



# Tree Equity Handbook

## A Practical Guide to Closing the Canopy Gap Between Neighborhoods

ACTIVITY 3.4

### → Coalition Action Plan

Toolkit 3: Coalition Action Planning

Issued November 2025



## Activity 3.4: Coalition Action Plan

Toolkit 3 Overview:

### Coalition Action Planning

Achieving Tree Equity is a crucial — and enormous — undertaking. By diligently engaging community voices to build a unified strategy, your coalition can move confidently toward its goals, one step at a time.

Begin with community engagement planning to ensure all perspectives are thoughtfully included from the start. Next, conduct a comprehensive Tree Equity Needs Assessment to evaluate the state of the urban forest, assess current approaches to equity and community engagement, and review existing activities and policies. With that groundwork laid, you can formulate a Coalition Action Plan that operationalizes your goals and reflects the community's needs, priorities and contributions.

#### Activity Map

→ [Community Engagement Plan](#)

→ [Community Insights](#)

→ [Tree Equity Needs Assessment](#)

**Coalition Action Plan**

# Coalition Action Plan



## Overview & Basic Steps

Create an action plan outlining steps, responsibilities and timelines for implementing the coalition’s initiatives. This four-part exercise will help you set a clear directive for your plan and then break larger priorities down into actionable steps that move the coalition’s Tree Equity goals forward.

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### Before starting this activity, you might need:

- Coalition Mission, Vision and Goals → [Activity 2.6](#)
- A Coalition Roadmap → [Activity 2.5](#)
- A Tree Equity Needs Assessment → [Activity 3.3](#)

**Suggested Time:** 3–4 months

**Level of Difficulty:** Challenging

**Participants:** Led by a subcommittee of the coalition core team, with actions detailed by responsible parties

## Instructions

- 1** Fill out the “Plan Overview” section of the **Coalition Action Plan Worksheet** to set a clear directive for your plan.
- 2** Complete the “Action Playbook” section of the worksheet, identifying all concrete steps the coalition can take to advance its priorities. At this stage you will also identify people or groups who might lead each action.
- 3** Once leads and supporting partners are assigned to specific actions, they will fill out one “Action Template” for each action. The provided template guides SMART planning and encourages thinking ahead about resource needs, timelines and steps.
- 4** Finally, use the “Action Plan Checklist” to draft your Coalition Action Plan in full, making sure to seek review by the coalition core team and responsible parties.

**TOOLKIT 3: Coalition Action Plan | Activity 4 – WORKSHEET**

## Defining and Refining Actions



The Coalition Action Plan outlines a detailed strategy for the coalition and comprises a set of discrete steps, or actions. For the purposes of this worksheet, an **action** is defined as a specific task or activity that needs to be completed to achieve a coalition priority. Most of the time, one priority will require multiple actions.

Each proposed action should define clear tasks, responsibilities, resource needs and the specific steps needed to accomplish the action. Use SMART (**S**pecific, **M**easurable, **A**chievable, **R**elevant and **T**ime-bound) criteria as a guide to establish effective actions.

### Criteria to test for SMART actions:

<b>Specific</b>	<ul style="list-style-type: none"> <li>• What needs to be accomplished?</li> <li>• Who’s responsible for achieving it?</li> </ul>
<b>Measurable</b>	<ul style="list-style-type: none"> <li>• How many? How much?</li> </ul>
<b>Achievable</b>	<ul style="list-style-type: none"> <li>• Can we reasonably accomplish it?</li> <li>• Can budgets and staffing be reasonably expanded to accomplish it?</li> <li>• Can current capabilities be expanded or developed within the given timeframe?</li> </ul>
<b>Relevant</b>	<ul style="list-style-type: none"> <li>• Why are you proposing this action?</li> <li>• What will achieving this action do?</li> </ul>
<b>Time-bound</b>	<ul style="list-style-type: none"> <li>• What’s your time horizon?</li> <li>• When will the team start creating and implementing the tasks they’ve identified?</li> <li>• When will they finish?</li> </ul>



Trulove Studios

**Bulleit sponsored urban planting and mural reveal with Trees For Houston and Streetart for Mankind in Houston, TX**

# Coalition Action Plan Worksheet

Use the next four exercises to develop a Coalition Action Plan, starting with broad goals and gradually working toward specific actions that help achieve those goals.

## Plan Overview

Start by drafting an overview for your Coalition Action Plan. You'll use your mission and vision statements and coalition goals (see [Toolkit 2](#)) to set a clear directive for your plan. All priorities and actions that you define in the next worksheets should fit under the umbrella of this overview.



### Project name

*The name of your initiative.*

### Coalition Description

*Provide a brief description of how the coalition formed and the shaping forces of the initiative.*

### Coalition Mission Statement

### Coalition Vision Statement

### Coalition Goals

### Why Tree Equity? Why now?

*Why is tree canopy important to the coalition? Why now? What are the critical local challenges, and how does advancing Tree Equity address those?*

## Action Playbook

Developing a complete Action Playbook will likely take the most time and collaborative effort out of all four sections in your Coalition Action Plan. We recommend approaching it in phases, starting with the broadest concept (overarching goals) and working toward more specific details (assigning leaders to actions). You'll need to make refinements at every step, ensuring buy-in and shared understanding among stakeholders and partners. The final product will serve as the structure of your Coalition Action Plan.

Aleksandr Watson / American Forests



### How to complete the worksheet:

- 1 Each goal you identified in the Plan Overview will get its own Playbook — there are four blank sheets provided below, but feel free to add more.
- 2 Start by writing the goal at the top of the sheet, then **identify priorities** (see your Coalition Roadmap Worksheet, [Toolkit 2](#)) that align with this goal.
  - a. Review these selections with your collaborators. Is anything missing or mismatched? Make sure you're aligned before proceeding.
- 3 Then **identify concrete actions** for each priority. Use your **Tree Equity Needs Assessment Worksheet (Activity 3.3)** as a reference, compiling a draft list of actions that both address existing needs and advance the chosen coalition priority.
  - a. Use SMART criteria to ensure actions are specific, measurable, achievable, relevant and time-bound.
- 4 Finally, **assign leaders to each action**.
  - a. Circulate the draft Action Playbook to partners and stakeholders, inviting them to assume leadership of certain actions based on their expertise and availability.
  - b. These partners can also help you refine each Playbook, filling in gaps and identifying opportunities for collaboration.
  - c. Each action needs an assigned leader before it can move to the next step: completing a detailed Action Template.
- 5 After all partners have had a chance to volunteer for leadership roles and provide feedback (this may involve multiple rounds of review), compile all suggestions into a near-final Action Playbook and share it with the core team or other key stakeholders for review.

**Goal 1:**



Priority	Actions Needed	Potential Leads/Partners

**Goal 2:**



Priority	Actions Needed	Potential Leads/Partners

**Goal 3:**



Priority	Actions Needed	Potential Leads/Partners

**Goal 4:**



Priority	Actions Needed	Potential Leads/Partners

## Action Template

Now that you have a complete Action Playbook, you and your collaborators can start creating specific plans for each action. Set measurable objectives, identify the resources you will need and break the action down into smaller, more digestible steps.

Complete one worksheet per action — the person or group who volunteered as the lead for an action should fill out this worksheet and maintain an active role in action planning.



<b>Action</b>		<b>Deadline</b>
<b>Lead(s)</b>	<b>Supporting Partner(s)</b>	
<b>Purpose</b>		
<b>Objectives</b>		
<b>Steps</b>		

Continued on next page.

# Action Template (Continued)



**Resources Needed**

**Notes**

**Status**

**Coalition Goal ([Toolkit 2](#))**

**Coalition Priority ([Toolkit 2](#))**

Sample on [page 18](#)

## Action Plan Checklist

You have established an overview for your Coalition Action Plan, compiled a list of discrete actions and created detailed plans for each one. Now it's time to put everything together!

Using the checklist below, combine all the pieces of your Coalition Action Plan into a document that you can share with coalition members, stakeholders and the broader community to increase transparency and accountability.

Your Coalition Action Plan will serve as a guiding document that helps the public understand how your coalition will concretely advance its Tree Equity goals.



### Your Coalition Action Plan should include:

- A completed Plan Overview
- Tree Equity Commitment or letter of support (see [Toolkit 2](#))
- List of Tree Equity Coalition Core Team members
- List of all organizations involved with the Tree Equity Coalition
- Summary of priority neighborhoods identified in Tree Equity Score (see [Toolkit 1](#))
- Neighborhood Profiles summarizing community insights
- Summary of findings on current conditions and activities evaluated in the Tree Equity Needs Assessment
  - Urban Forestry Activities
  - Plans and Policies
  - Tree Equity Initiatives
  - Community Engagement
  - State of the Urban Forest
- A completed Action Playbook
- All complete Action Templates
- A summary or link to your Community Engagement Plan

# Sample Action Playbook

**Goal 1:** Center community needs and preferences in the decisions and management of the urban forest.

Priority	Actions Needed	Potential Leads/Partners
Establish an independent organization as an <b>anchor institution</b> whose role is to drive and mobilize urban forestry initiatives.	Formalize the role through a non-binding Memorandum of Understanding (MOU) or a legally binding Cooperative Agreement.	
	Secure funding to establish a new role at the anchor organization to project manage and mobilize the initiative.	
Develop an <b>urban forest management plan with a Tree Equity framework</b> that explicitly focuses resources on neighborhoods with fewer trees and greater vulnerability to climate change.	Develop a formal process to conduct community engagement and gather input to inform the urban forest management plan.	
	Develop a 30-year funding strategy.	
	Create Urban Forest Management Plan.	
<b>Monitor and evaluate program progress</b> toward achieving Tree Equity objectives.	Develop a review protocol with clear monitoring metrics that can be implemented biannually.	
	Establish feedback mechanisms to gather input from stakeholders, including residents, community groups, and partners.	

## Sample Action Playbook

**Goal 2:** Community organizations and leaders take an active role in decision-making processes, task forces and stewardship programs related to advancing Tree Equity.

Priority	Actions Needed	Potential Leads/Partners
<p><b>Develop engagement policies</b> that require more inclusive engagement around tree planting, maintenance and removal (such as establishing an advisory committee of tree stewards).</p>	Form a Community Engagement Policy Advisory Committee.	
	Publish a “Guide to Inclusive Engagement Policies.”	
	Implement training and outreach programs for coalition members using the guide.	
<p>Build <b>long-lasting tree stewardship programs</b> that engage residents in tree care, maintenance and advocacy.</p>	Facilitate community-led workshops and trainings on tree care and advocacy.	
	Establish and manage an active Tree Steward Network that provides access to events, tools, supplies, resources, and technical assistance	
<p>Bolster <b>youth education and introduce young people to careers</b> in urban forestry and Tree Equity.</p>	Develop an urban forestry curriculum for grades 4–6 in public schools.	
	Create youth apprenticeship and internship programs for juniors and seniors in public high school.	
	Support a youth-led campaign about the benefits of urban trees and the importance of equitable access to green spaces.	

# Sample Action Playbook

**Goal 3:** Maximize climate resilience in trees and green space.

Priority	Actions Needed	Potential Leads/Partners
<p><b>Integrate tree species climate vulnerability and climate projections</b> into tree planting initiatives and decision making.</p>	Develop localized tree planting guidance on climate-adapted tree species that can support public health, climate mitigation and stormwater management in future climates.	
	Integrate research on local projected temperature changes, precipitation patterns and other factors into decision making.	
	Hold community workshops and publish guidance on selecting climate-resilient tree species.	
<p>Establish <b>cyclical, programmatic maintenance</b> that includes low Tree Equity Score neighborhoods so trees remain healthy as long as possible.</p>	Conduct a comprehensive assessment of tree health and maintenance needs in neighborhoods with low Tree Equity Scores.	
	Allocate resources and coordinate ongoing efforts to ensure consistent and equitable maintenance.	
	Coordinate a 10-year plan for cyclical maintenance.	
<p>Establish <b>dedicated Tree Equity staff</b> in urban forest-related departments, community organizations and anchor organizations.</p>	Conduct a needs assessment to determine the specific responsibilities and scope of the dedicated Tree Equity staff positions.	
	Secure sustainable funding to support needed position(s).	
	Integrate the dedicated Tree Equity staff into urban forest-related departments or anchor organizations.	
<p>Adopt <b>ordinances, policies and regulations to protect existing trees</b>, particularly in areas with limited canopy or undergoing development or urbanization.</p>	Conduct a comprehensive review of existing ordinances, policies and regulations related to tree protection. Identify gaps and opportunities.	
	Engage residents, community groups, developers and other stakeholders in the process of developing and adopting new ordinances or policies. Seek input on proposed measures.	
	Provide training and resources to municipal staff, developers and residents to ensure compliance with tree protection measures.	
<p>Expand <b>tree nursery capacity and local supply of native and climate-resilient species</b> available at tree nurseries.</p>	Conduct an assessment to determine current tree nursery capacity and the availability of native and climate-resilient species. Identify gaps in production and distribution.	
	Partner with local nurseries, suppliers and growers to expand the production and availability of native and climate-resilient tree species.	
	Conduct outreach and education campaigns to promote the benefits of planting native and climate-resilient trees. Provide guidance to homeowners, businesses and municipalities on selecting appropriate species.	

# Sample Action Playbook

**Goal 4:** Attain a citywide tree canopy coverage of 28% by 2050, prioritizing implementation in neighborhoods with a Tree Equity Score below 80.

Priority	Actions Needed	Potential Leads/Partners
Establish <b>baseline tree canopy and track change</b> over time.	Establish a monitoring and evaluation protocol to track progress toward achieving the 28% tree canopy coverage goal.	
	Create a staff- and volunteer-led program to conduct a baseline street tree inventory and tracking program for high-priority neighborhoods.	
<b>Prioritize neighborhoods with low tree canopy cover and limited access to green spaces</b> in targeted tree planting initiatives.	Conduct a needs assessment to determine priority neighborhoods using Tree Equity Score in combination with deep community input.	
	Implement targeted tree planting initiatives in neighborhoods with Tree Equity Scores below 80 to rapidly increase canopy coverage. Prioritize the selection of native and climate-resilient species	
	Allocate resources and funding proportionately to support tree planting and maintenance efforts in underserved neighborhoods.	
Establish a <b>sustainable finance mechanism</b> to support urban forestry.	Conduct a thorough needs assessment and financial analysis to determine the funding requirements for urban forestry initiatives. Identify potential funding sources.	
	Develop tailored funding strategies such as creating dedicated funding streams through local ordinances or taxes, establishing an endowment fund, or leveraging philanthropic contributions and corporate sponsorships.	
	Engage stakeholders, including local government officials, community leaders, businesses and residents, to ensure buy-in and approval.	

# Sample Action Template

**Action**

Form a Community Engagement Policy Advisory Committee

**Deadline**

2026

**Lead(s)**

Lakeview County Urban Tree Commission

**Supporting Partner(s)**

City of Arborvale Urban Forestry Department  
 Urban Sustainability Division  
 Environmental Justice Network  
 Green Community Alliance

**Purpose**

Establish a Community Engagement Policy Advisory Committee (CEPAC) that will serve as a bridge between the community and decision makers. The committee will review existing policies and initiatives and provide a set of published recommendations to improve community engagement in urban forestry and Tree Equity decision making and planning.

**Objectives**

- Increase public participation and ensure community voices are centered in decision making and planning for urban forestry and Tree Equity.
- Recommend policy changes and new initiatives to increase community engagement.
- Foster transparency and build trust.

**Steps**

- Identify the goals of the CEPAC and the scope of the committee’s advisory role.
- Recruit members using selection criteria to ensure a diverse and representative committee.
- Set a regular meeting schedule (e.g., monthly, quarterly) and communicate it to all members.
- Review existing community engagement policies and identify areas for improvement.
- Host a town hall to gather input from the broader community.
- Work with community representatives and stakeholders to draft new policy recommendations.
- Gather feedback from committee members and the broader community.

**Resources Needed**

- CEPAC Project Manager responsible for operations and logistics
- CEPAC Policy Writer responsible for drafting, editing and finalizing all published recommendations and reports
- Budget for town hall meeting — meeting space, materials, equipment

**Notes**

- Monitoring Progress: Implement a system for tracking the committee’s progress and impact.
- Community Feedback: Continuously seek and incorporate community feedback to ensure the committee remains aligned with public needs and concerns.
- Documentation: Keep thorough records of all meetings and decisions.

**Status**

Not started. Scheduled for kickoff in September.

**Coalition Goal**

Community organizations and leaders take an active role in decision-making processes, task forces, stewardship programs related to advancing Tree Equity.

**Coalition Priority**

Develop engagement policies that require more inclusive engagement around tree planting, maintenance and removal (such as establishing an advisory committee of tree stewards).



## Activity 3.4: Coalition Action Plan

### Toolkit 3: Coalition Action Planning

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