



12 Steps for Planting a Tree

Materials

- Tape measure or yard stick
- Metal skewer, coat hanger, stout wire, or pointed screwdriver
- Shovel, spade, iron rake, wire rake, crow bar; backhoe for larger trees
- Sharp knife or scissors
- Hand pruner—*bypass* type, pruning saw, loppers
- Water supply
- Mulch to provide a 2-4 inch layer over the planting area
- Large-gauge wire cutter if Balled and Burlapped
- Hand saw if containerized and the main root system is more than 1 inch below the soil surface (Step 3). An inexpensive folding pruning saw works well, but any saw would work.

1. Move the tree to its planting site

Carry your tree by its root package (ball or container) - not the trunk!

2. Remove trunk and branch packaging

Once the tree is at its planting site, remove the trunk wrap, any twine around the branches and any labels/tags. Leave any root packaging in place for now.

3. Find the trunk flare

The trunk flare is where the trunk expands at the base of the tree and starts to curve (See illustration). In the case of Balled and Burlapped (B&B) and containerized trees, the trunk flare may be buried under excess soil.

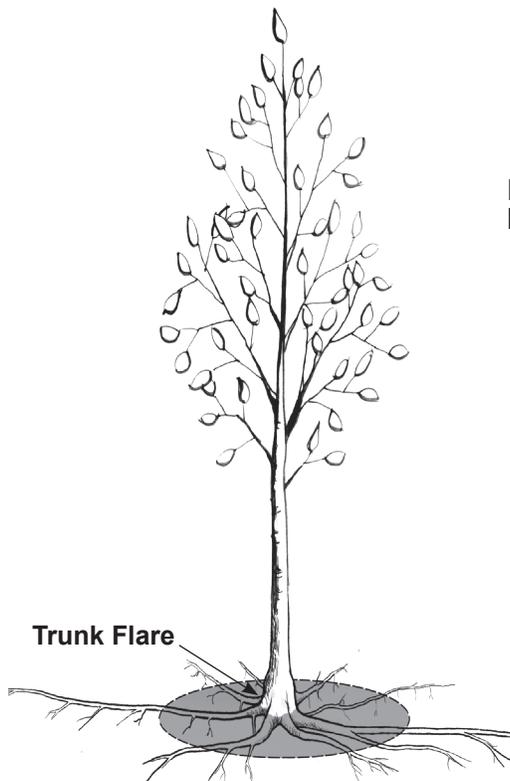
B&B trees: probe the root ball with a stiff wire to find the trunk flare/top roots and estimate how much soil will need to be removed, if any.

Containerized trees: remove the entire container. If needed, pull or cut the soil off the top of the root ball until the trunk flare is found.

If the top roots are more than 4 inches below the top of the root ball, consider returning the tree to the place of purchase.

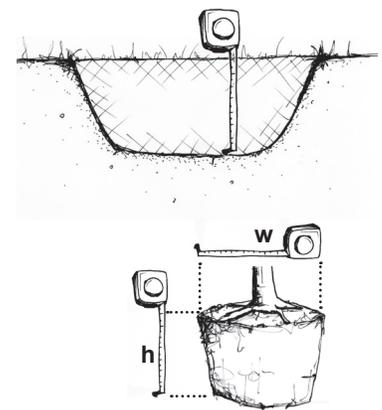
4. Determine how deep and wide to dig

Measure the height of the root ball. Adjust downward if you had to dig into the root ball to find the flare/top roots. The depth of the planting hole should be no greater than the height of the root ball. Measure the approximate width of the root ball. Add two feet to this, or more depending on if your soil is hard (clay or compacted). This is approximately how wide you should dig your hole to give yourself enough room to work.



5. Dig a hole to the dimensions from Step 4

Break up compacted soil and then dig the hole ONLY as deep as the root system (NO deeper!). Loosening the soil beneath the tree will cause the tree to settle and become planted too deeply.



HOLE DEPTH = height of root ball (h)
HOLE WIDTH = width of root ball (w) + 2 feet

6. Put the tree into the hole

This is labor intensive work. Be careful when moving the tree and make sure you have enough helpers. Bare root/containerized tree: Place the tree facing the desired direction into the hole. If the hole is too deep, take the tree back out and put more soil in the bottom of the hole. Compact this soil so that the tree won't settle deeper into the hole.

Lightly pack some soil around the base of the roots to hold it in position.

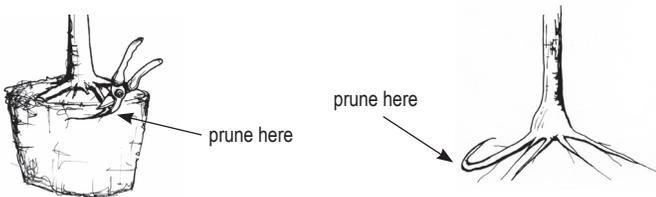
B&B tree: Carefully slide the tree facing the desired direction into the hole. A shovel or spade is useful in straightening the tree out once in the hole. Stabilize the tree by packing just enough soil around the base of the root ball.

7. For B&B trees, remove root ball packaging

A root ball should remain a root ball. If it starts to fall apart as you take off the wire and burlap, backfill the hole with enough soil to stabilize it. Then carefully remove the wire and burlap, and backfill as you go to keep the root ball intact. Using gloves and heavy gauge wire cutters, cut vertically up the side of the wire basket and remove the wire. Cut and remove as much burlap as you can from the root ball. Make sure nothing is left wrapped around the trunk. Carefully, pull back all of the soil that is above the trunk flare. Level the soil out across the top of the ball. The base of the aboveground portion of the tree should be about level or a touch above the level of the surrounding soil.

8. Remove problem roots

Wearing gloves, remove all small roots above the main root system with a hand pruner. Examine the main root system for roots that extend out but then turn to the side or back towards the trunk. Prune these roots at the point where they turn.

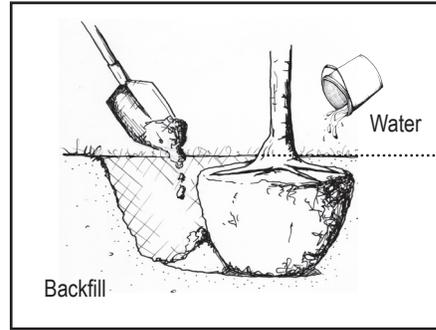


9. Backfill with the same soil or amend as recommended by the soil test

Make sure the trunk is straight. Put the original soil back in the hole, breaking up large clods, and working it in with your hands or a shovel.

10. Water

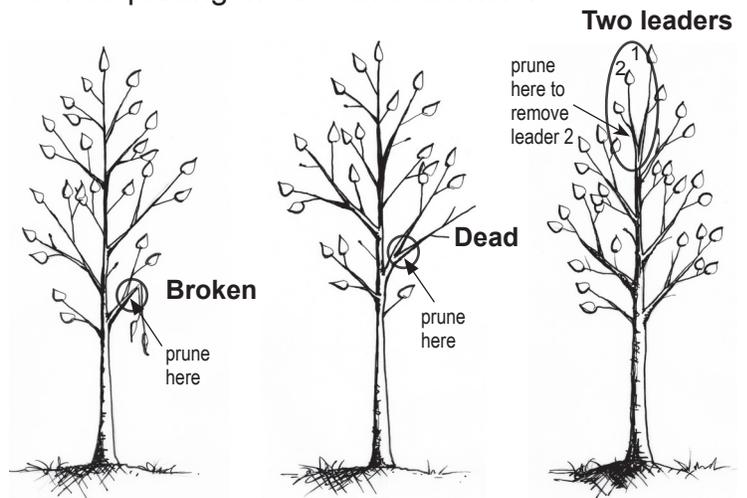
Thoroughly water the root ball and entire backfilled area to fill any air pockets and allow the soil to settle. If desired, mound a 3-inch berm on the perimeter of the planting hole to retain water.



Make sure the trunk flare is level to or a touch above the surrounding soil.

11. Prune critical branches and no others!

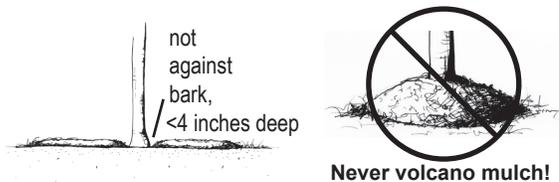
Prune only branches that are broken or dead. You may also remove competing leaders, if present. Most trees should have one central leader. If there are two or more leaders, choose which one you want and remove the other(s). Note: You may need to do some of this work before placing the tree into the hole.



12. Mulch

Put a 2-4 inch layer of mulch over the backfilled area. Pull mulch away from the trunk so that none touches the bark.

By blocking sunlight from reaching the soil, mulch hinders the growth of weeds and helps keep string trimmers away from thin young bark.



Do you stake the tree?

Stake the tree only if the roots are loose, the trunk bends excessively or the site is very windy.