Conservation Certification Reviewer Guidance

Version 1.5 | February 2017

Introduction

This document is an resource for Conservation Certification Reviewers (Reviewers) to support them with reviews. Additional support information can be found in the project scoring sheets and glossary.

WHC Conservation Certification is in its nascent stages. Organizations are either new to WHC or transitioning from WHC's previous structure and systems. The review process supports this learning, while also holding organizations accountable for their conservation practices and for following the Conservation Certification standard's requirements.

Reviewers should focus on the quality of conservation practices themselves. Grammar, typographical errors, mislabeled documents and other errors of composition should not influence the Reviewer's decisions.

This WHC blog discusses this supporting nature of reviews in more detail.

General policies

The following guidance is relevant to all project themes.

Program structure

Conservation Certification was designed to allow for multiple project themes (e.g. Grasslands, Pollinators, Formal Learning) to be implemented at a site. This collection of projects is a program. Applications that do not follow this structure should be reviewed based on the merit of the conservation practices. Comments should be left noting that the applicant did not follow the proper structure and that it must be corrected in the next application.

Score all Reviewer questions (questions on the project scoring sheet) in a project regardless of the quality or completeness of the application.

Score all actively managed projects. Some habitat tiles in the WHC Conservation Certification website (website) will have a black header; this means that the habitat is *not* actively managed but relates to another project. For these black-tiled projects, the Reviewer will not score the project but will instead look at the overview information provided there to help inform their evaluation of the associated species or education project(s). Such a not-actively managed project will not be listed in the program summary sheet.

Certification term (time period)

For renewal applications, the review is focused on what was done since the program was last certified, or during the certification term. If the term does not appear in the program information (click *Program i button* on the website) assume it is three years. For initial applications, all information is evaluated, but some fields (such as hours) will be limited to the previous three years.

Documentation (e.g. attachments, uploads)

Several application questions require that documentation be uploaded. Application questions that state that documentation should be uploaded *if applicable* do not require documentation to achieve a Reviewer score greater than zero. Where *if applicable* is not stated, documentation must be provided to achieve a Reviewer score greater than zero for that question.

Unless specified in the scoring criteria, documentation can be in any format. This includes photos, monitoring logs, videos, etc. However, monitoring documentation must be in a form that allows for comparison of change over time in order to receive a Reviewer score greater than zero.

Documentation must be current with regards to the application question it is supporting. For example, an inventory of plants from five years ago is not current (thought it could serve as useful baseline information). A corporate statement that was online at the time the application was submitted, is current. Photos and other visual information that is not dated can be verified with the file's metadata. This if found by right clicking on the document file, selecting properties and searching for information on the date the file was created and modified.

Detrimental practices

If the applicant is implementing practices that may be harmful to the conservation of biodiversity (e.g. removing native songbirds from bluebird boxes), please write a brief, constructive note with the reason the practice may be detrimental in the yellow "Reviewer comments" cell. Just as a point of information, detrimental practices are incorporated into Reviewer scoring. For example, use of non native species will lower scores and could disqualify a program from receiving certification.

Nested questions and increasing detail

Application questions within branches (e.g. monitoring, management) are sometimes nested. One general question, perhaps a check box or yes/no question, is often followed by a request for a text description about the previous question. For example, if a user answered "yes" to one question (e.g. 13) they may be prompted to answer question 13a. A "no" answer may prompt them to answer question 13b.

This nesting affects the value of the information in applications and how conflicting information should be addressed.

Conflicting information

There may be conflicting or inconsistent information within nested questions. For example, the applicant may have selected the wrong checkbox and put the correct information in text. Reviewer scores are based on the most *detailed* fields.

Level of detail	**Question type**
Low	Checkbox, radio button, yes/no
Medium	Short text box
High	Long text box
Highest	Uploaded document

For information that conflicts in detailed fields across projects (e.g. uploaded documents from two different projects in one program), Reviewers should use their best judgement in determining appropriate Reviewer scores.

Missing information

If some of the application questions are not answered or are not answered in full (i.e. not enough information to properly evaluate), Reviewer scores will be based on the information provided. For example, if a plant list was stated as "lily, rose, bush" the Reviewer score will be based on how many of these species are native. If the applicant provides a common species name that is distinctive enough to look up the scientific name, it may be used to evaluate the native status of the plant even though the applicant was asked to provide the scientific name.

Only the information provided will be used as basis for scoring; Reviewers do not infer information. For instance, if a plant list said "lily, rose, dogwood" with no further information, the Reviewer will not infer that applicant planted one of the native lily, rose or dogwood species of their region.

Superfluous information

Reviewer scores are limited to the specific criteria provided. Information that is not applicable to the criteria does not impact the Reviewer scores.

Branches in all themes

The Reviewer questions are organized into branches (e.g. scope, monitoring, management). The information below is applicable specific branches across all themes.

Monitoring (habitat and species themes)

Comments in section apply to habitat and species project themes. For guidance on monitoring in education themes, please see the relevant project scoring sheet**.**

Baseline

Like all monitoring data, baseline data needs to allow for comparison of biodiversity values over time (i.e. it must include dates). It can take various forms (including photos). Baseline data may differ from subsequent monitoring data as a project develops more sophisticated sampling techniques. For example, a project may start with photo lots of grassland, then in later years, hire a biologists to record individual species.

Monitoring protocol/plan

Monitoring protocols (also called monitoring plans) may consist of a known monitoring protocol (e.g. citizen science protocol, protocol described in a peer-reviewed journal article) or be designed specifically for the project. It need not be formal, but it much provide enough information to determine what monitoring was done, when it was done and how it was done.

A monitoring protocol is *relevant* when it coheres with the project type. For example, a monitoring protocol for a pollinator project that measures abundance of native pollinators is relevant. An irrelevant protocol for a pollinator project might measure abundance of bird species, or non-native pollinators such as honey bees.

A monitoring protocol is *scientifically rigorous* when it incorporates at least one of the following:

1. Credible, repeatable, and logical, and results in quantitative data that can be analyzed
2. Complex, measuring multiple environmental aspects (e.g. species, nutrients, phylogenetic diversity)

3. Complex, examining the influences of outside sources (e.g. weather, pollution) on the project
4. Analyzed with stated geographic and temporal dimensions

Implementation

Assessment of implementation—a measure of the quality of monitoring—is based on documentation. Applications do not need to provide every record from the monitoring efforts. They must provide a representative sample that illustrates the quality of their monitoring over time.

Evaluation

Reviewer scores are based in part on whether the application describes next steps that will be taken as a result of the monitoring. This could include "no changes needed." The application must note the next steps needed (or not needed) in order for the Reviewer score to be a two.

Calculating hours (employees or partners)

The average number of hours per year is calculated in two steps:

Step 1: Sum all of the recorded hours (i.e. planning and on the ground implementation).

- If only the current year's data exists, use this data and move to step 2.
- If data from previous years exists, only incorporate the current year's data if it is equal to or greater than hours from a previous year. This serves to "normalize" data across applications that may or may not prorate hours annually.

Step 2: Divide the sum by the number of years. This average is entered into the project scoring sheet.

Example 1

Year	**Planning and Preparation**	**On the ground work**	*Total hours*
2015	25	25	*50*
2016 (current year)	25	20	*45*
Current year's data is less than all previous years' data. Do not include current year's data. The average of total previous years is 50.			

Example 2

Year	**Planning and Preparation**	**On the ground work**	*Total hours*
2014	20	20	*40*
2015	25	25	*50*
2016 (current year)	25	25	*50*
Current year's hours are greater than a previous year's;. Include all three years in average (47 hours).			

Example 3

Year	**Planning and Preparation**	**On the ground work**	*Total hours*

2015	25	25	*50*
2016 (current year)	25	25	*30*
Current year's data is less than all previous year's. Do not use the current year's data. The average for previous year's data is 50.			

Additional notes

- For programs applying for renewal of certification, only hours from the current certification term are included in the calculation. (See the *Program I button* on the website to determine if program is currently certified. If it is certified, it is a applying for renewal.) For example, if a program received certification in 2014 and is reapplying in 2016, only hours from 2015 and 2016—the current term—are included in the calculation.
- For programs applying for initial certification, up to 3 years of data—the current term—is included in the calculation.

Alignment

Large scale initiatives
Large scale initiatives include regional voluntary initiatives and do not include corporate commitments or large scale implementation of WHC programs. For example, a program's conservation projects may be designed to comply with a regional conservation plan or regional environmental education effort.

Corporate commitments
Corporate commitments must be specific to the project's theme (e.g. Pollinators, Grasslands). This corporate commitment cannot be solely financial (e.g. grant to a local conservation organization). The evidence provided must be an official organizational (corporate) document (e.g. on letterhead, website).

Third party certification
To be accepted as valid third party certification, it must meet one of the following requirements:

1) Support WHC's conservation or conservation education objectives
2) Demonstrate efforts to conform with key principles of sustainability standards (e.g. transparency, accessibility, truthfulness), evidenced by actions including all of the following:
    a. Stakeholder engagement on the development of standard
    b. Documentation of activities in an application
    c. Scoring criteria published on the internet
    d. Independence from the applicant through management by an independent body

The certification must be mentioned in the project application. Examples of acceptable certification include:

1. Arbor Day Foundation's Tree Campus USA program
2. Audubon Cooperative Sanctuary Program
3. Audubon Partners for the Environment Program
4. Chicago Wilderness Excellence in Ecological Restoration
5. Green Development Initiative
6. Forest Stewardship Council
7. Food Alliance Program
8. North Carolina Native Plant Society's Native Plant Habitat Certification Program
9. North Carolina Wildlife Federation's "Wildlife and Industry Together" (W.A.I.T.)
10. MassWildlife Certification of Vernal Pool Habitat
11. Sustainable Forestry Initiative
12. Sustainable Sites Initiative

Branches in habitat themes

This guidance is for habitat themes (e.g. Forest, Desert).

Locally Appropriate

Locally appropriate in habitat themes is evaluated using the species inventory that is typically an uploaded document. Note that:

- No supporting evidence except for the inventory is needed.
- The inventory must be current. Generally this is defined as being no more than five years old for forestry projects and no more than three years old for all other habitat themes. Reviewers will use their professional judgement to determine if the list is current.

Native species must be native to the region. They do not need to be native to the state/province specifically. Useful resources to determine if plants are native in the U.S. are: NatureServe Explorer, Lady Bird Johnson Wildflower Center, and USDA Plants Database.

For Cave, Desert Marine Intertidal and Rocky Area projects, vegetation may play a reduced (or absent) role. In these cases, animal species can be appropriate indicators of habitat health, serving as proxy indicators of extent and diversity of native species. A list of species found in the habitat should have been provided by the applicant somewhere in the project application.

Branches in species themes

This guidance is for species themes (e.g. Avian, Mammal).

Locally Appropriate

At least one of the targeted species must be native in order to receive a Reviewer score greater than zero. There is no reduction of the Reviewer score if some species are not native.

- Native species must be native to the region. They do not need to be native to the state/province specifically. A useful resource to determine if species are native in North America is NatureServe Explorer.

Specific Threat

This Reviewer question pertains to regional or site-specific threats for the targeted species (e.g. white-nose syndrome for bats, night time building collisions for birds). This Reviewer question does not refer to generalized threats such as habitat loss or declining populations. Answers that are limited to general threats would not receive a Reviewer score greater than zero.

Population Management

This Reviewer question pertains to specific population management methods, generally involving direct manipulation of local populations of the species, that are designed to create or maintain healthy population levels. Examples of population management methods include sustainable hunting, species reintroduction and species relocation. Generalized “supporting” or “increasing” the population do not receive a Reviewer score greater than zero.

Additional questions

Questions about the guidelines for determining Reviewer scores should be directed to the WHC Certification & Technology department at conservationcertification@wildlifehc.org.

The information contained in this document may be modified at any time.

Appendix I: Project theme definitions

A program is composed of one or more projects. These projects are organized into 26 themes, organized in 4 categories: habitat, species, education, and other options. These themes are designed to independently evaluate the conservation practices and impacts of different projects.

Habitat Project Themes

Habitat projects are designed to protect, restore, and conserve the entire biotic community within a habitat type, often through vegetation management. Monitoring may focus on the integrity of the vegetative community, on hydrology or water quality, or on one or more faunal species as indicators.

Deserts

> Deserts are commonly defined as dry regions receiving less than 10 inches of rain per year on average. Deserts generally have sparse plant cover, except in depressions where water accumulates.

Caves and Subterranean Habitats

> Natural caves are underground spaces formed by the weathering of rock. They are unique systems that have immense scientific, recreational and wildlife value.

Forest

> Forests are an ecosystem type dominated by trees that form a continuous stand or are composed of many stands grouped together.

Grasslands

> Grasslands are an ecosystem dominated by herbaceous vegetation – typically grasses and wildflowers – with woody species covering no more than 10-20% of the ground area.

Landscaping

> Landscaping is generally considered part of the built environment, rather than a natural' habitat. However, when designed with biodiversity in mind, it can make valuable contributions to conservation efforts.

Marine Intertidal Project Guidance

The marine intertidal zone is the area of shore between the extremes of high and low tides. It is also known as the foreshore and seashore, and is sometimes referred to as the littoral zone.

Rocky Areas

Rocky habitats are surface areas dominated by exposed rock, such as mountain peaks, inland cliffs, buttes and rocky outcrops.

Wetlands [and Waterbodies]

Wetlands are lands saturated with water permanently or seasonally. Wetlands vary widely due to regional and site-specific differences in soil, topography, climate, hydrology, water chemistry, vegetation and other factors. At this time, the Wetlands theme includes permanent bodies of water such as ponds and streams.

Other Habitats

In case a habitat project does *not* fit into one of the above themes, applicant may fill out questions for Other Habitats.

Species Management Themes

Species projects are those that address the habitat needs of a particular species or group of species.

Avian

Avian species, commonly known as birds, are found on every continent and play important roles in the world's ecosystems and cultures.

Bats

Bats are the only mammals with true flight capabilities. With 1,331 species of bats globally, bats can be found in all regions except the polar regions, extreme deserts, and the most remote islands.

Invasive Species

Invasive species threaten both habitat quality and biodiversity, so their control is vital to the conservation of native habitats and wildlife. Invasive species can also negatively impact human and animal health, and the economy.

Mammals

A mammal is a warm-blooded vertebrate animal of a class that is distinguished by the possession of hair or fur, the secretion of milk by females for the nourishment of the young, and (typically) the birth of live young. This theme covers all mammals except bats.

Pollinator

Pollinators – the animals that move pollen from flower to flower to accomplish fertilization – are vital to the health and economy of the world.

Reptiles and Amphibians

Reptiles and amphibians are important parts of both aquatic and terrestrial ecosystems. Reptiles include snakes, lizards, crocodiles and turtles; and amphibians include frogs, toads and salamanders.

Other Species

Applicants that manage for species not covered by one of the above themes may answer questions in the Other Species theme.

Education and Awareness Themes

Education and awareness projects improve awareness, understanding, and skills related to conservation. These may include service learning as long as there is a stated educational objective. Education projects may take place off-site as long as they are related to a conservation program on site or the region's community need.

Awareness and Community Engagement

Awareness and community engagement projects target a wide variety of learners who attend conservation-themed events and tours involving the corporate habitat.

Formal Learning

Formal learning projects are designed for primary, secondary and college students who are subject to state, provincial or national learning standards. Any formal learning topic, including language arts, visual arts and history can be taught in an outdoor environment.

Training

Conservation training projects help learners acquire knowledge and skills that can be applied to a conservation project or conservation education effort.

Other Education and Awareness

Applicants whose education and awareness project does *not* fit into one of the above themes may answer the application questions for Other Education and Awareness.

Other Options Themes

Other Options projects do not fall into the categories above. Except for Integrated Vegetation Management, they may be classed no higher than contributing.

Green Infrastructure

> Green infrastructure is an approach to mitigating environmental challenges using vegetation, soils and natural processes as part of a living engineered solution.

Integrated Vegetation Management

> Integrated Vegetation Management (IVM) is a system of land management generally associated with infrastructure corridors, now ubiquitous across the landscape, including pipeline, transmission and rail.

Land Conservation Agreements

> Enhanced or permanent protection of corporate lands through land conservation agreements means that companies have voluntarily chosen to temporarily or permanently prevent development of an identified property or group of properties.

Remediation

> Remediation involves the cleanup of contaminants from environmental media such as soil, groundwater, sediment or surface water, with the goal of protecting human health and the environment.

Species of Concern

> Conservation efforts to protect species of concern and their habitats are of particular importance because these species face high risk of further population losses or extinction.

Appendix II: Program Descriptions Writing Guidelines

Program descriptions provide an overview of the program, its practices and impacts. These descriptions are used to promote the successes of WHC members and their conservation efforts. They are important in the overall marketing of WHC and our members.

The program description should include the following:

- Introduction (~100 words)
    - Description of site, if applicable. For example: knowing that a site is a working limestone quarry helps to put the program in context.
    - Description of the conservation objective(s)
- Practices and Impacts (~50 words per project)
    - Bulleted list of the practices implemented and impacts achieved for qualifying projects

Checklist of information to be included

- ☐ Full organization name and subsidiary name
- ☐ Program name
- ☐ History or current use of the site (if provided in the application)
- ☐ Location (city, state/province, country if outside of U.S.). Specificity is helpful (e.g. located in northwest Alabama, located along the Susquehanna River in the Chesapeake Bay watershed, 20 miles from Columbus, Ohio).
- ☐ Size of the habitat
- ☐ Conservation objective
- ☐ List of practices and impacts

To note: Only qualifying projects are described in program descriptions.

Grammar and style

- Ensure names of partner organizations (e.g. coalitions, schools, government agencies) are correct. It may be necessary to check online; do not rely on applications.
- Do not begin the introduction with congratulations (e.g. "WHC congratulates General Motors' Arlington Assembly for achieving certification…).
- When referring collectively to the people who actively manage the program, use the word "team," or a specific name indicated in the application (e.g. Bayer Green Team). Also, "team" should not be capitalized unless it is part of a specific name. Do not use passive or past tense:
    - DON'T USE: "The team has maintained…" DO USE: "The team maintains…"
    - DON'T USE: "They will have completed…" DO USE: "They completed…"
- Ensure proper attribution; a program cannot maintain a project, but a team can:
    - DON'T USE: "the program maintains…" DO USE: "The team maintains…"

- Use only one space at the end of sentences.
- Use lowercase letters for the common names of species.
- Do not include scientific names for species.
- Only use Oxford commas in a complex series.

Tips

The following tips can improve the speed and quality of program descriptions:

- The Conservation Registry contains program descriptions of existing WHC programs. These can help in writing new program descriptions. Please note that these have been edited by people without conservation expertise and may contain information on conservation practices that have ceased. The application contains current information.
- Only utilize the information found in the application and the Conservation Registry. You do not need to search for information on the company and/or their programs online.
- Content is more important than length. Program description lengths will vary based on the individual programs and projects.
- Consider all statements for the Program Description against the listed conservation objectives.
- Focus more on the “Objective,” “Monitoring” and “Other Participant” categories while writing the program summary.
- Write program description immediately after completing the project evaluations.

Example

The 345-word summary below may be used as a template. The summary will include:
Introduction: Description of the site + Description of the conservation objective(s)
Practices and Impacts: List of the practices implemented and impacts achieved.

Colors and notes are for instructional use only; they are not to be included in final summaries.

General Motors Warren Technical Center

Introduction

Description of site

Conservation objective(s)

General Motors Warren Technical Center encompasses 709 acres in Warren, Michigan, approximately 12 miles north of Detroit. It consists of facilities for the design, engineering and testing of GM vehicles. The site is located in a once-rural area that is now an expanding urban community, making the ongoing efforts to improve habitat of pivotal importance to local wildlife. To this end, the team actively manages 78 acres of the property to benefit wildlife. Habitats found on the site include man-made lakes and ponds, a tree buffer surrounding the facility's perimeter, and large expanses of grasses with interspersed low shrubs.

Practices and Impacts

Practices in purple

Impacts In blue

- The initial habitat enhancement project was initiated on an 8-acre parcel of land that was used as a parking lot. With employee and community support, this area was transformed into a park for the enjoyment of employees. Additional landscaping to benefit wildlife was installed in 2013, with the creation of a pollinator garden which was planted with the help of schoolchildren, aiding in their STEM awareness.
- Twenty acres of no-mow zones along the front of the property were established, reducing the carbon footprint, providing food and cover habitat for insects and birds and reducing water use.
- Team members regularly engage in citizen science projects that monitor birds. Since 2010, the team has surveyed 44 bird species bird species and submitted their sightings to eBird. The team has also monitored nest boxes for songbirds, eastern screech owls and wood ducks and contributed this valuable data to NestWatch.
- The team regularly monitors fish populations in one of the lakes. Starting in May 2013, volunteers have fished the lake to assess fish species composition, size and health, and use the accumulated data to recommend potential management techniques to improve lake ecosystem health.

  A 0.25-mile nature trail was constructed in 2013 to improve access to this area for invasive species monitoring and cataloguing. Debris and trash are regularly removed from the area, and native plants were introduced along the trail. Using techniques such as selective herbicide application and hand-pulling, the team continues to control non-native invasive plants.