

S.O.G. 406
Planting Details: Trees and Shrubs
Handout

SMALL TREE and SHRUB PLANTING

1. Trees and shrubs can come from the nursery in one of three ways: ball and burlap, container or bare root. They are best planted in late fall or early spring when the plant is dormant and the ground is not frozen. Before planting, have the utilities dept. locate underground utilities.
2. Ball and Burlap: the roots, with its ball of soil is wrapped in burlap, which is then reinforced with a rope or wire basket.
 - A. Dig a saucer shaped hole about three times wider than the root ball.
 - B. Position the tree in the hole, lifting it by the root ball.
 - C. The root collar should be about two inches above ground level.
 - D. Remove the top 2/3 of the wire basket.
 - E. Backfill the hole with the original soil, adding an amendment if necessary.
 - F. Add a collar of dirt around the tree to form a water retaining basin, about three times the diameter of the trunk.
 - G. Place pine straw mulch around the drip zone of the tree up to the water retaining basin, about three inches deep.
 - H. Water it thoroughly.
 - I. Stake and guy it if it cannot stand upright by itself.
3. Container: the tree or shrub comes in a container or pot.
 - A. Dig a hole as deep as the container and about two times the width of the container. Loosen the soil well up to three feet from the center of the hole.
 - B. Remove the tree or shrub from its container being careful not to damage the roots.
 - C. Tease the roots loose, releasing knots and kinks. Any that cannot be straightened out should be pruned away.
 - D. Set the tree or shrub in the hole, carefully spreading the roots out so there is no doubling back or kinking. If need be, enlarge the hole to accommodate the roots.
 - E. Backfill the hole with the container's dirt with the original dirt, adding an amendment if necessary. Firm it as you go with your hands, to eliminate possible air pockets in the roots.

- F. Add a collar of dirt around the trunk to retain water.
 - G. Place pine straw mulch around the drip zone, but not against the trunk.
 - H. Water it thoroughly.
 - I. Stake and guy it if it cannot stand upright by itself.
4. Bare roots: The tree or shrub comes with bare roots and no container.
- A. Make sure the roots are kept wet. If you cannot plant it right away, then “heel” it in a shady place by placing it on its side in a shallow hole, covered with moist sand or sawdust.
 - B. Dig the hole wide enough to easily accommodate the root system without having to fold or kink the roots.
 - C. Thoroughly loosen the soil in the hole.
 - D. In the bottom of the hole, make a cone of dirt for the roots to sit on so they can spread out into the hole with no air pockets.
 - E. If some roots are damaged or kinked, prune them back.
 - F. Backfill the hole, firming the soil with your hands as you go, to eliminate air pockets in the roots.
 - G. Add a collar of dirt to form a watering basin.
 - H. Place pine straw mulch around the drip zone but not against the trunk.
 - I. Prune any damaged branches.
 - J. Stake the plant and guy it if it cannot stay upright by itself.
5. Staking & Guying for trees or large shrubs:
- A. Only if the plant cannot stand on its own, and only long enough for it to be able to stand on its own.
 - B. Three Stakes equally spaced around the plant, at least 18” deep.
 - C. Three Guy Wires from the plant to the stakes.
 - 1. Thread a one-foot piece of hose on each guy wire.
 - 2. Place the hose around the plant trunk at the lowest branches.
 - 3. Anchor the loose ends of the wire to the stakes, tightly enough to remove the slack.
 - 4. Remove the stakes and guys before the plant’s trunk become girdled.