



## Outline for Initial Site Assessment

Time: 1-1.5 hrs

### I. Visiting the Garden

#### Goals

- Set **expectations** for time together  
Example: "This visit will take approx. 1 hr. We want to understand what your goals/use of the garden and areas that would be good for habitat. There are 5 elements that I'll be looking for, for certification (native plants, noxious weeds, stormwater management, habitat and how you take care of your garden/pesticide reduction)"
- **Understand** the participants habitat/gardening knowledge & what those next steps are
- **Identify** area to start and focus habitat work

#### Common questions

*Ask questions that focus on what you're trying to capture in the Site Report*

How long have you lived here?

What's your familiarity with Willamette Valley Natives (scale 1 to 5)?

What's your timeline?

What are your goals for the backyard? How will you use the space?

Are there children in the household, are they gardeners, will they hire a landscape professional?

What types of resources would be helpful?

### II. Sit Down

a. Thank them again for signing up for the program. You'll be spending the next 20 minutes going through the program and resources available after this visit.

b. The Partnership: This program is a really unique program. It's the partnership between two large environmental organizations that work throughout the region, Portland Audubon and Columbia Land Trust. Ask if they are familiar with either organization. Show the organizational handouts in the Resource Binder so they can learn more.

**Portland Audubon:** State Wide Conservation Organization. From their wildlife care center to policy, conservation and advocacy work.

**Columbia Land Trust:** Work along the Columbia River, from John Day to Astoria. Focus on land conservation and to-date, conserved over 27,000 acres along the river.

**Friends of Tryon:** For Lake Oswego sites

***Both organizations want you to know how important the work you do in your backyard habitat plays a really important role in broader conservation work for both organizations. The expertise we bring to large scale conservation has been adapted for you to be most successful in your garden.***

c. **The Goal** of the BHCP is to provide one-stop-shopping for resources and information to help you achieve great success in your garden and for teaching and encouraging your neighbors and friends to do the same. All so we can have a healthy urban landscape, for people and wildlife. Part of bringing all this information to you is through this Resource Binder.

d. Resource Binder

- Start by going through the BHCP information. Go through the **Certification Criteria** and the five elements to certification and how they are interwoven through each level. The more you do, the high level of certification that's achieved. The **Benefits** that you'll receive that are exclusive to this program and the **Landscaper Directory** if they choose to hire a business to help them achieve certification.
- Pull out specific resources that were touched on/mentioned during the site visit walk-through. Popular handouts include the native and invasive weed posters, Metro's Native Plant booklet and the Naturescaping classes.
- Emphasize that the plants that qualify for certification are in the Portland Plant List. Use the Metro Native Plant booklet PPL coding under ecosystem and/or show the Portland Plant List book.

III. Next Steps

- Summarize the next steps that you've both come up to achieve certification.
- Those next steps will be detailed in the site report that's completed and will be sent to you via email. Ask the participant to read through the report to ensure it captures everything that was discussed today. There will be instructions in the email sent that asks for them to sign the report and return it to Susie Peterson with Columbia Land Trust.
- Review the resources that were needed that will be included in the Site Report
- Remind them the quarterly Enews that will be chock-full of current resources will be sent via email in addition to our exclusive native plant sales

Thank them again for signing up for the program & excited about their participation and what they'll create in their garden.