



**NEW
CONSERVATION
PROGRAM
MANAGERS TOOLKIT**

A Guide for Main
Site Contacts



WHC



Welcome

to your new role as Main Site Contact. When taking on the management of a corporate conservation program, it is important to familiarize yourself with the site's conservation efforts and to understand and prioritize the tasks associated with leading the program. To help ensure a smooth transition in program management, Wildlife Habitat Council (WHC) has developed this checklist detailing the steps to take as you begin your role. Completing these tasks will prime the program for success.

If you haven't already, start by viewing [this video](#), an introduction to WHC and WHC Conservation Certification®. Next, begin to review the steps detailed in this toolkit. For a condensed, printable checklist, see page 9.

If you are preparing to hand off a program and step down as Main Site Contact, see page 16 for a specialized checklist that will help ensure a smooth transition for your successor.

CONTENTS

- 1 Program Transition Checklist** | p3
- 2 Condensed Transition Checklist** | p9
- 3 Project Task Worksheet** | p10
- 4 Project Timeline Worksheet** | p11
- 5 Certification Timeline** | p12
- 6 Project Strength Assessment** | p13
- 7 Teambuilding Tool** | p15
- 8 Program Hand-Off Checklist** | p16

1

PROGRAM TRANSITION CHECKLIST

**Register as the Main Site Contact for the facility's conservation program and acclimate yourself with the corporate leadership structure for the company's conservation programs.**

- Know who is the Corporate Contact for all of the company's WHC programs. If you need assistance identifying this contact, email WHC at conservationcertification@wildlifehc.org.
- Request that the outgoing Main Site Contact or the current Corporate Contact log in to the [WHC Conservation Certification website](#) and designate you as the program's Main Site Contact. You will then receive an email prompting you to create a user profile. With a user profile, you will be able to make changes to the program in the Certification website.
- Learn more about how to [navigate the Certification website](#) and about [user permissions](#) through the [Support Center](#).

**Learn about the general structure of WHC conservation programs.**

- WHC defines *program* as the combination of conservation and education efforts taking place within a given site.
- *Programs* are made up of one or more *projects*, a term that refers to a collection of activities that support a specific objective targeting either a habitat, species or learners.
- *Projects* are divided into four categories: Habitats, Species Management, Education & Awareness and Other Options, each contains specific sub-categories, such as Pollinators or Training.
- A single *program* can consist of one or more *projects*. *Programs* sometimes have multiple *projects* in the same category. Learn more about project types [here](#).



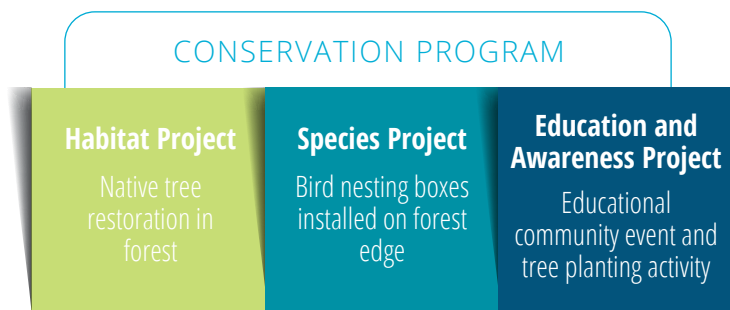
Get to know the site's current conservation program and its individual projects. Determine how projects are managed and how progress is tracked.

- Request information from the outgoing Main Site Contact and other program participants to contextualize what conservation or education activities have taken place recently.
- Gather materials from the previous Main Site Contact, team members, internal files, networks and databases to understand how current activities are planned, tracked, documented and evaluated. These materials could include pictures, meeting notes or event invitations.
- Identify external partners (NGOs, state-level agencies, schools) that have provided technical guidance, labor or outreach assistance to the program. Make introductions, discuss the history of the partnership, and familiarize yourself with their roles in the program or projects.
- If the program is currently WHC-Certified, [email the WHC Certification team](#) to request access to the program's most recent certification application, including any supporting documentation and the resulting scoresheet. Reviewing past applications will provide insights on the program's history and current status and can help identify opportunities for growth or improvement.



Map out projects for greater clarity.

- Once you have a strong understanding of the site's conservation work and the WHC structure, organize the program's various projects into the four project categories (Habitat, Species Management, Education & Awareness and Other Options). This mapping exercise will help set specific project objectives, clarify tasks and track progress, leading to clearer decision making.
- The example on the right demonstrates how projects can be separated into categories, even when occurring in the same location (e.g., in a restored native forest).
- Visit the [Support Center](#) for information on categorizing and mapping projects.





Plan how to maintain and document the conservation program.

- Documenting project activities and collecting relevant monitoring data are critical. Monitoring data provides a scientific basis for decision-making, reporting metrics, and progress tracking that makes it easier to onboard new participants or project leaders.
- The WHC Certification application asks a series of questions related to maintenance and monitoring activities for each project and prompts applicants to upload relevant data. Keeping this documentation in one place (or updating the information to the Certification website as activities occur) will allow for a smoother application process.
- Identify the tasks required to maintain each project, along with the methods used to track maintenance activities, collect monitoring data and evaluate a project's success. From there, list the resources or participants needed to complete each task. [WHC Project Guidances](#) are a great resource for best practices for each project type.
 - » *See Section 3, p.10 for a worksheet to help take inventory of necessary maintenance and monitoring tasks.*
- Create a timeline of all maintenance and monitoring activities in chronological order.
 - » *Note that this timeline may be more task-intensive during the growing, nesting or migration seasons.*
 - » *See Section 4, p. 11 for a project task timeline example and worksheet.*
- If planning on applying or reapplying for WHC certification, create a separate timeline that details key application milestones and deadlines.
 - » *See Section 5, p.12 for a timeline detailing the certification process.*
- Connect with a [WHC Conservation Specialist](#) and discuss the plans for continuing the program and ask any questions.
 - » *Regular check-ins with the WHC team can help steer management toward best practices aligned with certification requirements.*



Plan how to adjust or expand the conservation program based on current needs or personal interests.

- Review program-level goals and project-specific objectives. Revise these goals or add new ones as needed.
 - » *Example program goal: to increase carbon sequestration capacity across the corporate campus through nature-based solutions.*
 - » *Example project objective: to plant and maintain at least 30 native trees in an open, previously mowed space to increase the site's tree canopy and capacity to handle stormwater and capture carbon.*
- Be mindful of any corporate-level environmental priorities (carbon sequestration, flood mitigation, pollinator or native bird conservation, employee environmental education) that may shape the goals and objectives. Aligning site-level efforts with company-wide priorities can help the program receive corporate funding or recognition and can result in a stronger certification application.
- If time and resources allow, consider integrating your own environmental priorities and interests into the program, or survey site employees to determine what projects would be of interest.
- Gain inspiration from other WHC conservation programs:
 - » *WHC regularly highlights member companies' efforts as [Corporate Conservation Success Stories](#). These stories explore the motivations, actions and outcomes of successful programs.*
 - » *Browse the [WHC Index](#), an online catalog of WHC-Certified programs around the world. Search by company, state and/or country.*
- Identify and review resources that will help you reach goals and objectives.
 - » *Revisit [WHC Project Guidances](#) and/or view relevant on-demand [WHC Webinars](#) to learn best practices for projects.*
 - » *Partner organizations may be able to provide additional resources.*
- If resources or capacity are limited, consider prioritizing projects with the greatest likelihood of success. Section 6, p.13 provides guidance on evaluating the strength of projects.
- Solicit help from others, both internally and externally, through targeted outreach.

- » Recruit employee volunteers through internal communications platforms (e.g., intranet, facility newsletters). Section 7, p. 12 contains guidance on building a strong internal team.
- » Ask a representative from a partner organization to lead a planting or education event for site employees.
- » Consider opening project implementation, maintenance or monitoring events up to community members.



Understand the WHC Conservation Certification process and requirements.

- Review the basics of WHC Certification in the [Support Center](#).
- Understand the basic [project requirements](#) for certification. If you answer YES to all the following questions for at least one project, the program may qualify for certification:
 - 1. *Is the project locally appropriate?***
 - 2. *Does it have a stated conservation or education objective?***
 - 3. *Does it provide value or benefit to the natural community (or local community, if education)?***
 - 4. *Have outcomes been measured and is there supporting documentation?***
 - 5. *Does it exceed any pertinent regulatory requirements?***
- [WHC Webinar Series](#) regularly hosts sessions that explore certification requirements and provide guidance on a strong application.
 - » [View upcoming live webinars](#)
 - » [View on-demand webinar recordings](#)
- For additional insights on how to increase a program's impact and certification scores, review the [Certification Application Scoring Sheets](#) for each of the project types.
- Make note of the WHC Conservation Certification timeline (APPENDIX D) and [certification application deadlines](#).
- Coordinate with the Corporate Contact regarding budgets for applicable application fees.



Find resources and get help when needed.

- [WHC Conservation Certification Support Center](#)
Online resources designed to help those applying for WHC Conservation Certification understand the process and requirements.
- [WHC Project Guidances](#)
Best practices guide for design and implementation of each project type.
- [WHC Webinar Series](#)
[Live](#) and [on-demand](#) webinars providing guidance and instruction on a wide spectrum of corporate conservation topics from experts in their fields.
- [WHC Consulting](#)
Offering expert services that cover a diverse suite of needs, including site-specific program support, customized conservation program communications and reporting plans, and adaptation of company-wide stewardship visions.
 - » To learn more about these services, contact [WHC Consulting](#).
 - » Connect with the WHC Corporate Contact to discuss the availability of support funding for consulting services.
- WHC Conservation Specialists are available to assist — reach out any time with questions about projects or programs. [View the WHC staff list](#).
 - » If you have further questions after reviewing the Support Center, reach out to the WHC Certification Team at conservationcertification@wildlifehc.org.

2 CONDENSED TRANSITION CHECKLIST

☐ Register as the Main Site Contact for the facility's conservation program and acclimate yourself with the corporate leadership structure for the company's conservation programs.

- Identify the company's WHC Corporate Contact.
- Ask the previous Main Site Contact or the Corporate Contact to invite you to register as the new Main Site Contact in the WHC Certification Website.

☐ Learn about the general structure of WHC conservation programs.

- Learn about the difference between conservation program and projects.

☐ Get to know the site's current conservation program and its individual projects. Determine how projects are managed and how progress is tracked.

- Gather information about the conservation activities and projects, and compile materials used for tracking progress and documenting activities.
- Identify and connect with existing partners.

☐ Map out projects for greater clarity.

- Write out the program's projects and organize them into the four project categories.

☐ Plan how to maintain and document the conservation program.

- Identify the tasks needed to maintain and track the success of each project. See Section 3.
- Make a timeline that lists all activities chronologically and identify the resources or participants needed to complete each task. See Section 4.

☐ Plan how to adjust or expand the conservation program based on site/company needs or personal interests.

- Define new and continuous goals and short-term objectives that are relevant for helping nature and increasing environmental awareness.
- Assess available resources that will help reach goals and objectives.
- If resources or capacity is limited, consider prioritizing projects. See Section 5.
- Solicit assistance from site employees and external partners.

☐ Understand the WHC Conservation Certification process and requirements.

- Learn about WHC Conservation Certification, and the requirements needed to meet the standard.
- Research how projects are scored and identify activities beyond the base certification requirements that could increase the program score.

☐ Learn where to find resources and get help when needed.

- Understand what support resources exist and where to find them on wildlifehc.org.
- Identify points of contact within your organization, partner organizations and WHC.

3 PROJECT TASK WORKSHEET

Use this worksheet to help take inventory of the conservation and education projects being managed at the site, and the upkeep, monitoring and documentation activities associated with each one.

The top two lines of this worksheet feature examples of tasks that may be components of habitat and education projects, respectively.

Project	Upkeep Activities	Monitoring & Documentation Activities
Native Garden	<ul style="list-style-type: none"> • Watering plants • Weeding garden • Reseeding or replanting as needed 	<ul style="list-style-type: none"> • Plant inventory, updated yearly, including the common and scientific names of all plants in habitat. • Plant health worksheet, completed monthly during the growing season, noting which plants are flowering and which appear unhealthy or damaged. • Archived meeting or email notes documenting conversations with landscapers or the project team.
Environmental Education Tour	<ul style="list-style-type: none"> • Clearing and maintaining the nature trail • Updating the educational tour script as needed 	<ul style="list-style-type: none"> • Organizational meeting notes. • Participant survey or evaluation results, documenting knowledge learned at the end of every tour • Pictures of each tour group, taken with the group leader's permission.

4 PROJECT TIMELINE WORKSHEET

Use this worksheet to ensure all tasks are completed in a timely manner, particularly when managing multiple projects. The top row suggests a timeline for listing and tracking tasks. Each project row contains two lines. In the top line, list all monitoring and maintenance tasks by season. As tasks are finished, identify the task

and the date it was completed in the 2nd line.

Remember to collect documentation of monitoring activities (e.g., pictures taken from the same vantage point each month, counts of animal species or blooming flowers, notes on plant health).

Project	Winter	Spring	Summer	Fall	Assess Results and Adjust
Native Garden		Monitor (M) and weed (W) monthly	Water weekly (WW), monitor (M) and weed (W) monthly	Re-seed (RS) as needed	
		<ul style="list-style-type: none"> • March 25 (M) • April 10 (M&W) • May 5 (M&W) 	<ul style="list-style-type: none"> • June 9 (WW, M&W) • July 14 (WW, M&W) • August 18 (M&W) 	<ul style="list-style-type: none"> • October 20 (RS) 	

5 CERTIFICATION TIMELINE

Use this certification timeline as a guide for planning for the application process and any associated tasks. As milestones are reached, check them off in the **Done** column.

Take note of the year's application deadlines (typically in summer and winter), as published in the [Support Center](#). Currently certified programs are due for renewal 2-3 years after the most recent application.

Milestone	Done	Month											
		J	F	M	A	M	J	J	A	S	O	N	D
Update team & add contributors to account		█											
Review scoring sheets		█	█										
Confirm that all habitats are entered in system			█										
Add projects not yet in system			█	█									
Create action plan for certification term		█	█	█									
Review objectives & partners			█	█									
Plan monitoring & maintenance		█	█	█									
Assign/schedule monitoring & maintenance			█	█									
Track employee & partner hours		█	█	█	█	█	█	█	█	█	█	█	█
Conduct monitoring & maintenance		█	█	█	█	█	█	█	█	█	█	█	█
Review monitoring & maintenance											█	█	
Adapt management & action plan												█	█
Enter information in certification system					█	█				█	█		
Review application materials					█	█				█	█		
Request a WHC Program Assessment from a Conservation Specialist*					█	█					█		
Revise & update application						█	█				█	█	
Submit application & application fee							█					█	

█	Summer application deadline
█	Winter application deadline

* A WHC Program Assessment is a quick check of a drafted application before it is submitted. A WHC staff member will assess whether the program is likely to fulfill requirements and will identify any adjustments you should make before submitting. Please contact whcconsulting@wildlifehc.org to discuss the assessment process or to discuss pricing.



6 PROJECT STRENGTH ASSESSMENT

This assessment will help in understanding current project needs and if there are enough resources to meet project objectives. Fill in the right columns with the project titles. For each question in the left column, answer YES or NO. Add up the number of YES responses for each project, then rank the projects based on score. For stronger results, have multiple team members complete this activity, and then tally and rank the total scores. The results can be used to prioritize or identify gaps in existing projects.

The questions are divided into three categories, assessing alignment with WHC Certification, internal priorities and the team’s capacity. If one of these categories is of greater importance to the team, consider assigning the questions in that category a weighted value of two points per YES response.

If further program planning assistance is needed, the [WHC Consulting team](#) can help with project selection and prioritization.

Question	Project 1	Project 2	Project 3
Certification Requirements: A definitive answer of ‘YES’ for all questions for a single project is an indicator that the project may qualify for certification.			
<i>Is the project locally appropriate?</i> “Locally appropriate” means that the project targets native plant or animal species and that it is appropriate in the context of the surrounding natural environment.			
<i>Does it have a stated conservation or education objective?</i>			
<i>Does it provide value or benefit to the natural community (or local community, if education)?</i> Learn how value is assessed in certification by reading General Requirements for Habitat, Species and Education Projects .			
<i>Have outcomes been measured for a full year or growing season and is there supporting documentation?</i> Education projects do not need a full year of documentation; they instead require documentation of changes in learners’ knowledge/behavior OR an evaluation of teaching methods/ activity implementation.			
<i>Does it exceed any pertinent regulatory requirements?</i>			

Question	Project 1	Project 2	Project 3
<p>Alignment to Priorities: Successful projects are often championed by the company, community, employees or an individual. Ensure that all projects have the support needed to succeed.</p>			
<i>Does the company have stated sustainability or biodiversity stewardship statements that the project supports?</i>			
<i>Are you personally interested in the conservation outcomes of the project?</i>			
<i>Are other employees at the facility interested in the conservation outcomes of the project?</i>			
<i>Does the project provide value to employees or the community by increasing their proximity to nature?</i>			
<p>Capacity: Projects require time, labor and resources to succeed. Make sure the team has what is needed to meet each of the projects' objectives.</p>			
<i>Do you currently have the resources and time to conduct this project?</i>			
<i>If you do not have the time, can you recruit employees who can help with the project?</i>			
<i>If you do not have the resources, can corporate leadership supply what is needed?</i>			
<i>Do you currently have external partners that can volunteer time or resources to help with the project?</i>			
<i>In the future, will you have more time or resources to conduct this project?</i>			
<i>Are there NGOs, schools or other local organizations to partner with to meet project objectives?</i>			
<i>Are you willing to put in the time and effort to build capacity for this project in the future?</i>			
Total of YES Responses			

7 TEAMBUILDING TOOL

Project teams provide assistance with management and monitoring of activities. Also, employees gain opportunities to spend time outdoors and learn about the natural spaces surrounding the facility. Select an approach to help communicate expectations with potential team members and ensures that the team structure addresses program needs.

Check the approaches you plan to adopt.

- Build a team that strategically fills gaps in current or future capacity needs:** Use Section 6, p.13 to determine gaps in capacity for each project, then determine whether that gap can be filled by additional employees.
- Target employees whose interests align with the projects:** If a project does not align well with your personal interests, there may be other employees whose interests do align, opening the potential for them to take responsibility for project tasks.
- Provide leadership opportunities:** Provide early-career colleagues the opportunity to manage individual projects under supervision. This helps train the next generation of conservationists and provides low-stake leadership experience to employees.
- Create a community and connections:** Provide a space for socialization and environmental enrichment for colleagues in the outdoors, away from computers and daily work.

Once the approach(es) have been identified, begin to engage employees using one of the options below:

Bottom-up engagement: Survey potential team members about their interests and knowledge related to current and future projects. Compile this information and either assess best fitting positions or hold an open discussion based on survey results. Below is an example survey.

Rank projects by level of interest ("1" indicating the greatest interest):

Project	Rank	Related skills or knowledge
<i>Project Description 1</i>		
<i>Project Description 1</i>		
<i>Project Description 1</i>		

Circle tasks you are interested or experienced in (you may select more than one option):

<i>Photography</i>	<i>Public relations</i>	<i>Outdoor field work/ Monitoring</i>	<i>Data compilation and analysis</i>	<i>Education</i>	<i>Volunteer engagement</i>
--------------------	-------------------------	---	--------------------------------------	------------------	-----------------------------

Role-centric engagement: If you've already identified the structure of the team, provide interested employees a list of roles and ask them to choose the position(s) they are most interested in. Common conservation roles include (but are not limited to):

- Main site contact
- Project coordinator
- Project monitoring specialist
- Volunteer coordinator
- Photographer
- WHC Certification application writer
- Conservation results communicator
- Environmental educator

8

PROGRAM HAND-OFF CHECKLIST

**Communicate the change in leadership.**

- Alert the WHC support contact or the [WHC Certification team](#) about the upcoming change in program management.
- Log on to [WHC Conservation Certification](#) and invite the new Main Site Contact to the program by sending them a registration code. Detailed instructions for adding and editing contacts can be found [here](#).
- Communicate the change to the program's Corporate Contact and any other internal leadership contacts. If possible, connect leadership with the incoming Main Site Contact.
- Alert the program partners of the change in program management, and if possible, introduce them to the incoming Main Site Contact.

**Consolidate materials.**

- Gather the materials you use for each project into an organized electronic folder that can be accessed by the incoming Main Site Contact. Examples of materials might include monitoring sheets, meeting notes, partner information, pictures, past WHC Conservation Certification applications and scoring sheets, and support materials provided by WHC or other knowledge partners.
- Ensure that the incoming Main Site Contact has access to the full Transition Toolkit, which will guide them through the details of conservation program management.

**Acclimate the incoming Main Site Contact to the program.**

- If possible, meet with the individual taking responsibility for program. Introduce them to the program and explain how you manage and track progress for each individual project, show them where to find the electronic folder with collected materials and take them on a tour of the project sites. Be sure to include any details on future program goals or potential partners/resources that the new contact may wish to pursue.
- If you are unable to meet with the individual taking responsibility for the program, write a brief memo for them that describes the above details including information for reaching the WHC corporate contact, partners and contractors.