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GETTING STARTED ON YOUR UFMP

A TEMPLATE TO CREATE AN URBAN FOREST MANAGEMENT PLAN

HOW TO USE THIS RESOURCE

This template is a starting point for communities who want to develop or update an urban forest management plan (UFMP). It poses foundational questions that guide you through concept development, helping you to:

- Define why a UFMP is important for your community
- Identify potential partners who can contribute to the development of your plan
- Compile baseline data and identify additional data that is needed to build and optimize your plan
- Create objectives and timelines to guide your project workplan

This template serves as a companion resource to our guide, [Creating an urban forest management plan for your community](#). You may wish to review the guide alongside this template to help you fill out each section.

SETTING THE STAGE

This section focuses on the key building blocks needed to develop a UFMP. It covers:

- Defining your “why” statement using drivers, barriers and strategic priorities
- Identifying potential partners
- Understanding the data you have and what you need

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Define your “why” statement

Step 1. Identify drivers and barriers

Your UFMP will be stronger if you take time at the beginning to determine why the plan is important for your community. This will also help you craft a compelling case for investing in the development and implementation of the plan.

The first step is identifying **drivers** and **barriers**. In other words:

- What is *motivating* your community to plant and care for its trees?
- What is *preventing* your community from planting and caring for its trees?

List your top three drivers in the textbox. Below are examples of common drivers; you might select from this list or come up with your own.

Examples of common drivers:

- Risk management or public safety
- Major pest or disease outbreak (e.g., emerald ash borer, Dutch elm disease)
- Climate adaptation and mitigation (e.g., heat island, drought, windstorms)
- Major disaster (e.g., ice storm, hurricane)
- Urban development causing canopy loss
- Urban development adding new trees that require management
- Public pressure or community advocacy
- Stewardship partner momentum (e.g., ENGOs, conservation authorities)
- Direction from Council
- Internal staff leadership
- Beautification or urban renewal

Next, list your top three barriers, drawing from the list of examples or using your own.

Examples of common barriers:

- Lack of staff
- Lack of equipment (e.g., watering trucks, chippers)
- Lack of operational budget (i.e., to hire contractors or fund maintenance operations)
- Lack of capital budget (i.e., to fund new plantings and major projects)
- Lack of strategic direction (e.g., a plan that informs coordinated action)
- Lack of Council support or prioritization for urban forestry
- Lack of data or outdated data to inform program
- Community resistance, low awareness, or engagement challenges

Step 2. Identify strategic priorities

Another area that can shape the rationale for developing a UFMP is your community’s strategic priorities, usually found in plans and policies. Look for those that have a direct or indirect influence or impact on your community’s urban forest activities.

In the boxes below, list any plans and policies and the strategic priorities they contain that are linked to your urban forest and may provide direction for how it is managed. Examples are provided on the next page.

RELEVANT PLAN OR POLICY	STRATEGIC PRIORITIES

Examples:

RELEVANT PLANS AND POLICIES

- Council strategic plans
- Municipal development or official/community plans
- Regional growth strategies
- Climate action plans
- Parks master plans
- Development standards
- Biodiversity plans
- Indigenous relations or Reconciliation strategy, policy, or Memorandum of Understanding

STRATEGIC PRIORITIES

- Council strategic plan: Proposes an environmental strategic initiative to prepare an urban forest plan, increase green space, and grow tree canopy
- Municipal development plan: Includes a policy to “evaluate and, where appropriate, protect the urban forest through incorporation of existing forest stands into parks”

Step 3. Write your “why” statement

Use your reflections and research on drivers, barriers and strategic priorities to articulate, in a couple of sentences, why developing a UFMP is important for your community.

Example:

We are developing an Urban Forest Management Plan because **[drivers:]** emerald ash borer and rapid urbanization in the last decade have had a devastating impact on our urban forest that prompted public outcry, while **[barriers:]** our team’s resources remained constant, contributing to a widening gap between tree removals and planting.

The Plan will support our municipality’s broader efforts to **[strategic priorities:]** better protect our tree canopy while improving community equity through a better distribution of and access to greenspace.

Identify potential partners

After establishing why you are developing a UFMP, you'll need to identify who might participate in the process and how. Consider both internal participants (i.e., departments or individuals within your municipality) and external participants (i.e., groups or organizations in your community).

Start by brainstorming a list of departments, groups and organizations that might have an interest in or be impacted by the UFMP. At this stage, it may be easier to identify titles or roles rather than specific individuals.

INTERNAL PARTICIPANTS	EXTERNAL PARTICIPANTS

If and how these participants will be involved in the UFMP development process will depend on their interest, availability and level of influence over the plan. For each, consider how they might be involved in the process, including the perspectives or knowledge they might bring, how much influence they might have over the final plan and how they might contribute to implementing and sustaining the plan.

Use the influence/interest matrix below to organize your participant list:

		INTEREST	
		LESS	MORE
INFLUENCE	MORE	Objective: Meet their needs, engage and consult on interest area(s), try to increase level of interest. Aim to move these participants into the “More” box.	Objective: Focus efforts on these groups as key players. Involve in governance/decision-making bodies, engage and consult regularly.
	LESS	Objective: Inform via general communications. Aim to move these participants into the “More” box.	Objective: Involve in aspects that can be appropriately influenced, keep informed and consult on interest area(s). Potential supporter and goodwill ambassador.

Once you have determined your participants’ levels of interest and influence, you can use the International Association for Public Participation (IAP2)’s [Spectrum of Public Participation](#) to define how you might engage different participant groups. The IAP2 spectrum is a common tool for planning engagement activities along a scale: inform, consult, involve, collaborate and empower. Note that this step may come later in the process as you develop an engagement strategy for your UFMP.

Be sure to consider how you will involve equity-deserving groups and follow best practices for inclusive engagement. Some groups may appear to have less interest or influence in a project than others but may be disproportionately impacted by planning decisions. These groups should be a priority for engagement.

For more information on integrating community engagement into urban forestry initiatives, review our [tip sheet](#) on this topic.

Compile data and data needs

Developing a UFMP requires a robust understanding of the current state of your community's urban forest and how it is managed. Collecting and analyzing data about the urban forest and your community helps you set priorities and make evidence-based decisions.

Examples of common datasets are tree inventories (Excel or GIS maps), canopy cover analyses, heat maps and socio-demographic data.

See Step 2 of our guide, [Creating an urban forest management plan for your community](#), for a more in-depth look at urban forestry studies and analyses that can be used to inform the development of a UFMP. Our factsheet on [urban forestry technology and tools](#) also provides additional information.

In the boxes below, document the data you have and identify what you need to collect to inform your UFMP. These data may be available within your municipality or may require reaching out to other organizations (e.g., provincial/territorial governments, academic institutions).

WHAT DATA ARE AVAILABLE?

WHAT DATA ARE STILL NEEDED?

DEVELOPING THE DETAILS

The next phase of the UFMP development process involves considering what you want to achieve and how to get there. This requires you to establish a project team, develop clear objectives, determine key tasks and a project schedule, identify and mitigate risks, and assign a budget.

Establish a project team

In the boxes below, identify who will be part of the core project team that will develop and implement the UFMP. You can copy from the list of participants you identified earlier, if relevant, or include names of specific people if you know who will be involved.

For each individual or organization, outline their role (e.g., project manager, sponsor, department representative) and how they will contribute to the project. Examples are provided on the next page.”?

POSITION	ROLE AND RESPONSIBILITIES

Examples:

POSITION

- Municipal arborist
- Director of parks and recreation
- Public engagement specialist
- Development services / planning staff
- Engineering / public works staff

ROLE AND RESPONSIBILITIES

- Serves as project manager, oversees the process and liaises with the core team and senior leadership
- Serves as project sponsor and provides updates to Council
- Supports the design and implementation of engagement (surveys, meetings, public outreach)
- Represents their department and advises on bylaw integration, tree protection during development, and cross-department alignment
- Represents their department and advises on planting feasibility in rights-of-way, utility conflicts, and maintenance implications

Develop clear objectives

This section helps you summarize why you are developing a UFMP and identify the objectives you plan to achieve. This project overview builds on your “why” statement that you developed earlier and forms the basis for the vision and goals of the plan, as determined in discussion with the project team and through community engagement (see Step 3 of [Creating an urban forest management plan for your community](#)).

To develop your objectives, consider the benefits you want to achieve through the UFMP. These might include:

- Socioeconomic benefits (e.g., creating jobs)
- Climate change resilience (e.g., reducing urban heat)
- Biodiversity and ecosystem health (e.g., increasing ecosystem connectivity)
- Future tree planting (e.g., creating strategies for replacement and replanting, improving canopy resilience and diversity)
- Reconciliation, anti-racism, equity and inclusion (e.g., creating spaces for learning and cultural practices)

PROJECT NEED	
OBJECTIVES	

Examples:

- To establish a 20-year vision for the community’s urban forest
- To review and document the importance of the urban forest and quantify the benefits for residents
- To review current operational costs and professional practices related to trees, including management, mitigation and cultivation
- To inform future policies and budget directions
- To promote public awareness of the importance of stewardship of the municipality’s urban forest

Determine project tasks and schedule

Use this section to identify required tasks (or milestones) that will need to be completed to develop the UFMP. It’s usually helpful to organize these into high-level project phases to help with planning and implementation, such as:

- **Background and data analysis:** Activities that involve collecting and compiling data to inform your current state assessment
- **Engagement strategy:** Activities that involve planning and coordinating engagement with different participants
- **Drafting:** Activities that involve writing and preparing the plan
- **Implementation planning:** Activities that involve operationalizing the plan and ensuring goals are met once it is finalized

For each phase, try to list three to four required tasks as well as the deliverable (i.e., the outcome of completing the task) and approximate timing (e.g., January to March). Project phases may overlap as long as there are sufficient resources to complete each task.

PROJECT PHASE		
Required tasks	Deliverable	Timing

PROJECT PHASE

Required tasks

Deliverable

Timing

PROJECT PHASE

Required tasks

Deliverable

Timing

PROJECT PHASE

Required tasks

Deliverable

Timing

PROJECT PHASE

Required tasks

Deliverable

Timing

Examples:**Background and data analysis**

Required tasks	Deliverable	Timing
Complete a canopy cover analysis	Canopy cover layer and canopy summaries	Jan to Mar
Complete a tree inventory analysis	Tree inventory summaries	Jan
Report on the background review and data analysis	State of the urban forest report	Feb

Engagement strategy

Required tasks	Deliverable	Timing
Create a plan for public engagement	Public engagement strategy	Mar
Plan, advertise and host public and targeted engagement events	Survey Project webpage Open house boards	Apr to May
Summarize engagement results	Public engagement summary	Jun

Drafting the plan

Required tasks	Deliverable	Timing
Set targets and goals	List of targets and goals	Jul
Identify actions	List of priority actions	Jul to Sept
Write draft plan	Draft UFMP	Jul to Nov

Implementation planning

Required task	Deliverable	Timing
Assign responsibilities, timelines and budget	UFMP implementation section	Nov to Dec

As you continue to scope out your UFMP and work with your core project team, you will be able to build a more detailed project schedule, including task assignments for specific individuals and more accurate timing estimates.

Identify and mitigate risks

In the boxes below, identify risks that may delay or prevent you from completing the UFMP. These may be linked to the barriers identified earlier.

For each risk, consider how you will mitigate or manage it to avoid unnecessary delays or challenges and keep the project on track.

RISKS	MITIGATION STRATEGIES

Examples:

RISKS

- Impacts on project timeline or budget from unexpected events
- Loss of key personnel
- Insufficient public engagement and participation

MITIGATION STRATEGIES

- Plan sufficient review time in the project schedule and be responsive to shifting needs
- Ensure sufficient participation from core project team to replace team members as needed and ensure continuity
- Use diverse engagement methods and offer extensions to encourage additional participation

Assign a budget

If you already have an idea of the budget you need or that you will have available to complete your UFMP, include it in the textbox below.

NEXT STEPS

By filling out this template, you have compiled the foundational information needed to scope and plan out the development of your UFMP. Use the ideas you have recorded here to guide your next steps, such as:

- Securing Council or executive support
- Confirming your project lead and core team
- Developing a more detailed project work plan
- Gathering background data and research
- Drafting required project documentation
(e.g., project charter, Council briefing note, request for proposals)

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