

**Tree Research & Education Endowment Fund (TREE Fund)**  
**Sample Grant Agreement**  
**Research Grants**

Grant #: *(To Be Determined)*

**Scope of Agreement:** By its signature on page two of this agreement, *(University or Institution)* accepts grant # *(to be determined)*'s terms and conditions, which govern the payment and use of any funds granted by Tree Research and Education Endowment Fund, hereafter "TREE Fund." This agreement is considered to include the initial request for proposals, the supporting documentation provided with the grant application, and any supplemental information contained in the award notification document accompanying this agreement. *(University or Institution)* is responsible for the expenditure of funds and for maintaining adequate supporting records consistent with generally accepted accounting practices. *(University or Institution)* must notify TREE Fund immediately should there be any change in or challenge to the organization's tax status.

**Use of Funds:** Funds provided by this grant and any income earned thereon may be spent only in accordance with the original grant request and budget as submitted to TREE Fund, unless amended by this agreement. Any variation in the project or budget must be submitted to and approved in writing by TREE Fund in advance of changes being implemented. No funds provided by TREE Fund may be used for any political campaign or to support attempts to influence legislation of any governmental body other than through making available the results of non-partisan analysis, study and research. Any grant funds or income earned thereon not expended for defined purposes of the grant must be returned to TREE Fund.

**Reporting Requirements:** The Executed Agreement, along with an Executive Summary of the project in layman's terms and the Principal Investigator's photo must be uploaded via TREE Fund's online portal at *(to be determined)* within two weeks of grant award notification. Interim payment, if applicable per Payment Terms below, will be made upon receipt and approval of an interim report describing the program's progress against the goals and objectives defined in the original proposal. Final payment will be made upon receipt and approval of a final report documenting the results achieved and practical or applied outcomes anticipated. The final report must include a financial statement comparing the original budget to actual expenditures, an Executive Summary written in layman's terms summarizing findings and potential impacts on the work of tree care professionals, and at least two high resolution photos suitable for publication. The final report must supply sufficient information for TREE Fund to determine that the grant was used for the purposes intended and for TREE Fund to fulfill its own public reporting requirements. Templates of interim and final reports may be viewed at *(to be determined)*.

**Payment Terms:** This grant will be paid in *(to be determined)* installments. The first payment in the amount of *(to be determined)* will be sent upon receipt of an executed copy of this agreement and related documents, indicating that the institution receiving the funds accept the terms and conditions of this grant. An interim payment in the amount of *(to be determined)* will be sent upon receipt and approval of an interim progress report due *(to be determined)*. The final payment in the amount of *(to be determined)* will be sent upon receipt and approval of a final report due *(to be determined)*.

**Liability:** Each party to this Agreement shall be solely responsible for any and all actions, suits, damages, liability or other proceedings brought against it as a result of any alleged negligence, misconduct, error or omission of any of its officers, agents or employees engaged in this Agreement's defined scope of work, and each shall continue to enjoy all rights, claims and defenses available to it under law.

**Publicity:** The Principal Investigator must submit findings for publication to relevant professional journals, i.e. *Arboriculture and Urban Forestry, Urban Forestry & Urban Greening, Arboricultural Journal, Trees: Structure and Function, Journal of Horticultural Science and Biotechnology, Plant Pathology, Hortscience, Horticultural Science, Sustainable Development, Landscape and Urban Planning, Journal of Urban Health, Environment and Urbanization, Urban Ecosystems*, etc. TREE Fund is a public 501(c)3 trust tasked by law not only with funding scientific research, but also disseminating its results. Widespread publicity for grants issued by TREE Fund has direct positive impact on all initiatives designed to secure funding for future research and education projects. *(University or Institution)* and *(Principal Investigator)* agree to credit TREE Fund at conference presentations, in press releases, programs, announcements, feature stories, and print materials produced in conjunction with this grant. A TREE Fund slide is provided with this agreement to support consistent distribution of the trust's mark.

### ACCEPTANCE

For: *(University or Institution)*

TREE Fund

\_\_\_\_\_  
Print or Type Name

\_\_\_\_\_  
J. Eric Smith, President and CEO

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date