



How to Conduct a Backyard Habitat Certification Determination Visit - 2019

Background: Steps to Certification

1. Participant signs up, pays a one-time \$35 fee, and receives an *initial site assessment* and follow-up *site report* from BHCP Habitat Technician. Habitat Technicians are staff.
2. Participant has a myriad of tools and resources to support them toward certification; resource packet, site report, online resource library, quarterly e-news, Open Garden Project, plant sales and other special events, phone call and direct email follow-up, etc.
3. When they are ready to get certified, they notify program staff.
4. Program staff organize a volunteer (you!) that lives near them to verify the property meets certification criteria and to collect basic data about the site.

Certification Checker Responsibilities and Expectations

- As a certification checker, you are responsible for maintaining strong communication with JP about the number of certification visits you are able to manage. For example, tell him if you can do one visit per week or two per month. Also, tell him if you're going out of town for more than two weeks so that he knows not to set you up on any yard visits.
- JP puts volunteers directly in touch with participants via an "intro email". This is a stock email (but it appears personal) and it includes the original site report as background info.
- Please read the site report *before* contacting the property owner. Please note, we've improved the site report over the years, and each technician has their own personal style. You may see several versions of the site report.
- Excellent customer service and professionalism is imperative. We expect you to contact the participant by email and/or phone **within 2 days** of when JP sent the intro email.
- When scheduling, strong communication is crucial. Make the email short and sweet. Introduce yourself, express excitement in seeing their yard. Offer several potential dates/times for the visit. Ask for their availability.
- Here's an example scheduling email:

Hello Linda,

My name is Nikkie and I'm a volunteer with the Backyard Habitat Certification Program. I'm very excited to schedule a time to come and visit your garden and hopefully award your habitat certification. Here's some dates/times that work for me:

- *Mon, 3/20 – morning only*
- *Sat, 3/26 – anytime*
- *Tues, 3/29 – afternoon only*

Do any of those options work for you? If not, please let me know a couple dates/times that fit your schedule.

- If the participant doesn't respond within a few days, try calling them. Leave a message that references your email and encourages them to schedule with you.
- You may need to email them again. Please keep on it, until the visit is set.
- If you try contacting them three times, and they never respond, let JP know – so he can also give the participant another nudge.

What to Bring to the Certification Visit

- Certification determination form – mostly blank, but with these items from site report:
 - Name, address, contact info (in case you get lost or are running late)
 - Any noxious weeds present in initial assessment
 - Plant-able area
- Volunteer Manual (preferred) or, at a minimum, the certification criteria sheet
- Wear your BHCP volunteer badge
- Certified Backyard Habitat sign
- Camera or phone with camera

How to Conduct the Certification Determination Visit

1. Arrive on time.
2. Knock on the front door.
3. Introduce yourself as a volunteer with the Backyard Habitat Program.
4. Invite the participant to give you a tour of their yard. There is no need to go inside.
 - **General** - Use the certification form to guide your visit, as needed. Be encouraging and focus on the positive things.
 - **Noxious weeds** - Keep an eye out for noxious weeds, especially those that were listed in their site report. Indicate any weeds still present, on the certification form.
 - **Native plants** - Make your best estimation of square footage of area naturesscaped with native plants as well as the canopy levels. Record this data on the form.
 - **Wildlife stewardship** - Acknowledge the wildlife stewardship menu items you see as you're touring the yard and record them on the data sheet. You may need to ask about some of the items that you can't see (i.e. cats) later.

- **Stormwater management** - Acknowledge the stormwater management menu items you see as you're touring the yard and record them on the data sheet. You may need to ask about some of the items that you can't see (i.e. maintenance habits) later.
 - **Pesticides reduction** - This certification element requires an important conversation with the participant. The best way to open the conversation is by asking "Tell me about what types of yard and garden products you use." You can follow-up by asking specific questions such as; "What do you do to control slugs? Moss? Garden weeds? Fungus? To maintain your lawn?" Based on this conversation, do your best to assess which pesticides reduction level to select. If they use products you are unsure of, you can either look them up in [Grow Smart Grow Safe](#) together, or recommend that they look them up to determine their toxicity later.
 - **Final Questions and Data Collection** - Go through the wildlife stewardship and stormwater management menu items together. Ask about and record data on the items that were not visible. Ask about and record the number of native trees and shrubs planted since they first began working toward certification. Please note, some people plant native plants for certification *even before they enroll in the program*.
5. If the property meets the criteria, present the participant with their new certification sign!
 6. Show them the place for the sticker. Tell them it will come in the mail in about one month.
 7. Take a great, clear pic. Participants signed a photo waiver when they enrolled. Capture blooms, pets, and kids (if comfortable); tilt the sign downward to avoid the sun's glare.
 8. End the visit clearly and positively. Be sure to congratulate them and recap the most positive aspects of their yard. As you leave the property, the participant should know exactly the certification level they achieved (you are making the determination!). They should feel a strong sense of accomplishment and completion. They should not expect any additional follow-up from you or program staff.

Fielding Questions from Participants during a Certification Visit

During a certification determination, participants may ask you for information that you don't know or are not prepared for. That's ok – we're always learning!! We only expect you to perform a positive, encouraging certification determination, not to have all of the answers. Our program is about empowering participants to use the resources, discounts, and incentive we provide to dig in, get dirty, and eventually building the amazing habitat that gets them certified. When in doubt:

- If you have time/interest, look through the volunteer manual together to find the answers
- Refer participants to the resource packet they received in their initial assessment
- Refer them to their personalized site report
- Refer them to our online resource library and/or the program's general website
- Refer them to the Friends of Backyard Habitats Facebook group (see text box)

After the Certification Determination Visit

9. Some volunteers choose to follow-up the visit with eloquent, info-packed emails. You are welcome to do this, but please avoid promising any follow-up unless you're 100% sure you will follow-through.
10. After the visit, enter data and upload the photo online as soon as possible:

<https://backyardhabitats.wufoo.com/forms/certification-determination-form/>

