



Evaluation of Conservation Certification Applications

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Conservation Certification Overview

The Wildlife Habitat Council (WHC) recognizes habitat, species, and conservation education projects on working lands through its Conservation Certification program.

Conservation Certification takes the place of WHC's former certification programs, *Wildlife at Work* and *Corporate Lands for Learning*. Conservation Certification is designed to be accessible to applicants from various backgrounds (geographic, educational) while also remaining credible by requiring detailed information and documentation.

Applications are submitted through the Conservation Certification website. Programs that are certified must apply for renewal every 2-3 years.

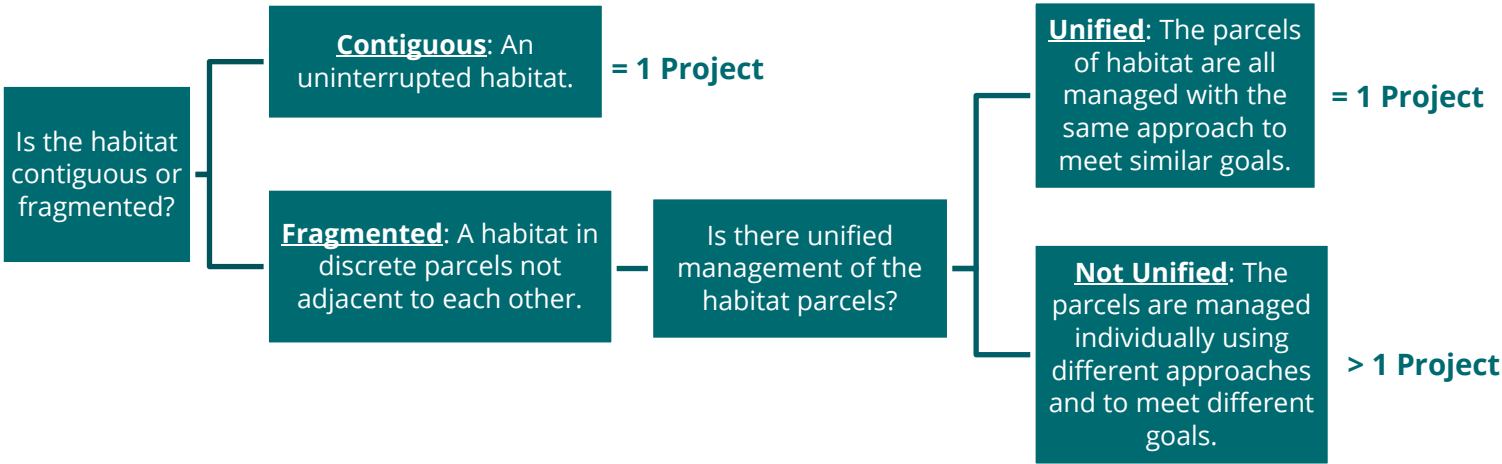
Conservation Certification Structure

Conservation Certification recognizes conservation and conservation education efforts through its third-party certification of *programs*. A **program** is a site-based collection of efforts that are organized into different *projects*. **Projects** are divided into different types - there are 26 project types that are broadly grouped into four categories: Habitat, Species, Education, and Other Options.

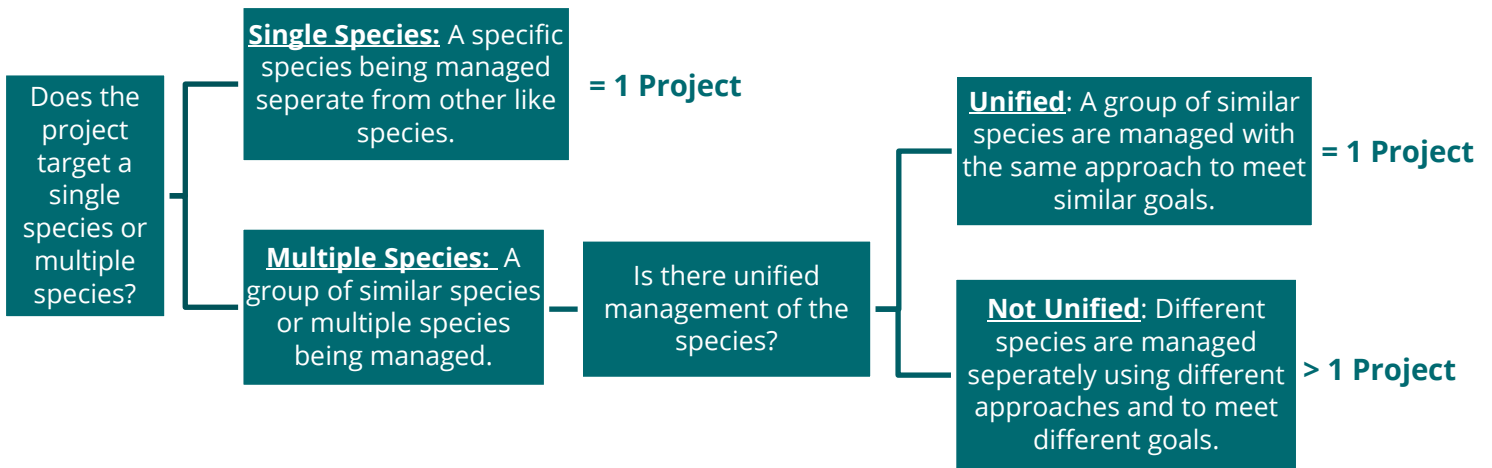
Applicants create their program by adding project(s). An applicant first selects the category of the project they would like to submit (e.g. Habitat, Species, Education) and then selects the specific project type (e.g. Forest, Avian, Training). Applicants are encouraged to add all habitat types found on site to their program, whether or not the habitat is being actively managed.

Once a project type has been selected, an applicant is prompted to go through a short decision tree to determine if they have one or more projects of the selected types.

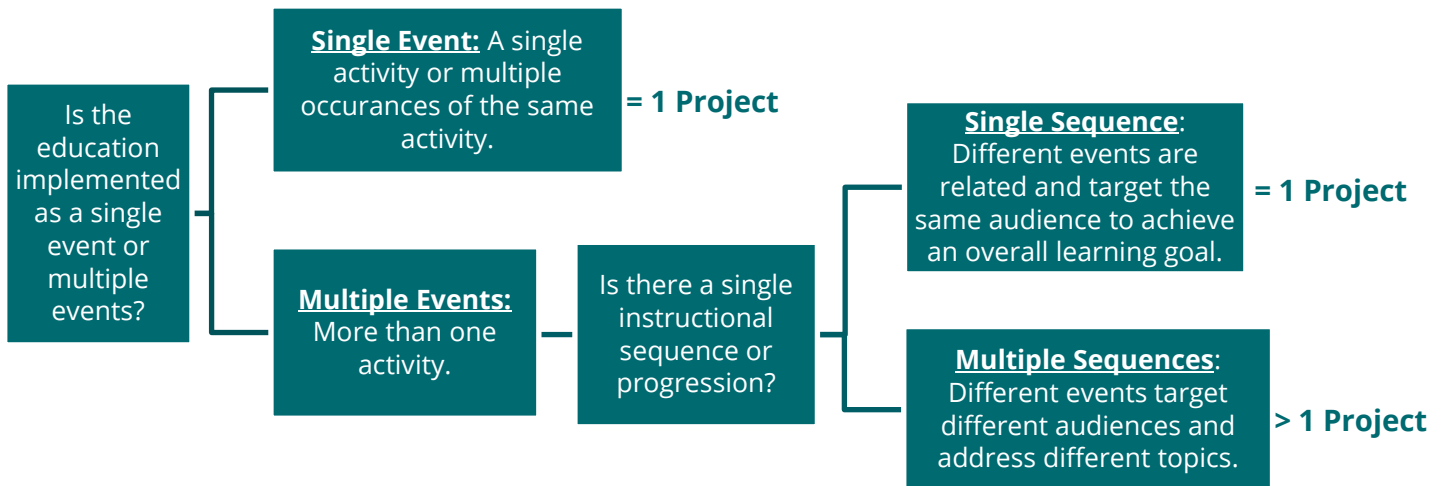
Habitat Decision Tree



Species Decision Tree



Education Decision Tree



Managed & Unmanaged Habitats

While adding the habitats to the program, the applicant will be prompted to link any non-habitat projects to the habitats in which they occur. If an applicant is not actively managing the habitat, but a non-habitat project is linked to the habitat, the applicant will be prompted to answer overview questions about the habitat to provide context. If an applicant is not actively managing a habitat and no projects are linked to a habitat, no information needs to be entered by the applicant. If the applicant is actively managing a habitat, that is considered a habitat project and the applicant will answer the application questions associated with the project.

Certification Requirements and Review Process

Requirements

In order for a program to receive Conservation Certification, there must be at least one qualifying Habitat, Species or Education project.¹ Projects are **classified** as Early, Contributing, or Qualifying depending on which of the 5 base requirements listed below are met.

- 1) Locally appropriate
- 2) Exceeds regulatory requirements
- 3) Conservation or education objective
- 4) Provides conservation or education value
- 5) Documented measurable outcomes

Each of the above project requirements are addressed by specific questions in the application and corresponding **scoring criteria**. While there is some variation on the requirements for each project type, the general requirements for Habitat, Species and Education project types are outlined in the table below. To see the exact requirements for a specific project type, refer to the [Scoring Sheet](#).

Requirement	Habitat	Species	Education
Locally Appropriate	Consists of native species	Targets native species	Relates to habitat or species
Exceeds Regulatory Requirements	Is voluntary or exceeds any regulatory requirements		
Conservation or education objective	Has a stated conservation objective	Has a stated conservation objective	Lists project goals
Provides conservation or education value	Large enough to be considered a habitat and has been on the ground for one or more growing seasons	Addresses multiple habitat/life cycle needs and on the ground for one or more breeding seasons	Number of hours audience is engaged and how often the education occurs
Documented measurable outcomes	Adequate monitoring (providing data that can be evaluated over time) is implemented	Adequate monitoring (providing data that can be evaluated over time) is implemented	Project implementation and learning goals are assessed

¹ A program can also be certified with a qualifying Integrated Vegetation Management (IVM) project, but none of the other Other Options project types can earn certification on their own.

Project Classification

Depending on which of the project specific requirements are met, each project in an application is given a classification:

- **Early** projects: do not meet requirements 1 & 2 - not eligible to earn points
- **Contributing** projects: meet requirements 1 & 2 but not all 5 - earn points towards a program's overall score but are not recognized as full projects
- **Qualifying** projects – meet all 5 requirements - recognized as full projects and enable a program to be certified

- 1) Locally appropriate
 - 2) Exceeds regulatory requirements
 - 3) Conservation or education objective
 - 4) Provides conservation or education value
 - 5) Documented measurable outcomes
-
- Contributing (points)
- Qualifying (certification)

Review Process

WHC has a team of external Reviewers that review and evaluate applications. Each application is assigned to a single reviewer who reviews all of the projects within the program using the Scoring Sheets.

Scoring Sheets

Each of the 26 project types has a corresponding **Scoring Sheet** with a defined scoring rubric. The Scoring Sheets are publicly accessible and can be downloaded at wildlifehc.org.

Reviewers review each project in a program using the designated Scoring Sheet for the project type. In the Scoring tab of the Scoring Sheet, the reviewer assigns scores for a series of criteria based on the rubric provided. The Calculations tab uses the scores provided by the reviewer and the point weighting described above to determine how many points are earned. The Outcome tab summarizes information from the other 2 tabs, providing information about the project's class, score and which of the project requirements were met.

After completing Scoring Sheets for each project in a program, the reviewer compiles the overview information from each project into a Program Summary sheet. If a program contains at least one qualifying project, the program will be certified. Certified programs have a program score equal to the sum of all of the project scores. The overall program score determines the program's *tier*.

Reviewers write a program description for each certified program, outlining the qualifying projects in the program. This program description serves as the public facing representation of the program. After being edited by WHC's Marketing and Communications department, program descriptions are uploaded to the [WHC Index](#).

Point Values

The Scoring Sheets consists of a number of specific criteria. WHC drew from the Conservation Fund's expertise in the [Logic Scoring of Preference](#) method to develop a methodology for assigning point values to each criteria. Point values are based on first grouping similar criteria (also known as attributes) into branches and then assigning weights (values) first at the branch level, then to the individual criteria.

The Reviewer scores provide a simplified way to score individual criteria. Although there are some yes/no scoring criteria as well as some specific values (such as acreage), most of the criteria are evaluated against defined levels of achievement. For example, a reviewer can score a monitoring protocol as 0, 1, or 2 based on defined levels of achievement in the scoring sheet:

0 = No monitoring protocol or a protocol that is not relevant

1 = Monitoring protocol that is relevant but not scientifically rigorous

3 = Monitoring protocol that is both relevant and scientifically rigorous

Each selected score is then input into calculations to determine the final point value that is awarded for the criteria. The details of the scoring calculations for each criteria can be found in the Calculations tab of each [Scoring Sheet](#). The sum of the point values awarded for each criterion results in the **Project Score**. While all project scoring was based on a 100-point scale, for most project types the allocation of points means that a score of 100 is not possible. For example, a new project would be able to earn points for design considerations but would not be able to earn the maximum points for the duration of the project.

WHC developed the levels of achievement for each criteria as well as the weight assigned to each criteria drawing on input from several Advisory Committees that included external conservation experts.

Appeals

If a program receives an outcome of not certified, the applicant has an option to appeal. An appeal may be submitted by the applicant to provide additional information or clarify information from the original application. Appeals must be submitted within 30 days of receipt of the not certified outcome. Detailed information about the appeals process and the forms to complete to submit an appeal can be found on wildlifehc.org.

Tiers

Certified programs are awarded a **tier** based on the program's overall score. Tiers are designed to provide an additional level of recognition for strong and exceptional programs. The score ranges associated with each tier are determined by analyzing percentile ranks of scores from applications in previous years to determine the relative standing of different point values. Score ranges for each tier are updated annually to accurately reflect recent applications and to drive change as programs improve over time. Once Conservation Certification has been in place for a full three years, score ranges will be based on the combined data from the previous three years of program scores.

2018 Tiers

Program Score	Tier	Certification Term (# of years until renewal)
Up to 131	Certified	2 years
132-250	Certified Silver	2 years
251 +	Certified Gold	3 years

Evaluation Criteria Guidance

WHC Conservation Certification Reviewers review all applications based on the established rubrics provided in each Scoring Sheet. Points are not awarded to or deducted from a score outside the framework of the scoring rubrics – there are no bonus points or penalties. Reviewers use their professional knowledge, paired with the additional information below, to inform their decisions as to how the information provided in the application addresses each criterion.

Overall Considerations for Project Evaluation

Conservation Certification is designed to be both credible and accessible, both of which are reflected in the review process. Additional information about these tenets can be found in the “Setting the New Standard” posts of the blog of [WHC’s President](#).

Accessibility Considerations

In keeping with WHC’s motto that “every act of conservation matters” Conservation Certification is designed to be accessible to a wide variety of people from across the globe. The following considerations help minimize the burden of submitting an application, making the certification as accessible as possible:

Content Over Form

Evaluation focuses on the quality of efforts being reported in the application. Grammatical errors or sub-optimal image quality will not adversely impact scores as long as the reviewer is able to fully and clearly understand all of the material presented in the application.

Nested Questions

Application questions utilize conditional logic and nesting of questions to ensure the applicant only needs to answer relevant questions. As a result, some application questions will not be displayed in some applications. For example, if an applicant selected “no” to the question about whether baseline data was collected, the application would skip over the questions asking for a detailed description and to upload the baseline data.

As a result of this nesting of application questions, some criteria will correlate to questions that do not appear in an application. If an application question does not appear in the application, the answer from the preceding application question will inform the scoring of the criteria.

Credibility Considerations

In order to ensure projects are credible, Reviewers must find sufficient information and documentation of ongoing activity to award scores using the rubrics in the Scoring Sheets. There are several key aspects that Reviewers take into consideration to ensure credibility:

Current Information

Applications evaluate recent efforts. For programs applying for initial certification, all information and documentation is considered but the evaluation focuses on information from the past 2-3 years. Programs applying for renewal must provide updated information and documentation for each project to describe and demonstrate what has been done for the project since the applicant last applied (2-3 years previously).

Documentation

Documentation is a crucial aspect of a review. Unless noted as optional, all upload fields are required. Uploaded files (e.g. monitoring logs, photos, receipts) serve as documentation to support the other information provided by the applicant. If the applicant does not provide the required supporting documentation, they will not be awarded points for that criterion.

Applicants are encouraged to submit all applicable documentation but if the amount of documentation would be overwhelming (e.g. hundreds of files), applicants can submit a representative sample of documentation. This representative sample should support the information about methodology and frequency provided elsewhere in the application. For example, if an applicant provides a monitoring protocol that mentions recording date, time, number of individuals, etc. weekly, documentation showing these measures should be submitted with enough examples for the reviewer to confirm that monitoring took place weekly.

The following document icon is used to highlight criterion that require documentation. 

Inconsistent Information

Information presented in the application may sometimes have inconsistencies. For example, the applicant may have selected a checkbox that does not correspond to the details written out in the associated long text field. Reviewers score based on the most *detailed* fields as the more detailed fields provide more information and additional detail provides additional credibility.

Level of detail	Question type
Low	Checkbox, radio button, yes/no
Medium	Short text box
High	Long text box
Highest	Uploaded document or photos (photos = highest)

Insufficient Information

Reviewers evaluate all projects that have been filled out as part of an application. If some of the application questions for a project are not answered or are not answered in full (i.e. the answer provided does not fully address the criteria in the scoring rubric), the reviewer will not award points for corresponding scoring questions. Reviewers do not infer details, so applications are scored as fully as possible given the information provided. For example, if a plant list consisted of unspecific names such as “lily, rose, dogwood”, the reviewer will not infer that it is referring to lily, rose or dogwood native to the region (as it could be an invasive variety).

Scoring Criteria: All Project Types

There are a number of criteria that are common across most or all of the 26 project types. The following information provides additional detail on these fields and how they are evaluated.

Project Start Date

Projects must have been implemented or “on the ground” long enough to have a measurable impact to be qualifying. Although the evaluation of an application focuses on the past 2-3 years (since the program last applied), the total number of years the project has been occurring is also included in the evaluation to recognize the value of long-term projects.

This criterion recognizes the length of time between which the applicant demonstrated that the project implementation began and the date the application was submitted. The project start date is used to evaluate previous projects as associated documentation from outside the past 2-3 years is not required. New projects should be evaluated based on a combination of the listed project start date and other information and documentation provided in the application to ensure the project has been implemented long enough to be qualifying.

The requirements for how long a project must be on the ground for a specific project type can be found in the corresponding project type’s Scoring Sheet. For planning purposes, applicants are encouraged to consider a full year as a good rule of thumb for the time a project should be on the ground to ensure the project will meet this criterion.

The time a project has been on the ground is measured in years and Reviewers may include decimals as small as $\frac{1}{4}$ of a year (e.g. 5.25 years) in the Scoring Sheet. As long as the specific criteria outlined in the rubric is met, a value of less than one year can earn points.

Conservation or Conservation Education Objective

A conservation or conservation education objective outlines what the end goal of the project is. Revisiting an established objective over time can help ensure that a project remains on track to accomplish the desired goal.

Applicants are asked to provide a conservation objective for habitat and species project types and to list the goals for education project types. As there can be some variation and subjectivity involved in evaluating objectives, this criterion is evaluated as either there is an objective for the project or there is no (or a non-sensical) objective.

Employee & Other Participant Involvement

WHC encourages and recognizes that engagement of employees and partners can strengthen a project. This recognition is evaluated both through the quantity of involvement (number of hours) and the quality of involvement (depth of engagement).

Hours of Involvement

Applicants record the number of hours that all employees actively work on each project in a given year. Those working with partners record partner hours in the same way. The partner and employee hours recorded for each year are divided into planning and implementation (on the ground work).

For example, if two employees led a one-hour training for 10 other staff members about managing for an invasive plant, they would have 2 hours to list for their training project (1 hour of each of the employees leading the training). The employees who received the training would not be included in the hours recorded as they were not planning or implementing the training project, they were recipients of the training. Since the activity was a teaching/learning activity and no actual actions or planning for invasive species management was occurring, those two employee hours would not also be listed under an invasive species project.

Calculating Hour Averages

Certification terms can vary in length (2-3 years), so to fairly allocate points for employee/partner hours, the average number of hours/year is used for scoring. The average is based on the annual total of both planning and implementation hours.

Applicants may apply at any time during the calendar year, as a result, applicants applying early in the year would have fewer hours for that year. In order to not adversely impact the average by including a partial year, the number of hours in the current year is omitted from the calculation if the current year's hours are less than the total hours listed in any of the previous years in the certification cycle.

Conversely, applicants who apply late in the year should not have the hours counted in both their current and future application. To avoid counting the same hours from the previous application, the calculation should only include the hours from the year the applicant last applied if they applied before the July 15 deadline in that year.

Depth of Engagement

Applicants are asked to record the number of hours of employee/partner involvement (see [Employee & Partner Hours](#)) and also to describe how the employees/partners are involved in the project. The description of how the employees/partners are involved provides insight into the depth of engagement.

- Indicators of *one-off or irregular* involvement include mentions of a specific event or day
- Indicators of regular involvement in *implementation* include mentions of participation in *doing* work needed for the project to function such as management, monitoring, teaching, etc.
- Indicators of regular involvement in *long term planning* include mentions of team meetings to assess the project, annual project assessments, etc.

Technical Advice

Seeking out and utilizing technical advice improves projects. Technical advice can take many forms, including written material (e.g. website, guidebook) and relevant experts. Sources of technical advice must have a demonstrable background in the relevant subject matter. Examples of demonstrable backgrounds include: an author who has been published, an individual with multiple years of experience, or a publication or employee of a reputable organization.

If the applicant described how the sought out technical advice has already been implemented as part of the project, they can earn points for **implementation** of technical advice. To earn the maximum points for this criterion, the applicant's description of the use of technical advice must convey that there is ongoing **regular** use of the technical advice (i.e. implemented or used at least once per year for at least two years).

Regulatory Requirements

All projects must exceed any relevant regulatory requirements as WHC recognizes voluntary conservation efforts. For projects that do relate to any regulatory requirements (e.g. a mitigation wetland), the applicant must explain how they exceed that requirement. For example, if 5 acres was required for mitigation and 6 acres were created, this would exceed that regulatory requirement for the Wetland project. Many projects will not have any associated regulatory requirements, if this is the case the project meets this criterion because the project is entirely voluntary.

Corporate Commitment

Applicants are asked whether the project is part of a corporate initiative or commitment to that specific project type. If there is such a commitment (such as a corporate level commitment to grassland habitats) the applicant needs to upload documentation to demonstrate the formalized commitment.

The applicant must upload **documentation** to show the corporate level commitment to that specific project type in order to earn points. General corporate commitments to the environment, biodiversity, or education are not recognized through this project-level criterion. There must be specific mention of the project type for the commitment to be awarded points. Documentation for a commitment that is uploaded into more than one project can be counted for multiple projects only if each project type is explicitly included as part of the documentation of commitment.

Reviewers evaluate based on the information provided for each project so if an applicant selects “no” for the question about a corporate commitment, no points would be awarded.

Alignment with Large Scale Initiatives

Alignment with large scale conservation and education initiatives can magnify the impact of actions being taken and ensure that actions are innkeeping with regional priorities. Large scale initiatives are established plans or priorities recognized or authored by experts in the field.

Applicants are asked to name the conservation plans or large-scale initiatives the project aligns with and to provide a website link, if available. In most cases, a website link should be available for a large-scale initiative. If a website link is not provided, the applicant must provide sufficient information to describe the initiative, including the primary objectives or focuses and the parties who developed the initiative.

To earn credit for aligning with the large-scale initiatives, the applicant must specifically explain how their project aligns (e.g. what objectives or actions from the initiative are addressed through the project). Alignment with a general plan, such as a State Wildlife Action Plan, can earn points. To earn the maximum points, the alignment needs to be with a project type specific plan.

Third Party Certification

A third-party certification specific to the project type demonstrates not only a commitment to the project, but also serves as an additional verification of the work being done. In order to earn points for third-party certification it must be:

- 1) Project type specific - for example, if a forest project had a general habitat certification, that would not meet the requirement, but a *forest* certification would
- 2) Credible – certifications must include at least some of the following factors that WHC considers to be characteristics of a credible certification program:
 - a. Requirements/evaluation criteria are publicly available
 - b. Some sort of verification (documentation or audit) is required
 - c. Applicants are not guaranteed to receive certification just for applying (some applications are not successful)
 - d. There is a renewal aspect (certification is not awarded on a permanent basis)

Habitat Project Criteria

Size of the Habitat

The size of the habitat is evaluated based on acreage (applicants may report the habitat size in other measures but for the evaluation, size is converted into acres). For most habitat types, there is not a set minimum acreage required, instead a project must be large enough to function as a habitat or be considered a habitat.

Time on the Ground

General information about evaluating the time a habitat project has been on the ground can be found in the [Project Start Date](#) section. Although individual project Scoring Sheets should be consulted for specific requirements, generally habitat projects require a full growing season. It is important to note that the time periods associated with growing seasons vary by vegetative community types and location, so Scoring Sheets generally do not provide a specific amount of time (e.g. 5 months).

Locally Appropriate

A habitat is considered locally appropriate if it consists of at least some native species. For vegetated habitats, the species inventory is used to determine the composition of native vs non-native vegetation, which may be verified by referencing submitted photographs. For habitat types that are predominantly non-vegetated (e.g. Caves, Rocky Areas) applicants can submit an inventory of animal species observed in the habitat in-lieu of a list of plant species observed. The uploaded species inventory (plant or animal when applicable) serves as **documentation** and is required to earn points.

The extent of native versus non-native plants or animals (depending on the habitat type) is what is used to determine if a habitat is locally appropriate. The species inventory must be current, generally this means within the current certification term but forest projects may be up to five years old and still be considered current.

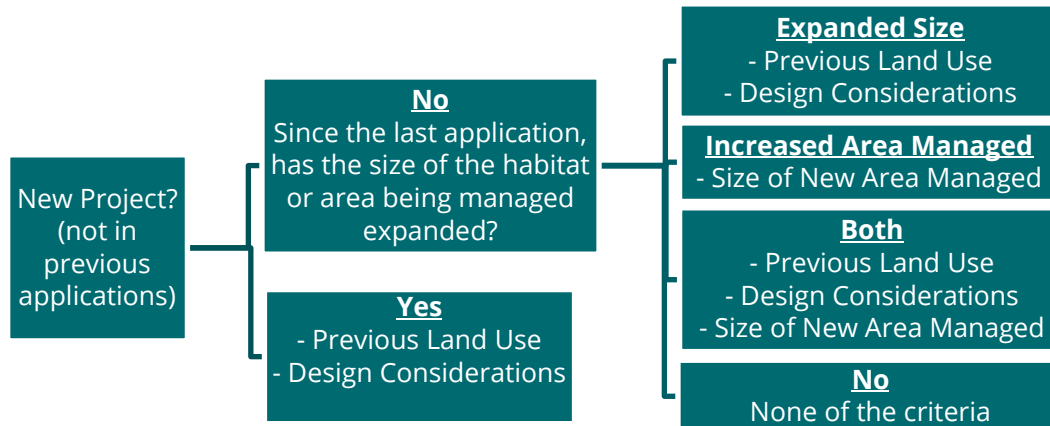
Whether or not a species is native is determined by consulting resources such as [Natureserve Explorer](#) or other reputable resources. A species is considered native if it is native to the region, it does not need to be explicitly native to a specific state or province as this information can vary between resources. For example, if a plant is not listed as native in Indiana but is listed as native in Ohio, the plant would be considered native for a project in Indiana unless there is a specific reason why the species should not be in that state.

Habitat Creation/Expansion

Applicants are prompted to answer a series of questions to determine whether the project or components of the project are new (i.e. not presented in a previous application). This provides an opportunity to recognize and encourage development and expansion of projects. As project longevity is also important, that is recognized elsewhere in the review.

As a result of these varied mechanisms for recognition, applicants take different pathways of application questions to answer. The application questions that are answered inform what criteria the applicant can earn points under. The following chart outlines the general pattern and there are comments in the scoring sheet specifying whether the criteria should be scored zero based on which of the application questions were answered.

Application Question Flow for Habitat Creation/Expansion



Design Considerations

The considerations taken into account when designing a new habitat or a habitat expansion play a significant role in the value the habitat will provide. To earn points for this criterion, the applicant is asked to describe any design or plant selection considerations and upload documentation of the considerations.

Applicants would not earn points for this question if none of the design considerations relate to habitat or wildlife (e.g. only aesthetic considerations) or if design decisions are likely to be harmful (e.g. planting a highly invasive plant). Design considerations that are relevant and generally good but with some errors (such as inclusion of non-native but non-invasive plants) can earn points.

Applicants are awarded the maximum points if multiple considerations are described (such as soil type, wildlife plant usage, etc.) and all of the considerations are valid and provide value.

Supporting **documentation** must be provided to earn points for this criterion. Examples of documentation might include seed mixes, landscaping plans, or photographs illustrating implementation of the design considerations.

Habitat Management

Habitat maintenance and management vary by project type. Each project Scoring Sheet outlines the specific considerations for that type of habitat. Although the specific management considerations vary between project types, generally techniques that incorporate multiple considerations earn more points.

Adaptive Management

Using results of past management/monitoring to inform future management is a best practice, so demonstrated implementation of adaptive management earns more points. Points are only awarded for adaptive management if the adaptive management efforts have been implemented on the ground. Planned changes to management efforts are recognized elsewhere in the review.

Baseline Data

Baseline data is data that is used for comparison with subsequent data to determine changes over time. The most common form of baseline data is **initial** baseline data collected prior to implementation of a project - it provides a strong foundation for assessing the impact of the project. Some projects may not have access to initial baseline data but may have access to some older records that can serve as **mid-point** baseline data for comparison against current data. Additionally, projects can progress in multiple phases, so data taken prior to new actions can be helpful to assess changes with a **new** baseline (i.e. results from an earlier phase/action) with current monitoring (after implementation of subsequent phase/action).

As baseline data is used for comparison to determine the impact of actions, it must be clearly defined/recognized as baseline data. The applicant must therefore describe and upload their baseline data as **documentation** in order to earn points for this criterion.

Monitoring Protocol

Having an established monitoring protocol is an important step to assess the success of a project. If monitoring is consistent, the results of monitoring can be compared over time to determine whether a project is successful and potential areas for improvement. A monitoring protocol should provide enough information so that a new team member could take over monitoring using only the protocol. A monitoring protocol includes information about both timing and frequency and methodology/procedure for conducting monitoring.

A monitoring protocol is **relevant** if implementation of the monitoring would inform assessment of the habitat. A **scientifically rigorous** monitoring protocol addresses at least one of the following:

- Collected with stated geographic and temporal dimensions
- Credible, repeatable, and logical, resulting in quantitative data that can be analyzed
- Complex, measuring multiple aspects (e.g. species, nutrients) and/or influences of multiple variables (e.g. weather)

Applicants are asked to upload a monitoring protocol only if applicable. For this criterion, the applicant does not need to upload a file to earn points for a monitoring protocol. If the protocol entered in the long text field is sufficient, the applicant can be awarded points based on that.

Monitoring Implementation

Regular monitoring is a crucial aspect of habitat management as it helps to ensure that the habitat is of value and that any indications of potential problems are caught early so that corrective actions can be taken.

Monitoring can be done in various formats. For monitoring to be considered **adequate**, the resulting monitoring records provide enough information to be compared over time to assess what is being monitored. Indirect monitoring of a habitat which relies on monitoring not of the habitat directly, but of associated factors, can earn points as long as the associated factors are specific to the targeted habitat (i.e. wildlife observed *within* the habitat). Strong monitoring of a habitat generally involves monitoring of the vegetation (for vegetated habitat types) and therefore this more direct monitoring of a habitat will earn more points.

Documentation of monitoring must be submitted in order to earn points for this criterion. Documented measurable outcomes is a requirement for a qualifying habitat project so projects that do not include adequate and relevant documentation will not be qualifying projects.

Evaluation of Monitoring

In order to ensure that monitoring efforts are being utilized, results of monitoring should be evaluated by the applicant. Applicants are asked to summarize the results from monitoring efforts and to evaluate the success of the project and address any concerns.

As evaluation of monitoring efforts can vary significantly depending on the type of monitoring being implemented, the purpose of this criterion is to evaluate whether the applicant is taking the time to assess their project. If an applicant misinterprets something in their evaluation, this is not counted against them.

To earn the most points for this criterion, the applicant must not only provide an evaluation but also use the results of the evaluation to inform next steps for the project. If the applicant provides an evaluation of the project that notes the project was successful and mentions there were not any concerns, so no changes are needed, this can count as using the results of the evaluation to determine next steps.

Connectivity

Connectivity is an important component of habitat. If a habitat on-site is connected to the same type of habitat on adjacent properties, this expands the value and accessibility of both parcels' habitats. To earn points for this criterion, the habitat must be of the same general type (i.e. two grassland areas) and the habitats must be on adjacent properties. Habitats can be considered adjacent if they are bifurcated by a road or other feature (although this does decrease the benefits of connectivity).

Alignment with Large Scale Initiatives

General information about alignment with large scale initiatives can be found in the main [Alignment with Large Scale Initiatives](#) section. An example of a project type specific plan for habitats would be a southeastern grassland conservation initiative.

Species Project Criteria

Time on the Ground

General information about evaluating the time a species project has been on the ground can be found in the [Project Start Date](#) section. Although individual project Scoring Sheets should be consulted for specific requirements, generally species projects require a full breeding season. It is important to note that the time periods associated with breeding seasons vary by species and location, so Scoring Sheets generally do not provide a specific amount of time (e.g. 5 months).

Locally Appropriate

General information about how to determine if a specific species is native to the region is provided in the [Locally Appropriate](#) section. With the exception of the Invasive Species project type, all other species projects are determined to be locally appropriate if the targeted species are native to the region. Targeting of any native species designates a project as locally appropriate so inclusion of a non-native species (e.g. honey bees) in a list of targeted species does not negate other native species that are listed. The project can still earn points for the work done to address native species as long as information and documentation for the native species is included throughout the project (i.e. habitat needs, monitoring, etc. are addressed for the native species).

For the Invasive Species project type, the locally appropriate criterion is reversed. If an Invasive Species project targets non-native/invasive species, it is locally appropriate.

Habitat Needs Addressed

Species projects must address at least one habitat or life cycle need for the targeted species to ensure the needed resources are available for the species. Applicants select habitat/life cycle needs being addressed and then describe how plants or structures address these needs and upload documentation. Applicants can also enter “other” habitat or life cycle needs beyond those provided in the application. Additional needs entered as “other” by the applicant can’t duplicate needs that are mentioned elsewhere in the list (e.g. food sources can’t be added if foraging is already checked off).

In order for applicants to earn points for habitat needs being addressed, the habitat/life cycle needs must be appropriate to support the species’ natural habitat and life cycle needs and be valid for the region. A program located in an area where the targeted species do not winter can’t earn credit for providing wintering habitat for the species.

The applicant must also fully describe how the habitat needs are addressed and upload **documentation** that generally supports their description of the habitat needs met.

Specific Threat to the Species

In addition to widespread threats impacting biodiversity (such as habitat loss), some species or groups of species face other, more specific, threats. Examples of wide-spread but specific threats include White Nose Syndrome (a deadly disease impacting multiple species of bats in the eastern United States) and window strikes (hundreds of millions of birds are killed in the United States after colliding with windows).

Actions to target these specific threats can play an important role in conservation so (for relevant species types) applicants are asked whether they are targeting a specific threat. In order to earn points for this criterion, applicants must list the specific threat and describe the actions being taken to address the threat.

Considerations to address general threats, such as providing habitat components or supporting populations, are not recognized through this criterion as they are recognized elsewhere in the review.

Design Considerations

The considerations taken into account when adding features for a species play a significant role in the value the features will provide. To earn points for this criterion, the applicant is asked to describe any design considerations and upload documentation of the considerations.

Applicants would not earn points for this question if none of the design considerations relate to the targeted species (e.g. installation of a bee block in an avian project) or if design decisions are likely to be harmful (e.g. steep banks in a created wetland/waterbody). Design considerations that are relevant and generally good but with some errors (such as installation of nest boxes without predator guards) can earn points. Applicants are awarded the maximum points if multiple considerations are described (such as considerations for suitable placement and orientation of a nest box as well as design features such as predator guards, access for monitoring, etc. of the structure itself) and all of the considerations are valid and provide value.

Supporting **documentation** must be provided to earn points for this criterion. Examples of documentation might include technical plans for structures, seed mixes for plantings targeting the species, or photographs illustrating implementation of the design considerations.

Species Management

Species management varies by project type. Each project Scoring Sheet outlines the specific considerations for that type of species. Although the specific management considerations vary between project types, generally more regular or frequent management will earn more points. As described in the [Adaptive Management](#) section, additional points can be awarded for that best practice.

Population Management

Population management techniques, such as reintroduction, relocation, and sustainable hunting, are sometimes used to enhance the health of specific populations or the diversity of the species overall. Population management measures such as these are taken after assessing a population of the species. The population management efforts are designed to accomplish specific goals (such as increasing genetic diversity or improving health by reducing overconsumption of resources). Generalized population “support” efforts, such as habitat conservation or enhancement or the creation of nesting structures, are not recognized under this criterion as they are recognized elsewhere in the review.

Applicants are asked to select relevant population management techniques (if any) and to describe the measures being taken and are given an opportunity to upload documentation if applicable. For this question, the applicant does not need to upload a file to earn points for population management. If the information entered in the long text field is sufficient, the applicant can be awarded points based on that.

Baseline Data

See the [Baseline Data](#) section for habitat projects.

Monitoring Protocol

See the [Monitoring Protocol](#) section for habitat projects. The primary difference for a species monitoring protocol is that the protocol is **relevant** if it would inform assessment of the species (instead of the habitat).

Monitoring Implementation

See the [Monitoring Implementation](#) section for habitat projects.

Evaluation of Monitoring

See the [Evaluation of Monitoring](#) section for habitat projects.

Connectivity

See the [Connectivity](#) section for habitat projects. The primary difference for a species project is that the connectivity needs to be with adjacent habitats for the targeted species. This may sometimes involve different habitats (e.g. connectivity for a species that utilizes both forest and grassland habitats could be with an adjacent property of the other habitat type, as long as that habitat type is a habitat the targeted species requires).

The Connectivity criteria is broader for Avian projects. Refer to the Avian Scoring Sheet for specifics.

Alignment with Large Scale Initiatives

General information about alignment with large scale initiatives can be found in the main [Alignment with Large Scale Initiatives](#) section. An example of a project type specific plan for species would be a shorebird conservation initiative.

Education Project Criteria

Project Start

The requirements for the project start date for education projects are different from those in habitat and species projects as documented measurable outcomes can be achieved as soon as an educational event (that includes some form of assessment) has occurred. As a result, projects where learning has occurred will meet this requirement.

Project Goals / Conservation Education Objective

See the [Conservation or Conservation Education Objective](#) section. The primary difference for education project types is terminology of the application question. For education projects, the applicant is asked to provide the **goals** of the project and these goals are considered the conservation education objective.

Community Need/Value

Education projects are most valuable to learners if they provide specific value by addressing a need in the community. For example, if there aren't outdoor learning spaces at local schools or a scout group has certain activities needed to earn a badge/patch, proving the learning space or activity meets these identified needs.

As employees are generally members of the community in which they work, community needs can be anecdotally determined by employees. However, the best way to ensure that projects address the biggest community needs or provide the most value to the community is to engage an external group or utilize reports generated by such groups. For example, working with local teachers to determine what would be of most value will help ensure that a formal education project best meets the needs of the community.

Applicants that describe the community need or value and how it was identified can earn points for this criterion while those engaging external stakeholders/resources can be awarded the maximum points for the criterion. Documentation is not required to earn points for this criterion.

Planning

As with all project types, planning plays an important role in education projects. A plan outlines information about the project, including more than one of the following aspects: what is being done, when and where it occurs, who the audience is. The strongest plans are those that are developed with the input of external experts (e.g. teachers, education professionals, conservation professionals) and that include an overall strategy (e.g. informed by conservation context, community needs, corporate goals).

Applicants who submit a cohesive plan can earn points for this criterion. The incorporation of a strategy and/or external input can earn additional points.

A plan must be uploaded as **documentation** to earn points for this criterion.

Appropriate Materials & Equipment

Materials and equipment can support or even be integral to education projects. Needs for materials and equipment will vary depending on the project, so these are not required, but the value of materials and/or equipment are recognized through this criterion. **Materials** are generally printed or electronic written resources such as curriculums, lesson plans, interpretive materials, etc.

Equipment includes tools or components that are used to implement the project, such as nets, microscopes, water quality kits, etc.

The materials/equipment must be **appropriate** to the project activities and the audience. Applicants can earn points for appropriate materials/equipment. The maximum points for materials can be awarded if the written materials are not only tailored to address the education objective, but also deliberately tailored to the learning level of a specific audience (e.g. 4th graders).

Samples of written materials must be uploaded as **documentation** to earn points for the materials criterion. The applicant must adequately describe how specific equipment or tools are used for the project to earn points for the equipment criterion.

Relevance to Habitat or Species

For an education project to be locally appropriate, it must relate to habitat or species either on or off site. This ensures that the content of the education will be applicable to the learners locally. The habitat or species that the education project relates to does not need to be an active project in the application.

Conservation Impact

Some conservation education projects have benefits beyond the scope of the education project and also contribute to habitat and species projects. Any direct contribution to a program's habitat or species project is therefore extending the impact of the education project beyond learners and to the conservation projects themselves.

Applicants are prompted to make this connection by answering whether the education project supports a conservation project. If the applicant answers yes, they are prompted to describe the way(s) in which the education project supports a conservation project. The level of support of a conservation project is classified as either **contributing** to the conservation project or being **integral** to the conservation project. If the corresponding habitat/species project would not be viable without the education project, the education project can be considered integral to the conservation project. For example, if the only formal vegetation monitoring for a grassland project is students conducting vegetation surveys every year, the education project's monitoring contribution would be integral to the grassland project.

Assessment & Evaluation

Evaluating an education project is important to assess the success of the project and also determine ways to strengthen it over time. Education projects are required to have some form of assessment.

The assessment can focus on the actual learning and/or the project implementation. Assessing changes to a learner's **knowledge** or behavior provides insights into the content and delivery of the material, while assessment of project **implementation** provides insight into the logistics and overall experience.

For both knowledge/learning and implementation, an informal assessment can earn points if it sufficiently addresses the learning and/or implementation. An **informal** assessment, such as an oral survey and hand count can earn some points. A more **formal**/structured assessment, such as feedback forms that are administered to learners, can earn the maximum points.

Although assessment can be done for both knowledge/learning and implementation, they are separate discrete criteria. Both must be sufficiently addressed to earn points for both criteria. Supporting **documentation** is needed to earn points for the knowledge/learning assessment. Examples of documentation include email correspondence or meeting minutes recording the outcomes of informal assessments or the results of formal feedback forms that were administered and recorded.

Adaptive Management

Just as with habitat and species projects, outcomes from assessment of education projects can be used to improve the project in the future. Applicants can earn points by describing how they use the evaluations to inform future management. Applicants who describe how they use *both* learning and implementation assessment results to inform future management can earn the maximum points for this criterion.

Alignment with Large Scale Initiatives

General information about alignment with large scale initiatives can be found in the main [Alignment with Large Scale Initiatives](#) section. For education projects, there is only one level of alignment recognized that is inclusive of *relevant* conservation or education plans.

Other Options Project Criteria

The Other Options projects cover a wide variety of topics and, as such, there are not criterion that are common across each of the project types. As these project types are broader, a brief explanation of each project type is provided highlighting key aspects of the project type and selected criteria. Full details on the requirements for each project type can be found in each corresponding Scoring Sheet. As with all other projects, unless an upload field is noted as optional, all upload fields are required **documentation**.

As mentioned in the [Requirements](#) section above, the only Other Options project type that qualifies for certification on its own is Integrated Vegetation Management. As with all project types, detailed requirements for each project are found in the project's Scoring Sheet.

Green Infrastructure

Green infrastructure projects recognized through Conservation Certification are living engineered solutions that also **provide a direct biodiversity benefit**. As the green infrastructure project type focuses on considerations specific to the green infrastructure and not how the green infrastructure functions as a habitat, a **corresponding qualifying habitat project must also be submitted**. For example, if the green infrastructure project is a rain garden, a Landscaped Area habitat project must also be submitted.

Integrated Vegetation Management

Integrated Vegetation Management (IVM) projects follow specific methodologies to manage vegetation on linear infrastructure (e.g. Rights of Way, pipelines). The property being managed through the project **must be a linear feature** in order to submit an IVM project. To earn points for this project

Invasive Species – Coordinated Approaches

Prevention and early control efforts are key aspects to minimize the impacts of invasive species. The Invasive Species – Coordinated Approaches project type recognizes the **use of a comprehensive (multi-species) plan** designed to prevent invasive species or serve as an early warning and action system if invasive species are detected. *An invasive species management plan that does not contain a comprehensive approach is recognized as an Invasive Species project type (in the Species category).*

Comprehensive Plan Options

- Early Detection Rapid Response (EDRR) Plan – contains many specific mechanisms or steps but must include aspects of early detection, rapid assessment, and rapid response
- Hazard Assessment Critical Control Point (HACCP) Plan – identifies potential pathways of introduction of an invasive species and steps that can be taken to minimize the risks
- Other Comprehensive Plan – another type of comprehensive invasive species prevention, detection, and response plan

Land Conservation Agreements

Land Conservation Agreement projects recognize enrollment in a **formal multi-year or permanent conservation agreement**. Land Conservation Agreement projects are generally accompanied by one or more Habitat projects, and details of the habitat management are recognized there.

If all other requirements are met, applicants can be recognized for Land Conservation Agreements multiple times over the duration of the agreement if the agreement spans multiple applications.

Remediation

Remediation projects recognize voluntary incorporation of conservation and conservation education considerations **before completion of remedial actions**.

Species of Concern

Species of Concern projects recognize the importance of voluntary efforts taken to support protected or otherwise imperiled species. As the species of concern project type project focuses on specific considerations for the species of special concern and not how the species is managed for, a **corresponding qualifying species project must also be submitted**. For example, if the species of concern is monarch butterflies, a Pollinator project must also be submitted.

Actions must be being taken on-site to address at least one threat to the species. As described in the [Specific Threat to the Species](#) section, the threat must be specific to the species.