



## **TreeVitalize Watersheds Bid Form Line by Line Instructions**

This document has been created to help you develop an application using the TreeVitalize Watersheds Bid Form. Open the Form and you will see that each line has an associated row number on the left-hand side. These instructions are keyed to those row/line numbers. The first five lines are taken by the document heading, so we'll start on Line 6. Cells that are shaded in gray will automatically calculate based on your inputs.

### **APPLICANT AND PROJECT INFO**

**Line 6- Applicant-** this should be the organization that will be responsible for the grant.

**Line 7- Project Name-** Choose a name that will relate to the site or the work being done.  
Example: *Twin Streams Park Riparian Buffer Project*

**Line 8- Location/ Street Address-** A street address is most helpful if there is one for the project site, but some sites may not have one. If there is a nearby intersection, use that, naming both streets. If not, just name the street that the project site is entered from, and we will contact the applicant if we need directions.

**Line 8- Date-** Enter the date you submit the application.

**Line 9- Latitude-** You will need to determine the latitude and longitude of your project site. You can do this by going to Google Maps, locating your project site and clicking on the middle of your site. Latitude and longitude coordinates will appear near the bottom of the screen. **Please use the decimal coordinate system that Google Maps uses, for the sake of uniformity.** For good instructions on how to use Google Maps, go to this link:

<http://montgomeryconservation.org/wp-content/uploads/2015/02/Google-Map-Instructions.pdf>

**Line 9- County-** Enter the county that your project is located in. If your project site straddles the county line, enter the county of the Watershed Specialist that you are working with.

**Line 10- Longitude-** See Line 9, Latitude



**Line 10- Municipality-** Enter the name of the borough, township, or city where the project is located.

**Line 11- Quadrangle name-** “Quadrangle Name” refers to the USGS topographical map that contains your project site. To determine this, go to this address (you can copy this and paste it into your browser window):

<https://viewer.nationalmap.gov/basic/?basemap=b1&category=ustopo&title=US%20Topo%20Download>

Once there, type the site address (or address of a nearby landmark) into the “Search Location” box near the top of the page. Click on “Go” and the map will zoom in to that location. A box will also pop up; click on “Find Products.” The appropriate map product will be listed on the left bar, under “Products.” The town listed is the name of your Quadrangle. Enter that in the form.

**Line 11- Square Footage-** You can also measure the site using a variety of measuring tools. The Urban Forest Cloud site’s map tool is very accurate (see announcement for link). You may also calculate square footage on Google Maps by following the instructions below:

Go to Google Maps, and locate your project site. Zoom in, so that your site is as large as will still fit on the screen. Then right click, and select “Measure Distance”. A little box will pop up at the bottom of the map, telling you to click the distance you want to measure. That will give you the length of your site; continue adding points along the boundary of your site, and eventually close your polygon by returning to your starting point. An area measurement of the enclosed space will be displayed.

Careful field measurements are also accepted.

**Line 12- Watershed/Subwatershed-** Name the watershed where your project is located. If it’s on a small stream, name that stream as the Subwatershed. Example: *Neshaminy Creek/Cooks Run*

**Line 12- Acreage-** Divide your square footage by 43,560 (the number of square feet in an acre) to get number of acres. Please include this number even if your site is less than 1 full acre. If you enter the square footage first, this line will automatically calculate.

**Line 13- Creek or stream-** enter the name of the waterbody that your project will be planted along. This is usually a stream, but can be a lake or stormwater basin. If your site is a stormwater basin or wetland, just name the stream that the basin or wetland drains to.

**Line 13- Total Number of Trees Planned-** Please enter your total planned number of trees – this is a key metric we report to our funders and use to evaluate projects.

#### **Lines 15-19 – Contact Information**

**Line 15- Name of Organization-** This is usually the organization that is completing the project. An exception to this would be if your group has no paid staff, is not a registered non-profit or is working with a municipality. A good example of this is an Environmental Advisory Council. If this is the case, you will need to find a non-profit or municipality that will act as a “pass-through” for your funding. **If your organization requires a fiscal sponsor, please list the name of your sponsor organization here.**

**Line 15- Contact Phone-** Provide the phone number of the person who will be managing the project.

**Line 16- Organization Contact Person-** Please provide the name of the person who is responsible for project management. It needs to be the person who knows the most about the project, since they will only be called if the Conservation District or PHS has a question about specific information about the project.

**Line 17- Organization’s Address-** The address of the applicant organization (not necessarily the project address), or fiscal sponsor if necessary.

**Line 18- Contact Email-** The email address of the person managing the project.

**Line 19- Signature-** The form should be signed by the project manager or other authorized signer from the applicant organization or by the project’s fiscal sponsor. A typed signature is acceptable, as we prefer to have these documents electronically.

**Lines 20-21 – Grant Totals-** Please leave these blank, they will auto-fill based on your entries below.

#### **SITE PREP**



**Remember:**

- All items can be counted as Match if they exceed the amounts allowed by TreeVitalize Watersheds; i.e. any legitimate project costs that are more than the allowable amount can be moved over to the Match column. You will be responsible for that expense.
- All work hours must be documented by organization timesheets. If you are without those kinds of tracking systems, submit a typed timesheet on letterhead with worker name, date of work and hours worked.
- A maximum of \$1,000/acre of site preparation staff time can be reimbursed. You will have an opportunity to put in administrative costs under the Staff and Labor section.

**Please enter all costs as a unit cost, followed by the number of units. Then enter in the amount you'll be requesting to receive from your grant. The "totals" and "match" columns will calculate automatically.**

**What we are looking for is an accurate hourly rate in order to determine whether your cost is in line with usual costs for that task.**

**Line 27- Debris Removal-** Under *Units*, enter the number of hours spent on debris removal. Debris removal should consist only of the removal of debris needed to carry out the project. For instance, if your project is in a flood plain and a recent flood left heavy debris that will interfere with the project, TreeVitalize will pay for its removal. Under *Per Unit Cost*, enter only the hourly rate of the workers who do the actual work.

**Line 28- Mowing-** Under *Units*, enter the hours spent on mowing needed for the project. Under *Per Unit Cost*, enter the hourly rate of the worker doing the mowing. If you have hired a contractor for this item, ask them for an estimate of how many hours the work will take and divide that into the cost estimate they have provided; enter that hourly amount. Brush hog work should be listed here too.

**Line 29- Invasive Removal (per Hr.)-** You should estimate how many hours of work you will expend on invasive removal. We realize that this can be difficult to predict, since it depends on how heavy the invasive presence is and how you plan to remove the invasives. Make your best guess and put those hours in the *Units* column. Then track the actual time spent in the field. If you are diligent about record keeping, you will get better at this on future projects. Then put the hourly cost of your workers in the *Per Unit Cost* column.



**Line 30- Herbicide (Per Hr.)-** If you are using a contractor, get an estimate from them and ask them to include the estimated hours needed for the herbicide application. Then divide the hours into the total to get the *Per Unit Cost*.

If you are doing your own Herbicide work, estimate the number of hours needed, and put that in the *Units* column. Then put the hourly cost of the worker in the *Per Unit Cost* column to get the total amount. Enter that cost in the *Grant Request* or *Match* column, as you wish.

Put the cost of the herbicide itself (i.e., the chemical product) under the **Other** section. You should only ask to be reimbursed for the amount of herbicide that you actually use on this project.

**Line 31- Old Project M & M (Monitoring & Maintenance) (Per Hr.)**

Monitoring and maintenance of previous Treevitalize Watersheds projects is critical to the long term success of those plantings, and is required of each project. However, because of the nature of TreeVitalize funding, we are unable to pay for that work. In an effort to acknowledge the cost associated with this activity, TreeVitalize Watersheds now allows monitoring and maintenance on *old projects* to be counted as Match towards *new projects*. Remember to track time spent either with organization time sheets or in writing as described at the beginning of this section. We are trusting you to estimate and then report time accurately, but we need that written record for our auditors to approve that expense.

**Line 32- Other (Per Hr.)** - You can use the same math to get your *Units* and *Per Unit Cost* as above. Please describe the nature of this work in your application narrative.

**PLANTING MATERIALS**

Conservation District employees (Watershed Specialists) are not allowed to recommend any private vendors for plants etc. For a list of vendors of native tree, shrub, herbaceous plant and seed mix vendors, contact PHS Associate Director of Trees Tim Ifill at 215-988-8898. This list does not constitute an endorsement or recommendation of the vendors listed.

**Costs will go to the Total column by default. You can then type them into the Grant Request or Match box, or split them between the two, if that is your choice.**

**Line 38- Trees-** Under *Units*, put the number of trees that you will be planting on the site. Remember, trees must comprise at least 80% of the total Planting Materials section *Grant*





*Request.* Don't confuse this with the *total* Grant Request amount at the bottom of the application, it's 80% of **Planting Materials** costs only. This percentage will automatically calculate on line 43 for your and the evaluator's reference.

If you have more than one price that you will be paying for the trees, total up your Tree costs (including shipping) and divide by the total number of trees you plan to buy and plant. This will give you an average price to put in as your *Per Unit Cost*. This may go to more than two decimals. Just round it up and you will be covered for the total cost.

**You should get a written estimate from your provider, including shipping if you will not be picking them up, and include that shipping cost in your calculations; this will account for all the costs of getting your trees to the site. You should include the estimate as your plant list in your grant materials, or list them in the narrative.**

**Line 39- Shrubs-** Same as trees, but put your shrub unit cost (plus shipping if applicable) and number of plants in. Please note: shrubs and herbaceous plants can only account for 20% or less of your total Planting Materials cost. If you want to get more shrubs and still meet the cost percentage requirement, consider smaller, less expensive shrubs.

**Line 40- Herbaceous-** See Line 28 instructions, and Line 27 for how to arrive at an average *Per Unit Cost*.

**Line 41 Seed-** A good way to do a complete restoration (i.e., all layers: canopy, shrubs and herbaceous) is to use a seed mix instead of herbaceous plugs. You won't need to worry as much about deer predation, since there will be so many plants, and the mix will hopefully provide additional competition against invasives as well as erosion control.

*Make sure that you read the full list on your seed mix, we only pay for native plants. You can ask your seed vendor to take non-native seed out of the mix. You will need to have a good area measurement of your site, and then use that to determine how many pounds of seed to order. Put the number of pounds in the *Units* column and then seed mix cost per pound in the *Per Unit Cost* column.*

*Remember, if you still want to include more shrubs and herbaceous plants beyond the 20% Plant Materials cost, you can pay for them with another funding source and include them as Match.*



## STAFF AND LABOR

**Line 47- Staff Project Management-** This category is for time spent managing and administering the project. This can be project manager time, bookkeeper time or executive director time if it is time spent specifically on your project. However, this time can be no more than \$1,000 per project. If you feel that staff time over that amount will be spent on the project, you should include that extra amount in the Match column. Project management staff time is only available to nonprofit grantees.

**Costs will go to the Total column by default. You can then type them into the Grant Request or Match box, or split them between the two, if that is your choice.**

## OTHER

**Line 53- Contracted Services-** If you hire someone to mow, apply herbicide or do other site work, that should go under *Site Prep*. If you use a consultant to help you design your project, write your grant application for you, specify plants and sizes, or anything like that, this is the place to put that cost. Remember, TreeVitalize Watersheds will only pay up to \$1,000 *per project* for consultants. If you submit more than one project, you can request up to another \$1,000 for the next project.

*TreeVitalize Watersheds strongly recommends that you use your Watershed Specialist for technical assistance, rather than pay an outside consultant for their expertise. Unless justified in your narrative, this may result in a lower ranking of your application.*

**Line 54- Volunteer Labor Hours-** This is another easy line. The Per Unit Cost is already there; it is the Pennsylvania Volunteer Hourly Rate, \$28.54, as determined by Independent Sector. All you need to do is estimate how many volunteers you expect to recruit and multiply that by the number of hours you expect them to work on your project.

For instance, you expect to plant 100 trees and shrubs. You expect that, with the 40 volunteers you think you will attract, it will take three hours. 3 hours times 40 volunteers equals 120 hours. Enter '120' in your *Units* column, and the form will automatically fill in \$2,922.80 in the Match column (remember, Volunteer Labor must be listed under *Match*).

*Remember to create a Volunteer Sign In Sheet (you may use the sample Volunteer Log form that provided by PHS or create your own) with name of volunteer, date and number of hours worked and **have your volunteers sign in**. Please calculate the total hours and*





*write them on each sheet. If your project is funded, you will be required to provide this Sign-In Sheet to document Volunteer Labor Hours in your Request for Reimbursement paperwork.*

**Line 55- Supplies-**List all the supplies that are not already listed on other lines. If you do your own herbicide work, this is where you should enter the name of the product, the *Per Unit Cost* (probably dollars per ounce or gallon of herbicide) and number of *Units*. If you use mulch mats rather than mulch, enter it here.

Anything that is not named on another line *and is an Eligible Expense as listed in the Eligible Expenses document* should be listed out here. Three empty lines are provided for additional supplies. You may insert additional lines if needed by clicking on Insert, then Insert Sheet Rows.

**Lines 56-58- Other-** Other allowable or necessary expenses. Be sure to describe and justify these in your narrative.

**Line 59- Mulch (Cubic Yards)-** Mulch provides many benefits for trees and shrubs, not the least of which is less frequent watering, a major chore that you will be responsible for. Because of this, it was added as a new requirement in 2017. You can get mulch from many local suppliers, and they will usually deliver it to your site. Please note: *TreeVitalize Watersheds will only pay for bulk mulch by the cubic yard. Do not buy bagged mulch or dyed mulch, as it is comparatively very expensive.* Put the cost per cubic yard (delivered, if you need it delivered) in the Per Unit Cost column. Put the number of cubic yards in the Units column. A rule of thumb- one cubic yard will mulch about 11 trees or shrubs.

**Line 60- Deer Protectors-** Deer protection is now a requirement of TreeVitalize Watersheds projects. There are no natural areas that are “safe” from deer predation in southeastern Pennsylvania, and your plants will need protection. How you do it is up to you. You can fence the whole site with at least 8-foot fencing (expensive), or protect each tree or shrub with at least four feet high plastic deer netting, chicken wire, steel fencing or other products that will prevent or discourage deer damage. Don’t forget to order stakes as needed to secure the deer protection in place.

**Line 65- TOTAL TVW GRANT REQUEST BY APPLICANT-** All your totals from the *Site Prep, Planting Materials, Staff and Labor and Other Sections* should have added themselves up in the *Grant Request, Match and Total* boxes in this line. Please double-check your totals to make sure they are in line with your expectations and that any formulas have not been inadvertently changed.





## TreeVitalize Watersheds Program

**Conservation District Fee** PHS pays your Conservation District Watershed Specialist a fee of \$200/approved project for serving as your local grant advisor. Previous grantees may remember this fee appearing on the bid sheet and reimbursement materials. While it has been removed from this, the fees remain in place, and grantees are not responsible for paying them.

### POINT OF CONTACT

**Please note: this is a legally binding signature, and the person who signs will be responsible for the completion of the project in accordance with the work described in the Narrative, the plants and other materials listed in the Bid Form and the monitoring and maintenance responsibilities agreed to in the Operations and Maintenance form.**

**Line 65- Title-** Provide the title of the person signing the Bid Form.

Please feel free to contact your grant advisor with any questions!

