

HIGHWAY OF HEROES FUNDING AGREEMENT

October 27, 2021

Private and Confidential

South Nation River Conservation Authority

Dear Madame/Sir:

Re: Forests Ontario (“FO”) – Highway of Heroes (“HOH”) Funding

WHEREAS South Nation River Conservation Authority (the “PDA”) entered into a planting delivery agent agreement with FO dated October 1, 2021 (the “PDA Agreement”);

AND WHEREAS the PDA Agreement provides for the funding of the PDA’s tree planting based on site plans approved by FO on the basis of \$1.41 per seedling;

AND WHEREAS the PDA is eligible for an additional \$0.365 per seedling from the HOH as certain of the PDA’s site plans are located in the HOH corridor, which qualify for funding pursuant to the Proposed Partnership to Support Highway of Heroes Campaign dated October 28, 2019 between FO and the HOH.

AND WHEREAS FO is responsible for administering the HOH funding pursuant to the terms of the HOH Funding Agreement.

NOW THEREFORE in consideration of the mutual agreements contained in this Agreement (the receipt and adequacy of which are acknowledged), the parties hereto agree as follows:

1. **Funding.** FO’s funding commitments contained herein are conditional upon the allocation and payment of relevant monies from HOH. Funding is based on an aggregate allocation of \$0.365 per seedling as set forth more particularly in the HOH Funding Agreement. Once FO has approved the 2022 post plants submitted by the PDA pursuant to the PDA Agreement, FO shall pay to the PDA \$0.34 per seedling within 30 days of receipt of an invoice from the PDA and all required reports in a form acceptable to FO, as determined by FO in its sole discretion. Once FO has received the year 1 survival assessment submitted by the PDA pursuant to the PDA Agreement, FO shall pay to the PDA \$0.025 per seedling within 30 days of receipt of an invoice from the PDA and all required reports in a form acceptable to FO, as determined by FO in its sole discretion. Site Plans are due on or prior to March 7th of the funding year and year 1 survival assessments are due on or prior to November 30th of the funding year. All monies received from FO are inclusive of all applicable taxes. The PDA covenants and agrees that in the event any site plans are cancelled or the PDA plants fewer seedlings than contemplated in its site plans the PDA will reimburse FO for all funding received from FO pursuant to this letter for the difference between the approved seedling allocation in the site plans and the total number of seedlings planted by the PDA. The PDA shall be obligated to reimburse FO no later than September 30, 2022. In the event that the PDA fails to reimburse FO in accordance with this letter, FO shall be entitled to set-off against any other funding amounts contemplated in the PDA Agreement, including, without limitation, the \$0.20 per seedling contemplated upon the completion and approval of the

post-plant report and the \$0.025 per seedling contemplated upon the completion and approval of the survival assessments.

2. **Indemnity.** PDA shall indemnify and save harmless HOH, FO and its employees and agents from or against any and all claims, damages, loss, costs and expenses which they or any of them may at any time incur or suffer as a result of or arising out of: (i) breach of this letter, and; (ii) any injury to persons (including injuries resulting in death) or loss of or damage to property which may be or be alleged to be caused by or suffered as a result of the carrying out of any work or any part thereof in connection with this Agreement, except to the extent caused by a breach of duty of FO, its employees or agents.
3. **Notices.** Any notices sent by FO or the PDA shall be sent in accordance with Section 4.4 of the PDA Agreement.
4. **Application of Law.** This letter is governed by and will be construed in accordance with the laws of the Province of Ontario and the federal laws of Canada applicable therein and the parties irrevocably attorn to the exclusive jurisdiction of the courts of the Province of Ontario sitting in the City of Toronto.
5. **Counterparts.** This Agreement may be executed in any number of counterparts, each of which shall be deemed an original, but all of which together shall constitute one and the same instrument.

- Signatures on next page -

If the terms of this Letter Agreement are acceptable to you, please confirm by executing a copy hereof.

FORESTS ONTARIO

By:



Rob Keen

CEO

I have the authority to bind the Corporation.

Agreed and accepted this 27th day of October, 2021.

PDA INFORMATION

By:

Name: Angela Coleman

Title: General Manager / Secretary-Treasurer

I have the authority to bind the Corporation.



50 Million Tree Program

Agreement Between

Forests Ontario

and

South Nation River Conservation Authority

for the period

October 1, 2021 to September 30, 2022

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Planting Delivery Agent Agreement

This Agreement made this 1st day of October 2021.

BETWEEN

Forests Ontario (FO).

of the First Part

AND

South Nation River Conservation Authority herein referred to as the Planting Delivery Agent (PDA)

of the Second Part.

WHEREAS Forests Ontario's mandate is to increase tree planting on public or privately owned lands in Ontario through collaborative arrangements with Government and local tree planting agents;

WHEREAS Forests Ontario will increase tree planting by providing local tree planting agents with financial support that will be directly used to reduce tree planting costs;

WHEREAS Forests Ontario must demonstrate an increase in tree planting as a result of the financial support provided to local tree planting agents;

AND WHEREAS South Nation River Conservation Authority is committed to work with FO in facilitating the role of Planting Delivery Agents (PDAs).

NOW THEREFORE, the parties hereto mutually agree as follows:

1.0 Definitions and Schedules:

- (a) Planting Delivery Agent (PDA) means a Company who is actively delivering local tree planting programs.
- (b) All schedules attached hereto are incorporated by reference and form part of this Agreement.

2.0 Partner Responsibilities for 50 Million Tree Program Projects:

2.1 PDA responsibilities:

The PDA shall be responsible for the implementation of this Agreement and shall:

- (a) Adhere to all conditions identified in the 50 Million Tree Program Guidelines (Schedule A);

- (b) Provide FO with the number of trees that the PDA planted under their tree planting program;
- (c) Provide FO with a description of property and additional information as per Schedule B (site information to be inputted via the FO online reporting system);
- (d) Review and sign Landowner Agreements (Schedule C) with landowners;
- (e) Ensure that site plans are developed for each property that include prescriptions for site preparation, tree planting and tending (Schedule B, Appendix A);
- (f) For the purposes of tracking stock covered by stock deposits, PDAs must identify, and track seedlings reserved for the 50 MTP from each partner nursery using the stock tracking template provided by nurseries (Schedule H, Appendix A);
- (g) Inspect all stock prior to planting to ensure that it is locally sourced and appropriate for attaining the goals and objectives of the Site Plans; Nursery stock used in the program will meet the Nursery Stock Size Parameters listed in Schedule E;
- (h) Ensure that all planting prescriptions are completed in accordance with good forestry practices and that a member (Full or Associate) of the Ontario Professional Foresters Association (OPFA) certifies all prescriptions and site plans. The OPFA member must also sign invoice summaries for Site Plans, Refill, Post Plant Reports, and Survival Assessments (Schedule G, Appendix B);
- (i) Ensure that all sites planted under this agreement are in accordance with the Site Plan attached to the Landowner Agreement (Schedule B);
- (j) Coordinate and/or supervise the ordering and shipping of trees, site preparation, planting and tending of eligible sites;
- (k) Ensure that all services provided are conducted by qualified companies or individuals with proven related experience;
- (l) Ensure that all staff and contractors that may be retained for various activities associated with the planting operations, are adequately covered with at least \$2,000,000 of public liability insurance and provide proof of Workers Compensation and any other licenses or permits required to perform any of the services provided (e.g. pesticide exterminator license). A certificate of insurance must be available upon request by Forests Ontario;
- (m) Ensure that any operations carried out by the Landowner and paid for under this program are done properly (Schedule D) and with the necessary licenses and permits (e.g. pesticide exterminator license);
- (n) Ensure that a Post Plant Report (Schedule B, Appendix B) includes Planting Quality Assessments (Schedule F, Appendix A), actual operational costs and spatial

coordinates of the planting site for each property and is submitted using the Forests Ontario online reporting system;

- (o) Post a sign on properties of high visibility indicating the partners involved with the plant, if sign is provided by FO;
- (p) Maintain a physical or digital copy of the Site Plan, Post Plant Report, Survival Assessments, maps, cost information and any other related material for a 15-year period. This information will be made available to FO upon request. The PDA will notify FO prior to disposing of any relevant documents within the 15-year term of the agreement;
- (q) Ensure that activities carried out by PDA staff or agents thereof under this Agreement, comply with all federal, provincial and municipal laws;
- (r) Ensure that all invoices submitted are completed on PDA letterhead with an online reporting system generated invoice summary appended (Schedule G, Appendix B);
- (s) Provide long term stock forecasts to FO by December 31st of each year;
- (t) Ensure that Forests Ontario and the 50 Million Tree Program are recognized in any relevant social media posts, communications materials and/or correspondence with landowners.

2.2 FO Responsibilities:

FO shall:

- (a) Designate a contact liaison person who will receive updates on PDA activities;
- (b) Assist the PDA in reviewing progress in the implementation of this Agreement;
- (c) Authorize all planting sites prior to implementation; Electronic confirmation notice email (Schedule B, Appendix C) provided to PDA upon authorization of each submitted site;
- (d) Report promptly to the PDA any corrective measures required that are consistent with the objectives of this Agreement;
- (e) Maintain a copy of the required reports for each site planted under FO's 50 Million Tree Planting Program through the online reporting system;
- (f) Ensure that payments are made to PDA within 30 days of receipt of invoices with required reports as determined and at the sole discretion of FO;
- (g) If FO or a sponsor/ funding agency supporting a 50 MTP planting project requests a site visit, FO will reach out to the PDA to contact the landowner to obtain permission. FO and/or one of its sponsors/funding agencies will not enter

any property or project area without permission of the landowner and accompaniment of the PDA.

3.0 Term of Agreement

- 3.1 This Agreement shall be in effect as October 1st, 2021 to September 30, 2022. See Program Guidelines attached as Schedule A.
- 3.2 FO has the right to terminate this Agreement at any time upon sixty-day written notice to the PDA.
- 3.3 Upon termination of this Agreement, FO shall only pay for trees planted or other silvicultural operations completed as per the amounts approved, and subject to any adjustments contemplated in the Program Guidelines attached as Schedule A.

4.0 Financial Provisions

- 4.1 FO's funding commitments contained herein are conditional upon the allocation and payment of relevant monies from Natural Resources Canada (NRCan). Funding is based on an aggregate allocation of **\$1.41 per seedling** as set forth in Schedule A, Section 3 of the 50 Million Tree Program Guidelines.
- 4.2 **PDAs will receive a total of \$1.16 per seedling for approved site plans.** Stock deposits for 50 MTP seedlings are in place with three partner nurseries (Somerville Seedlings, Ferguson Tree Nursery, Pineneedle Farms). Each partner nursery has received a \$0.25 deposit per seedling for stock being grown for the program. **The nursery partners will deduct \$0.25 per seedling for stock purchased for 50 MTP.** This payment will also be reflected on the invoice to 50 MTP PDAs for stock planted through the program. **The remaining \$0.91 per seedling will be paid directly to the PDA after site plan approval.** When special permission is granted to purchase stock from a nursery, the PDA will receive \$1.16 per seedling after site plan approval. Once FO has approved post-plant reports submitted by the PDA, FO shall pay the PDA \$0.20 per seedling (see Schedule A, Appendix A). All payments will be made within 30 days of receipt of invoices submitted on PDA letterhead accompanied by the online reporting systems generated invoice summary. All monies received from FO are inclusive of all applicable taxes.
- 4.3 The PDA covenants and agrees that in the event any site plans are cancelled or the PDA plants fewer seedlings than contemplated in its site plans the PDA will reimburse FO for all funding received from FO, **including stock deposit payments (\$0.25 per seedling)**, for the difference between the approved seedling allocation in the site plans and the total number of seedlings planted by the PDA.
- 4.4 The PDA shall be obligated to reimburse FO no later than September 30th of that planting year. In the event that the PDA fails to reimburse FO in accordance with this Section 4.2, FO shall be entitled to off-set against any funding contemplated herein, including, without limitation, the \$0.20 per seedling contemplated upon the completion and approval of the post-plant report and the \$0.025 per seedling contemplated upon the completion and approval of the survival assessments.

4.5 The claims for payment, requests, notices, and information referred to in this Agreement shall be sent in writing or by any method of telecommunications and, unless notice to the contrary is given, shall be addressed to the party concerned at the following address:

To: Forests Ontario
Nicole Baldwin, Forestry Programs Manager
144 Front St. W., Suite 700
Toronto, ON M5J 2L7
Phone: 416-646-1193 Ext. 230
Email: nbaldwin@forestsontario.ca

To:
Attention: Angela Coleman
38 Victoria St,
Finch, ON, K0C 1K0
Email:
Phone: 613-984-2948

Notification will be effective 5 business days after being sent.

5.0 Audit and Accounting Provisions

5.1 The PDA shall maintain prior to and for a period of 15 years after completion of the Project, complete and accurate physical or digital records and accounts of its revenue received and expenses incurred and paid in connection with this Agreement. The PDA shall make such accounts and records available at all reasonable times for inspection and audit by FO, NRCan or its authorized representative who may make copies and take extracts therefrom.

6.0 General Provisions

- 6.1 Participation in the 50 Million Tree Program is strictly voluntary and specifically any projects or activities which involve land must have the authority and cooperation of the landowner on whose land the proposed project or Activity is to take place.
- 6.2 Failure to fully comply with the terms and conditions of this agreement will disqualify PDA as planting delivery agent for the 50 Million Tree Program.

7.0 Indemnity

7.1 PDA shall indemnify and save harmless NRCan, FO and its employees and agents from or against any and all claims, damages, loss, costs and expenses which they or any of them may at any time incur or suffer as a result of or arising out of: (i) breach of this Agreement, and; (ii) any injury to persons (including injuries resulting in death) or loss of or damage to property which may be or be alleged to be caused by or suffered as a

result of the carrying out of any work or Activities or any part thereof in connection with this Agreement, except to the extent caused by a breach of duty of FO, its employees or agents.

8.0 Force Majeure

- 8.1 The Parties shall not be in default or in breach of this Agreement due to any delay or failure to meet any of their obligations caused by or arising from any event beyond their reasonable control and without their fault or negligence, including any act of God or other cause which delays or frustrates the performance of this Agreement (a “force majeure event”). If a force majeure event prevents the performance of this Agreement, FO will only be liable for its proportionate share of the Eligible Expenditures Incurred and Paid to the date of the occurrence of the event.
- 8.2 The performance of the obligation affected by a “force majeure event” as set out above shall be delayed by the length of time over which the event lasted. However, should the interruption continue for more than thirty (30) days, this Agreement may be terminated by FO.
- 8.3 Should either Party claim the existence of a “force majeure event” as above, prompt notice thereof shall be given to the other Party and the Party claiming the existence of a “force majeure event” shall have the obligation to provide reasonable satisfactory evidence of the existence of such event and use its best efforts to mitigate any damages to the other Party.

IN WITNESS THEREOF this Agreement has been executed on behalf of FO and on behalf of the PDA by an officer duly authorized in that behalf.

IN THE PRESENCE OF:

Forests Ontario

Witness



Rob Keen, Forests Ontario CEO

IN THE PRESENCE OF:

**South Nation River Conservation
Authority**

Witness

Name: **Angela Coleman**
Title: **General Manager/Secretary-Treasurer**

Schedule A: Forests Ontario 50 Million Tree Program Guidelines

All Schedules noted within these Guidelines refer to the 50 Million Tree Program PDA Agreement for the period of October 1, 2021 and September 30, 2022. These program guidelines shall be binding on the PDA.

1. Application and confirmation of eligibility to become a Planting Delivery Agent

- All existing afforestation agencies with proven expertise to meet these guidelines will be provided the opportunity to qualify to become a FO PDA. (e.g. local stewardship councils, Conservation Authorities, consultants, etc.). Where specific site plans are expected to incorporate such methodologies as direct seeding, establishment of cover crops, etc., demonstrated expertise must include those approaches as well.
- Any new agencies interested in participating in the 50 Million Tree Program must submit an application to Forests Ontario. The application will be reviewed by Forests Ontario's Technical Advisory Committee in accordance with eligibility criteria the 50 Million Tree Program. Based on their recommendations, the applicant may be approved for participation in the program.
- Once approved, PDAs are not required to reapply each year.
- PDAs with no past involvement in Forests Ontario programs will be limited to an allocation of no more than 50,000 for their first year. Any deviation from this amount will be based on recommendations from Forests Ontario staff. Subsequent annual allocations will be based on first year results.
- Nurseries providing seed or stock to the 50 Million Tree Program will not be permitted to also act as PDAs unless approved on a case-by-case basis by Forests Ontario.
- If PDAs do not conform to this Agreement, including Program Guidelines, the non-conformance will be reviewed by the 50 Million Tree Program Technical Advisory Committee which will:
 - deem the PDA ineligible from further participation in the program, or
 - develop corrective actions to be implemented by the PDA at the PDAs own expense.

2. Planting Delivery Agent Agreements with Forests Ontario

- PDAs will sign agreements with Forests Ontario, to conduct planting operations which may include nursery bareroot stock and/or plug or container planting. Such agreements will stipulate the conditions as presented in these guidelines that must be met for individual sites to be eligible for funding.

3. Program Funding

- Eligible Charges by PDAs:
 - A maximum of \$1.41 per seedling will be available to the PDA for planting costs from the 50 Million Tree Program (see Appendix A Funding Chart below).
 - The funds from FO can be applied to the full cost of all expenses, including HST
 - The funding from Forests Ontario and the landowner contribution can be used for:
 - Office overhead
 - Maintenance of financial and other required records
 - Site visits and plan development
 - Coordination and delivery of site plan operations
 - Site preparation
 - Stock
 - Stock delivery
 - Cold storage
 - Planting
 - Planting Quality Assessments
 - Survival Assessments
 - Tending
 - OPFA Registered Professional Forester (RPF) signatures
 - Other (as approved by Forests Ontario)
- Only direct costs borne by the PDA for forest creation/restoration efforts and program administration are eligible for funding payment under the 50 Million Tree Program.
- Only the direct costs borne by the PDA to the nursery will be eligible for stock charges.
- If applicable, PDAs will access funding from other funding programs to support additional costs such as topographic restoration (e.g., drainage modification, pit and mound establishment, planting, site preparation, tending etc.).

4. Funding Allocations for Planting Delivery Agents from Forests Ontario

- Planting Delivery Agents will receive an annual funding allocation from Forests Ontario. However, funding will only be confirmed on a site-by-site basis and the timely submission of fully completed Site Plan Applications through the online reporting system. Site Plan Applications approved by FO (via electronic acceptance of terms), will draw down from the overall funding allocation amount.

- All funds under a PDAs approved allocation that are not associated with a site plan by February 1st, 2022, will be re-distributed to projects on the waiting list and then on a first come first serve basis (Schedule A, Appendix A)

5. Site Selection Criteria

- Site Plans will be required for each site funded and must be submitted through Forests Ontario's online reporting system no later than end of day on March 7th of the planting year
- Post-planting reports are a mandatory funding requirement that must be submitted to the Forests Ontario online reporting system by July 31st of the planting year
 - Sites must be planted at a suitable time during the spring. Late summer/fall planting is not eligible for 50 Million Tree Program funding without prior permission from Forestry staff.
- Sites must have a minimum of 500 trees planted
- Maximum of eight (8) species per planting site/compartment. A property can have multiple planting sites.
- Planting density should fall within the recommendations made for each project types (afforestation, windbreak, riparian, and forest restoration)
- PDAs are responsible for ensuring the stock used meets Stock Standards (See Schedule E)
- Source identified species with lot numbers and spring lift dates are required. Species planted must fall within the program eligible species list which can be viewed on Forests Ontario's online reporting system.
 - Species at risk (e.g., Butternut) will be considered on a case-by-case basis, please contact Forests Ontario's Seed and Stock Coordinator to review site plans containing SAR
- Afforestation, riparian, windrow, and forest restoration (e.g. fire, flooding, ice storm damage, insects (EAB)) project types are eligible provided there is a minimum of 500 trees planted a minimum of 2m from existing trees
- Reforestation sites will not be considered eligible (areas harvested for timber, firewood, etc.)
- Trees must not be planted for the purpose of growing Christmas Trees, Landscape Stock production, or reforestation

- Sites that are shallow, infertile, drought prone or very wet that are expected to limit tree growth or survival should be avoided due to survival outcomes
- Property may be on privately or publicly owned land in Ontario (e.g., municipal lands, parks, idle farmland etc.)

6. Project Types

Afforestation:

A planting area that is open or mostly open land with no previous tree cover.

- Density of planting must be between 1200-2200 seedlings/ha
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Riparian:

A site adjacent to the banks of water bodies such as creeks, streams, ponds and rivers.

- Recommend planting at top of bank to ensure trees have strong chances of survival and are not within possible flood paths
 - Recommended spacing of 6.5 ft x 6.5 ft or a minimum of 2 metres
 - Staggered planting is recommended
-

Windrow:

A row(s) of trees planted to act as a windbreak or wildlife corridor.

- Recommended spacing of 6.5 ft x 6.5 ft to 8 ft x 8 ft or minimum of 2 metres
 - <https://www.ontariowoodlot.com/publications-and-links/owa-publications/extension-notes/designing-and-caring-for-windbreaks>
-

Forest Restoration:

Sites that have been impacted by disturbance including Climate Change events such as fire, wind/ice storm damage, insects (EAB) or others and/or require an under planting to establish regeneration for future forest growth.

- New trees should be spaced a minimum of 2 metres away from existing native trees on site
 - Recommended spacing of 6.5 ft x 6.5 ft to 8 ft x 8 ft or a minimum of 2 metres
-

7. Acceptable Seedling Stock

- Acceptable species are listed on the “Species Eligibility” page of the Forests Ontario online reporting system. If a specific species is not included, the PDA is encouraged to

contact Forests Ontario and request an update and expansion of the listing. Such additional species must be approved by Forests Ontario prior to planting.

- No more than 8 species may be planted per site (compartment) unless approved by Forests Ontario.
- Only plant nursery stock of acceptable size, quality and age as defined in Schedule E, or tree seed of high quality, collected within the identified Seed Zone, unless endorsed by the Forest Gene Conservation Association (FGCA).
- Identify seed zone appropriate seedlings to be planted, unless otherwise approved by FO.
 - If seed zone suitable stock is not available, the PDA must request permission to plant stock outside of their seed zone
- Requests for sourcing stock outside of the partner nurseries (Somerville Seedlings, Pineneedle Farms Ltd, and Ferguson Tree Nursery) must be made to FO before stock reservation and will be considered on a case-by-case basis.

8. *Planting Delivery Agent Agreements with Landowners*

- Landowners wishing to participate in 50 Million Tree Program must sign a 15-year “Landowner Tree Planting Agreement” with the PDA (template provided in Schedule C).
- Both the landowner and the PDA must understand and agree to their individual roles and responsibilities that will ensure the protection and management of the plantation according to an approved planting site plan.
- Landowners should contribute to the planting of their property, so they have a vested interest in the project. It is recommended that they pay a minimum charge per seedling to the PDA and / or make other in-kind contributions. It is up to the PDA to determine any additional costs to delivery of the program.
- The landowner agreement may specify that some of the roles and responsibilities may be at the expense of the landowner or may be paid through other programs where available.
- The landowner agreement must be consistent with these Program Guidelines.
- The landowner agreement must include permission for the PDA, Forests Ontario and sponsors/funding partners to enter the property for the purposes of assessing planting operations and tree survival during the term of the agreement. Forests Ontario and sponsors/funding partners must contact the PDA to make arrangements to access the site and the PDA will contact the landowner.
- Any work performed by the landowner will be considered as an in-kind contribution and the landowner cannot be reimbursed using 50 Million Tree Program funding, unless a

legal contract between the PDA and landowner is prepared and the landowner possesses all legal requirements as a contractor including liability insurance, WSIB, appropriate licences, etc.

- Operational activities performed by the PDA may be eligible but only at locally accepted rates. Proof of locally accepted rates may be requested by Forests Ontario.

9. Application for Sites into Program

- Site Plan Applications for areas scheduled for spring planting and/or previously approved late summer planting must be submitted to the online reporting system by March 7th of the planting year. Failure to submit sites by this date may result in the loss of funding for the properties.
 - **Please note that late summer planting will be funded only with prior written approval from Forests Ontario. Late summer planting project site plans must be uploaded to the online reporting system prior to March 7th deadline and will be evaluated on a case-by-case basis.**
- The application requires information such as property location, size of plant area and number of trees, site productivity (soil depth, drainage) and accessibility (see list of site plan information required for online reporting in Schedule B, Appendix A).
- The site plan must provide the name and number of the Full or Associate member of the OPFA that will be signing the Site Plan and Post Plant invoice summaries. The site plan must indicate that the PDA has completed a site productivity/soil assessment prior to site submission and reserved suitable stock by species and seed zone from a partner nursery.
- Any changes to a submitted site plan must be reported immediately to Forests Ontario for approval.
 - If changes to a submitted site plan occur prior to the site plan submission deadline (March 7th) the site plan will be rolled back to the PDA for edits and resubmitted for FO approval.
 - If changes to a submitted site plan occur after the submission deadline (March 7th) the changes must be reflected in the post-plant report and, if applicable, the PDA will reimburse FO for all funding received from FO for the difference between the approved seedling allocation in the site plans and the total number of seedlings planted by the PDA.
- Approval of each submitted site plan will be confirmed by an automated email sent to the PDA from the FO online reporting system.

10. Nursery Stock and Tree Seed Purchase

- Trees must be purchased from the following nurseries: Somerville Seedlings, Ferguson Tree Nursery, Pineneedle Farms, or PRT and be identified as an appropriate species, stock size, and seed source for the site.

- **When reserving stock, PDAs must notify the nursery if any stock included on the order is not for an FO program to allow for stock deposit tracking, an example tracking template can be found in Schedule H, Appendix A.**
- Tree orders placed through other nurseries may be considered for funding on a case-by-case basis but only if a written request has been submitted and approved by Forests Ontario prior to reserving stock.
- Tree seed must be source identified and site appropriate.

11. Site Plans, OPFA Member Approval and Invoices

- A Site Plan must be prepared by the PDA or PDA representative after a site visit providing the information identified in the Site Plan template found in Appendix A.
- A property may have more than one planting site (compartment), which will be reflected in the Site Plan
- The Site Plan must:
 - Include landowner objectives, short and long term
 - Ensure objectives are consistent with good forestry practices and sound ecological principles
 - Provide general site details including but not limited to access, previous land use, topography, size of planting area (Ha), competition, project type, and soil characteristics
 - Demonstrate appropriate species selection and meet landowner objectives
 - Identify stock needs including quantity type, source, and seed zone to be used on site
 - Mapping of proposed planting area(s)
 - Outline site preparation, planting and tending operations and assessments, much of which will be the landowner's responsibility after the initial 2 years of operations.
 - Provide an estimate of the planting costs both short term and long term
 - Be approved and signed by a full or associate member of the OPFA
 - Upload any necessary supporting documents (photos, invoices, etc.) to the online reporting system as required
- A site plan must be prepared using Forests Ontario's online reporting system and submitted by March 7th of the planting year.
- It is highly recommended that the Site Plan payment contribute to ensuring stock availability at the nursery.
- PDAs must follow the approved site plan.
- Forests Ontario will make the payment for approved site plans upon submission of:
 - Invoice from PDA on their letterhead indicating total payment required;
 - Online reporting system generated invoice summary signed by a full or associate member of the OPFA signifying the project abides by good forestry practices and aligns with the 50 MTP criteria (Schedule G, Appendix B);

- Planting Delivery Agents must submit Site Plan invoices and all supporting documentation to Forests Ontario by March 31st of the planting year. Failure to do so may result in a forfeiture of funding.

12. Tree Planting

- Stock handling and planting must be done according to Forests Ontario's Best Management Practices for Tree Planting (Schedule E).

13. Planting Quality Assessments

- When using nursery bareroot stock, containers or plugs, quality assessments will be done by the PDA in accordance with Forests Ontario's Planting Quality Assessment Procedures (Schedule F)
 - The Planting Quality Assessment must be completed for each site (compartment) at a 2-5% random sample rate of the total number of trees planted using Schedule F: Tree Planting Quality and Survival Assessment Procedures as a guide. An assessment data collection template can be found in Schedule F, Appendix A.
 - Planting must attain a minimum of 80% planting quality. At FO's discretion, anything less will require follow-up action, including, without limitation, remediation by the PDA at the PDA's sole cost and expense
 - Planting quality assessments must be completed during or immediately following the plant to allow for corrections to planting quality as required.
 - Planting quality assessment results and comments must be submitted as part of the Post Plant report submission
- Where planting of nursery stock at irregular spacing constitutes a high percentage of the effort to establish the new forest (e.g., forest restoration project types), a standard quality assessment will not be possible. The PDA will assess the establishment effort as it progresses and provide written confirmation that seed quality, the density of seed by species and the depth of planting were accomplished according to the approved site plan

14. Post Plant Report and Invoices

- PDAS will submit a Post Plant Report for each property to Forests Ontario online reporting system no later than July 31st for spring projects and September 30th for late summer projects of the planting year. Forests Ontario shall have 30 days to review the Post Plant Report to determine the amount of program funding the PDA is eligible for based on funding chart (Appendix A), such determination to be made

in Forests Ontario's sole discretion having regard to the PDA's compliance with the Program Guidelines.

- Information reported will include (Schedule B, Appendix B):
 - Confirmation of general information including but not limited to access, previous land use, topography, size of planting area (ha), competition, project type, and soil characteristics
 - Location of planting area
 - Site preparations and date(s)
 - Planting methods and date(s)
 - Tending methods and date(s)
 - Stock Details:
 - Number planted by species
 - Source of Stock
 - Lot number
 - Spring Lift Date
 - Tree Seed Details:
 - Number planted by species
 - Seed origin
 - Planting Quality Assessment
 - Reporting of Expenses
 - Costs charged to the planting program for each operational activities (i.e. planting costs, site prep, storage etc.)
 - Cost of stock and / or tree seed purchased by the PDA
 - Note – PDA must retain records (physical or digital) of these costs, but Forests Ontario may not require all information to be recorded using the online reporting system
- The PDA must inform the nursery that they require the above stock information before lifting occurs
- Forests Ontario will make the payment for approved post plans upon submission of:
 - Invoice from PDA on their letterhead indicating total payment required;
 - Online reporting system generated invoice summary signed by a member of the OPFA signifying the project abides by good forestry practices and aligns with the 50 MTP criteria (Schedule G, Appendix B);
- Planting Delivery Agents must submit all post plant invoices and supporting documentation to Forests Ontario by August 31st or October 31st (for late summer plantings) of the planting year. Failure to do so may result in a forfeiture of funding

15. Forests Ontario Site Audits

- Forests Ontario will assess a representative sample of PDA sites, typically in the spring while planting occurs

- Audits will include site visits and review of information for the site including site plans, post plant report, maps, invoice to landowner, contractor invoices and nursery invoices
- An acceptable audit result requires the PDA demonstrate the application of good forestry practices and program delivery consistent with the intent and goal of the 50 MTP and FO

16. Survival Assessments and Invoices

- For areas that have been planted with nursery bareroot stock, containers or plugs in a fairly regular pattern, survival assessments will be completed by the PDA in growing season Years 2 and 5 according to Forests Ontario's Survival Assessment Procedures in Schedule F of the agreement
- Assessments will be submitted using Forests Ontario's online reporting system by November 30th of the required year
- For funding purposes Survival Assessments are considered part of the planting operations
- Funding associated with the assessments will be paid to PDA upon completion and submission of data related to each of the required assessments. (See Schedule A, Appendix A Program Funding Chart)
- Survival Assessment payment will be based on the original number of trees reported planted on the site as per the Post Plant report
- Once assessments have been submitted to the online reporting system, the PDA may invoice Forests Ontario on PDA letterhead along with the invoice summary generated by the online reporting system. Invoice summaries from the reporting system will be approved and signed by a full or associate member of the OPFA signifying that the member is satisfied with the sampling used and the accuracy of the results submitted

17. Tending

- Responsibility for tending operations will be identified in the Landowner Agreement and Site Plan
- Tending to maintain high survival and growth rates should be performed and includes controlling competition from other vegetation and limiting damage from animals and other pests
- Where the PDA realizes funding surpluses during plantation establishment operations, the PDA is expected to manage those funds to carry out subsequent

tending operations necessary to ensure long-term survival and growth. The PDA shall report such follow-up tending operations in the online reporting system and maintain records of those treatments

18. Refill Planting

- If survival is <60%, the site (compartment) may be eligible for refill funding
 - For example, if a property has two planting sites, Area A with 70% survival and Area B with 50% survival, the PDA can apply for refill funding for Area B
- Sites are eligible for one refill treatment within 5 growing seasons of the initial plant
 - For example, a 2017 planting with less than 60% survival can apply for refill funding until November 30th, 2021, for spring 2022 planting
- PDAs must report on reasons for poor survival and justify additional investment
- PDA must submit an online application for refill funding to Forests Ontario by November 30th of the survival assessment year (See Appendix A Funding Chart)
- All applications are reviewed by FO representatives after the November 30th deadline
 - Approved refill funding is based on the annual available budget
- Upon completion of the refill planting, the PDA submits accurate stock details
 - Source
 - Seed origin
 - Spring Lift date
 - Stock type

19. Planting Delivery Agent Record Keeping

- Planting Delivery Agents must maintain the following files for a 15- year period: landowner agreements, approved site plans, post plant reports, operations records, assessments, and invoices for all delivery costs.
 - Note: Site Plans, Post Plant Reports and Survival Assessment invoice summaries (generated by Forests Ontario online reporting system) must be signed by a member of the OPFA and be available for review if requested by Forests Ontario or NRCan. Records can be either physical or digital copies.

Schedule A, Appendix A: Program Funding Chart for 2022

Funding Breakdown	Activities	Amount (\$/seedling)	Year
NEW 50 MTP SITES			
Allocation Turnback Due: February 1st, 2022	Remaining allocations (not associated with a submitted site plan) will be distributed to PDAs on the waiting list		Year 1
Stock Deposit	Stock deposit paid by FO to partner nurseries, subtracted from stock cost owed by PDA	\$0.25	Year 1
Site Plan Submission Due: March 7th, 2022	Upon submission of a site plan and approval from Forests Ontario	\$0.91	Year 1
Total Site Plan Funding		\$1.16	
Site Plan Invoice Submission Due: March 31st, 2022	Planting Delivery Agents must submit Site Plan invoices for approved sites		Year 1
Post Plant Report Due: July 31st or September 30th, 2022 (for approved late summer plantings)	Upon completion of a post plant report and approval from Forests Ontario	\$0.20	Year 1
Total Funding (Year of Planting)		\$1.36	
Survival Assessments (or other assessment as per Schedule A) Due: November 30th, 2023 (Year 2) November 30th, 2026 (Year 5)	As per Forests Ontario survival assessment procedures	\$0.025	Year 2 and Year 5
Total FO contribution		\$1.41	
REFILL 50 MTP SITES			
Refill Application submission Due: November 30th 2022	A separate application process, <60% survival, understanding of the reasons for failure, plan in place to successfully re-establish plantation to the targeted level.	\$1.16	Following 2nd or 5th year assessments
Refill Post-Plant		\$0.20	Following

Report Due: July 31st or September 30th, 2022 (for approved late summer plantings)			2nd or 5th year assessments
Survival Assessments	Projects within 5 growing seasons of the initial planting are incorporated into the original survival assessment schedule.		
	Total FO Refill contribution	\$1.36	

Schedule A, Appendix B: Program Activity Timelines

Program Guideline Step	ACTION	DETAILS
Application & confirmation of eligibility to become a PDA	Planting Delivery Agent wishing to participate in the program submits a completed “50 Million Tree Program Funding Application – Planting Delivery Agency” to Forests Ontario for review. Applications are reviewed by Forests Ontario and if accepted, applicant receives written confirmation of eligibility.	Schedule A, Section 1 50 Million Tree Program Funding Application, Planting Agent Eligibility
Planting Delivery Agent agreements with Forests Ontario	Planting Delivery Agent agreements will be sent to each PDA.	50 Million Tree Program: Agreement between Forests Ontario And PDA
Funding Allocation for PDAs from Forests Ontario	Allocations will be provided annually by Forests Ontario each fall season. Allocation is based on past performance of partner, potential for delivery, and annual 50 Million Tree Program budget.	Allocations provided via email and/or phone call.
Site Selection Criteria	Schedule A, Section 5 of these guidelines	Provided within Schedule A, Appendix A of the 50 Million Tree Program Agreement between Forests Ontario and the Planting Delivery Agency
Acceptable species / seedling stock	Stock Standards and Protocols the Planting Delivery Agency has agreed to comply with.	Provided within Schedule E of the 50 Million Tree Program: Program Guidelines between Forests Ontario and the Planting Delivery Agency
Planting Delivery Agent agreements with Landowner	Agreements between the landowner and PDA must be in place prior to tree planting. Optionally, site plans can be downloaded from the online reporting system to retain as a record for the PDA and/or the landowner.	Schedule C of the 50 Million Tree Program Agreement between Forests Ontario and the Planting Delivery Agency
Site Plan Report and Invoices	Site Plans will be submitted online by March 7 th of the planting year. Upon approval, PDAs must submit an invoice on	Schedule B of the 50 Million Tree Planting Agreement between

	company letterhead and matching Invoice Summary (produced by the online reporting system and signed by a member of the OPFA) for payment. Invoices are due prior to March 31 st of the planting year.	Forests Ontario and the Agency shows what information needs to be reported on using the online reporting system
Planting Quality Assessment	Planting Quality Assessments take place during or immediately following planting. Results are required as part of the Post Plant Report.	Schedule F, Appendix A provided in the 50 Million Tree Program Agreement between Forests Ontario and the Planting Delivery Agency
Post Plant Report and Invoices	Post Plant Reports will be submitted online by July 31st or September 30th (for late summer plantings) of the planting year. Upon approval, PDAs must submit an invoice on company letterhead and matching Invoice Summary (produced by the online reporting system and signed by a member of the OPFA) for payment.	Schedule B of the 50 Million Tree Planting Agreement between Forests Ontario and the Planting Delivery Agency shows what information needs to be reported on using the online reporting system
Survival Assessments Year 2 and 5	Results submitted online prior to November 30th of the required year. PDAs must submit an invoice on company letterhead and matching Invoice Summary (produced by the online reporting system and signed by a member of the OPFA) for payment.	Procedure and data collection form template provided in Schedule F of the 50 Million Tree Program Agreement between Forests Ontario and the Planting Delivery Agency
Nursery Stock Forecast	DUE: December 31 (annually)	
Refill Planting	PDA submits online request for approval following submission of annual survival assessments, and prior to November 30th of the required year.	Forests Ontario will submit notice of the status of Refill submissions to the PDA by December 20 th

Schedule B: Forests Ontario 50 Million Tree Program Property Details

This list summarizes the information needed to complete 50 MTP Site Plan and Post Plant Reporting through the online reporting system. The templates in Schedule B, Appendix A and B can be used to ensure the proper data is collected to fulfill reporting requirements.

Landowner Information

- First Name
- Last name
- Organization
- Home Address
- Closest town/city
- Country
- Province
- Postal code
- Phone Number
- Email

Property Location

- Property name
- Closest town/city
- Concession
- Lot Number
- County
- Roll Number
- Legal address
- Total Property Area (Ha)

Property Detail

- Latitude,Longitude(Decimal Degrees)
- Seed zone
- Name of RPF approving the Site Plan and Post Plant Report
- Referral Agency

Site Plan

- Landowner Objectives
- General information
 - Site name, area (ha), previous land use, topography, competition, project type, existing vegetation, drainage, texture
- Stock needs
- Planting Prescription

- Site preparation, planting method, spacing, tending
- Planting area (drawn online)
- Planting costs (e.g., admin, stock, site prep, planting...etc.).
- Planting Season (spring/summer)
- Total area to plant
- Planting Start and End Dates
- Total estimated trees to be planted
- Confirmation of stock availability

Post Plant Report

- Update details from site plan as needed
- Stock needs
 - Enter lot number and spring lift date to master stock list
- Verify planting area is correct
- Planting details (dates, method, comments)
- Planting Quality Assessment data
- Final planting costs updated/added

Online Reporting System Access:
<https://tools.forestsontario.ca/ops>

Schedule B, Appendix A: Site Plan Template

Template

50 Million Tree Program- Site Plan

Prepared by: _____ FO Code Number: _____
 Date Prepared: _____ PDA: _____

Property Owner/s:	_____	Location of planting	_____
	_____	Roll #:	_____
Mailing Address:	_____	Lat	_____
	_____	Lon	_____
	_____	County	_____
	_____	Township	_____
Home Phone:	_____	Ward	_____
	_____	Lot	_____
Work Phone:	_____	Conc.	_____
	_____	911#	_____
Email:	_____	Property	_____
	_____	Acreage	_____

Landowner Objectives:

Trees to be planted - by species.	SEED ZONE _____	
Spp	Type	# of Seedlings
Site 1		
Site 2		
Total Seedlings Planted:		

Area to be planted: _____ acres hectares

Proposed Plant Year: _____

Planting Site Information						
<i>Previous land use:</i>	_____					
<i>Predominant Soil Texture:</i>	Very Gravelly	Gravel Sand	Sand	Gravel Loam	Coarse Loamy	Shallow
	Silty	Fine Loam	Clayey			
<i>Drainage:</i>	Poor	Imperf.	Good	Rapid	Very Rapid	Moderately Well
<i>Soil Moisture Regime:</i>	Very Moist	Mod. Moist	Moist	Very Fresh	Mod. Fresh	Mod. Dry Dry
<i>Depth to Distinct Mottle:</i>	<30cm very shallow		60cm shallow		120cm moderately deep	120+cm Deep
<i>Soil Depth:</i>	_____					
<i>Depth to Free Carbonates (cm)</i>	_____					
<i>Topography:</i>	_____					
<i>Competition:</i>	_____					

Access:

Site Preparation Prescription:

Planting Prescription:

Method: _____

Spacing: _____

Spraying: _____

Planted by: _____

Tending Prescription:

Estimated Costs				
	<u>Description</u>	<u>\$/Unit</u>	<u>Units</u>	<u>Total Cost</u>
	Site Prep			
	Planting			
	Tending			
	Other			
	Total			
Forests Ontario				
Landowner cost				

Site plan approval by OPFA Member (full or associate) in Good Standing: I certify that I have the expertise relevant to afforestation practices and the above site plan follows sustainable Forest management practices and has the potential to result in a well-stocked, productive plantation.

Name (Printed)	Signature	Date
<hr/>		

* Map Requirements Map of property (or aerial photo) showing plant site(s) with associated species and site variation

Schedule B, Appendix B: Post Plant Report Template

50 Million Tree Program- Post Plant Report

Section A

FO Code Number:
PDA File Number (optional):

Section B - Planting Details

Site Preparation	Description		
Start date	Completion date		
Completed by	Unit cost	Total cost	
Planting	Planting Method	Hand	Machine
Weather Conditions			
Start date	Completion date		
Completed by	Unit cost	Total cost	
Tending	Description		
Weather Conditions			
Start date	Completion date		
Completed by	Unit cost	Total cost	

Section C - Stock Needs

Species Planted	Quantity	Source	Age	Lift Date	Seed Source	Stock Lot # and Comments
Total						

Section D - Planting Quality Assessment

Date of Assessment	Sampled	Planted OK	Percent Quality			
Overall Quality	0	0	0%			

Comments

Name of Planting Agency Representative _____

Signature _____

Name of OPFA Member (full or associate) _____


Signature _____

Schedule B, Appendix C: Electronic Confirmation Email

Confirmation notices are received through email when submitted reports have been approved by FO.

Property Funding Approved



Murray, Hayley - Forests Ontario
To  Murray, Hayley - Forests Ontario



1:45 PM

To: Paul Morril

Subject: Property Funding Approved

Dear Paul Morril;

Forests Ontario has approved funding on the following property(s):

John Smith (2022.001);

Manage the property(s) by visiting this URL:

<https://tools.forestsontario.ca/ops/pda?agencyId=2>

Schedule C: Landowner Tree Planting Agreement

Between

(name of Planting Delivery Agent)

and

(name of Landowner)

Owner's Name: _____ FO Code: _____

Address: _____

Phone: _____ Business: _____

Property Location:

Lot: ____ Concession: ____ Geographic Township: _____

Latitude (Decimal Degrees): _____

Longitude (Decimal Degrees): _____

Roll No: _____

AGREEMENT

I, the Owner of the above-mentioned Property, agree to the following terms:

- 1) To contribute a minimum \$___per tree toward plantation establishment costs beyond any in-kind contribution I may make toward implementing the Site Plan;
- 2) At my expense, to protect the trees from fire, livestock, pests (e.g. mice, insects, disease), machinery damage, and excessive weed growth, to the best of my ability;
- 3) Not to cut, harvest, or otherwise remove the trees from the planted area for a minimum of 15 years after planting;
- 4) To allow the Planting Delivery Agency (PDA), Forests Ontario, or representatives of project funding agencies entry onto the Property to conduct site visits, post-planting inspections and/or survival assessments. FO its funding agencies will not enter any property or project area without permission of the landowner and accompaniment of the PDA.
- 5) Agree to the implementation of a Site Plan (Appendix A) prepared by the PDA.
- 6) If available, to have a sign posted on the Property by the PDA describing the Program;

- 7) The Owner, in applying for this program (herein referred to as the "Program"), hereby agrees to assure in advance of planting:
 - a) That the planting area is adequately fenced from livestock, and;
 - b) That the site is clear of movable debris to allow access for site preparation, planting and tending operations: These provisions will be done at the landowner's expense;
- 8) If the planting location (as per Appendix A) is not fenced or cleared of debris, the PDA reserves the right to not proceed with the activities described in Appendix A;
- 9) The PDA, NRCAN and FO are not responsible for the failure of a tree or trees to become established but will make all possible efforts to see that the project is properly designed and carried out.
- 10) To absolve the PDA, NRCAN and FO, of any liability in connection with projects undertaken through the planting program on the Property;
- 11) To indemnify and save harmless the PDA, NRCAN and FO from and against all costs, claims, demands, suits, actions, and judgments made, brought or recovered against the PDA, NRCAN and FO resulting from or arising out of any alleged act or omission by the Owner, in connection with the services provide or purported to be provided pursuant to this Agreement;
- 12) In the event that the seedling stock is unavailable or the PDA is unable to deliver the Program, the planting will be cancelled and the Owner will receive a full refund of the funds paid by the Owner to the PDA.
- 13) Pending final approval, the **50 Million Tree Program** may cover a portion of the project cost, as listed in the quote (Appendix B). If funds are unavailable, the Owner can proceed with the planting at full rates, a reduced planting agreed upon by the Owner and PDA, or a cancellation of the planting.
- 14) This Agreement is a matter of contract between the PDA and _____ **(insert name of Owner)** and is not binding on subsequent owners.
- 15) If the event that the Owner sells the Property, all obligations of the Owner under this agreement will cease.

Owner _____ Date _____

Witness _____ Date _____

Program Delivery Agency _____ Date _____

Witness _____ Date _____

Agreement to be signed in duplicate, one copy retained by the Owner and one by the landowner

Schedule D: Best Management Practices for Tree Planting

General Considerations

1. Each planting hole needs to be of a size that will accommodate the entire root system of the tree in a natural spread-out position and not in tangled, bunched, or doubled-up position. Avoid 'J' roots.

Note: Make sure you know if the stock you are receiving from the nursery is root pruned or not. Non-root pruned material will need a much larger hole to plant properly, especially heavy tapped rooted species.

2. Each tree needs to be planted to a depth so that, after filling in and compacting soil about the roots, the soil comes to a point at or near the root collar on the tree stem where roots are not exposed, and no branches and tree leaves are covered with soil. In the case of container stock each container should be planted so as not to leave any of the paper pot (and/or plug) showing above the ground.
3. Soil needs to be filled in and compacted around the roots to remove air pockets and firmly anchor the tree and in an upright position.
4. Each planted tree must be capable of withstanding a reasonable tug by hand without being extracted from the soil.
5. The planter must not damage the tree during the planting processes, including breaking branches and buds, snapping roots, and removing the bark and exposing cambium tissue.

Storing and Handling Nursery Stock

1. Only the nursery stock that can be planted in one day should be removed from the storage site. If environmental conditions are hot and on-site storage is not able to keep stock cool throughout the day, then perform several trips to the cooler to restock inventory at the site
2. For Bareroot Stock:
 - a. Spring-lifted stock should be kept between 3 to 5 °C before delivery to the field
 - Spring-lifted stock should be planted as soon as possible after lifting
 - b. On site, store the containers (bags) of nursery stock in a shaded, cool place. Use silva-tarps when a reefer or a fully insulated storage system is not available to maintain the standard storage temperature
 - Measure and record the internal temperature of the bags. Keep the container temperatures below 10 °C
 - c. Store nursery stock in a shaded, cool place with space between the containers to permit the circulation of air between containers
 - d. Do not pile the containers

- e. Prevent unnecessary drying of nursery stock by opening containers only when nursery stock is required for planting and by keeping containers closed at all other times
 - Note: If the temperatures warm up more than anticipated through the day and the stock is not able to be returned to the cooler in a timely manner, then the bags should be opened slightly to allow excess heat to escape the packaging
 - f. Avoid any unnecessary handling of nursery stock
 - g. Avoid exposure of the root system on windy and/or sunny days. Roots can dry out and die within minutes which means the tree is also compromised!
 - h. Always keep water on-site in case dipping of roots is required throughout the day
 - If roots need to be moistened, limit the duration in the water to a few minutes and avoid submerging foliage in the water.
 - i. When transporting stock on site, it should be carried in a planting pail bag or other container with the roots of the nursery stock protected by at least 5 centimeters of water in the pail or moist peat moss or equivalent packing material in the bag
3. When nursery stock is removed from the storage site(s) or delivery point(s), it should be transported directly to the field storage or planting site(s).
 4. Provide adequate covering to protect the nursery stock from sun and wind exposure during transport (i.e. Silva-tarp, enclosed-fully insulated containment system).
 5. Do not overload planting pails, bags or other containers.
 6. During temporary stoppages in planting, place planting pails, bags or other containers containing nursery stock in a shaded area.
 7. During planting, remove only one tree at a time from the planting pail, bag or other container.
 8. Minimize exposure of nursery stock roots to air and direct sunlight.
 9. Do not root prune nursery stock. Communicate pruning expectations with the nursery prior to pick up or shipment of stock.
 10. Plant all stock removed from the containers by the end of the day, however, if this stock is not able to be planted, the remainder should be returned to the container and sealed, and then planted the following day (note this on the planting sheet in case there are issues after planting).

Improperly Planted Trees

Trees that are considered improperly planted:

1. Unsuitable micro-sites:
 - a. Rotten log, pure duff, stumps, bottom of gullies or depressions subject to flooding, cut banks, roadside fill, raised humps of loose soil or debris
2. Unsuitable root placement:
 - a. Where tree is placed in the planting hole with roots not in a near-natural arrangement;
 - b. Roots are doubled up, twisted and tangled or container stock with excessive damage;
 - c. When roots are exposed.
3. Unsuitable Planting Hole
 - a. If the tree has been planted too far below or above the root collar;
 - b. When living branches or foliage are buried in the soil or in the case of container stock where any part of the paper pot or plug is showing above the ground;
 - c. Having more than one (1) tree or container per hole;
 - d. When a planting hole is not large enough to accommodate the entire root system of the tree.
4. Unsuitable Positioning of Crown and Stem
 - a. Trees that are planted in a leaning position greater than a 15-degree deviation for hardwoods or 30-degree deviation for conifer from the vertical are considered improperly planted.
5. Unsuitable Distances
 - a. Where a tree is planted too close to another tree within a row or between a row. The following table demonstrates the prescribed spacing

Prescribed Spacing Tree X Row	Prescribed Spacing Close Tree Infraction (if closer than) Tree X Row
1.8m x 1.8m	1.4m X 1.4
1.8m x 2.1m	1.4m X 1.7
2.0m x 2.0m	1.6m X 1.6
2.1m x 2.4m	1.7m X 1.9
3.0m x 3.0m	2.4m X 2.4
4.0m x 4.0m	3.2m X 3.2

NOTE: For other spacing, close tree infraction if closer than 80% of prescribed spacing (e.g. prescribed spacing 2.6, 2.1m)

Schedule E: Stock Standards and Protocol

Nursery Stock Size Class Parameters and Protocol

Note: The standards listed below are minimum standards for bare root stock. Seedlings that do not meet these specifications must be brought to the attention of the Nursery and Forests Ontario.

<p>General Specifications: Seedlings- Must meet the site needs and be compatible with vegetation control measures. Seedlings should appear vigorous and healthy</p> <p>Shoots- Ideally seedlings should have a dominant leader clearly dominant above all other shoots with at least a 1-inch differential between leader and lower shoots</p> <p>Roots- Must be well developed and pruned where necessary to efficient handling as well as optimum root growth after out-planting.</p>
--

Acceptable minimum values for bare root stock			
Specifications	All conifers except pines	Pine species	Deciduous species
Height (cm)*	15	15	25
Stem Diameter (mm)**	3.6	3.6	4
Ht/ Dia. Ratio***	<70:1	<60:1	<70:1
% of seedlings meeting minimum standards	≥95%	≥95%	≥95%

Acceptable minimum values for container stock			
Specifications	All conifers except pines	Pine Species	Deciduous Species
Height (cm)*	15	15	25
Stem diameter (mm)**	3.0	3.0	4.0
Ht/ Dia. Ratio***	<70:1	<70:1	<70:1
% of seedlings meeting minimum standards	≥95%	≥95%	≥95%

Disclaimer: Forests Ontario provides stock specifications to ensure that partners obtain adequate stock to establish forests under the 50 Million tree program. **Planting Delivery Agents should ensure that proper site preparation and tending plans are established to ensure the survival of the planted seedlings.**

*Height is measured at the root collar or apparent root collar to top of terminal bud.

** Stem diameter is measured at root collar or apparent root collar.

***The Height Diameter Ratio is provided to reduce the susceptibility of physical damage that could occur in nursery and out-planting, as well as to ensure the seedling has the adequate resources in the initial year during establishment. **PDA's should ensure that proper site preparation and tending plans are established to ensure the survival of the planted seedlings.**

Stock Standards Protocol

Scenario 1: Planting Delivery Agent (PDA) seeking approval to utilize sub-standard stock

PDA Action:

- Contact Forests Ontario **in advance** if PDA and/or Nursery firmly believes there is biological justification to deviate from standards—Forestry Program Manager and Seed and Stock Coordinator should be informed prior to plant (following nursery stock viewing in September);
- Contact Forests Ontario **in advance** if suitable stock is not available. As soon as the issue has been identified, Forestry Program Manager and Seed Stock Coordinator must be notified (this might occur during stock viewing or in the spring prior to lifting trees).

Forests Ontario Action:

- Forests Ontario's Forestry Program Manager Seed and Forest Program Manager will work with Field Advisors to verify PDA and Nursery rationale (site conditions, stock quality, etc.);
- Forestry Program Manager and Seed and Stock Coordinator will verify if suitable stock is unavailable through an alternate nursery;
- Once due diligence has occurred and it has been determined that other nurseries cannot provide alternative stock, and educated decision will be made, which may include the approval of stock not meeting standards at all. This will happen **on a case by case basis**;
- If use of questionable stock is not acceptable:
 - Permission will not be granted
 - PDA will be expected to utilize other compatible species, source from other nurseries or delay plant until suitable stock is available
 - Nursery will be given the opportunity to source stock conforming to standards from another appropriate source

Scenario 2: PDA accepts and/or Nursery ships stock not meeting the stock standards without prior approval from Forests Ontario

PDA Action:

- PDA accepts and uses stock that does not meet the parameters of the stock standards and specifications
 - Nursery Action: Nursery ships stock to PDA that does not meet the parameters of the stock standards and specifications

Forests Ontario Action:

- Field Advisor to notify Forest Program Manager and Seed and Stock Coordinator of breach
- Situation will be discussed with PDA and/or nursery to ascertain reason for planting and/or shipping substandard stock
- Situation will be discussed with PDA and/or nursery to ascertain reason for planting and/or shipping standard stock
- Other PDA's using the same nursery and stock types will be contacted by Forests Ontario to determine if this is an isolated breach or multiple offenses
 - **Final action**
 - Step 1: Forests Ontario provides written warning / notification of the issue
 - Step 2: Forests Ontario may reduce future allocations or funding opportunities
 - Step 3: Compensation to landowner from PDA or Nursery may be required depending on severity of incident

Schedule F: Tree Planting Quality and Survival Assessment

Procedures

Factors affecting tree survival change from the time the tree is planted to when it reaches ‘free-to-grow’. Trees need to be monitored and assessed throughout this establishment period, prompting the appropriate management, and tending activities to ensure survival. These assessments include evaluating the planting quality as well as the survival and overall health of the trees.

Planting Quality Assessment (at time of planting)

As soon as planting begins the PDA or planting supervisor must conduct this assessment to evaluate the quality of planting. Any problems identified in this assessment must be communicated to the planting crew and remedied immediately.

What to Look For:

- Planting in unsuitable microsites i.e., rotten logs or stumps, depressions at risk to flooding, highly eroded areas
- Improper root placement in the planting hole including roots in an unnatural position, doubled up, twisted, and tangled, etc.
- Unsuitable planting depth including too far or above the root collar, live branching or foliage buried in the soil, root exposure etc.
- Planted at an angle greater than 15° from the vertical for hardwoods or 30° from the vertical for conifers.
- Inappropriate spacing either too close within rows or between spacing. The spacing is too tight if it is closer than 80% of the prescribed spacing.

Procedures:

A visual assessment will address any initial issues as planting begins. Once the planting crew has settled into the compartment, the formal assessment can take place. The data recorded during the formal assessment must be submitted in the post plant reporting for each compartment of a planting site. **A sample of a Planting Quality Assessment template can be viewed in Schedule F, Appendix A.**

Visual Assessment:

- Inspect more than 10% of the firstly planted seedlings to identify problems.
- Follow closely behind the machine planter or individual hand planters to assess their planting quality and provide training if necessary.

- Perform spot checks at random to ensure the quality standard is maintained.
- Work with planting supervisor to correct any problems identified.
- All stock handling and planting quality must meet the requirements stated in Schedule E.

Formal Assessment:

- Select a random starting point and assess the first 10 trees encountered in that row (Figure 1).
- After inspecting the first 10 trees, move to the next row, and assess the next 10 trees (Figure 1).
- If a row ends before the sampling is complete, move to the adjacent row.
- 2-5% of each compartment should be assessed.
- Record all assessment results, per compartment. The name of the assessor, number of trees sampled, and number of trees planted properly will need to be entered in the post-plant report submitted using the online reporting system. A sample of the post plant report required information can be found in Schedule B, Appendix B.

Survival Assessments

Survival assessments in the first few years of a tree’s growth will indicate whether management activities need to be implemented or adjusted. A common example is the need for weed control. The information collected through this assessment can produce a recommended tending schedule including suitable time of year for the work to be completed. This inspection will also determine whether refill planting is recommended. **A sample of a Survival Assessment form can be viewed in Schedule F, Appendix B and C.**

What to Look For:

- Prolonged lack of growth, lack of or early browning of leaves and needles, and brittle or missing branches.
- Identifying possible reasons for poor survival including vegetation or weed competition, girdling by rodents, browse, pest damage, and environmental factors (i.e., drought)
- If trees have been removed or destroyed (i.e., lawn mower) notify landowner of your concerns.
- Compartments are eligible for refill on sites where survival is less than 60%

- Adjust species in refill prescription if necessary, including the need for drought resistant species.

Survival Assessment Procedure

- The same procedure for formal assessment of planting quality can be applied here. Refer to ‘Formal Assessment’ under the Schedule F; Planting Quality Assessment section for direction.
- A tree passes the assessment when it is healthy (i.e., increased height and spread, proper colour, etc.).
- A tree fails the assessment if it is dead, dying, or missing from the spot it should be located.
- A survival assessment is required for each compartment of a planting site.
- 2-5% of each compartment should be assessed.
- The name of the assessor, number of trees sampled, number of passed trees, and comments will be entered using the online reporting system.

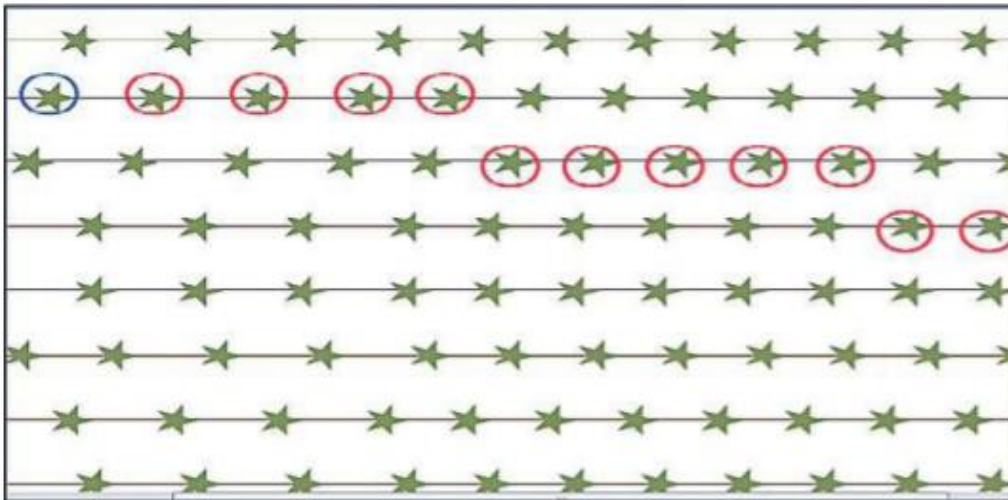


Figure 1. Quality and Survival assessment pattern, example using groups of 5 trees (Source: Southern Ontario Afforestation Guide 2018).

Schedule F, Appendix A: Planting Quality Assessment Template

Planting Quality Assessments take place at the time of or just after planting. Each site (compartment) should be assessed using this or a similar template.

Template

50 Million Tree Program- Planting Quality Assessment

<i>Site</i>	
Assessor: _____	Date: _____
	FO Code _____
	Number: _____
Total trees planted: _____	
Year planted: _____	Page ___ of ____

Row or Plot #	Date of Plant	Species	Properly Planted	Improperly Planted	Total Sampled	% Properly Planted
Total Trees Assessed						

- (1) Total Trees Planted on Site
- (2) Total Trees Assessed
- (3) Percent Sample Assessed ((1)/(2))

Note: A minimum 2% random sample of the total number of trees planted is recommended

Schedule F, Appendix B: Afforestation Survival Assessment Template

Each site (compartment) of each property should be assessed using this or a similar template.

Template

50 Million Tree Program- Afforestation Survival Assessment

<i>Site Assessor:</i> _____	<i>Date:</i> _____
<i>Landowner:</i> _____	<i>FO Code</i> _____
	<i>Number:</i> _____
<i>Year planted:</i> _____	Page ___ of _____

Row or Plot #	Year Planted	Species	(a) Live Trees (1)	Dead Trees (2)	(b) Total Trees (1+2)	(a)/(b) % Survival
Total Trees Assessed						

Calculation of Percent Sampled

(1) Total Trees Planted on Site (2) Total Trees Sampled (3) Percent Sampled ((2)/(1))

Note: 2-5% random sample of the total number of trees planted is recommended

Schedule G: Invoicing Procedure

Forests Ontario makes funding payments directly to PDAs to offset the cost of approved tree planting projects. Once site plans, post plants, and survival assessments are approved and at the payment stage, PDAs must submit the appropriate paperwork to receive payment. The PDA must provide Forests Ontario with an invoice on company letterhead and the invoice summary from the online reporting system.

Company Invoices

- Company/organization invoices must be on letterhead
- The invoice must be for the same dollar value as the invoice summary
- HST tax is not to be added on top of the funding amount owed
- An invoice template has been provided in Schedule G, Appendix A as a guide
 - There is no mandatory invoice format

Invoice Summaries

- Invoice summaries are downloaded from the online reporting system
- Invoice summaries must be signed by an OPFA member (full or associate)
- An example of the invoice summary generated through the online reporting system is found in Schedule G, Appendix B

Invoicing Deadlines

Site Plan Invoices (new and refill)- March 31 st , 2022
Post Plant Invoices (new and refill)- July 31 st , 2022
Survival Assessments- November 30 th , 2022

Schedule G, Appendix A: Sample Invoice Template

Sample

Need to show to landowner what FO has contributed towards their planting costs

Planting Agency Information

Sample Invoice to Landowner and Funding Report Costs greater than \$1.41

Confirmation

Spring / Fall 2020 Tree Planting

FO CODE NO:

CONFIRMATION NO:

Name:

Address:

Home Phone:

Location of Planting

County:

Township:

Lot:

Concession:

911#

Date

The cost of seedlings, hand planting, and site preparation (Spot spraying).

Activity	Quantity	Description	\$/Unit	Unit	Total
Nursery stock	1500	3+0 white pine	\$ 0.45	tree	\$ 675.00
Nursery stock	1500	2+0 black walnut	\$ 0.95	tree	\$ 1,425.00
Nursery stock	1500	2+0 red oak	\$ 1.15	tree	\$ 1,725.00
Total Nursery Stock	4500				
Site Preparation	4	ha brush hogging	\$ 140.00	ha	\$ 560.00
Planting	4500	hand planting	\$ 0.30	tree	\$ 1,350.00
Tending	4500	herbicide spot spray	\$ 0.30	tree	\$ 1,350.00
					\$ -
					\$ -
					\$ -
		Total Operational Costs and Planning			\$ 7,085.00
		PDA Administration Cost	\$ 0.10	0	\$ 450.00
		Total Project Cost			\$ 7,535.00
		Cost per tree	\$ 1.67		
		Costs: Landowner contribution (.15/tree)	\$ 0.25	0	\$ 1,125.00
		FO Eligible contribution/tree	\$ 1.41	0	\$ 6,345.00
			\$ 1.66		\$ 7,470.00
		Residual Owing			\$ 65.00
		Additional Contributions			
		Additional Landowner Contribution			\$ 1,000.00
		OS			\$ 235.00

Schedule G, Appendix B: Sample Invoice Summary

Downloaded from the Forests Ontario online reporting system for all funding categories (i.e., site plans, post plants, survival assessments and refill)

PLANTING INVOICE SUMMARY

Planting season: 2022
Grouped: January 1, 2022

Program: Forests Ontario's 50 Million Tree Program
Delivery agent: [PDA NAME]
Contact: [PDA CONTACT NAME]
Phone: [PDA PHONE NUMBER]
Email: [PDA EMAIL]

Cost Details

Property Code	Property	Seedlings	Rate	Total
2021.001	[LANDOWNER NAME]	10000	\$ 1.360	\$ 2,000.00
Totals:		10000		\$ 2,000.00

** All monies received from Forests Ontario are inclusive of all applicable taxes.*

Deposits already paid against the following properties have been subtracted from these totals:
2021.001 - \$ 11,600.00 [

I hereby certify that as stipulated within the Forests Ontario's 50 Million Tree Program Planting Delivery Agency Agreement:

- a. All sites funded by the Forests Ontario's 50 Million Tree Program meet the Site Selection Criteria.
- b. the above information is accurate, and all planting has been done in accordance with the above Agreement.
- c. All Landowner Agreements, Site Plans, Post Plant Reports, Assessments, maps, and other related information have been completed and are available for review by Forests Ontario

Planting Agency Representative (printed): _____

OPFA Member (printed, if different from PDA Rep):

OPFA Signature: _____ Date: _____
(must be signed by an Associate (within scope) or Full member of the Ontario Professional Foresters Association)

Schedule H: Nursery Reporting

Stock deposits of \$0.25 per seedling were made to the three partner nurseries (Somerville Seedlings, Pineneedle Farms Ltd, and Ferguson Tree Nursery) for seedlings that will be planted under the 50 Million Tree Program in 2022. It is common for Planting Delivery Agents to order stock from the partner nurseries for projects outside of the 50 Million Tree Program. To keep track of what stock each Planting Delivery Agent is ordering for Forests Ontario programs (including Over the Counter), each company/organization is asked to fill out the form in Schedule H, Appendix A. Stock will be purchased from each partner nursery at a discounted rate to balance out the \$0.25 deposit that has already been made. Once site plans have been approved, the remainder of the site plan funding will be paid out ($\$0.25 + \$0.91 = \$1.16$).

