



Tree Equity Handbook

A Practical Guide to Closing the Canopy Gap Between Neighborhoods

ACTIVITY 6.1

→ **Tree Equity Funding Needs Assessment**

**Toolkit 6:
Fund Your Program**

Issued November 2025



Activity Map

Tree Equity Funding
Needs Assessment

→ Funding Mechanisms
and Priorities

→ Funder Inventory and
Engagement Strategy

Activity 6.1: Tree Equity Funding Needs Assessment

Toolkit 6

Fund Your Program

You know what your Tree Equity goals are, who will be involved, and how your coalition aims to pursue those goals. Now it's time to place one of the most important pieces of the puzzle: Where your funding will come from.

Building or expanding an urban forestry program to include Tree Equity objectives usually comes with added expenses — from specialized staff who engage with community partners to additional tree stock and planting resources. These new expenses, however, can create opportunities for new funding mechanisms. Use this toolkit to assess your Tree Equity funding needs, identify potential new sources of support, and develop effective strategies to make your case to funders.

Tree Equity Funding Needs Assessment



Overview & Basic Steps

Much like a typical budgeting exercise, this activity is designed to help you identify where you have budget shortfalls to meet your Tree Equity goals. Drawing from the equity-focused Coalition Action Plan you developed in [Toolkit 3](#), you will compare your current budget to your anticipated funding needs, determining not just how much more funding you need to secure overall, but where additional resources will be most needed to implement your vision for Tree Equity. The activities that follow will help you identify specific funding sources for each Tree Equity funding gap.

Suggested Time: 1 week

Level of Difficulty: Moderate

Participants: 1–2 individuals with strong knowledge of the finances and/or programmatic budget

Before starting this activity, you might need:

- A Tree Equity Coalition Action Plan → [Activity 3.4](#)

Instructions

- 1 Gain a detailed understanding of your Tree Equity budget needs, from funding sources to dollars needed, by completing the **Funding Needs Worksheet** ([page 6](#))
- 2 (Optional) Download the editable spreadsheet provided on our website. → [Funding Needs Template](#)

After you complete this activity:

- Identify funding mechanisms and priorities → [Activity 6.2](#)
- Develop a funder inventory and engagement strategy → [Activity 6.3](#)

TOOLKIT 6: Fund Your Program | Activity 1 – WORKSHEET

Funding Needs Worksheet

Start by entering estimates of your current budget for each line item under “Current Budget.” For any rows where you currently have no budget or budgeting needs, enter zeros. Add a note on the current source or sources of funding for that line item.

Then refer to your Coalition Action Plan priorities ([Toolkit 3](#)) to enter additional budget estimates under “Tree Equity Budget Needs.” Be sure to consider a timeline as you work on this section: Are you budgeting for the next year, or longer? If you’re just starting a program from scratch, a shorter timeline might be easier to manage so that you can focus on immediate needs.

Finally, for each line item, subtract the dollar value of the current budget from the estimated dollar value of your Tree Equity budget needs. This is your funding gap.

Choose from one the two templates provided to build your budget either by specific line-item expenditures (1a) or overall programmatic deliverables that include various components (1b). Adapt either template as needed to your specific budget needs.

If you prefer, you can download the editable spreadsheet provided on our website. → [Funding Needs Template](#)

See next page for the example worksheet

Scholarship presentation at Upward Ground Southern University



Loren Sullivan / American Forests

Sample Worksheet

Expenditure	Current Budget		Tree Equity Budget Needs			Funding Gap	
	Estimated Dollars	Funder	Estimated Dollars	Funding Secured	Funder	% Uncovered	Dollars Needed
Nursery Stock	\$180,000	State grant	\$100,000	\$80,000	Private Foundation	20%	\$20,000
Trees for planting	\$300,000	City allocation / fines	\$100,000	\$0	N/A	100%	\$100,000
Travel	\$10,000	City allocation					
Supplies	\$10,000	City allocation					
Subtotal	\$500,000	50%					
Staff + Fringe							
Position 1	\$125,000	City allocation					
Position 2	\$100,000	City allocation					
Position 3	\$100,000	State grant					
Position 4	\$75,000	Fines & Fees					
Position 5			\$90,000	\$18,000	Individual donor	20%	\$72,000
Subtotal	\$400,000	40%					
Overhead	\$100,000	10%	\$10,000	\$2,000	City Allocation	20%	\$8,000
Total	\$1,000,000	100%	\$300,000	\$100,000		66%	\$200,000

See next page for the fillable worksheet

Funding Needs Worksheet 1a (Line-Item Expenditures)

Expenditure	Current Budget		Funder	Tree Equity Budget Needs		Funding Gap	
	Estimated Dollars	% of Total Budget		Current Sources	Estimated Dollars	% of Total Budget	% Uncovered
Capital Expenditures/Direct Costs							
Nursery Stock							
Trees for Planting							
Travel							
Fuel							
Supplies							
Software Licensing Fees							
Data Storage Fees							
Communications Material							
Other:							
Subtotal							
Staff							
Contractor/ Consultant Fees							
Forestry Manager/ City Forester							
Community Engagement Specialist							
Specialist/Inspector							
Clerical Support Office							
Working Foreman (Crew Chief)							
Plan Review Arborist							
Arborist (Pruning/ Trimming)							
Equipment Operator							
Laborer							
Seasonal Worker							
Truck Driver							
Other:							
Other:							
Subtotal							
Total							



Funding Needs Worksheet 1b (Program Expenditures)

Activity	Current Budget		Funder	Tree Equity Budget Needs		Funding Gap	
	Estimated Dollars	% of Total Budget		Current Sources	Estimated Dollars	% of Total Budget	% Uncovered
Ongoing Maintenance							
Tree Pruning							
Tree Maintenance							
Watering/ Fertilization							
Forest Health Care							
Impervious Surface Removal							
Tree Inventory							
Tree Inspections							
Data Collection/ Software							
Database Management							
Equipment							
Tree Planting							
Nursery Development							
Tree Planting							
Tree Establishment							
Ad Hoc							
Storm Response							
Tree Removal							
Stump Removal							
Tree Repair							
Program							
Supervision							
Safety Training							
Employee Training							
Contractor Registration							
Office Expenses							
Administration							
Other							
Public Engagement							
Total							





Activity 6.1: Tree Equity Funding Needs Assessment

Toolkit 6: Fund Your Program

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