



Reviewer Guidance

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INTRODUCTION

Conservation Certification Reviewers (Reviewers) have several documents that can support them with reviews. The majority of this information is located in the project scoring sheets and glossary. This document is an additional resource.

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.

ALL PROJECT THEMES

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.

Complete review

Score all Reviewer questions in a project regardless of the quality or completeness of the application.

Certification term (time period)

For renewal applications, the evaluation is focused on what was done since the program was last certified. For initial applications, all information is evaluated, but the focus is on more recent information and some fields (such as hours) will be limited to the past three years. Details on the

information to be evaluated is specified below and in application questions. Reviewer questions and the criteria for Reviewer questions.

Documentation (attachments, uploads)

Several application questions require documentation be attached or uploaded. Application questions that state that documentation should be uploaded “if applicable” do not require documentation to achieve a Reviewer score greater than zero.

Unless specified in the scoring criteria, documentation can be in any format. This includes photos, monitoring logs, videos, etc. However, this documentation must allow for comparison of change over time in order for 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 (it could serve as useful baseline information), but a corporate statement that was online at the time the application was with commitment to the habitat restoration is. Photos and other visual information that is not dated can be verified with the file’s metadata. This is 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 and possible corrective actions in the yellow “Reviewer comments” cell. Just as a note, 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 around a category (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.

Conflicting information

There may be conflicting or inconsistent information with 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 more detailed fields.

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

For information that conflicts in detailed fields across projects, 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 said “lily, rose, bush” the Reviewer score will be based on how many of these species are native. If the applicant provides a common name that is distinctive enough to look up but does not provide the scientific name, it may be used to evaluate the native status of the plant even though the applicant was asked to provide that information and the scientific name.

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.

Calculating hours (e.g. employee, partners)

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

- Sum all hours (i.e. planning and on the ground implementation).
 - If the current year’s hours are the only ones listed, use this data.
 - If other years are listed, only incorporate the current year’s data if it matches or exceeds the total hours of one of the other years. This serves to normalize data across applications that may or may not prorate hours per year when applying before the end of the year. For example, an application submitted in March that included hours for that entire calendar year may estimate hours based on last year’s number or may only include hours accrued since March.
 - For programs applying for renewal of certification, only hours from the current certification term are included in the calculation. For example, if a program applied for 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.
- Divide the sum by the number of years. This average is entered into the project scoring sheet.

SPECIFIC CATEGORIES

The Reviewer questions are organized into different application categories (e.g. monitoring, management). These are called branches on the scoring sheet. Information below is applicable to individual categories across to all project themes.

Monitoring (Habitat and Species themes)

Baseline

Baseline data can take various forms (including photos) and does not need to be in the same format as subsequent monitoring. Baseline data does need to allow for comparison of biodiversity values over time (i.e. it must include dates).

Monitoring protocol/plan

The monitoring protocol or plan does not need to be formal. It needs to provide enough information to determine what exactly was done to monitor.

Monitoring protocol or 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.

A monitoring protocol or plan is *relevant* when it makes sense for the project type. For example, a monitoring protocol or plan for a pollinator project that measures pollinating species and/or associated factors/species. An irrelevant protocol or plan for this project type would measure neither of these factors.

A monitoring protocol or plan 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

Monitoring (Education themes)

Guidance for monitoring and evaluation of Education project themes are detailed in project scoring sheets. Please see the comment boxes in the “Scoring” tab of each Education project scoring sheet.

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.

Regulatory Requirement

Projects meet the regulatory requirement if the project is either:

- Not related to a regulation, or
- Related to a regulatory requirement and exceeds the requirement.

If an application states that there **are not** “aspects of the project done in relation to regulatory requirements” (i.e. this application question is answered “no”), then the project exceeds regulatory requirements. The Reviewer score should be “Yes.”

If an application states that there **are** “aspects of the project done in relation to regulatory requirements” (i.e. this application question is answered “yes”), then the application needs to explain

how it exceeds regulatory requirements. These requirements for a project could vary widely, depending on factors such as the location of the site. Examples of exceeding requirements include:

- Using/targeting native species when their use/targeting is not part of the requirement, or using/targeting more native species than are required
- Creating/restoring a larger tract of habitat than required
- Monitoring more intensively or for a longer period of time than required
- Contributing to citizen science or other broader research initiatives
- Additional project-specific actions that are not required

Examples not exceeding requirements include:

- Activities that would be captured as a separate project elsewhere in the application. For example the educational opportunities that a Grasslands project creates for schools will be captured by the program's Formal Learning project.
- Alignment with regional conservation priorities, unless alignment is required by law and conservation actions that are not required are taken to meet the alignment

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 an organization). The evidence provided must be an official organizational (corporate) document (e.g. on letterhead, website).

Third party certification

Third party certification must meet the following standards:

- 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:
 - a. Stakeholder engagement on the development of standards
 - b. Required application and documentation of activities
 - c. Publishing scoring criteria on their website
 - d. Independent body from the applicant so there are not conflicts of interest

The certification must be mentioned in the project application. Examples of acceptable third party 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](#)

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](#).

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.

Numbering

For every project, Reviewer questions and their related attributes follow a specific numbering scheme based on the pattern: ##.##.

The first set of digits denotes the project theme. Habitat projects are numbered 11-29. Species projects are numbered 31-49. Education projects are numbered 51-69. Other Options projects are numbered 71-89.

The second set of digits refers to the branch (See the document Conservation Certification Scoring for a description of the branch) that the Reviewer question is in. For Yes/No questions this number becomes a “Q.”

The third set of digits refers to the Reviewer question number within a branch.

For example, for the attribute 14.1.3: “14” refers to project theme Habitat—Grasslands, “1” refers to branch 1 (or the “scope” branch) and “3” represents the third question in the scope branch, locally appropriate.

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.