



Evergreen Shade Tree Planner: From Selection to Success

This checklist helps homeowners navigate the process of choosing and planting the right evergreen tree without the stress of guesswork. Use this list before heading to the nursery to ensure you invest in a tree that survives and provides the cooling relief you need.

Phase 1: Assessing Your Site

Before buying anything, understand exactly what your landscape can support to avoid costly mistakes later.

- Confirm the USDA hardiness zone for your specific zip code to ensure winter survival.
- Map the sunlight exposure in the desired spot specifically at 3 PM in July.
- Test soil drainage by filling a hole with water and timing how fast it disappears.
- Measure the distance from the planting spot to the house foundation and ensure it is at least 15 feet.
- Look up and verify there are no power lines or overhangs directly above the planting site.
- Check the width of the available space against the potential mature spread of the tree.

Phase 2: Selecting the Specimen

Use these criteria at the nursery to pick a healthy tree that meets your shade and privacy goals.

- Inspect the root ball to make sure roots are not circling tightly inside the container.
- Check the trunk for any mechanical damage, gashes, or peeling bark.



- Verify that the tree has a single central leader (trunk) rather than a split "V" shape.
- Examine the foliage for uniform color and lack of brown or yellow needle tips.
- Ask the nursery staff specifically about the growth rate per year for that species.
- Select a broadleaf variety if you want denser shade or a conifer for filtered light.

Phase 3: Planting for Longevity

The first hour in the ground determines the tree's future success. Follow these steps precisely.

- Hydrate the root ball thoroughly by soaking it in water before removing the container.
- Dig the hole two to three times wider than the root ball but no deeper.
- Locate the root flare (where trunk meets roots) and ensure it sits slightly above soil level.
- Tease outward any roots that were cramped in the pot to encourage outward growth.
- Backfill with native soil only and avoid adding bags of peat moss or fertilizer.
- Water the soil heavily immediately after planting to remove all air pockets.

Phase 4: Maintenance & Care

Establish these simple habits to maximize growth speed and health in the first two years.

- Apply a 3-inch layer of mulch around the base but keep it from touching the trunk.
- Water deeply once a week during the first summer, even if it rains lightly.
- Monitor for pests like bagworms or mites during the spring season.
- Prune only dead or broken branches during the first year to reduce stress.
- Wrap the trunk in winter if you live in an area with heavy deer activity.