	<b>30</b>
<b>Value and documentation of match</b> <ul style="list-style-type: none"> <li>▪ Match meets or exceeds the minimum 1:1 requirement (15)</li> <li>▪ Match is well documented with Volunteer Pledge documentation and in-kind or cash contribution letters (if applicable) (15)</li> </ul>	<b>30</b>
<b>Project Design</b> <ul style="list-style-type: none"> <li>▪ Project is well planned and ready for implementation (15)</li> <li>▪ Includes a clear plan for marketing, promotion and neighborhood outreach (15)</li> </ul>	<b>30</b>
<b>Total Possible Points (60+ is passing)</b>	<b>100</b>

## Terms and Conditions

### Contracts

Within 30 days following notice of approval, successful applicants will enter into a contract with the City of Charlotte. Contractual agreements reflect the project goals, budget, and match commitments that are included as part of the approved application. **Projects may begin only after the contract is executed.**

- Approval is withdrawn if the contract is not executed within 6 months.
- Fraud, misuse of funds, failure to meet match commitments or other non-compliance constitutes a grant default. Defaulted organizations may be ineligible for future grants for up to two (2) years.
- A grant may be abandoned upon request, reimbursement of expended grant funds may be required.
- Organizations may have one (1) Tree Care Grant and one (1) Neighborhood Matching Grant open concurrently.

### Disbursement of Funds

Grant funds are not awarded in advance; funds are released on an 'as needed' basis after applicants submit invoices and/or receipts for approved items to staff.

The City contracts solely with the recipient neighborhood organization; therefore, any discrepancies that may result from the hiring of contractors, consultants or private vendors must be resolved by the grantee.

- Checks are made payable to the organization, not to vendors. Organizations are responsible for releasing payments to their vendors. **Please allow (30) days for invoice processing from the day a complete reimbursement request is received by program staff.**
- Organizations are encouraged to use reliable vendors with valid credentials to avoid challenges.
- Contact Jonathan Hill, [jonathan.hill@charlottenc.gov](mailto:jonathan.hill@charlottenc.gov) or 704-432-4802, for questions related to grant reimbursement requests.

## Mentorship & Neighborhood Matching Grants

Many new and reoccurring applicants protect neighborhood trees & get to know more neighbors each year through successful implementation of Tree Care initiative grants. To be connected to past grantees who can provide advice, tips and tricks for finding success in your tree care project please contact Jonathan at [jonathan.hill@charlottenc.gov](mailto:jonathan.hill@charlottenc.gov), or 704-432-4802.

For larger projects or projects that fall outside of the scope of the tree care grant, eligible neighborhoods are encouraged to apply to the Neighborhood Matching Grants (NMG) program, which can provide matching grants of up to \$25,000 towards tree care projects. To learn about NMG opportunities, visit [charlottenc.gov/nmg](http://charlottenc.gov/nmg).

## Appendix A: Available Tree Care Projects

Project Opportunity	Purpose	Eligible Expenses	Requirements
<b>Tree Canopy Opportunity Survey</b>	<ul style="list-style-type: none"> <li>An opportunity survey will identify risks and areas for improvement in the tree canopy, allowing the neighborhood to take action to keep the canopy strong and healthy. Neighborhoods lying within Neighborhood Matching Grant eligible areas may use that grant to fund projects recommended by the survey.</li> </ul>	<ul style="list-style-type: none"> <li>Professional tree canopy assessment by a certified arborist</li> </ul>	<ul style="list-style-type: none"> <li>Tree canopy must be assessed by a certified arborist</li> </ul>
<b>Invasive Plant &amp; Vine Removal</b>	<ul style="list-style-type: none"> <li>Trees and vines rely on the same supply of water and nutrients. Because vines and invasive plants can be more aggressive, there's a chance the tree isn't getting its fair share of nutrition.</li> <li>Vines can weigh a tree branch down, putting it at a higher risk of breaking in a storm.</li> <li>Over time, a vine invasion weakens a tree, making it a target for opportunistic pests.</li> </ul>	<ul style="list-style-type: none"> <li>Professional vine removal, including ivy, wisteria, and kudzu</li> <li>Professional invasive plant removal, including bamboo, privet, and tree of heaven.</li> <li>Tools and supplies related to vine and invasive plant removal. Reference sheet available upon request</li> <li>Volunteer training to review proper vine and invasive plant removal techniques</li> </ul>	<ul style="list-style-type: none"> <li>License may be required for certain herbicides</li> </ul>
<b>Tree Pruning</b>	<ul style="list-style-type: none"> <li>Pruning trees early in their lives ensures better structure and long-lasting tree health.</li> </ul>	<ul style="list-style-type: none"> <li>Tools and supplies related to tree pruning. Reference sheet available upon request</li> </ul>	<ul style="list-style-type: none"> <li>Pruning must be conducted by volunteers</li> </ul>
<b>Community Education Event</b>	<ul style="list-style-type: none"> <li>An informed community is a strong community. Providing educational opportunities, such as workshops, documentary screenings, and expert panels is a great way to engage the neighborhood in tree care.</li> </ul>	<ul style="list-style-type: none"> <li>Fees for equipment rental, including projectors, audio equipment, tables, and chairs</li> <li>Food and non-alcoholic beverages for the educational event(s)</li> <li>Equipment for canopy related events (arbor day celebrations, heritage tree celebrations, etc.)</li> <li>Speaker fees</li> </ul>	<ul style="list-style-type: none"> <li>Food and beverage purchases not to exceed \$500</li> </ul>

## Appendix A: Available Tree Care Projects, cont.

Project Opportunity	Purpose	Eligible Expenses	Requirements
<p><b>Bark scale Treatment</b></p>	<ul style="list-style-type: none"> <li>🍃 Crape Myrtle Bark Scale (CMBS) is a damaging insect that sucks nutrients out of crape myrtle trees.</li> <li>🍃 First identified near Lake Norman in 2016, CMBS has now spread to other parts of Charlotte.</li> <li>🍃 Knowing how to identify and control CMBS can help slow its spread and reduce its impact in your neighborhood.</li> </ul>	<ul style="list-style-type: none"> <li>🍃 Professional assessment/identification and treatment plan by a certified arborist or landscape contractor</li> <li>🍃 Tools and materials for chemical control (as recommended by a professional using a science based approach - a targeted application based on the insect's life cycle)</li> <li>🍃 Fees for pesticide application that follow the NCDA pesticide label and applied by a NC licensed pesticide applicator.</li> </ul>	<ul style="list-style-type: none"> <li>🍃 Volunteers must review tree treatment guidelines before application</li> <li>🍃 NCDA pesticide label MUST be followed. "The label is the law"</li> </ul>

## Appendix B: Grant Application Guide

### Grant Application Questions

#### Part I: Organizational Information

1. Organization Name
2. Verifying documentation: Please upload a copy of your Bylaws (or Articles of Incorporation) indicating you are an active, neighborhood-based or business association
3. How did you hear about this grant opportunity?
4. NMG Eligibility; is your organization located within the general Neighborhood Matching Grants Program's eligible geography? By answering this question, staff will be able to provide potential resources about other grant opportunities.
5. Board Retreat: Indicate if your organization participated in a Board Retreat within the past year. If yes, upload your Vision to Action Idea Development Workbook to use your \$1,500 credit (project must be one that was prioritized at the retreat).
6. Has your organization previously received a City of Charlotte Tree Banding or Tree Care Grant?



#### Part II: Tree Care Project Information

1. Describe (in 500 words or less) the project you will use the requested funds for.
2. Have you attended a Tree Care Information Session in the past year?
3. Please list the streets you plan to focus on through your project (Please upload a map, if available)
4. What is the final goal of your project?
5. How will you measure the success of your project?
6. Amount of grant funding requested (limit is \$3,000)
7. Upload your budget worksheet
8. Upload your Vendor Quote(s)
9. Upload your Tree Care Volunteer Pledge Sheets
10. Upload a letter of support from your organization pledging support for the application and Tree Care project
11. Upload a completed Contribution Template or letter of support for each cash or in-kind contribution that is on your budget (if applicable)

### Application Pointers

- 🍃 The application will auto save every 30 seconds. You can also save the application at the bottom of the screen and log back in later to complete and submit it.
- 🍃 Technical assistance, computer and internet access are available; please contact Jonathan Hill, 704-432-4802 or email [jonathan.hill@charlottenc.gov](mailto:jonathan.hill@charlottenc.gov).

Tree Care Grant Budget Template

<b>Organization Name:</b> Charlotte Neighborhood Association			
<b>Project Name:</b> Tree Care Initiative			
<b>TOTAL PROJECT COST (grant funds requested + applicant paid costs, if any)</b>			
1. List ALL items/services required for project completion. If a vendor is to be paid list the vendor's name. If items are to be purchased, indicate where the items will be purchased from (ex. Lowe's, Amazon.com, Community Toolbank, etc.).			
Vendors/suppliers to be paid with NMG funds:	Items/services to be funded:	Amount:	Quotes Provided <input checked="" type="checkbox"/>
Charlotte Toolbank	(25) Bypass Loppers (rental)	\$20	<input checked="" type="checkbox"/>
	(5) Hand Saws (rental)	\$3.00	<input checked="" type="checkbox"/>
ABC Tool Supply Store	(30) Work Gloves	\$30.00	<input checked="" type="checkbox"/>
Your Local Grocery	(2) Lemonade, Gallon	\$5.98	<input checked="" type="checkbox"/>
	(2) Sweet Tea, Gallon	\$5.98	<input checked="" type="checkbox"/>
	(1) Lunch, catered	\$150	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
<b>Total Project Cost</b>		<b>\$ 214.96</b>	
<b>CASH MATCH CONTRIBUTIONS (if applicable)</b>			
2. List any cash that will be contributed toward the project by your organization or others. Cash match is not required.			
Orgs/Entities contributing cash:	Items/services to be paid (if specified):	Amount:	Documentation Provided <input checked="" type="checkbox"/>
NHA	Yard Waste Bags	\$20.00	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
<b>Total Cash Match</b>		<b>\$ 20.00</b>	
<b>IN-KIND MATCH CONTRIBUTIONS (if applicable)</b>			
3. List any services or supplies to be donated by your organization, individuals, businesses or others (ex. refreshments).			
Org/Entities donating supplies or services:	Items/services to be donated:	Value:	Documentation Provided <input checked="" type="checkbox"/>
John Doe (neighbor)	Truck for picking up supplies	\$20.00	<input checked="" type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
			<input type="checkbox"/>
<b>Total In-Kind Match</b>		<b>\$ 20.00</b>	
<b>VOLUNTEER HOUR CONTRIBUTION - At least 50% of NMG requested funds must be matched through volunteer effort.</b>			
4. Complete the Volunteer Hour Worksheet on Tab 2. Values will be inserted automatically.			
<b>Volunteer Hour Match</b>		<b>\$ 4,348.53</b>	
Total Project Value	<b>Total NMG Grant</b>	<b>\$ 194.96</b>	<b>Congratulations, your match looks terrific!</b>
<b>(project cost + contributions)</b>	<b>Minimum Match Required</b>	<b>\$ 194.96</b>	
<b>\$ 4,583.49</b>	<b>Total Match Provided</b>	<b>\$ 4,388.53</b>	

Tab 1: Grant Budget Worksheet

Volunteer Hour Worksheet			
Total project cost (all vendors & supplies)			\$ 214.96
Total NMG funds requested (total cost - cash contributions)			\$ 194.96
(\$25.43/hr)			<b>4.00</b>
List volunteer events - One (1) event per row	Approximate date	Total # of volunteers	Total # of hours committed
Neighborhood Meeting	9/15/2019	15	15.00
Adopt a City Street Cleanup	10/12/2019	10	30.00
Fall Festival	10/25/2019	7	21.00
Neighborhood Training- Vine Removal	11/13/2019	20	20.00
Ivy Removal Day	11/16/2019	30	80.00
Follow Up Pruning and Removal	3/21/2019	5	5.00
		<b>Total Volunteer Hours</b>	<b>171.00</b>
		<b>Volunteer Hour \$ Value</b>	<b>4348.53</b>
<ul style="list-style-type: none"> <li>Summarize proposed volunteer events above using information from your Volunteer Pledge Sheet(s)</li> <li>Completed Volunteer Pledge Sheets must be submitted with your grant application</li> <li>The top of the page indicates the required number of volunteer hrs to meet the 50% minimum, the remaining 50% match may be met by additional volunteer hours, in-kind donation and/or cash</li> <li>≤ 20 hrs of grant related, community engagement pre-application activities may be included, remaining events should begin at least 75 days after the grant application deadline (see pg 5, program guidelines)</li> <li>Total volunteer hours committed will automatically transfer to the Grant Budget Worksheet on Tab 1</li> </ul>			

Tips:

- Make sure your MATCH TOTAL is equal to or exceeds the TREE CARE-GRANT REQUEST
- Make sure your Volunteer time is AT LEAST 50% of the TREE CARE-Grant Request
- You should have a quote for any purchases you want to make or vendor(s) you plan to hire
- You should have Contribution letters for all in-kind or cash donations listed
- Volunteer time is valued at \$29.95 per volunteer per hour

Tab 2: Volunteer Labor Worksheet





Recommended template for documenting cash and/or supplies



Date

Name(s) of donor

Address

City, State Zip

Phone number

Dear staff and Review Team members,

It is my/our understanding that \_\_\_\_\_ is applying for the City of  
*(Name of organization)*

Charlotte's Housing & Neighborhood Services (HNS) Tree Care Grant Program.

\_\_\_\_\_ is pleased to support this organization in their endeavor and  
*(Your name or company/agency name)*

would like to make the following contribution(s):

In-Kind Contribution

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Valued at: \$ \_\_\_\_\_.

Cash contribution

\$ \_\_\_\_\_.

Combined contribution totaled at: \$ \_\_\_\_\_.

Sincerely,

Signature(s)

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