



# Tree Equity Handbook

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

→ **Toolkit 4:  
Create Plans  
and Policies**

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**We envision a world in which the significant environmental, societal and economic benefits of forests are fully realized and equitably available to all people.**

Above: Alamo Colleges Communications



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# Welcome to the Tree Equity Handbook!

Join the movement to shape a future where cities and towns have the resources to sustain a thriving urban forest with transformative benefits, particularly for people in under-resourced communities.

Advancing Tree Equity takes far more than planting trees. It demands a comprehensive approach grounded in deep community engagement, coalition building, policy change and skilled workforce development. It requires scaling up climate-resilient tree supply and implementing arboricultural best practices to manage urban forest health. It calls for innovative financing strategies and new systems for wood reuse, carbon capture and carbon storage.

City staff and officials, urban forestry practitioners, community leaders and advocacy champions — this handbook is your step-by-step guide to activate, focus and lead a community-wide Tree Equity movement. This resource is for you if you are starting from scratch, or if you need tools to re-inspire and refocus your process. You will join a community of practice across the country taking parallel action in their own cities, towns and neighborhoods.

Thank you for joining us on this important journey. Let's make this vision for Tree Equity a reality!



# We Need Tree Equity in Cities

Trees are more than scenery. Much like schools, streets and sewer lines, they are crucial elements of our community infrastructure. Trees play a vital role in supporting public health, well-being and climate resilience.

Trees in cities and towns across the U.S. absorb 17.4 million tons of air pollutants annually, preventing 670,000 cases of asthma and other acute respiratory symptoms every year.<sup>1</sup> Trees help prevent hundreds of heat-related deaths and more than 50,000 doctor's visits annually<sup>2</sup> by lowering surface and air temperatures. On average, trees in the U.S. reduce energy demand for heating and cooling by 7.2%.<sup>3</sup>

However, Americans do not enjoy the same access to the benefits of urban trees and green spaces.

Nationwide, American Forests' Tree Equity Score shows areas with the lowest poverty rates have double the tree cover per person and are 6 degrees cooler than areas with the highest. Areas with the fewest residents of color have four times more tree cover per person and are 13 degrees cooler than areas with the most.

This is a direct result of decades of systemic and inequitable governance and planning. These disparities have the most impact on communities of color, economically disadvantaged neighborhoods and other people facing institutional barriers, all of whom are disproportionately affected by environmental hazards such as extreme heat waves, air pollution and degraded water supply. It's time to change that and reinvest in our communities.



<sup>1</sup> Nowak, D.J., S. Hirabayashi, A. Bodine, E. Greenfield. 2014. Tree and forest effects on air quality and human health in the United States. *Environmental Pollution*. 193: 119-129.

<sup>2</sup> McDonald, R.I., T. Kroeger, P. Zhang, P. Hamel. 2020. The value of US urban tree cover for reducing heat-related health impacts and electricity consumption. *Ecosystems*. 23:137-150.

<sup>3</sup> Nowak, D.J., N. Appleton, E. Ellis, E. Greenfield. 2017. Residential building energy conservation and avoided power plant emissions by urban and community trees in the United States. *Urban Forestry and Urban Greening*. 21: 158-165.

# A Tree Equity Approach

The Tree Equity Handbook employs a strategic, community-led approach to building an equity-forward urban forestry program:

- **Data-Driven Planning:** Use data combined with local knowledge to prioritize investment in historically under-resourced areas.
- **Community Engagement:** Create strong decision-making roles for community leaders and representatives to ensure that actions respond to local needs and priorities.
- **Forestry for People:** Develop coordinated strategies for managing urban forests to maximize benefits to people and ensure long-term health and community resilience.
- **Capacity Building:** Collaboratively develop strategies that support program growth, sustainable funding, scaled up systems and workforce development to build a stable support system for urban forests in the long term.



Liz Putnam / Liz Putnam Photography

## Toolkit 4

# Create Plans and Policies

You've collected data, built a coalition, and gathered community input to develop an action plan. Now it's time to begin pulling on the levers of power to create real, measurable change through local policy.

Start by taking a comprehensive inventory of the existing policies, plans and codes that affect trees in your city. Identify what is working and where there are opportunities for improvement. Then begin to craft new policy priorities, assessing your

initiatives for potential impacts to the community. Finally, take stock of the strengths that you and your team members bring to the initiative and decide how you will put those skills to work.

### Big Deliverables:

Policy Inventory and Gap Analysis, Policy Impact Assessment, Advocacy Team



# Activity 1: Policy Inventory and Gap Analysis

Toolkit 4  
Create Plans  
and Policies

## Activity Map

Policy Inventory  
and Gap Analysis

→ Policy Impact  
Assessment

→ Policy Advocacy  
Guide

# Policy Inventory and Gap Analysis



## Overview & Basic Steps

Strong urban forest policies create healthier, more resilient communities, and include equitable outcomes in their objectives. This activity helps you take stock of your community's existing policies and identify gaps or areas for improvement. You can also use the included set of guiding questions to specifically assess existing policies through an equity lens. By the end, you'll have a clearer picture of what's working, what's missing and what can be changed or improved to make Tree Equity a reality for your community.

**Suggested Time:** 1–2 weeks

**Level of Difficulty:** Moderate

**Participants:** 1 leader

**Resources:** 2–4 individuals with strong knowledge of the community's laws, codes, existing plans and policies

## Instructions

- 1 Use the **Policy Inventory and Gap Analysis Worksheet** ([page 12](#)) to identify existing urban forestry policies (and other related policies) and make notes on what they cover.
- 2 Use the guiding questions in the **Equity Assessment for Existing Policy Worksheet** ([page 24](#)) to evaluate current policies through an equity lens and identify opportunities to advance Tree Equity through policy.

## After you complete this activity:

- Based on your understanding of an ideal local policy landscape, develop policy actions that align with your existing priorities. Refine your ideas using our framework to forecast potential impacts. → [page 25](#)
- Consider where the policy language is best deployed, whether through a new initiative or integration into standing documents. Then begin to revise existing policy, draft new policies and strategically include policy within plans and governance. → [page 25](#)
- Identify your personal and shared team strengths and develop an advocacy plan that leverages those strengths to gain buy-in. → [page 38](#)

**TOOLKIT 4: Create Tree Equity Plans and Policies | Activity 1**

## Urban Forestry Policy 101

Cities and towns have multiple avenues for implementing, enacting and enforcing rules around urban trees. Policy is typically codified in municipal law, but there are also more informal mechanisms for communicating city agencies' plans and goals. Urban forestry policies and plans concern all types of trees within a city: those on private or public property or somewhere in between, as well as trees to be planted or preserved during development.

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**Policy (laws) can be codified in:**

- Tree protection ordinance
- Landscaping ordinance
- Development ordinance
- Zoning code

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**Quasi-policy can be adopted in:**

- Comprehensive plan
- Urban forest management plan
- Climate action plan
- Open space/green space plan

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**Types of Trees:**

- Public trees
- Public trees adjacent to private property
- Private property trees
- Private property trees during development of land
- Institutional trees such as on museum or university grounds

## Where to Locate Existing Policies that Impact the Urban Forest

Policies that negatively and positively impact tree canopy can live in many places! As you work through your policy inventory assessment, the list below helps you locate existing policies to identify the best opportunities to remove harmful language or introduce new language aimed at advancing Tree Equity. If passing an ordinance in your community is challenging, for example, you may have other, more achievable options for implementing policies that protect or expand tree canopy where it can be most beneficial.

- **Local Government Ordinances & Codes:** Tree protection, planting requirements, maintenance responsibilities and removal regulations or lack thereof.
- **Urban Forestry & Green Infrastructure Plans:** City or regional strategies outlining goals for tree canopy, resilience and management.
- **Zoning & Land Use Regulations:** Requirements or lack thereof for tree preservation, landscaping and green space in development projects.
- **State & Federal Forestry Policies:** Relevant laws, funding programs and best practices that influence urban forestry at a broader level.
- **Comprehensive Plans:** Citywide long-range (20 years) master plans that guide urban planning and development.
- **Climate Action & Sustainability Plans:** Policies linking urban forestry to climate resilience and related topics such as heat mitigation and air quality.
- **Stormwater & Watershed Management Plans:** Regulations on tree planting for erosion control, flood reduction and water quality improvement.
- **Street & Public Space Design Guidelines:** Standards for tree placement, species selection and maintenance in rights-of-way and public spaces.
- **Parks & Open Space Master Plans:** Policies on tree planting, maintenance and community engagement in parklands.
- **Utility & Infrastructure Policies:** Guidelines for tree/utility conflicts, such as pruning near utility lines or green infrastructure projects.
- **Community & Neighborhood Plans:** Local initiatives that address Tree Equity, greening efforts and community-driven forestry projects.
- **Covenants, Conditions & Restrictions (CC&Rs):** Rules that dictate how properties within a community can be used.

## Assess Tree Equity Policy Gaps and Needs

When assessing your policy and plans, consider: Who benefits from this or that policy? Who might be negatively impacted by these policies? What unintended consequences may arise? What's missing? Use the Equity Assessment for Existing Policy Worksheet ([page 24](#)) as a guide.

**TOOLKIT 4: Create Tree Equity Plans and Policies | Activity 1 – WORKSHEET**

## Policy Inventory and Gap Analysis Worksheet

The goal of this exercise is to identify and assess all the existing policies that may apply to urban forestry in your community. You may need to look in different places to find policy (see **Where to Locate Existing Policy**, [page 11](#)).

As you work through your inventory to identify gaps and needs, you may find it useful to look ahead at the guiding questions in the **Urban Forestry Policy 101** ([page 10](#)) to apply an equity lens.

You’ll probably expand your knowledge as you go. Any points marked as “Unsure” are great opportunities to follow up with local experts and get more information.

### Sample Policy Inventory

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Assign authority over public trees to a person or department (other than adjacent property owner)?	Yes	Public Works Department	Need to share authority with new forestry dept.
Provide guidance on planting trees on public property?	No	We have witnessed well-meaning CBOs planting on public property but there is no plan for maintenance.	Suggest permitting, access to BMPs, and linking to climate ready species lists.
Provide guidance on removing trees on public property?	Yes	Current ordinance forbids unauthorized removal of public trees but no fine for errant removal or path to collect a fee when removal is authorized.	Opportunity for revenue generation through fines and fees.

See next page for the fillable worksheet



## Tree Protection & Care

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Assign authority over public trees to a person or department (other than adjacent property owner)?			
Provide guidance on planting trees on public property?			
Provide guidance on removing trees on public property?			
Provide guidance on maintaining trees on public property?			
Assign any authority over trees on private property (e.g. nuisance trees or to prevent spread of invasive species)?			



## Tree Protection & Care (Continued)

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Establish the position of an arborist, urban forester or equivalent?			
Outline the specific responsibilities of above position(s)?			
Provide guidelines for enforcement of the code?			
Outline standards used for care of trees in the municipality (e.g., lists of species to be planted or avoided, diversity requirements, ISA Tree Risk Assessment Qualification (TRAQ), ANSI A300 Tree Care Standards)?			
Outline the requirements or certifications for contractors working on public trees? If so, what are they?			



## Tree Protection & Care (Continued)

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Require contractors to register with the city before performing work?			
Prohibit damage or removal of public trees without a permit?			
Prohibit damage or removal of private property trees without a permit?			
Define and outlines an appeal process for enforcement decisions made by a tree authority?			
Outline exceptions to the rules (e.g., emergency removals of trees, trees of a certain size, type of land use)?			



## Tree Protection & Care (Continued)

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Outline a required inventory and re-inventory period? Periodic canopy assessments?			
Mandate a current urban forest management plan and sections of the plan?			
Outline tree risk assessment protocol?			
Establish a tree board, advisory or advocacy group?			
Establish rules for both public and private tree obstruction, such as view blocking, overgrowth into fences or overhanging trees?			



## Tree Protection & Care (Continued)

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Establish rules for protecting exceptional trees (i.e., heritage or legacy trees)?			
Outline the government entity's role in public outreach about trees?			
Define species/genus diversity requirements?			
Define a target canopy goal for the community?			
Establish tree planting programs for residents?			



## Zoning & Land Development

Does Your City Have Policies or Codes That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Enable land uses that increase green space (e.g. less parking and more landscaping)?			
Prioritize <u>complete street conversion</u> or development?			
Require relocation or replacement of trees removed during construction? If so, what are they?			
Establish a process for preservation of trees to be considered in site plan review for development projects or subdivision?			
Outline requirements for protection of public trees during construction?			



## Zoning & Land Development (Continued)

Does Your City Have Policies or Codes That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Outline requirements for protection of private trees during construction?			
Incentivize tree preservation or proactive tree planting and deter tree removal, such as a credit system?			
Establish a tree fund to receive fines or fees-in-lieu for tree removal on private property?			
Establish the authority of the government entity to hold a cash bond, create warranties, or enter contracts for owners' tree-related commitments?			
Establish a process for tree inspection and compliance for owners' tree-related commitments?			



## Zoning & Land Development (Continued)

Does Your City Have Policies or Codes That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Establish conservation or open spaces in subdivision requirements? If so, do they include canopy requirements or management prescriptions (e.g., natural areas, groves and stands)?			
Establish rules for trees specific to local building authorities (e.g., housing, school districts)?			
Include different rules for trees based on the type of land use?			
Include zoning code with environmental overlay districts?			



## Landscaping

Does Your City Have Policies That ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Require a certain amount of trees for new parking lots?			
Establish landscaping buffers that could include trees between different uses or on the perimeter or certain types of land use?			



## Programs

Does Your City ...	Yes/No/Unsure	Notes & Observations	Describe Gaps/Needs
Provide incentives for reducing impervious surface?			
Provide incentives for utilizing structural support (e.g., Silva Cells)?			
Have tree planting cost-share programs?			



## Plans

Does Your City ...	Yes/No/ Unsure	Notes & Observations	Describe Gaps/Needs
Mention trees in its comprehensive plan?			
Set target canopy goals in its comprehensive plan?			
Identify priority places to preserve or grow tree canopy in its comprehensive plan?			
Address trees in neighborhood management plans?			
Mention trees in open space, parks or green infrastructure plans?			



## Plans (Continued)

Does Your City ...	Yes/No/ Unsure	Notes & Observations	Describe Gaps/Needs
Include trees in an emergency management plan?			
Have an invasive species or pests plan?			
Have a plan for recycling/reuse of wood (urban wood utilization)?			



Joy Alexander / American Forests



**Julie Cerqueira, executive director, and Claire Jahns, senior advisor, of the U.S. Climate Alliance at American Forests' Learning Lab**

## Equity Assessment for Existing Policy Worksheet

Use these guiding questions to evaluate your city’s existing urban forestry policies and identify opportunities to advance Tree Equity through new, updated or improved policy.

### Urban Forestry Service Impact

*Do your city’s policies prioritize equitable tree distribution, protection, preservation and maintenance? Do they remove barriers to equitable tree planting and care? Do they align with climate resilience and public health goals?*



What’s in place now?	What elements are missing or underdeveloped?	What could be improved to support Tree Equity?

### Policy Development Impact

*Who are the main people or groups developing current policies? Were these policies developed through participatory planning or other community involvement?*

Who develops policy now?	What elements are missing or underdeveloped?	What could be improved to support Tree Equity?

### Policy Community Impact

*How might current policies or gaps in policy be positively or negatively affecting equitable outcomes in your community? Are there burdensome requirements for low-income residents or small businesses? Who may be negatively impacted by tree-related responsibilities and risks?*

What are the impacts now?	What elements – or missing pieces – are resulting in added burden?	What could be improved to support Tree Equity?

## Activity 2: Policy Impact Assessment

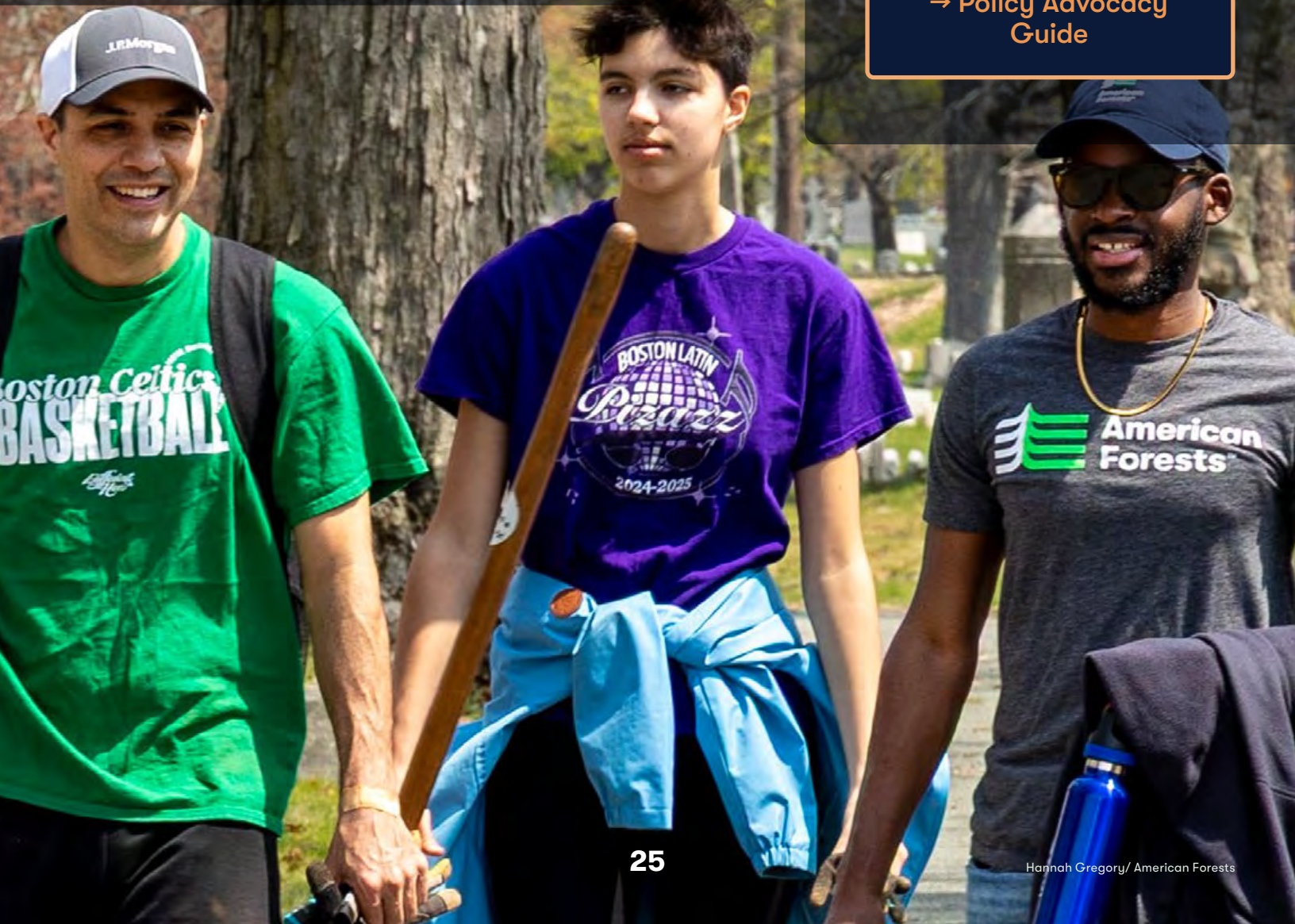
Toolkit 4  
Create Plans  
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### Activity Map

→ Policy Inventory  
and Gap Analysis

Policy Impact  
Assessment

→ Policy Advocacy  
Guide



# Policy Impact Assessment



## Overview & Basic Steps

Now that you've completed a policy inventory, you have a full picture of existing policies that shape the urban forest in your community. You've also identified potential gaps or areas for improvement through a Tree Equity lens. Now it's time to align policy action with community priorities.

Using the provided framework, you'll determine the broader issues you can address through Tree Equity work, assess what needs can be met through policy and planning, and evaluate each policy for its broader effects and its impact on equity. Working through this process will help you determine which policies you want to continue developing to advance a more just and effective urban forest strategy.

**Suggested Time:** 1 week

**Level of Difficulty:** Moderate

**Participants:** 1 leader

**Resources:** 2–4 individuals with strong knowledge of the laws, code, existing plans and policies

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

- A Tree Equity Coalition Roadmap → [Toolkit 2](#), page 40
- A Policy Inventory and Gap Analysis → [Toolkit 4](#), page 8

### Instructions

- 1** Use the **Align Priorities With Policy Action Worksheet** ([page 28](#)) to develop ideas for how to address priorities through policy solutions.
- 2** Use the **Forecasting Policy Impacts Worksheet** ([page 32](#)) to critically examine potential outcomes of existing or new policy that could help advance urban forestry and Tree Equity in your community.

### After you complete this activity:

- Identify your personal and shared team strengths and develop an advocacy plan that leverages those strengths to build momentum and gain buy-in. → [page 38](#)

## Considerations When Setting Priorities

As you set priorities and begin crafting policy ideas, keep the following in mind:

### Environmental and Health Disparities

Prioritize actions and initiatives that create positive outcomes in areas with the **greatest need** — neighborhoods with low tree canopy cover, high urban heat, poor air quality and populations vulnerable to environmental stressors. Using data like Tree Equity Score or heat disparity can help target underserved communities and address systemic inequities.

### Community Engagement and Support

The success of Tree Equity policies often depends on **community buy-in**. The foundation of any ordinance should be built upon feedback from engaged residents, especially in historically marginalized communities. Make sure their priorities are understood and their concerns and cultural values regarding green space are incorporated into the next steps. This will help you develop policies that are equitable not only in outcomes but also in process.

### Funding and Implementation Feasibility

Evaluate what resources — financial, staffing and political — are available or attainable. Prioritize policies that can realistically be implemented and sustained. Consider how you can leverage federal or state grants, create partnerships with nonprofits or incorporate Tree Equity into broader climate and infrastructure initiatives.



Massachusetts State Senator Nick Collins (navy coat) and Representative Liz Miranda (red coat) joined H.E.R.O. Hope Garden founder Judith Foster (red hat) and the team to install a new garden in Dorchester, MA

**TOOLKIT 4: Create Tree Equity Plans and Policies | Activity 2 – WORKSHEET 1**

## Align Priorities With Policy Action Worksheet

First, compile priorities that may have a policy solution. Priorities may come from your Coalition Roadmap ([Toolkit 2, page 40](#)) or other places. Then assemble a representative team to brainstorm policy solutions that might be effective, based on the gaps and needs in your Policy Inventory. You will use the Forecasting Policy Impact Worksheet ([page 32](#)) to further refine your proposed policy actions.

### Sample Worksheet – Align Priorities With Policy Action

<b>Policy Priority</b> <i>Identify the biggest problems you need to solve for Tree Equity. Review priorities from your Coalition Roadmap or other places.</i>	<b>Policy/Planning Action</b> <i>Within the realm of policy and planning, and based on findings in your Policy Inventory, what can you do?</i>	<b>What are examples?</b> <i>For these common policy actions, we’ve compiled some great examples of integrating Tree Equity into policy.</i>
Increase tree canopy in low-canopy areas.	Collaborate with frontline communities on setting and implementing neighborhood-level tree canopy goals.	The <a href="#">Oakland Urban Forest Plan 2024</a> is a great example of centering equity in every step of planning to drive policy, steer operational plans and focus results in communities with the most need. See p. 126 for how they actively reorient “normal” urban forestry program toward equitable outcomes by strategically engaging in collaborative planning.
Reduce canopy loss from illegal tree removals.	Strengthen enforcement of laws and policies affecting both public and privately owned trees.	The <a href="#">Austin, TX Tree Ordinance</a> sets a high standard for tree protection and how best to preserve tree canopy.
Reduce costs and risks associated with storms and trees, especially for neighborhoods with a high percentage of low-income property owners.	Establish cyclical, programmatic maintenance that includes low Tree Equity Score neighborhoods so trees remain healthy and low risk as long as possible.	The <a href="#">Pittsburgh Urban Forest Master Plan</a> explicitly requires the regular maintenance of “all street trees” while conducting community engagement during planning phases.
Reduce the costs for those responsible for maintaining trees on private property.	Establish income-contingent private property programs where public funding is available for low-income property owners to plant or maintain trees, including hazard removal.	Partners in <a href="#">Charlotte, NC</a> have prioritized Tree Equity by providing assistance for tree maintenance and replacement in communities with low Tree Equity scores.
Prevent rapid canopy loss that may occur during development.	Adopt ordinances, policies and regulations to protect existing trees, particularly in areas with limited canopy or undergoing development or urbanization.	One strategy to mitigate canopy loss to development is through policies like the <a href="#">Heritage Trees designation in Washington, D.C.</a> , where several acts provide requirements to mitigate the loss of large trees on private property.

See next page for the fillable worksheet

## Align Priorities With Policy Action Worksheet

Fill out one worksheet per conversation. See discussion prompts on the next page for more specific questions and follow-ups that can help guide your discussions.

<b>Policy Priority</b> Identify the biggest problems you need to solve for Tree Equity. Review priorities from your Coalition Roadmap or other places.	<b>Policy/Planning Action</b> Within the realm of policy and planning, and based on findings in your Policy Inventory, what can you do?



## Considerations When Evaluating Policy Impact



You've now established a set of policy actions to pursue. Before moving forward, take time to evaluate these actions for their potential impacts — both intended and unintended. This step will prepare you to write more effective policy that achieves your goals.

**Policy Goals:** Does the problem the policy is trying to solve align or compete with broader community and environmental priorities? How could introducing this policy change outcomes in your community affect other priorities or derail ongoing/planned initiatives?

**Unintended Consequences:** Could the policy create financial or logistical burdens for certain groups? Does it inadvertently contribute to displacement, increased costs or community conflicts?

**Community Impacts:** Who benefits from the policy? Who might be left out or harmed? Does it address historical inequities in tree canopy, urban forest maintenance, resources or decision-making?

**Feasibility:** Are there clear, realistic steps for enforcement and accountability? Does the policy have the necessary funding, staffing and public/political support?

**Enforcement & Compliance:** How are rules enforced? Is there staff capacity to enforce any new policy? Who bears the costs of non-compliance? Could fines or fees disproportionately impact low-income communities?

**Funding Model:** How is the policy funded and how does the funding model impact the community and other community priorities?

### Common Sticking Points

**Navigating Competing Priorities & Scarce Resources:** Through trust-building, joint decision-making and adaptive governance, collaborative planning can transform fragmented efforts into a unified, equity-driven policy agenda.

#### How to unstick:

- Begin by bringing together cross-sector stakeholders — local government, community groups, nonprofits and the private sector — to establish shared goals centered on equitable urban canopy growth.
- Use data (e.g., Tree Equity Score) to prioritize underserved areas and make the case for policy interventions.
- Engage communities early and continuously to ensure transparency and local relevance.
- Pool funding streams, identify co-benefits (e.g., health, climate resilience, workforce development) and use pilot projects to demonstrate impact.

**Tree Disservices:** Increasing tree canopy can redistribute risks to certain communities, such as increased maintenance costs or damage.

**How to unstick:**

- Plan and execute effective outreach well before, during and after tree planting and throughout ongoing maintenance activities.
- Ensure adequate maintenance planning and funding.
- Incorporate resources to mitigate potential tree disservices for low-income residents.

**Gentrification & Displacement:** There may be a perception in your community that increasing tree canopy is associated with causing gentrification (the influx of more affluent residents and businesses to a neighborhood) and displacement of long-term residents and businesses (moving away when the cost of living — including rent and mortgage — becomes too high).

**The facts:**

- There are studies noting correlations between tree planting and gentrification; however, no causal link has been established. There is no statistical evidence that urban greening causes gentrification. In fact, data shows the inverse — gentrification leads to greening. In other words, greening tends to happen in already gentrifying areas.

**How to unstick:**

- Plan and execute effective outreach well before, during and after tree planting and throughout ongoing maintenance activities.
- Align your efforts with affordable housing initiatives, more equitable zoning policies and other measures to help mitigate the impacts of gentrification and displacement in a comprehensive way.

**Tree Fund:** A financial mechanism used by cities or municipalities to support urban forestry initiatives. It is typically funded through fees, fines or contributions from developers, businesses or residents and is used to plant, maintain and protect trees in public spaces.

**The facts:**

- If fees are too high, they may increase development costs and impact housing affordability.

**How to unstick:**

- The fund must be structured to ensure benefits flow to the communities that need them most. Policy, participatory planning and transparent governance are needed to ensure funds are used effectively and equitably.



**TOOLKIT 4: Create Tree Equity Plans and Policies | Activity 2 – WORKSHEET 2**

## Forecasting Policy Impacts Worksheet

For each proposed policy or planning action, consider potential impacts — both positive and negative. The guiding questions are designed to help think you through the full range of outcomes that might result from your action.

Next, note possible opportunities to improve results. This might include adjusting your approach to better meet community needs, reducing potential harm, strengthening partnerships or aligning with existing policies or initiatives.

Make multiple copies of the worksheet to evaluate each policy action you would like to pursue.



**Policy/Planning Action**

Impact Type	Evaluation Question	Potential Impact	Opportunities to Improve Outcomes
<b>Impact on Other Community Priorities</b>	How might the policy fairly balance tree canopy goals with other community priorities, such as the need for affordable housing?		
<b>Economic Impact</b>	Could the policy unintentionally exclude certain communities from economic opportunities or raise housing costs?		

## Forecasting Policy Impacts Worksheet (Continued)



Impact Type	Evaluation Question	Potential Impact	Opportunities to Improve Outcomes
<b>Tree Disservices Impact</b>	Could the policy account for risks like maintenance costs, property damage or community burdens tied to increased canopy?		
<b>Community Relations Impact</b>	Could this policy account for conflicts, such as disputes over leaves, roots, overhanging limbs, views or other issues related to tree placement?		
<b>Equitable Impact</b>	Could this policy ensure historically under-canopied communities benefit from new planting efforts, with engagement and workforce development included?		

Continued on next page.

## Forecasting Policy Impacts Worksheet (Continued)



Impact Type	Evaluation Question	Potential Impact	Opportunities to Improve Outcomes
<b>Enforcement &amp; Fines</b>	Could this policy ensure fines, fees or enforcement measures do not disproportionately burden low-income communities?		
<b>Gentrification Risks</b>	Could the policy contribute to displacement or rising housing costs? Are there strategies to prevent harm?		
<b>Fee Structures &amp; Benefits</b>	Could fees and funds generated by the policy directly benefit the communities most in need?		

Continued on next page.

## Forecasting Policy Impacts Worksheet (Continued)



Impact Type	Evaluation Question	Potential Impact	Opportunities to Improve Outcomes
<b>Impact Over Time</b>	What unintended consequences might arise in 5 years? 10 years? 30 years?		
<b>Feasibility</b>	How feasible is it to implement this policy in our city? Who needs to be on board? Do we have the funding?		
<b>External Limitations</b>	Does this policy account for the implications of the climate crisis, like extreme heat and storms?		

See next page for a sample worksheet

## Sample Worksheet – Align Priorities With Policy Action

### Policy/Planning Action

Enact a heritage tree ordinance in Arborvale City.

Impact Type	Evaluation Question	Potential Impact	Opportunities to Improve Outcomes
<b>Impact on Other Community Priorities</b>	How might the policy fairly balance tree canopy goals with other community priorities, such as the need for affordable housing?	<p><b>Positive</b> – a heritage tree ordinance will protect trees and canopy on sites under development and can collect fees for the loss of otherwise non-risky trees removed during development. These resources may then be allocated for canopy growth within communities in urgent need of tree canopy.</p> <p><b>Negative</b> – some expenses related to tree preservation and fees may reduce revenue for developers.</p>	<ol style="list-style-type: none"> <li>1. Zoning overlays that direct investment of heritage tree fees to low Tree Equity Score neighborhoods will ensure resources support equitable outcomes.</li> <li>2. The same zoning overlays mentioned above may provide heritage tree “credits” for developers focused on affordable housing in priority communities.</li> </ol>
<b>Economic Impact</b>	Could the policy unintentionally exclude certain communities from economic opportunities or raise housing costs?	<p><b>Positive</b> – preserving large trees in neighborhoods results in maximized health, social, ecological and economic tree benefits within those communities.</p> <p><b>Negative</b> – fees for tree removal on private property may burden individuals on fixed incomes.</p>	<ol style="list-style-type: none"> <li>1. Public/private partnership through Treesilience programs can help communities most vulnerable to unexpected tree-related fees.</li> <li>2. Structured heritage tree fee systems can reduce or eliminate fees for vulnerable property owners.</li> <li>3. Develop a Tree Fund for fines and donations, a percentage of which is dedicated to an income-contingent tree hazard removal program for private property.</li> </ol>
<b>Tree Disservices Impact</b>	Could the policy account for risks like maintenance costs, property damage or community burdens tied to increased canopy?	<p><b>Positive</b> – the benefits of trees far outweigh the associated risks and expenses related to urban tree canopies.</p> <p><b>Negative</b> – tree disservices like leaf and debris cleanup risk of property damage, and unclear responsibilities can burden neighborhoods already facing other challenges.</p> <p><b>Negative</b> – overreliance on native tree species might not be ideal for street trees or projected warmer climates in the region</p>	<ol style="list-style-type: none"> <li>1. Allocating a portion of heritage tree fees to support community-led stewardship groups can help resolve disservices while educating neighbors about less obvious benefits.</li> <li>2. Prioritizing public tree maintenance with heritage tree revenues will reduce risk and other disservices on public properties through proactive city lead inspection and maintenance.</li> </ol>

## Develop Policy and Plans

Now that you understand which policies you want to continue developing, it's time to frame them out. First, you'll need to determine whether a plan or ordinance is the best vehicle for action.

City ordinance is the strongest tool to require equitable tree planting initiatives, maintenance and preservation, but building momentum toward systematic public policy changes takes time. Start the work now – the benefits and disservices related to trees in our communities compound over time.

Comprehensive plans, design guidelines and related land use planning tools influence where trees are allowed to grow. These plans are initiated and revised on more regular cycles than policy and may be more quickly influenced in the short term.

## Helpful Resources for Drafting Ordinance

Use the free tools below to frame your policy and draft language.

- Chicago Region Tree Initiative Ordinance Builders:
  - [Tree Preservation](#)
  - [Tree Protection](#)
- [ISA's Guidance for Developing and Evaluating Tree Ordinances](#) (2001)
- [Green Infrastructure Center's code assessment tools](#)
- [Sustainable Forestry Initiative Urban and Community Forest Sustainability Standard](#)

Regardless of your strategy, the next activity (4.3) will help your team begin the advocacy process so that you can start making these changes to benefit your community.



# Activity 3: Policy Advocacy Guide

Toolkit 4  
Create Plans  
and Policies

## Activity Map

→ Policy Inventory  
and Gap Analysis

→ Policy Impact  
Assessment

Policy Advocacy  
Guide

# Policy Advocacy Guide



## Overview & Basic Steps

Urban forestry is in a time of rapid transformation. Achieving Tree Equity requires letting go of old paradigms, embracing change and empowering leaders to activate sustained movements. This is where you come in. Use our provided framework to evaluate the strengths that you and your team members bring to your initiative, then visualize how you can put those strengths into play. This exercise should give you a clearer sense of just how your coalition can build power — and help you believe that change is achievable.

**Suggested Time:** 1 day

**Level of Difficulty:** Low

**Participants:** 2–4 individuals who are willing and able to help steer change in their community

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

- A Stakeholder Map → [Toolkit 2](#), page 9

### Instructions

- 1 Read about the key players in change-making and transformation.
- 2 Identify your specialty.
- 3 Use the **Advocacy Team Map** ([page 42](#)) to build your team and consider your team's strengths.
- 4 Apply you and your team's strengths to advance policy changes through advocacy.

## Urban Forestry and Transformative Leadership for Tree Equity



Whether your community’s tree canopy is thriving or shrinking, change is inevitable. Shifts in climate, development pressures and demographic changes reshape our communities and landscapes alike. We plan for trees; we must also plan for people. This is where strong leadership can bring transformative results to your community.

You may be wondering what role you will play in this transformation. Can you use your position to change the status quo? Do you have specialized knowledge that will inform policy? You will reflect on that role throughout this activity to discover how each of us can better serve the public and, together, grow something greater than the sum of its parts.

### A Framework for Transformation

In *The Tipping Point*, Malcolm Gladwell shows how small, strategic actions can spark large-scale change. He outlines “The Law of the Few,” asserting that leadership depends on having the right people in the right roles.

Gladwell identifies three key change agents:

- **Connectors** — relationship builders
- **Experts** — knowledge sharers
- **Persuaders** — motivators and storytellers

In the context of policy advocacy, these roles become powerful tools for change.

### What Kind of Change Agent Are You?

Use the following sections to identify which role(s) you most align with.

#### Are You a Connector?

Answer “yes” or “no” to each:

- I know a lot of people in my field and beyond.
- I enjoy meeting new people and going to events.
- I tend to remember names and faces.
- I often introduce people to each other.
- I maintain relationships across sectors.

**If you answered mostly “yes”:** You’re a *Connector*. You build bridges between people, disciplines and institutions — an essential role in aligning Tree Equity efforts with broader community goals.

### Are You an Expert?

Answer “yes” or “no”:

- I love learning and staying up to date on new ideas.
- I often research products or trends before others.
- I enjoy sharing useful information with others.
- I trust data and research to guide decisions.
- People come to me for advice or insights.

**If you answered mostly “yes”:** You’re an *Expert*. You are a resource of trusted knowledge — crucial for driving evidence-based change and building credibility in the field.

### Are You a Persuader?

Answer “yes” or “no”:

- I’m often animated or passionate when I speak.
- I enjoy telling stories and capturing attention.
- I’m good at inspiring others to take action.
- I don’t shy away from leadership roles.
- People listen to me and are moved by what I say.

**If you answered mostly “yes”:** You’re a *Persuader*. You can elevate Tree Equity by compelling others to care — and act.

Tom Koenig / American Forests



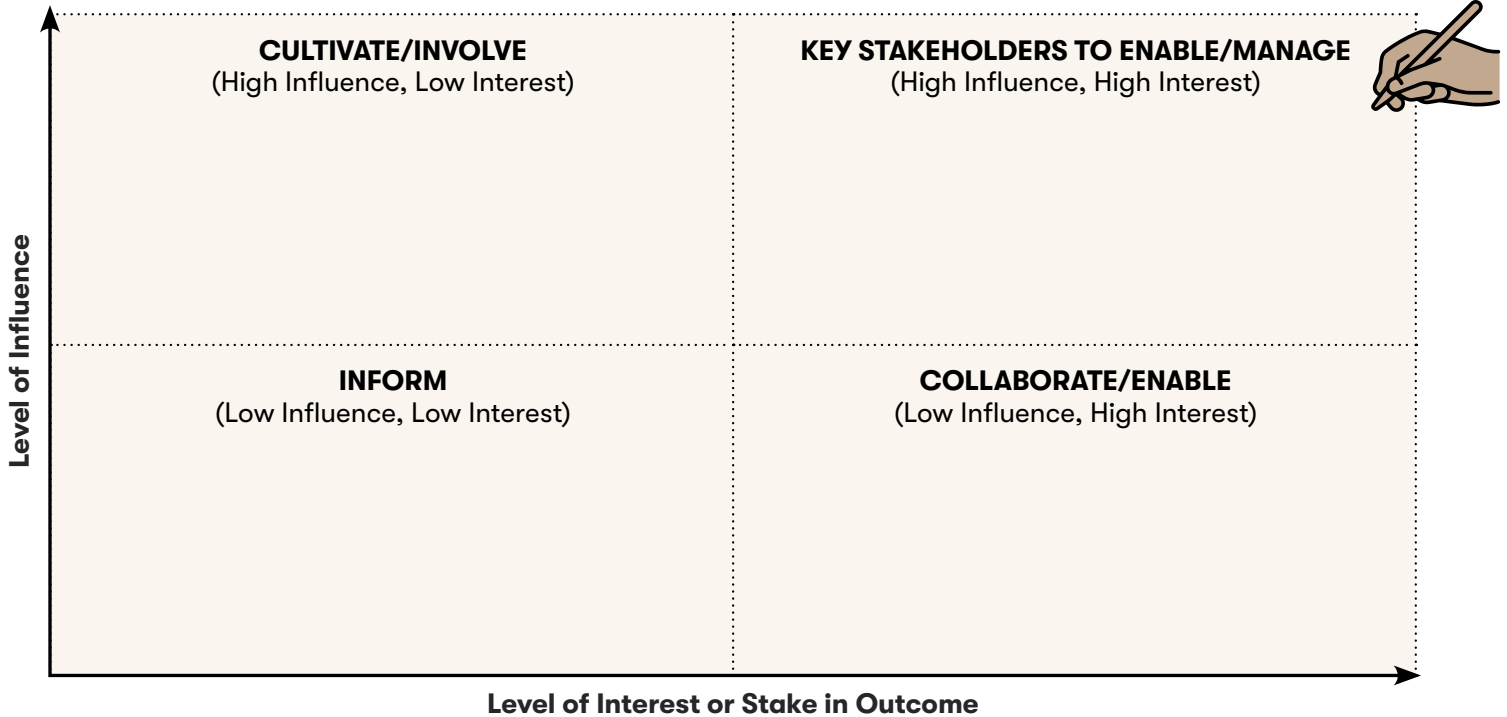
Trees for Houston, Google, and American Forests host a tree planting event at Shadydale Elementary to celebrate the launch of the Houston Tree Equity Score Analyzer (TESA). Rep. Thompson joins volunteers for a day of tree planting.

**TOOLKIT 4: Create Tree Equity Plans and Policies | Activity 3 – WORKSHEET**

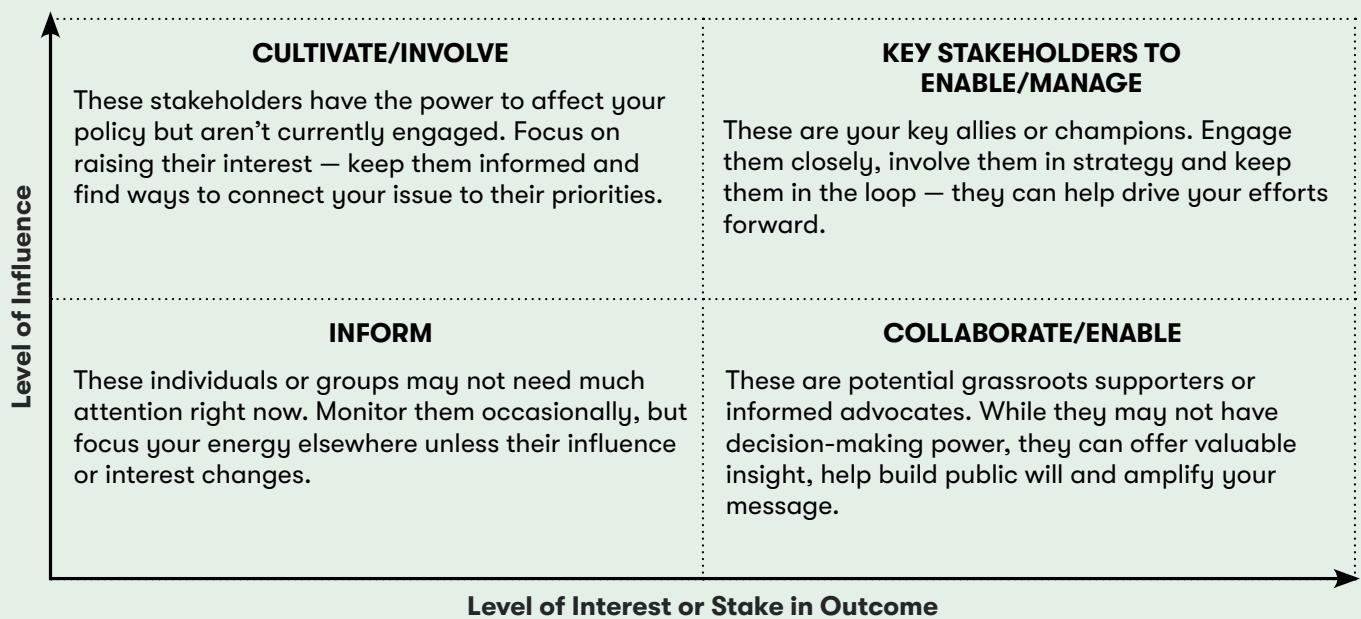
## Advocacy Team Map Worksheet

Now, look back to your Stakeholder Map (Toolkit 2, page 8) and identify partners you think will be most influential and interested in helping advocate for policy action. Place those partners in the Advocacy Team Map below.

### Advocacy Team Map



### How to interpret your Advocacy Team Map:



# Applying Your Advocacy Team’s Roles to Policy Advocacy

Each type of leader and their teams can support policy changes in their communities in different ways.

**Connectors** can:

- Build alliances across departments, sectors and communities
- Break down silos to integrate the intended results into broader planning and other policies

**Experts** can:

- Interpret data and map the expected results to tell a clear, compelling story about proposed policy improvements
- Provide sound science and best practices for decision-makers considering changes

**Persuaders** can:

- Advocate for marginalized voices who may benefit or otherwise be impacted by the policy
- Tell stories to community members and the media that build the public support and political will needed to move new ideas forward

No matter your role, these elements work best together. A full team includes all three — and values what each contributes.

Next, organize partners on your new advocacy team. Who can help build out a leadership team that advances effective policy? Who is best suited to serve which roles? List them below with their strength(s).

## Advocacy Team

Connectors	Experts	Persuaders



### Advocacy Team Check-In

Ask yourself and your advocacy team:

- Does your team include Connectors, Experts and Persuaders?
- Are other partners helping carry these roles?
- Can you or someone on the team grow into a role that’s missing?
- Can you recruit to fill gaps?

# Policy Advocacy in Action

Now that your team is in place, it's time to take action. Effective policy advocacy involves activation through many different channels. Your team can divide responsibilities based on each member's strengths.

## 1 Community Outreach & Education

- **Host town halls, workshops and public forums** to explain the policy's goals and benefits.
- **Distribute educational materials** (flyers, infographics, videos) both online and in person.
- **Engage schools, universities and community organizations** to raise awareness.

## 2 Stakeholder Engagement

- **Identify and meet with key stakeholders**, including local businesses, neighborhood associations and environmental groups.
- **Build diverse partnerships** to broaden the coalition's base of support.
- **Address concerns directly** to build trust and reduce opposition.

## 3 Lobbying Local Officials

- **Request meetings with city council members, the mayor or county supervisors** to present data and constituent support.
- **Coordinate letter-writing campaigns, petitions and phone calls** to demonstrate public interest.
- **Provide policy briefs and talking points** to officials and their staff.

## 4 Media & Communications

- **Write op-eds and letters to the editor** in local newspapers.
- **Use social media campaigns** to reach broader audiences and mobilize support.
- **Engage local radio, TV and podcasts** for interviews or public service announcements.

## 5 Organizing Public Support

- **Hold rallies, marches or visibility events** to show the volume of community backing.
- **Gather petition signatures** (paper or digital) to deliver to decision-makers.
- **Encourage public testimony** at city council or planning commission meetings.

## 6 Data & Research

- **Conduct local impact studies** or compile existing research showing the benefits of the policy.
- **Share case studies** from other cities or regions with similar successful policies.
- **Track public opinion** through surveys or polls to guide strategy.

## 7 Coalition Building

- **Align with organizations that bring unique skills or constituencies** (e.g., health, labor, youth groups).
- **Create a shared platform or policy agenda** with clear messaging.
- **Coordinate roles and responsibilities** to stay organized and strategic.

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## Final Reflection: Leading for Equity

Even if the specific categories of Connectors, Experts and Persuaders don't align perfectly with your experiences, this is a concept you can easily translate to other types of leadership. What's important to remember is that you will need many people, working together and combining their unique skills, to achieve your goals.

- **Is your team connected and collaborative?** Make introductions and form relationships that can unstick languishing policy change.
- **Is your team informed and data-driven?** Share the power of knowledge with decision-makers so they are compelled to act.
- **Is someone on your team inspiring others to take action?** Harness that inspirational energy and apply it to its greatest influence, be it policy advocacy or otherwise.

The path to Tree Equity is intersectional. Movements are sustained by diverse casts of characters who, whether by stepping up or by supporting others to lead, work together to advance new ideas and advocate for meaningful change. Trees can't stand alone, and neither can we.

Let's build something greater than the sum of its parts — and ensure everyone benefits from the power of trees.



## Toolkit 4

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