

Template: Tree maintenance and monitoring plan

Growing Canada's Community Canopies

Please include the following information when filling out this template:

PROJECT WORKING TITLE:

PARTICIPATING ORGANIZATIONS:

CREATED BY:

REVIEWED BY:

DATE:

USING THIS TEMPLATE

This template guides you through the process of developing a tree maintenance and monitoring plan. Use the questions in each section to help you build a comprehensive, well-thought-out plan to meet your project goals and ensure the long-term success of your community's trees.

While the template focuses on *new* tree planting projects, you can also use the guidelines in it to establish a maintenance and monitoring plan for the existing trees in your community. The template distinguishes between short-term activities (up to five years after planting) and long-term or ongoing activities.

This template can also assist you in preparing an application for the [Growing Canada's Community Canopies tree planting offer](#). Note that some of the questions in this template are repeated in the full application form for the tree planting offer. You may copy and paste your responses or provide the filled-in template as a supporting document if using it to supplement your application.

If you do not yet have details for a particular section, include the methodology you plan to use. This might include information on the personnel carrying out that portion of the project (e.g., contractors who will carry out watering activities) or a resource that outlines best practices or established guidelines for maintenance and monitoring activities. Be sure to also include software or other tools you will use to complete any activities where relevant.

To provide background, we encourage you to reference any existing documents that describe sections of your maintenance and monitoring plan. Please attach the documents that you cite or embed links to them.

Maintenance

Maintenance is crucial for ensuring safe and healthy tree growth. Trees in the built environment require more frequent maintenance to promote good structure, maintain clearance and manage risks. The frequency and type of maintenance will vary depending on site conditions, climate conditions and tree species.

Maintaining young trees

In this section, summarize the short-term maintenance activities in your tree planting project. Short-term maintenance typically takes place for three to five years after planting, depending on the planting site location and condition.

Include the following information:

- the maintenance activities¹ you will complete, including any differences by planting site or species
- maintenance cycles and timing (e.g., weekly, monthly or yearly activities)
- who will carry out maintenance (e.g., contractors, internal staff, community volunteers), including who will be responsible for which activities

- how you will track maintenance activities (e.g., using management software), including if and how this will be integrated with your tree monitoring data

Recommended minimum word count: 250 words

¹ Maintenance activities to consider

Maintenance activities should consider both **tree care** and **site care**. Tree care refers to activities that are used to maintain individual trees, such as pruning, watering, mulching, staking, and pest and disease management. Site care refers to activities that affect the planting site more generally, such as removing invasive vegetation, weeds or litter, and adding fertilizer or soil amendments.

To learn more about the importance of tree maintenance, review our [tree maintenance factsheet](#).

Reactive maintenance

In this section, describe how you will carry out reactive or unplanned maintenance. This might include maintenance needed after severe weather events, sustained periods of drought, or pest and disease outbreaks.

In your response, identify who will be responsible for reactive maintenance (e.g., municipal staff, contractors) and describe their qualifications or experience. If you have not yet identified who will be responsible for reactive maintenance, explain any standards or best practices you will follow.

Recommended minimum word count: 150 words

Replanting

In this section, describe how you will account for tree mortality in your planting project. Include an anticipated or target survival rate if your project has one. Explain how you will conduct replanting and acquire additional tree stock as needed.

Recommended minimum word count: 150 words

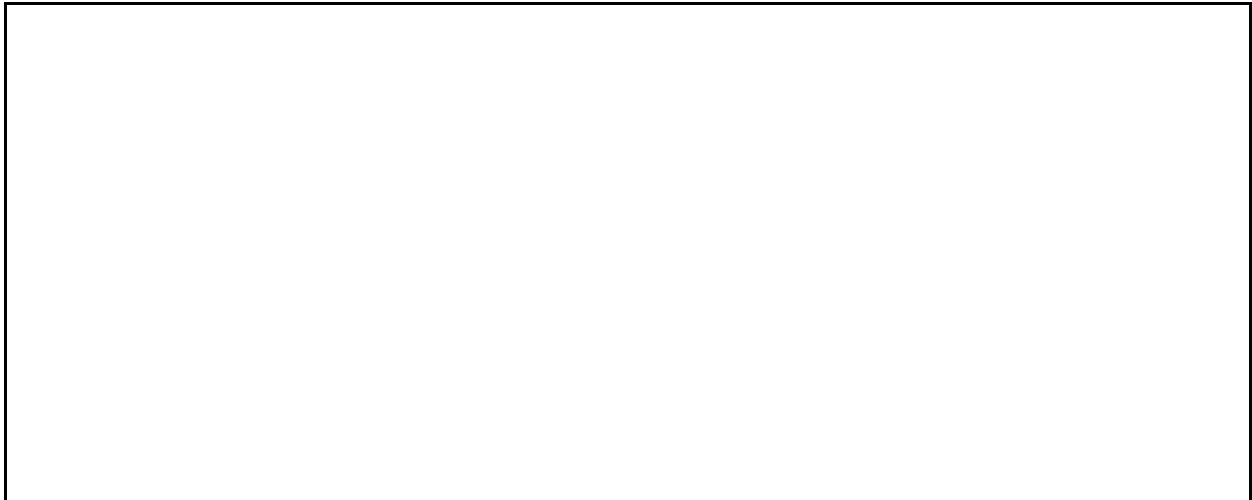
Maintaining established trees

In this section, summarize the long-term maintenance activities in your tree planting project. Long-term maintenance takes place once trees are mature enough that there are fewer risks to their survival. Maintenance at this stage mainly focuses on ensuring good structure and form to mitigate risks to people or property as well as managing pests or disease.

Include the same type of information you listed under the section on maintaining young trees, but specify if and how your approach will differ once your trees are established. For example, if you will integrate trees into a regular pruning cycle, explain how this will differ from your

young tree maintenance activities and why. Draw connections to existing municipal operations where relevant.

Recommended minimum word count: 150 words



Monitoring

Monitoring newly planted trees is essential for their long-term health and survival. Regular observation helps detect early signs of stress, disease or pest infestation and allows timely adjustments to care practices. Short- and long-term monitoring help ensure that trees are established successfully and that ongoing maintenance supports resilient, thriving tree planting projects.

Monitoring young trees

In this section, summarize the short-term monitoring activities in your tree planting project. As with maintenance, short-term monitoring typically takes place for three to five years after planting, depending on the planting site location.

Include the following information:

- what will be monitored,² including what indicators you will use to measure and define the success of your planting project, and any differences by planting site or species
- monitoring methodology (e.g., transects, GPS mapping, photo monitoring, sample plots, digital tracking tools)
- monitoring cycles and timing, including how often monitoring will occur
- who will carry out monitoring (e.g., contractors, internal staff, community volunteers), including who is responsible for which activities

Recommended minimum word count: 250 words

² What indicators to monitor

- **Tree-related variables:** tree health, presence of pests or disease, diameter at breast height, tree height, canopy condition, damaged or broken branches, tree mortality
- **Environmental variables** (if applicable): soil compaction, soil moisture, soil and water quality, invasive or competing vegetation
- **Biodiversity variables** (usually for restoration projects): presence of species at risk, local wildlife population metrics, vegetation metrics

To learn more about the importance of tree monitoring activities, including what to monitor, review our [tree monitoring factsheet](#).

Monitoring established trees

In this section, summarize the long-term monitoring activities in your tree planting project. Long-term monitoring takes place once trees are mature enough that there are fewer risks to their survival. Monitoring at this stage focuses on assessing growth and structure, and tracking signs of stress, pests or disease.

Include the same type of information you listed under the section on monitoring young trees, but specify if and how your approach will differ once your trees are established. For example, if you will reduce the frequency of your monitoring activities, describe how less frequent they will be and why.

Recommended minimum word count: 150 words

Data storage and use for maintenance

In this section, describe how monitoring data will be stored, shared and used to inform future maintenance or adaptive management activities.

Recommended minimum word count: 150 words

This resource was created in partnership by Tree Canada and FCM's Green Municipal Fund for the Growing Canada's Community Canopies initiative, which is delivered by the Federation of Canadian Municipalities and funded by the Government of Canada.

