

SIERRA FRIENDLY LANDSCAPING PROGRAM

COOKBOOK



Step-by-step guide for creating a program to help homeowners implement landscaping changes for the benefit of their families and the entire Sierra Nevada



SIERRA NEVADA ALLIANCE

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SIERRA NEVADA ALLIANCE

Keeping light in the range.

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Sierra Nevada Alliance

Since 1993, the Sierra Nevada Alliance has been protecting and restoring Sierra land, water, wildlife and communities. The Alliance's mission is to protect and restore the natural resources of the Sierra Nevada for future generations while promoting sustainable communities. We believe that local grassroots conservation groups are critical as on-the ground agents creating positive change. Acting on this belief, we work to educate, connect and mobilize conservation groups throughout the Sierra Nevada on regional efforts to create, share and enhance practical solutions to our conservation challenges. Today over 90 Member Groups spanning the entire 400-mile mountain range belong to the Sierra Nevada Alliance.

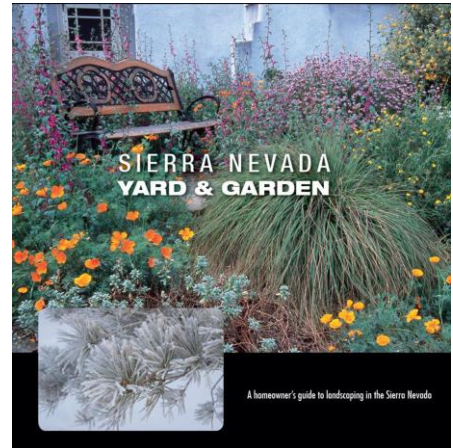
If you would like to join the Alliance as a Member Group or as an individual supporter, please visit our website www.sierranevadaalliance.org or contact our office for more details by phone at 530-542-4546 or by email at info@sierranevadaalliance.org.

CHAPTER 1: INTRODUCTION

This Sierra Friendly Landscaping Cookbook is a resource designed to help organizations, agencies or local governments start and coordinate Sierra Friendly Landscaping Programs. This “Cookbook” outlines steps and “ingredients” for designing a Sierra Friendly Landscaping outreach program. This reference includes the necessary resources to launch and implement a program, from tactics for inspiring homeowners to sign up and participate, to providing valuable resources to homeowners enabling them to implement Sierra Friendly Landscaping. Programs can offer free site evaluations, site plans, incentives and assistance in implementing landscapes that are Sierra Friendly.

SIERRA FRIENDLY LANDSCAPING OUTREACH PROGRAMS HAVE THREE PRIMARY GOALS

- Increase awareness about the interconnectedness of one’s property to the greater Sierra environment.
- Train homeowners on how they can make a difference on their property through landscaping techniques that affect the surrounding ecosystem, including promotion of clean water, native flora, healthy soils, fire defense and creation of wildlife habitats.
- Improve water quality, establish fire defensible space, decrease invasive weed populations and/or maintain wildlife habitat and safe communities.



Sierra Yard & Garden Guide

This Cookbook is designed to accompany the 157 page Sierra Yard and Garden Guide. The guide provides

- How Sierra yards impact water, soil, plants, wildlife and wildfire
- Detailed steps to observe, design and plant your yard and garden to be Sierra Friendly
- How to instructions

“This helpful guide is ideal for property owners throughout the Sierra Nevada. It gives people valuable information on how to manage their property to maximize its usefulness and beauty while preventing impacts to the environment and water quality.”

- John Cobourn, Water Resources Specialist, University of Nevada Cooperative Extension

WHY BRING SIERRA FRIENDLY LANDSCAPING TO YOUR COMMUNITY?

The Sierra Nevada region is a world-renowned treasure and home to many lovely rural communities. It is known for its majestic waters, biologically rich foothills, stunning peaks and abundant recreational activities. Over a million people call the Sierra home and more than 20 million people visit the region annually.

However, a development and poor planning have impaired and polluted Sierra waters, increased threat of fire to our communities, extirpated and endangered species, degraded natural resources and threatened the existence of rural communities. For more on the impacts to our waters, lands, wildlife and communities please see the Sierra Nevada Yard & Garden Guide and the side bar on this page to learn more.

A well-designed and maintained yard helps not only to meet the needs and desires of the residents, but can also protect and restore the high quality of life in the Sierra Nevada. Sierra Friendly Landscaping can

- Keep our Sierra rivers, lakes and streams clean by reducing runoff from properties
- Promote native vegetation and healthy soils
- Help homeowners conserve water resources
- Increase fire defensible space
- Protect Sierra wildlife

But how do you get homeowners to adopt the best practices to be Sierra Friendly? There is no need to recreate the wheel! The Sierra Nevada Alliance and local partners in Tahoe-Truckee and throughout the region have designed Sierra Friendly Landscaping Programs that can be adapted to and implemented in any community throughout the Sierra Nevada.

SIERRA NEVADA ALLIANCE RESOURCES

Learn more about impacts on Sierra waters, wildlife, communities and other policies and efforts to help the Sierra thrive

- *State of Sierra Waters: A Sierra Nevada Watersheds Index.*
- *Dangerous Development: Wildfire and Rural Sprawl in the Sierra Nevada.*
- *State of Sierra Frogs: A Report on the status of frogs & toads in the Sierra Nevada and California Cascade Mountains.*
- *Planning for Water Wise Development in the Sierra: A Water and Land Use Policy Guide*

Visit www.sierranevadaalliance.org for these resources and more

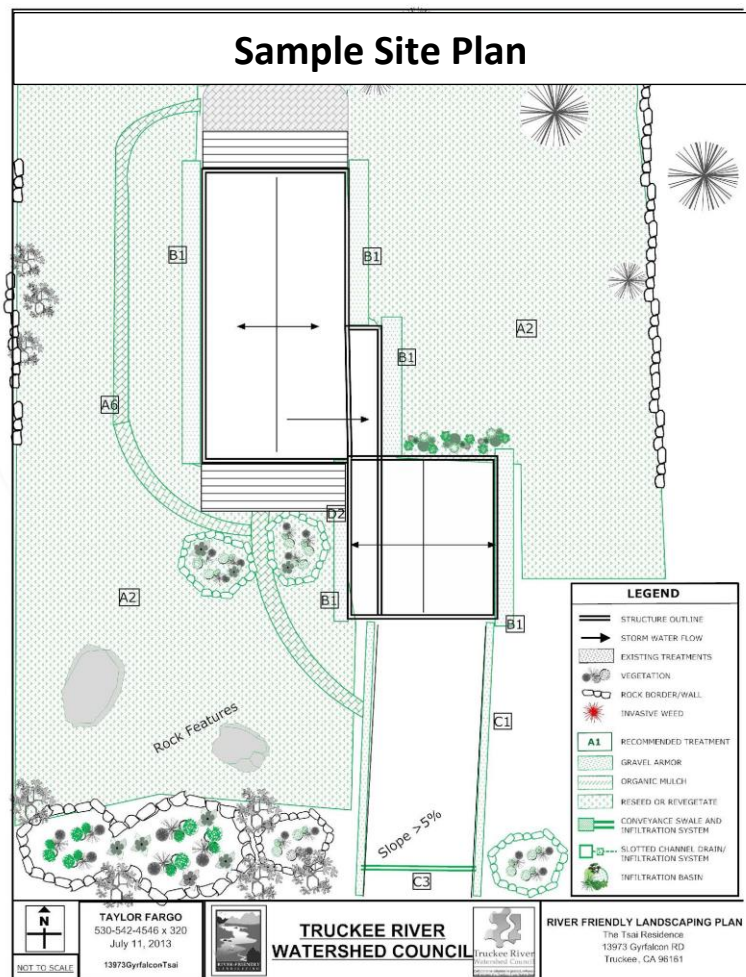
WHAT IS A SIERRA FRIENDLY LANDSCAPING PROGRAM?

A Sierra Friendly Landscaping Program:

- Does educational outreach
- Creates incentives
- Offers resources
- Provides training to homeowners/residents to implement Sierra Friendly Landscaping

Most residents have no idea of the impact their home and surrounding property has on local rivers, lakes and streams. They are also often unaware of how their yard and/or garden may make their home harder to defend from wildfire. Few residents can identify invasive species that may be flourishing on their property. Therefore a program that conducts educational outreach about healthy yards and gardens that contribute to a healthy Sierra environment is very important.

Programs can offer free home site evaluations to identify where the problem areas are and specify treatments that can be implemented to make the property more Sierra Friendly. Once a resident/homeowner understands their impact and what they can/should do, getting them to implement changes often requires incentives (due to the financial investment on their part), resources and training. Contests, rebates and coupons or discounts at local businesses are excellent incentives for homeowners to participate in the program and to implement the recommended changes.



10 STEPS TO A SUCCESSFUL SIERRA FRIENDLY LANDSCAPING PROGRAM

These steps are expanded on in more detail in the rest of the toolkit.



1. Establish your focus. What specific goals do you hope to achieve by bringing the program to your community? Is your area susceptible to storm water runoff from the increased development of impervious surfaces? Is your area located in an area with high fire risk? What issues are most important to your community and natural resources? Conveniently, this program can have multiple focuses, but it is important to identify your goals and what aspects will be most critical in reaching those goals.

2. Partner with other organizations and experts. Collaboration is often a key to success. Find other groups in your area that are working on similar goals and see if they want to partner on an outreach program. Ideally, partners can contribute resources, expertise, staff/volunteer time and a broader public reach to the program. Be sure to establish an advisory board of experts on your focus area. Experts can be found in your local public agencies (i.e. fire departments, water boards and agencies, Fish and Game department), schools/colleges, non-profits (i.e. Native Plant Societies, Audubon & Sierra Club chapters, Fire Safe Councils, Resource Conservation Districts) and businesses (local hardware stores, landscaping businesses, garden shops).

3. Secure funding and resources for your program. *Keep in mind: funders are increasingly attracted to collaborative efforts and the aforementioned step can be a competitive advantage when applying for funds.* Finding funding to launch and support these programs can be challenging. The program requires funds for staff time, marketing and any rebates or financial incentives that are provided. Government grants, private foundations, major donors and individual donors are all potential funding sources. This guide is not a fundraising toolkit, but we encourage you to visit the Grant Library and subscribe to the Sierra Nevada Conservancy's newsletter and Sierra Nevada Alliance Weekly all of which post funding opportunities. Another useful resource is the Sierra Nevada AmeriCorps Partnership that can provide full-time AmeriCorps member(s) to serve as fulltime staff on your Sierra Friendly Landscaping Program.

To have an AmeriCorps member, your organization pays a matching contribution towards the members living stipend and provides site supervision. For more information on the Sierra Nevada AmeriCorps Partnership visit [2](#). Finally, partners and businesses can often provide volunteer time, free services, discounts and donations of goods to support the program.

4. Train the Yard & Garden consultation team. Create a pool of staff or volunteers who will conduct outreach and site evaluations/recommendations. Hire consultants and recruit experts to train your team on effective outreach techniques noted in step 5 and in Sierra Friendly Landscaping. The Alliance can provide you with free Sierra Nevada Yard & Garden Guides for your training. We encourage you to recruit local experts in fire defensible space, invasive weeds, living with wildlife and water quality landscaping to help lead your training. The Alliance can also put you in touch with experts who have done these programs in Tahoe and Truckee to see if they can be hired to train your staff and volunteers. Expect to spend at least three days learning on-the-ground landscaping techniques that address all the Sierra Friendly topics.

5. Develop messaging. Determine your target community (i.e. residents, second homeowners, specific neighborhoods next to sensitive natural areas). Identify what could motivate them to participate and what might be hurdles they perceive (i.e. cost/time/expertise). Next, craft messaging to inspire community members to learn more about Sierra Friendly Landscaping, invite a site evaluation and then implement changes.

6. Setup homeowner and implementation tracking system. Programs need to track interested homeowners and move them through appointment, site evaluation, treatment workbook delivery and follow-up steps. This requires having a tracking system. Depending on programs goals and funding source(s), deliverables may require you to track the number

History of the Alliance's Sierra Friendly Landscaping Program Development

In 2008, the Alliance produced the Sierra Nevada Yard and Garden Guide as a resource for homeowners to create a high quality, resource-efficient, sustainable and cost-effective landscape. Residents and visitors can promote the ecological integrity of the Sierra Nevada region through smart landscaping choices. The Alliance then partnered with organizations to create 4 model Demonstration Sites, education programs and individual consultation programs up and down the region.

In 2009, the Sierra Nevada Alliance secured funding from the State of California Water Resources Board to help launch and work with the Truckee River-Friendly Landscaping program led by the Truckee River Watershed Council. The goal was to create a model program focused on neighborhood wide outreach to voluntarily reduce soil erosion, especially non-point source pollution, which contributes to the declining health of the Truckee River. These programs all built on the excellent work done in Tahoe on implementing home landscaping Best Management Practices to improve Lake Tahoe water quality.

In Truckee we partnered to offer home consultations/site evaluations and treatment workbooks. Additionally, the program provided rebates as an incentive to homeowners who implemented the recommended landscaping practices.

From these experiences above, the Alliance provided this Cookbook in hopes other communities can build on these efforts and expand Sierra Friendly Landscaping throughout the region.

of homeowners and best practices implemented by homeowners. Therefore, establishing a database or spreadsheet to keep track of this information is critical. The Alliance can provide you a sample tracking Excel sheet that you can adapt for your program. Be sure to train everyone on the team in effectively using these systems and ensure you have one person who is responsible for monitoring your system and data quality.

7. Conduct outreach and sign up homeowners/residents. There are two forms of outreach – passive outreach (news stories, posters, advertisements, mass mailings) and active outreach (face to face interaction). Create a passive outreach plan to educate your broader community. Active outreach, such as door-to-door outreach and tabling enables you to explain the program, address concerns and more easily and immediately sign people up for a site evaluation. Passive outreach piques interest, but few people pro-actively call your office to sign up for a site evaluation. We have found that active face to face outreach is necessary to successfully secure homeowner participation.

8. Make appointments. Once you've established a master list of people who would like to participate in the program, *immediately* call them to setup their site evaluation appointment. The longer you wait to contact and schedule a site visit, the less likely the homeowner will be interested due to the motivating conversation being forgotten. In communicating about the appointments, be sure to share that the program is voluntary and that the site evaluation is brief (an hour or less). It is advised to be available to make phone calls and conduct site evaluations in the evenings and on weekends when the majority of residents are home.

7. Conduct site evaluations. A site evaluation entails a brief walk around the property to identify areas needing improvements. Discuss with the homeowner their goals for their yard and garden. Let them know that you are not a professional landscaper, but are there to provide ways to help their yard be more Sierra Friendly while meeting their other landscaping goals. The goal is for the consultation to take no more than 45 minutes. Bring your camera to take pictures of the properties 'improvement areas,' a clipboard, paper and pencil to take notes so you can create a treatment workbook back at



the office. Depending on your program, you may want to bring additional tools such as a level and/or measuring wheel.

8. Produce treatment workbooks. This step entails the site evaluator organizing and compiling the data from the home consultation into a constructive site plan and recommendation list. We have found that it is important to limit the number of recommendations to ensure the plan is not overwhelming. Be sure the plan covers what to do, where to do it and offers tips/instructions for how to do it. Having a map of where the treatments should be installed/implemented is helpful. We have found creating a “Master Handbook” at the office to pull recommendations from helps tremendously in creating each workbook. A Master Handbook can ensure quality control on the recommendations. The Alliance can provide your local expert advisory group a sample Master Handbook from Truckee that can be adapted to your community and programmatic goals.

9. Deliver and follow-up to workbooks. Make sure that the workbooks are delivered ASAP to the homeowner in the form of e-mail, mail or by hand. The longer a delay between your site visit and delivery, the less motivated the resident will be to implement the changes. Be sure to follow up with the homeowner in the first week after delivery to answer any questions.

10. Optional: final walkthrough and rebate distribution. Your program may decide to track homeowner implementation. These results help you adjust your program and can help attract future funders and partners. Have the homeowner call you when they think they have completed most of the work they will do and do a final walk-through of the property. Use checklists based on the recommendations from the Treatment workbook and determine what has been implemented. Bring your camera to capture “After” pictures.



Offering rebates can be a great incentive for homeowners to implement the recommended treatments. If you offer rebates, you can decide whether a certain percentage or number of treatments must be implemented and if people can apply for more rebates at different times. Have the homeowner complete a rebate application and attach receipts for all costs, such as the materials used and services hired to implement the work.

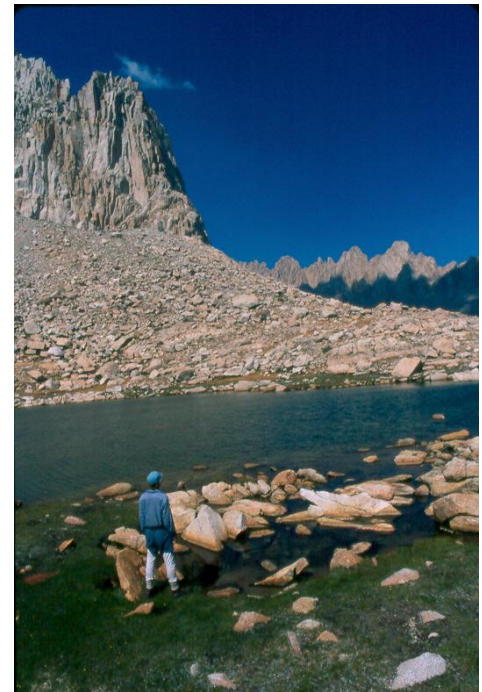
11. Share your success stories. Be sure to share stories of success in the community. This can be through news releases, articles in your newsletters, appearances on local TV and radio shows and presentations to local government and community groups. Share the total number of homeowners outreached to, number participating in the program and number of recommendations implemented. Calculate results such as how much pollution prevented from entering local streams and increased acreage of fire defensible space. Share a couple of specific examples with the residents permission – showing their before and after pictures and describing what they did. Success stories can help attract more homeowner participation, more community donations and future funding. Another potential way to spread the word is to have homeowners who are in the process of implementing the recommended measures or have already implemented put a sign in their yard advertising that they have a “Sierra Friendly Property” along with contact information for those who want to participate in the program.

CHAPTER 2: PLANNING YOUR PROGRAM

The Sierra Nevada Alliance Sierra Nevada Yard and Garden program promotes sustainable landscaping and gardening practices throughout the Sierra. Your program's mission is dependent on the specific resource issues that need to be addressed in your community. As stated above, some goals to choose from are

- Keeping water clean
- Conserving water for a reliable water supply
- Promoting native vegetation
- Keeping wildlife wild and communities safe
- Defending homes from wildfire
- Maintaining the integrity of native soils.

The following chapter provides more in-depth information helpful to develop your program.



RESOURCES YOU WILL NEED FOR PLANNING

A planning team. This could be your board of directors, staff of your program, advisory board, etc. Consider team members who have expertise in the issues, experience in community outreach programs, who will implement the program and people who may bring resources to the project.

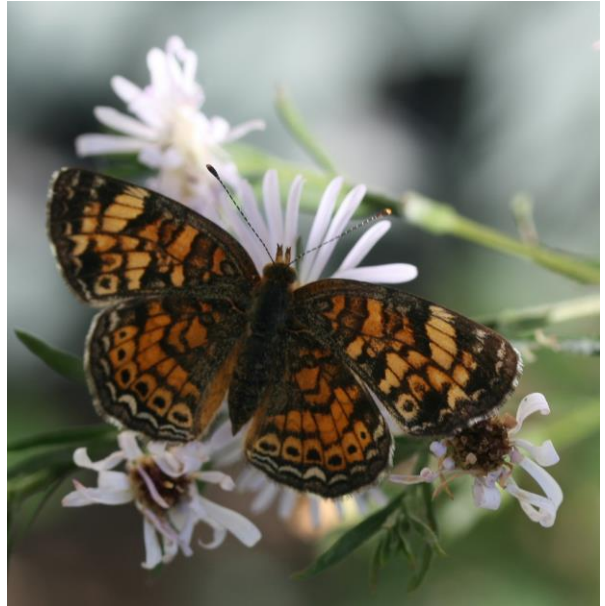
PLANNING STEP-BY-STEP PROCESS

- 1. Identify your natural resource target areas.** For your area, you're probably already aware of the issues that are negatively effecting your environment. Choose all or some of the areas you want your Yard and Garden program to improve.
 - a. Water quality
 - b. Water conservation
 - c. Native vegetation and invasive species
 - d. Wildfire
 - e. Soil health
 - f. Wildlife

- 2. Establish realistic impact goals for your target areas with your local experts.** These goals would be measurable, achievable in a determined time frame and directly tied to Sierra Friendly Landscaping voluntary implementation measures.

A few examples:

- a. Water quality – Reduce 200 tons of soil into local watershed. Determine number of measures implemented reduces x tons of soil lost per year / property.
- b. Native vegetation and invasive species – Eliminate star thistle in the Cooper Hill Neighborhood.
- c. Wildfire – Get 75% of properties in Cooper Hill to meet local fire defensible space standards.
- d. Wildlife – Ensure 30% of the properties have bear boxes in Lee Vining and all hobby livestock has mountain lion proof enclosures.



- 3. Identify your target community members you want to participate in the program.** Is your target community all residents of Lee Vining? Is it 10% of residents in three neighborhoods that are adjacent to your local creek? Is it low income housing property owners? Decide on a realistic target area and know that the more focused the area the easier to target outreach, measure results and visibly see participation.
- 4. Identify quantitative and qualitative goals for each step in the Sierra Friendly Landscaping Program.** Work backwards and do this process a few times to adjust back and forth. You may decide at first you want 100 BMPs implemented to achieve a 2000 ton reduction in sediment. But when you realize this will mean you need 500 people to sign up initially and this will take 100 hours of tabling, you may believe you don't have those manpower resources and you adjust your numbers accordingly.

Below are some goals we recommend you set and examples of the ratios of success discovered through the Truckee River Friendly Landscaping Program.

- a. Set a goal for the number of Best Management Practices Homeowners will implement. Only 11% of homeowners who got Treatment Workbooks however implemented at all in Truckee in the first season. This number increased with two seasons to implement. Of those who implemented in Truckee, we found they implemented 80% of the recommendations over a two season period if rebates were offered.
 - b. Number of homeowners who will get Treatment Workbooks and number of BMPs recommended. In Truckee we found that 9 out of 10 homeowners wanted a Treatment Workbook. Some decide at the point of the site evaluation to not go forward when they better understood what is involved and therefore did not get workbooks. We recommend not offering more than 10 recommendations per home in order not to overwhelm the homeowner.
 - c. Number of site evaluations completed. In Truckee, a site evaluation was completed for every homeowner who signed up for one.
 - d. Number of homeowners who agree to a site evaluation. Nine out of ten people who signed up at a table or at the door to engage with the program then signed up for a specific time to have their home property evaluated.
 - e. Number of homeowners who sign up. In Truckee, at good tabling sites they found they could sign up 10 people per hour and a half of tabling.
 - f. Active outreach numbers: Such as number of hours tabling and number of doors knocked-on.
 - g. Passive outreach numbers: Such as number of posters placed around town, number of news releases issued, number of advertisements placed.
 - h. Number of expert advisors to train your outreach team.
- 5. Create a timeline.** Put the steps above on a timeline. In the Sierra, the field season for home consultation visits varies community to community. Keep in mind factors such as when the snow melts, when the growing season occurs and when it is too hot to do outdoor fieldwork. Resource recruitment and training(s) are excellent activities to do when there is still snow on the ground or when it's too hot to be outdoors.
- 6. Identify funding needs and resources.** For each step in your plan identify the staff/volunteers you'll need, the funding requirements, expertise needed and any other necessary materials. The first step in implementing the plan and first item on your timeline should be recruiting these resources. Your first time period will be busy with fundraising, expert recruitment, hiring staff, recruiting volunteers and soliciting businesses for incentives and donation of materials.

PLANNING TIPS FOR SUCCESS

1. **Good planners make a good plan.** Ideally you will have experienced program managers, experts in natural resources, experts in community outreach and experienced landscapers or best management practice implementers. If these experts are not in the room when you're designing the program, ask them to review your draft and provide feedback
2. **Use adaptive management.** Set aside specific time to plan and then finalize the plan within that time, even if your plan is not perfect. Then establish points in your process to revisit and adapt the plan to changing information, unforeseen challenges and lessons being learned as you go. Your plan is just a tool to use, not the end goal upon which you judge your success.

PLANNING PITFALLS TO AVOID

1. **Plan lacks milestones along the way.** If you want 100 BMPs implemented in the first year, do you wait until December 31st to see if you have 100? Or do you determine that means you need to see 5 implemented in June, 25 in July, 35 in August and 35 in September. Setting benchmarks and creating timelines facilitate adjusting tactics along the way to your goals.
2. **Plan is unrealistic but stick to it.** Your plan states you want 90% of the homeowners of your county to sign up for a site evaluation. You have a budget of \$5,000 and are relying on volunteers to do the site evaluations. If you find that your original vision was overambitious, downscale your plan to be achievable. This will prevent staff and volunteers from feeling discouraged and better sustain your program.

PLANNING CONCLUSION

We hope this provided your team enough guidance to confidently start your planning process to create a Sierra Friendly Landscaping program. As noted above, we highly recommend you read this entire Cookbook before starting your planning. The following chapters provide more in-depth understanding of each step.

CHAPTER 3: FINDING FUNDING & RESOURCES FOR YOUR PROGRAM

Sierra Friendly Landscaping Programs have many elements that can be highly attractive to funders, volunteers and others. They can have clear, measurable performance measures, real impacts on water quality and benefits to fire defensible space. Increasingly co-benefit approaches are highly popular and if your program integrates multiple resource goals it will stand out. In addition, the stories from homeowners and residents implementing the recommendations with before and after pictures paint a clear picture of the program and its success.



The purpose of this chapter is to offer some leads to help you fundraise and secure other resources to match your program needs.

A Sierra Friendly Landscaping Program can be scaled to many different models and the resources required vary from one program to the next. A minimal model could be a program run by volunteers that offers free consultations and workshops and does limited outreach with a goal of helping 25 homeowners in one year. A larger scale model could be a five year program to install 1500 BMPs requiring five seasonal staff and an outreach plan requiring over 200 hours of tabling and door to door work. Based on the plan you create in chapter two, determine your budget and then set out to get resources.

Government grants, private foundation grants, individual donors, major donors, event fundraising and membership dues and fees can all help create funds to run these programs. Charging a fee for this service is also another possibility; although at this time the programs we have worked with or researched are not based on the fee-for-service model.

Government Grants

The Sierra Nevada Conservancy has resources to search for state and federal government grants on their website. They also offer grants periodically that might support a Sierra Friendly Landscaping Program. Visit <http://www.sierranevadaconservancy.ca.gov/other-assistance>



Private Foundation Grants

The River Network is an outstanding organization and they offer a highly recommended River Advocates Fundraising Guide and other tips for fundraising. Highly recommended. Visit <http://www.rivernetwork.org/resource-library/online-publications>



The Nonprofit Resource Center of Sacramento has excellent resources that are applicable beyond Sacramento. Visit <http://www.nprcenter.org/grant-funders>



AmeriCorps Members - SNAP

The Sierra Nevada AmeriCorps Partnership (SNAP), a program of the Sierra Nevada Alliance, invites Sierra Nevada conservation organizations and agencies to apply to become a Sierra Nevada AmeriCorps Partnership Host Site. SNAP Host Sites receive full-time AmeriCorps member(s) to serve 11 months at the organization/agency from October through September conducting watershed restoration and assessment, watershed education projects and volunteer recruitment and support. Sierra Friendly Landscaping Program outreach, site evaluations and workbook production are great SNAP member projects. To be a host site you provide on-site training to the Members, contribute a cash match payment between \$9700 to \$12000 towards the members living stipend/benefits and support and participate in program requirements. To learn more visit www.servingthesierra.org



Volunteers

Other Yard and Garden programs have used volunteers to help get the word out about the program through activities such as posting flyers and signing up residents at tables. Some programs even trained their volunteers to do site evaluations and create treatment workbooks. These latter activities require significant time commitments – both in the training and to help homeowners. The key is to create volunteer position descriptions specifying the skills, hours and responsibilities and ensure everyone is on the same page. The Truckee River Watershed Council has found the tasks of site evaluation and creating treatment workbooks requires a level of expertise and time commitment that was not the best fit for many volunteers' skills and availability.



Material Donations

Programs can use a variety of materials and many wonderful local businesses have donated these materials or offered significant discounts. Some examples of donations include:

- Candy and goodies to thank volunteers
- Free items offered at outreach tables to attract people over – native seed packets, energy bars or re-usable water bottles
- Discount coupons at local stores – given to homeowner/residents either to help reduce costs of implementing the landscaping changes or as appreciation gift after the work is completed.
- Discounts to implement landscape services

FINDING FUNDING AND RESOURCES CONCLUSION

Fundraising and resource attainment is never easy. We hope the tips and resources above help you secure the needed resources to support a robust program. Never doubt that others will join you in valuing the importance of helping communities implement on the ground landscaping designs that improve our stewardship of California's and Northern Nevada's watersheds, make our communities safer and ensure the beauty and diversity of the Sierra remain for future generations.

CHAPTER 4: MESSAGING FOR SIERRA FRIENDLY LANDSCAPING

Once your plan is established and resources are secured, the next step is to create messaging for your program to get your target community members to engage in Sierra Friendly Landscaping. The following chapter reviews lessons we have learned on messaging from our Sierra Friendly Landscaping Program and tips for creating your own effective messaging.

RESOURCES YOU WILL NEED FOR MESSAGING

- An understanding of target community, neighborhoods and residents
 - Their motivations
 - Their concerns
- Experts in communication outreach. While not required to hire a communication firm, it is always helpful if you have someone on your messaging team with professional communication experience.

MESSAGING GOAL

Create a message that concisely motivates homeowners and residents to engage with the Sierra Friendly Landscaping Program. These messages will be used in written outreach materials, for active recruitment and while working with residents/homeowners.

Note that we emphasize the importance of being concise. Nearly all the outreach conducted relies on quick statements/messages to gain attention, after which we follow with short conversations to motivate the homeowner to start the process by signing up for a site evaluation. We encourage you to keep “Concise” in mind as you go through the following steps.



MESSAGING STEP-BY-STEP PROCESS

1. **Determine homeowners and residents motivations and concerns to do Sierra Friendly Landscaping.** From these motivations and concerns you'll then craft specific messages.

Sample Motivation of Homeowners

- Want help in beautifying their yard. Help in the form of:
 - Expertise
 - Funding
 - Manpower
- Keep the local resource pristine/clean for everyone (see side bar)
- Be a good neighbor
- Keep family safe:
 - from fire
 - from dangerous wildlife
 - from dangerous pesticides or fertilizers
- Attract appropriate wildlife
- Save money on water bills
- Live lightly on the land

Sample Concerns of Homeowners

- Going to be more effort and time than they have
- Regulation? Will it end up requiring/forcing them to do something they don't want to
- Financial expense
- Sounds too good to be true – won't work out
- The changes that help make it Eco-Friendly are ugly
- They don't have the expertise – too complicated
- It's a communist United Nations Agenda 21 scheme, leading to the loss of local control

We recommend you review the motivations and concerns listed and determine if they are applicable for

In Truckee it's about the The Truckee River In Tahoe it's about Keep Tahoe Blue

The Sierra Nevada Alliance Sierra Yard & Garden program brands the focus on the Sierra. For your community residents and homeowners, they may identify with protecting and restoring the Sierra Nevada. But often, communities are attracted to saving an even more specific local feature.

The Truckee River Watershed Council calls their program Truckee Friendly Landscaping.

The Tahoe Basin program focuses their program on the Lake Tahoe.

Both these programs benefit more than just water quality of the local water body. But by anchoring their programs on a local treasured resource, they inspire stewardship and participation more quickly. As individuals get engaged with the program their awareness of the broader benefits grows, but it all starts with tapping the local love.

your target community. Determine what is missing and make the examples listed, if appropriate, more specific to your target geography. For example “Keep local resource clean/healthy,” for Truckee this meant Truckee Friendly Landscaping. Or “attract appropriate wildlife” – perhaps name the popular wildlife people often want in your yard – Rufus-sided hummingbird or Checker butterfly. Name specific nuisance or undesirable wildlife you want to avoid attracting near your home, such as coyotes, deer, bears or mountain lions.

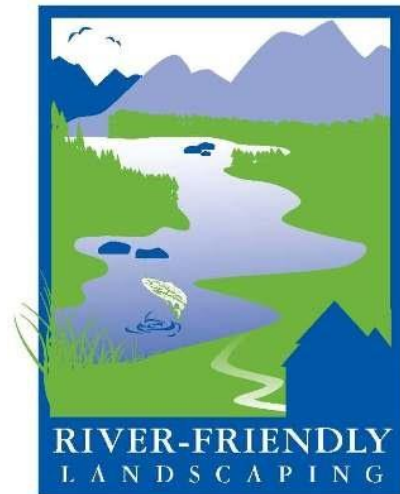
- 2. Determine program name.** Based on the motivations and concerns above, your program goals and the organizational interests, choose a name for your program. We encourage your program name to anchor to the popular local resource and be broad enough to include your resource goals. Here are some examples:

- Sierra Friendly Yard & Garden Program
- Truckee River-Friendly Landscaping Program
- Tahoe Backyard Conservation Program
- Butte Fire Safe Yard & Garden Program

Some names you may want to rethink based on motivations noted above.

- Jackson Green Gardener Program (does your target audience attract to ‘Green’? Not often in the Sierra)
- Erosion Control Landscape Program (how many people approach you about erosion control.) health?)
- Home Invasive Weed Program (again – is this a common top tier motivation)
- Mono County Home Best Management Practices (BMP is not a household term)

- 3. Determine key program messages based on motivations and concerns to implement Sierra Friendly Landscaping Program.** Determine one or two motivation(s)/goal(s) and use these as your main headliner on outreach materials. You will use the additional motivators when you have more space/time. Include messages in your outreach to pro-actively address concerns. Sometimes having the names of the sponsors and supporters lends legitimacy that addresses concerns.



MESSAGING HEADLINERS

Experience from existing Yard and Garden programs shows most community members are more motivated by ‘free resources/money savings,’ and safety messages, than they are in environmental stewardship. Therefore, while the program leaders may be more motivated to improve water quality

or prevent the spread of invasive weeds, the target audience may not care. We encourage you to have your top messaging and headlines play to messages like the following.

- Get free services and resources to improve your yard and garden!
- Call today for your FREE Sierra Friendly yard and garden consultation. Learn techniques for beautiful, low maintenance landscapes.
- Protect your family – call today for free support to make your yard more fire defensible
- Protect Your Home and Lake Tahoe
- Save money, get free home consultations on water conservation and other Sierra Friendly yard and garden techniques

SUPPORTING MESSAGING TO WEAVE INTO YOUR SUB-HEADERS

- We'll help you create the yard of your dreams while protecting (local resource)
- Not only can you improve your yard and garden – you can keep your family safer by deterring dangerous wildlife, reducing the use of certain pesticides and fertilizers
- We can help you get rid of invasive weeds and help native plants flourish

MESSAGES TO HEAD OFF CONCERNS

- Our consultations and resources make it easier for you to design and install Sierra Friendly Landscaping. (This addresses concerns of it being complicated and time consuming.)
- We help you establish low maintenance, cost-effective landscaping. (This addresses concerns about the yard being complicated or hard to maintain.)
- The program is voluntary program – providing you resources to design and implement your landscaping choices. (This addresses that it's not a regulatory program and it is completely in their control.)
- Thanks to our discounts from local businesses and rebates (if applicable), we help you save money
- This program has been field tested and implemented in communities throughout the Sierra. (This addresses concerns about program effectiveness.)



CREATE TOOLS FOR OUTREACH

Depending on your plan, you will need to create materials for outreach. The following are some sample types of materials different programs created to help in their outreach

Passive Outreach Materials

- Trifold brochure
- Posters
- Seed packets with sticker on program
- Trifold tabling display
- Direct mail letter
- Power point presentation for group outreach
- Webpage(s)
- News releases
 - Announcing the program launch
 - Announcing program milestones

Active Outreach Materials

- Script for tabling outreach
- Script for door to door outreach
- Script for phone calls to set appointments

We provide more detailed examples of messaging in the following chapters specific to outreach, setting up appointments, home consultations and workbook delivery.

"It was gratifying to learn that even though I do not live on the Truckee River, I can make a difference."

-Truckee Friendly Landscaping participant, homeowner Steve Ramos

MESSAGING TIPS FOR SUCCESS

- 1) **Free.** We said it above, but it's worth repeating again that the program's prime attractant is free services, resources and support. People want to make their yard more attractive, with easier maintenance. A free service to help them improve their yard is invaluable.
- 2) **Emphasize at every step there are no obligations.** Sometimes the program seems too good to be true and people are waiting for 'the catch'. Ensure they know they are in control and your motivations are not monetary.

MESSAGING PITFALLS TO AVOID

- 1) **Avoid using scientific language that doesn't resonate with the average resident.** If you use Sierra Friendly Landscaping jargon, provide definitions. Examples of what to avoid:
 - a. BMPs (Best Management Practice)
 - b. TMDL (Total Maximum Daily Load)
 - c. Structural stabilization
 - d. Nonpoint source pollution
 - e. SEZ (Stream Environment Zone)
 - f. Watershed- yes that's correct. Many people think this is a shed where you store your bottled water.
- 2) **Don't pitch the program as something it's not:** This program does not offer free landscaping. You are not offering a landscaping service – but free consultation with a workbook that they can then implement.

MESSAGING CONCLUSION

Being thoughtful and deliberate on your messaging will help you reach your target audience and engage them in the target behaviors. Combine this with your passion and interest in improving your local community and the environment and you are sure to have a more successful program.

CHAPTER 5: OUTREACHING TO ENGAGE RESIDENTS AND HOMEOWNERS

Now that you have your messaging perfected, spread the word! This is the time to get people signed up to get their home consultation. There are numerous possibilities for outreach.

As noted in the 10 Steps in the Introduction, we divide outreach into two forms: passive outreach and active outreach. There are a number of resources for how to do community outreach, posters, media and mailings and we will not repeat them here. It is important to note the two active strategies that have been proven to secure the highest rate of community engagement:

- Tabling
- Door-To-door

GOAL OF TABLING

To convey your message to the community and recruit participation.

TABLING RESOURCES YOU WILL NEED

- Table, the white foldable ones work well
- Signup sheet
- Clipboard, pencil/pen
- Program materials (examples)
 - Trifold brochure
 - Sample site plans
 - Yard & Garden Guide
 - Before and after pictures
- People attractant (examples)
 - Wildflower seeds
 - Candy
 - Coupons for discounts at local yard and garden shops
- Business cards



TABLING STEP-BY-STEP PROCESS

1. **Develop program materials**, such as brochures and trifold display.
2. **Locate where you want to table.** Knowing your target audience as described in the prior Messaging chapter helps you determine locations. Examples are:
 - a. Community events
 - b. Farmers markets
 - c. Neighborhood block parties
 - d. Post office
 - e. Grocery store
 - f. Other community areas with a lot of foot traffic.
3. **Get permission to table.** If it is an event, call the event organizer. If it is a permanent location such as a store, call the store manager. Public areas must allow free speech areas, but these still require coordination and following the rules established by the institution.
4. **Recruit “tablers.”** This could be staff or volunteers. Set specific dates and times and sign up people for blocks of time.
5. **Set-up.** Arrive early to setup your area.
 - a. Ensure your sign or big trifold are easily readable when walking by (not too small a font)
 - b. Think about what you will do in wind (rocks on top of flyers, trifold anchored to the table) and rain
 - c. Also think about shade for your tablers
 - d. Most importantly – choose a space that is highly visible to people passing by, but don’t block their way
6. **Don’t sit behind the table.** Be in front with your clip board and some materials. Many people don’t feel comfortable walking up to a table with people behind it. However, if you are in front with a clip board you are more accessible and engaging.
7. **Pro-actively engage people.** We have found the following steps make the difference between signing up 1 person an hour and signing up 8 people per hour.
 - a. Smile
 - b. Make eye contact
 - c. Say “hi”
 - d. Have a 30 second pitch



- i. Hi – are you a local? Would you like free support to improve your landscaping (or make your home safer from fire)? Use your most compelling message.
8. **Sign people up on the spot.** Ask people if they are interested to sign up on your clip board for either a call from your staff/volunteers to setup the free home consultation or to sign up for specific times for a staff/volunteer consultant to come to their house. The latter saves a step if you already have blocked out times to do home visits. Know that only one out of every 500 brochures distributed will result in the homeowner calling you pro-actively. This is because people often lose the flyer, get home and have other priorities, or lose the motivation in their busy life.
9. **Give the people who sign up a reminder card.** Write down on a card or existing materials the appointment date and time, with information for them to reschedule if needed.

TABLING TIPS FOR SUCCESS

1. **Free “stuff”** Always draws people in. Could be candy or another give-away. Truckee River Friendly outreach used wildflower seed packets with the program information on the packet.
2. **Broad questions to get folks to pause with you.** Attract a passerby with an easy-to-answer question like, “are you from the area?” or “do you landscape your property?”
3. **Pretty pictures.** Bring along photos of “before & after,” sample site plans and other visually stimulating materials, they work better than wordy materials.
4. **Be the first to sign up.** Fill in your name or a fictional name and information at the top of the list. No one wants to be the first to sign up for something. Once folks see others are doing it, they feel more comfortable to do the same.

TABLING PITFALLS TO AVOID

- 1) **No “on-the-spot” appointments.** Participants that signed up could not set-up appointments on the spot.
- 2) **Same events, same people.** A location or repeat event, over time, becomes saturated and everyone has been approached. Switch up your tabling locations.



GOAL OF DOOR TO DOOR OUTREACH

To raise awareness about your Sierra Friendly Landscaping Program, garner community support and recruit program participation in targeted neighborhoods.

DOOR TO DOOR RESOURCES YOU WILL NEED

- Signup sheet
- Clipboard, pencil/pen
- Trifold brochure
- Program materials for the clipboard (examples)
 - Sample site plans
 - Before and after pictures
- Business cards
- Any media stories covering your program from local news outlets

DOOR TO DOOR STEP-BY-STEP PROCESS

1. **Locate where you want to go door-to-door.** Pre-determining target residences helps you cater your door-to-door tactics to individual community regions.
2. **Obtain required permits.** Check with your local sheriff office to acquire canvassing permits, if they are required.
3. **Recruit canvassers.** Canvassers are the staff or volunteers who go door –to-door. Set specific dates and times to canvas. Sign up people for blocks of time. Note that some people are intimidated by approaching homeowners door-to-door. If preferred, you can have people do this in teams.
4. **Timing.** It is best to canvass between 5pm and 8pm, or on weekends between 10:00 am and 4:00 pm. This is when most working families are home.

5. **Create maps and tracking systems.** You can get parcel maps from your local county office with houses/dwellings marked clearly on each street. Assume that a canvasser can knock on roughly 10 doors per hour. Break the ‘turf’ up into shifts. Make ‘shift’ maps – a map for just that one person or team. Whenever someone has covered an area, have them mark that in highlighter on the central map as completed. Be sure they mark off what they did, not what was assigned on a central map tracking system.
6. **Solo canvassers or a crew?** Determine if you will have one person canvas independently, or if you will create a canvassing crew. For the solo canvasser, provide them with an entire neighborhood and let them work it on their own. They should drive themselves to the target region each day and report back to the central office each week. For the canvas crew, be sure that turfs don’t overlap. Create clear drop-off and pick-up locations for each person and set an appointed meet-up time. At the end of the canvassing session, have the crew mark their completed residences on a central map.
7. **Pro-actively engage people.** The following steps make a difference in signing up homeowners at the door.
 - a. Smile
 - b. Make eye contact
 - c. Take a moment to greet the homeowner
 - d. Give a prepared 30 second pitch
8. **Sign people up on the spot.** As delineated in the tabling section, ask people if they are interested in signing up on the spot. The homeowner can sign up for a call from your staff/volunteers to setup the free home consultation, or they can immediately set a date/time for their home consultation. Remember that only one out of every 500 brochures distributed will result in the homeowner calling you pro-actively.
9. **Give the people who sign up a reminder card.** Write down the appointment date and time on a trifold brochure or a quarter card. Provide program contact information, as the homeowner may need to reschedule.



DOOR TO DOOR TIPS FOR SUCCESS

- 1) **Let them know you are not asking for money.** Make it clear that this is truly a free program. Homeowners will be more inclined to listen to your pitch, without gearing up to say no.
- 2) **Show your credentials.** Bring all verification materials with you and make them visible to the homeowner. Tape on the back of the clipboard your picture with your name, title, organizational logo and contact information. Make sure the materials have your host organization and co-sponsor logos prominently displayed. If you have a news article from a local newspaper or known publication, include a copy of that news story on the clipboard and highlight the section that mentions your group's name.
- 3) **Use neighbor sign-ups as your clipboard cover sheet.** Don't use any false names. Simply sign up folks in your office to start. Once the first neighbor signs up, make sure they are on the top page. As you get more folks to sign up – ensure that the closest neighbors are your top sheet. This inspires confidence in the community.

DOOR TO DOOR PITFALLS TO AVOID

- 1) **A wordy pitch.** If you don't get to the key message quickly, the homeowner will not understand your purpose. You have 30 seconds before the homeowner makes a judgment about if they will give you more time and if they are interested in learning more. Make sure your pitch has the headliner/key messages up front. Be concise and compelling. See chapter on Messages for how to make it compelling.

OUTREACH CONCLUSION

Go forth and engage! Your Sierra Friendly Landscaping Program is doing your community a great benefit. People appreciate your goals, even if they don't participate. Those who do participate are pleased with these programs. Always remember that you are giving people useful resources and an opportunity to make a difference in their community. Often, the hardest part is getting the homeowner's time to hear about the program. The program is rewarding for you, for the homeowners and for the community as a whole.

CHAPTER 6: SETTING UP APPOINTMENTS

In order for residents to get a Sierra Friendly Landscaping home consultation, you need to setup site visits. These appointments will guarantee the homeowner is present, able to walk the property with you and provide approved access to their private property. How, where, what and when you setup appointments makes all the difference in successfully implementing this step. The following chapter presents information on how to setup appointments, tips for success and pitfalls to avoid.



RESOURCES YOU WILL NEED FOR SETTING APPOINTMENTS

- Volunteers and/or staff who will make the phone calls to setup appointments.
- Phones to call residents.
- Email account to email residents.
- Excel sheet master list of residents interested in setting up an appointment, including their names and contact information (contact the Alliance for a sample Excel Master List).
- Sample script for making phone calls:

Caller: *Hi, my name is Jane Doe and I am calling from the NAME OF GROUP's Sierra Friendly Landscaping Program. You signed up this last week for a free landscaping site consultation. I'm calling today to schedule that for you.*

Homeowner: *"Wonderful!" or "We are no longer interested."*

Caller: *Great! What dates and times work best for you? I can accommodate your schedule and conduct the site evaluation at a time convenient for you. The site evaluation should only take 30 or so minutes.*

GOAL OF SETTING APPOINTMENTS

To get homeowners to set aside a designated time to meet with your staff/volunteer for a home consultation.

SETTING APPOINTMENTS STEP-BY-STEP PROCESS

There are two roles in the appointment set-up process:

Coordinator: This is the person who manages the outreach list. This person assigns staff/volunteers names to call. The Coordinator tracks the calling results and creates a master calendar of home consultation appointments. This person offers support to staff/volunteers to ensure that the home consultations occur.

Caller: This is a person who calls people to sign them up for a home consultation appointment. They do the calling and report the results back to the Coordinator.

1. **Each caller is assigned a list of names to contact.** As mentioned above, the Coordinator assigns the names from the outreach list.
2. **Each caller sets aside time to call and email their list of homeowners.**
3. **Callers use a prepared script to engage homeowners over the phone.** A sample script:

***Caller:** Hi, my name is NAME, and I am calling from the Sierra Friendly Landscaping Program. I am following up with you today, because we have your name on a list of homeowners who is interested in a free site consultation.*

***Homeowner:** "Oh, wonderful..." or "Sorry, we're no longer interested."*

***Caller:** Great! When works best for you? I can conduct the evaluation whenever is convenient with your schedule. It should only take about 30 minutes.*



4. **Callers track and document information from each homeowner.** As the callers interact with the homeowners, they track the following:
 - a. the date/time they attempted to reach the homeowner
 - b. if they reached the homeowner or left a voicemail
 - c. if the homeowner committed to an appointment: yes, no or call back
 - d. if an appointment was scheduled-- the date, time and location
5. **The Coordinator collects caller information.** The Coordinator creates a master calendar of appointments, which will be used to assign staff/volunteers to home consultations.

TIPS FOR SUCCESS

1. **Success Rate.** The Truckee River Friendly Landscaping pilot project found that for every 10 names on a list, 8 were reached on the phone and scheduled an appointment, if called within a week of signing up.
2. **Timing is everything.** Contact people within one week of their sign up. The longer the period between their sign up and reaching them on the phone, the “colder” their name becomes. With each week that goes by after the person signed up, their interest and motivation dwindles.
3. **Call when people are home.** To reach the majority of people who work 9am to 5pm, make calls on weekdays between 5pm and 9pm or between 10am and 5pm on weekends.
4. **Send emails.** Callers can use email to setup an appointment. However, the email may never get opened or replied to, and thus, calling produces the highest results. Therefore email is only recommended for homeowners that declined to offer a phone number or are consistently unavailable by phone.
5. **Be prepared to review the program basics again.** When the homeowners initially signed-up, you reviewed the whole program. When setting up an appointment, assume that the homeowner does not remember program details. Provide a consolidated overview of the program at the beginning of the call/email.
6. **Have appointment slots for a variety of times.** Offer time slots on weekends, evenings and during the work week. Everyone’s schedule varies and the more options you present, the more likely you are to setup an appointment successfully.

PITFALLS TO AVOID

- 1) **Losing track of appointments.** It's easy to become disorganized with so many names and phone numbers. The Truckee River Friendly program created a Google calendar to keep track of appointments that allowed many volunteers/staff to setup appointments while maintaining one master list.
- 2) **Having too many appointments can create confusion during the consultation and workbook creation stage.** It will take 4-6 hours to create a workbook for each homeowner. Ensure that the home consultation schedule allows enough time for the home consultant to create a treatment workbook within the same week. The greater time between the site visit and creation of the workbook reduces the quality of the workbook. The home consultant may forget site details, or confuse the homeowner sites (which one had grass? which one had an eroding hillside?). We have found it best not to schedule more than 3 appointments in one work day.

SETTING APPOINTMENTS

CONCLUSION

Use trial and error to discover how to improve setting up appointments for your program. Ask yourself questions as you go: Which appointment times are popular with homeowners? What times produce the highest rates of contacting people? Setting up appointments is one of the most critical steps in the Sierra Friendly Landscaping Program. It ensures that homeowners fully engage in the program.



CHAPTER 7: CONDUCTING HOME CONSULTATIONS

After scheduling an appointment, it's time for the home consultation. A home consultation involves a trained volunteer or staff member visiting the homeowner's property and identifying areas of the yard and garden that need Sierra Friendly improvements. These observations are noted so the volunteer/staff can later create a treatment workbook at an office with landscaping recommendations and instructions.



In a perfect Sierra Friendly Landscaping world, the homeowner is present for the consultation and the property walk takes about 30 minutes. The appointment may take longer if the property is difficult or the homeowner has questions. If the homeowner is not available but gives you permission to conduct the consultation in their absence, do so.

Note: The home consultations should only be conducted by a trained volunteer or staff member. So before you start home consultations, organize a training for your staff/volunteer team who will do the home consultations and treatment workbooks.

TRAINING RESOURCES YOU WILL NEED

- A training workshop for those performing home consultations, including:
 - Expert consultants (Call our office for leads of trainers or consultants you could hire)
 - Location for training
 - Training binder (The Alliance has a Conservation Landscaping Workshop Material Binder available upon request that you can adapt for your own training)
 - Site(s) to visit and evaluate together

- Sample consultation materials:
 - GPS
 - Clipboard
 - Compass
 - Pen, pencil
 - Digital camera
 - Property soil type and parcel map
 - License agreement
 - Inclinator
 - Trifold brochure with program's contact information



TRAINING GOAL

Train all the staff and/or volunteers who will be performing home consultations. The training should cover all the landscaping retrofits needed to achieve your resource preservation goals. Experts you may consider to recruit to help lead your training:

- Erosion control experts, trained in erosion-reduction Best Management Practices
- Water conservation experts
- Invasive weed and native plant experts
- Local wildlife protection experts
- Defensible space experts
- Native soil experts
- Landscaping experts

TRAINING STEP-BY-STEP PROCESS

1. **Recruit your expert trainers.** Call our office if you need leads. Expect to pay the experts to conduct the training.
2. **Set a date for the training.** Use the experts' schedule to establish two training days-- one day in class and one day in the field.
3. **Arrange the facility and food logistics.** Based on the number of home consultants, pick a comfortable training site that can accommodate power point projection. Determine if you will provide food and outline the break schedule.

4. **Assign/Hire/Recruit your home consultants.** We highly recommend these programs use staff. If you use volunteers, establish detailed hours each week and negotiate a long-term time commitment. The program is training-intensive and should avoid high turnover. From the beginning, be clear about the full time commitment.
5. **Hold the training.** A sample agenda is available at the Sierra Nevada Alliance. The agenda overviews how homes contribute to specific resource problems, detailed home assessment techniques and residential landscape design. Ideally, you provide installation demonstrations and a walk through of both problematic and exemplary retrofitted properties.

CONSULTATION GOAL

Conduct a thorough on-site consultation and collect pertinent information to create a professional site plan and treatment workbook for the homeowner. The home consultant should educate the resident about Sierra Friendly Landscaping practices. Ultimately, the goal is to support homeowners as they implement your recommended treatments!

CONSULTATION STEP-BY-STEP PROCESS

1. **Bring an aerial view of the property with you.** The aerial map can be found on Google maps. The map will prepare you for the property's landscape design. It will give you an idea of where driveways, patios, forested areas and so forth exist.
2. **Prepare a license agreement.** Design a document that gives the home consultant permission to be on the homeowner's property. Include the homeowner's property information, contact information and a signature line. For an example of this document, please contact the Sierra Nevada Alliance
3. **Greet the homeowner and review the program and consultation goals.** Encourage the homeowner to share their landscaping goals, upcoming projects and any concerns about their property. By



incorporating the homeowner's input about their property into the final workbook, the recommendations are more likely to be implemented.

4. **Walk around the property, drawing a site plan and taking some measurements.** While walking the property, make sure to take pictures, write notes and make observations about the site.
5. **Inform the homeowner of a two-week turnaround time for the workbook.** Ask the homeowner how they would like to receive the workbook: hand delivered, mailed, or emailed? If the homeowner wants the workbook by mail, ensure that the mailing address is the same as the physical address.
6. **Leave the homeowner with the program's contact information.** If the homeowners have questions or concerns before they receive their workbook, encourage them to phone your organization.

CONSULTATION TIPS FOR SUCCESS

- 1) **Know where you're going and be on time!** Bring the homeowner's phone number and address in case you need to call them. Use a GPS for navigation and bring a map, in the event the GPS fails. Let the homeowner know if you're running late.
- 2) **Incorporate homeowner interests.** If the homeowner is present for the walk through, they'll often ask you for on-the-spot recommendations. If you feel comfortable making recommendations on-the-spot, do so. Inform the homeowner that the workbook will detail your recommendations and reiterate those recommendations in the workbook. This engages the homeowners more fully and incentivizes them to implement your Sierra Friendly recommendations.
- 3) **Spend the time you need.** During the consultation, it's important to spend the time you need to get all the necessary pictures and information about the property. It is important to be efficient, but thorough. After the first consultations, the process will become more streamlined and the consultations will take less time to complete – don't worry if the initial consultations take longer than expected!

CONSULTATION PITFALLS TO AVOID

- 1) **Don't leave with poor photos.** Before you leave the property, look through your photos to make sure you've captured everything you need. Take photos of the problems areas, but also take photos of exemplary Sierra Friendly measures. These can later be used as example photos. It's been useful for Truckee River Friendly Landscaping to include a picture of the house number and a picture of the entire property (usually from across the street).
- 2) **Don't leave with an unsigned license agreement:** It is important to get the homeowner to sign the license agreement. This legal document gives you permission to be on their property. It is tremendously difficult to track down the homeowner to sign them after the post site evaluation.

TRAINING AND CONSULTATION CONCLUSION

It is important to be prepared for your consultation. Be an expert on the issues your Sierra Friendly Landscaping Program addresses. Feel comfortable explaining the program goals, treatment recommendations and the program process. Once you have information from the homeowner, walked the property, taken pictures, drawn a site plan and made observations, it's time to get back to the office and start on the workbook!

CHAPTER 8: PRODUCING WORKBOOKS

After the initial property site visit, it is time to produce a treatment workbook for the homeowner. The workbook is a written account of your Sierra Friendly Landscaping recommendations. The workbook includes your recommendations, examples, tip sheets and a site plan. This part of the process has proven to be the most time intensive, as each workbook takes 4-6 hours. Once you get a couple completed, the rest get easier! A home consultant should start the workbook immediately after the appointment. The longer you wait to begin, the harder it is to remember the property details. This chapter contains some tips we have found helpful in creating Truckee River Friendly Landscaping workbooks.

WORKBOOK RESOURCES

YOU WILL NEED

- Computer program for drawing site plans (SmartDraw, Freestyle, or Autocad)
- Aerial view of the property parcel (Google maps)
- Your photos, notes and drawings from the home consultation
- Treatment Workbook Template
- Master Handbook (This contains all the recommendations with how-to-implement instructions for every possible best practice/improvement you might include in a workbook. It is a menu to pull from and standardizes recommendations amongst multiple volunteers and staff doing workbooks.)
- An expert to review final workbooks

Assign a Unique # to Each Property:

A Property ID Number

Each homeowner should have a file folder with all of their information and documents. We recommend you create a property ID number on each folder. One system looks something like this:

T12-001-12345Apple-Smith

-**T12** refers to the County where the property is located and the year of the consultation– Truckee and 2012

-**001** refers to the chronological order of the property in which we've conducted the consultation

-**12345 Apple** refers to the property street number

-**Smith** refers to the homeowners' last name

We recommend having a numbering system in place to help organize all the documents and files. It also allows you to sort in a database for all the results by county, easily know how many sites you have done and relocate properties.

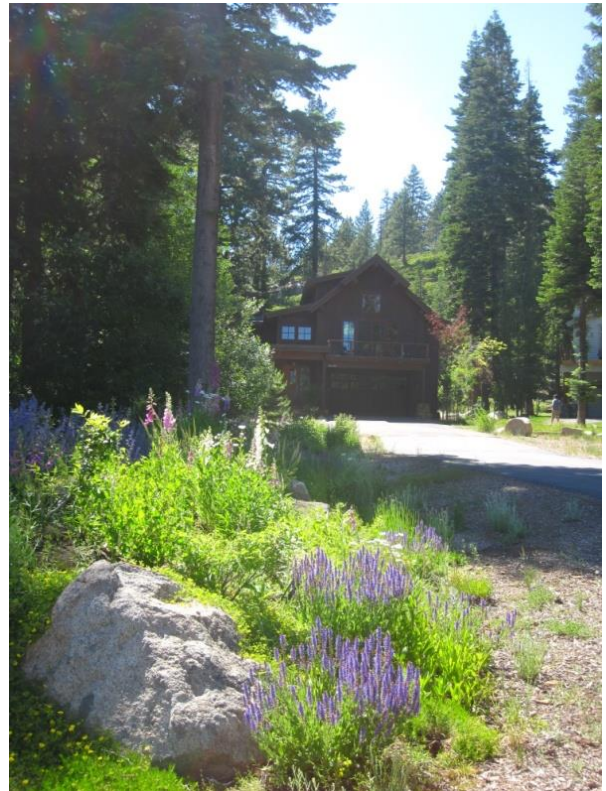
WORKBOOK GOAL

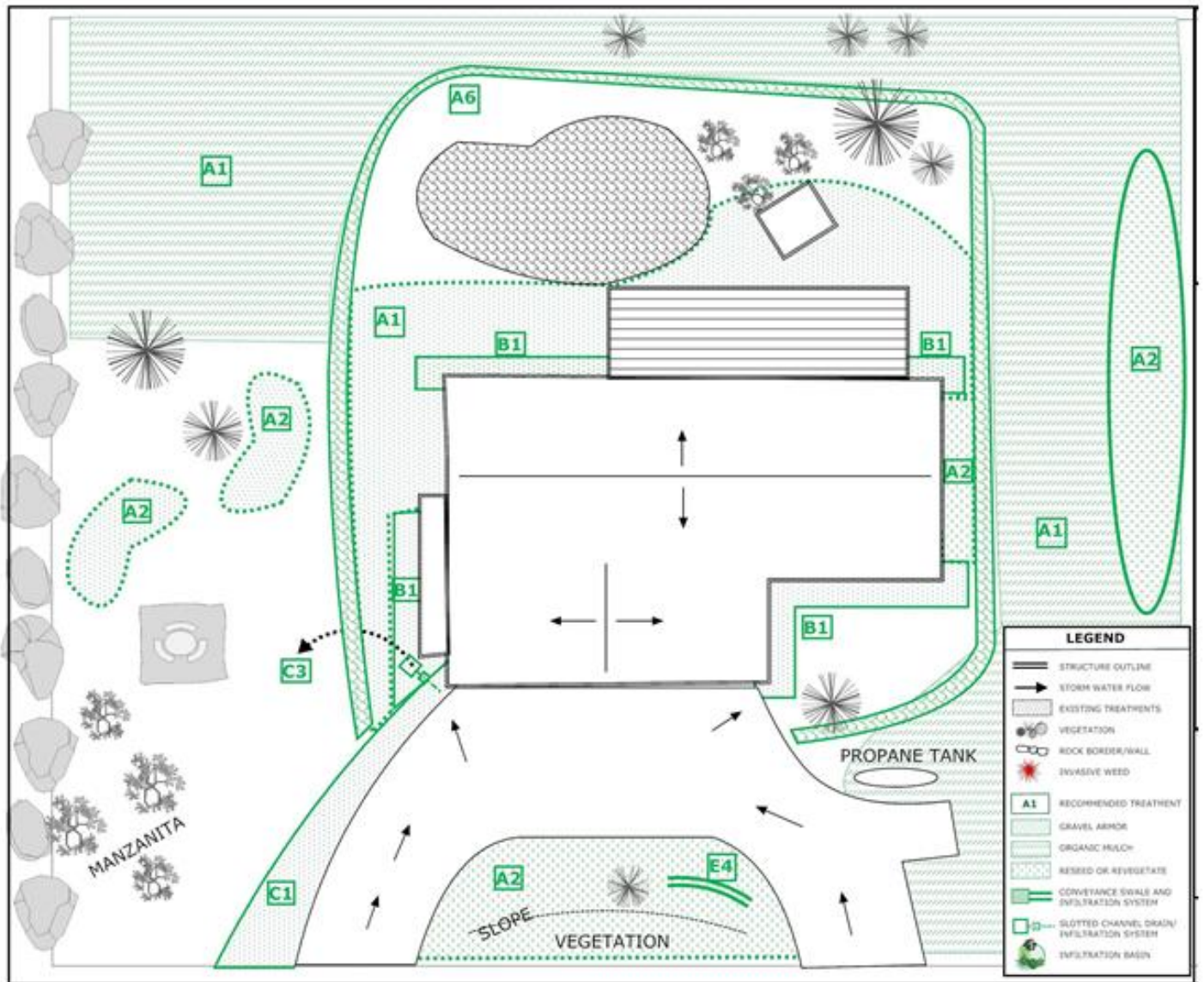
To provide the homeowner with a document they can refer to when implementing their best management practices.

WORKBOOK

STEP-BY-STEP PROCESS

1. **Create a cover letter for each workbook.** The workbook should summarize the program goals, mission and general conditions of the site. Note soil details, erosion levels and unique property details. For an example of a complete treatment workbook, contact the Alliance.
2. **Use an AutoCAD-like program to draw up site plans** (Freestyle and SmartDraw). The site plan illustrates the property landscape design. The plan should delineate the location of the home, patios, driveway, trees and other structures. Recommendations are then placed on the drawing. Note that the initial cost of these computer programs is usually hefty (\$100-\$700), but provides professionalism when creating the workbooks and site plans. See Appendix A for a sample.
3. **Include a header in the site plan.** In the header, include property information-- such as Property ID Number (see sidebar), the homeowner's address, the home consultant's name, a legend for any symbols and a compass.
4. **Draw an aerial image of the property.** The site plan should include the house, driveway, existing landscaping features, slope directions and percentages. Import an aerial Google map image to act as a quick reference to accurately trace the house and property. This has proven to be a huge time saver!
5. **Create a Treatment Workbook to serve as a guide for the homeowner to implement recommended treatments.** The recommended treatments should be fully explained with photos and tip sheets.
6. **The reference number should correspond between the site plan and the treatment workbook.** If you label a problem area A1 on the site plan, the recommendation for that problem should be labeled A1 in the treatment workbook.





Sample Site Plan Drawing

7. **In the workbook create a checklist of all the recommended treatments.** This check list can be easily used by homeowners to track implementation and ensure all measures are completed.
8. **Create tip sheets for each recommended treatment.** These provide how to information for each recommendation. Including the tip sheets helps homeowners and unfamiliar contractors properly implement the recommendations.
9. **Make one PDF with all the documents.** The master document should include the cover letter, site plan, treatment workbook and tip sheets.
10. **Have your expert review all site plans and workbooks.** The expert should make necessary edits.
11. **Deliver the workbook by in-person (preferred), email or mail.**
12. **Follow up via email or phone call to the homeowner.** The follow up ensures they received the workbook and allows the home consultant to answer questions.

WORKBOOK TIPS FOR SUCCESS

- 1) **Edit and review the workbook before distribution.** Mistakes happen and it is easy to overlook things. By delivering a polished final product, you will build credibility for your work and the program.
- 2) **Ensure you plan time to do workbooks after consultations.** This cannot be emphasized enough. The more time that passes from the site visit to writing the workbook, the more information is lost and the easier it is to forget important site details.

WORKBOOK PITFALLS TO AVOID

- 1) **Out-of-date Master Handbook.** Plan to update your Master Handbook based on your real-world experience every 4-6 months. Some existing programs found that when the Master Handbook was not updated consistently, each home consultant added to each workbook their version of updated information. The time updating the Master Handbook would save everyone time and ensure consistency in the program.
- 2) **Overwhelming the homeowner.** It's easy to create a document that is verbose. It is best to keep the Treatment Workbooks clear and concise, without excluding important information.

Treatment Solutions Checklist – T13-304-100Waterlo-Smith

A BARE SOIL

Recommended	Completed	%
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- A2. Mulch and vegetate low slope bare soil areas
- A3. Rehabilitate existing lawn or vegetation
- A4. Place parking barriers to prevent soil compaction
- A5. Mulch bare soil storage area
- A6. Install a pervious walkway to cover bare soil areas
- A7. Manage runoff from impervious surface
- A8. Bare Soil Treatment Maintenance

B DRIP LINES

Recommended	Completed	%
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- B1. Armor drip line areas
- B2. Modify undersized or improperly positioned drip line armor
- B3. Create a combination walkway and gravel drip line armor
- B4. Plant low-growing herbaceous vegetation below dripline
- B5. Maintain vegetation beneath drip line
- B6. Maintain existing gravel drip line armor
- B7. Install energy dissipater under downspout

C DRIVEWAYS

Recommended	Completed	%
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- C1. Add drain rock around driveway edges
- C2. Maintain vegetation surrounding driveway to infiltrate runoff
- C3. Capture, convey and infiltrate driveway storm water runoff
- C4. Driveway gravel armor maintenance

D DECKS, STAIRS & WALKWAYS

Recommended	Completed	%
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- D1. Armor under elevated structure
- D2. Armor under low elevated structure
- D3. Maintain existing armoring or vegetation under elevated structure

E SLOPE STABILIZATION

Recommended	Completed	%
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- E1. Stabilize moderate slope with mulch and native vegetation
- E2. Stabilize steep slope with vegetation
- E3. Place rip rap on slope
- E4. Stabilize extremely steep slopes by terracing or retaining walls
- E5. Maintain existing slope stabilization practice

F OTHER ADVISORIES

Recommended	Completed	%
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

- F1. Request a Defensible Space Consultation
- F2. Remove invasive plants
- F3. Install or Maintain Water Efficient Irrigation System
- F4. Underground Utilities

Signature: _____ Date: |

Conservation Assistant: Sally Willow

Workbook Conclusion

Balance your time between creating a high-quality workbook and being able to deliver the workbook within one week of the home consultation. If the program produces simple and professional treatment workbooks and delivers them quickly to homeowners, they are more likely to follow through with recommended implementation while they are still motivated. The shorter the time period between your home consultation and getting the workbook to the homeowner, the higher the rate of homeowners implementing the recommendations.

CHAPTER 9: DELIVERING WORKBOOKS AND HOMEOWNER FOLLOW-UP

Once workbooks are completed, contact the homeowner immediately for their preferred form of delivery. We strongly encourage you deliver the guide in person and walk through the guide with them. After delivery, maintain contact with the homeowner and encourage them to continue their work. Offer your advice and/or service whenever possible.

FOLLOW-UP RESOURCES YOU WILL NEED

- Excel spreadsheet of contacts
- Calendar for setting dates to follow-up
- Color Printer



FOLLOW-UP GOAL

Distributing the completed materials to the participant and providing support for recommendation implementation is key to the Sierra Friendly practices being implemented. Your support is the key to a successful implementation.

FOLLOW-UP STEP-BY-STEP PROCESS

1. **Contact the homeowner.** Inform the homeowner that their workbook is completed and ask for their preferred form of delivery of the workbook (in-person, email, mail). Explain that you would prefer to deliver it in person and review it with them in order to answer any questions they may have.
2. **Proceed with mode of delivery.** In-person is best but email and postal mail work too.

3. **Offer to review the workbook and identify the key recommendations.** This can be done while delivering the workbook in-person or can be scheduled after the workbook is delivered.
4. **Call homeowner within 1-2 weeks after delivery to answer questions and offer encouragement.** Offer your support for implementation whenever appropriate.
5. **Follow-up call after additional 3-4 weeks.** If the homeowner seems disinterested in the program, encourage them to continue and address their challenges.

FOLLOW-UP TIPS FOR SUCCESS

- 1) **Maintain a detailed tracking system.** Maintain an excel spreadsheet or database of all homeowners in the program, workbook recommendations and interactions with homeowners. Keep hard copy files of all workbooks. This helps you remember case-specific examples so that you can support the homeowner in implementing the measures.
- 2) **Do follow-up calls.** Never lose contact with a participant for more than 2 weeks. Once you do, assume they have lost interest and the workbook gets recycled without implementation.
- 3) **Hand delivery works best.** Hand delivery is correlated with the highest success rate for implementation. If homeowners prefer e-mail or other delivery service, offer to meet with them at another time when they are available to go over the workbook.

FOLLOW-UP PITFALLS TO AVOID

- 1) **No master contact list.** Keep a master list of all participants in the program, rather than each staff or volunteer keeping separate lists. With a master list, you can track overarching program successes and challenges. A master list also enables fellow staff/volunteers to assist a home consultant with follow-up calls.

CHAPTER 10: CONDUCTING WALKTHROUGHS AND ISSUING REBATES

We recommend that programs check-in at the end of the homeowner's implementation process to confirm they've succeeded. This provides further support to homeowners, while documenting a success for your program (such as taking 'after' photos). A rebate program is a wonderful mechanism to document that success, while providing an incentive for implementation.



WALKTHROUGH RESOURCES YOU WILL NEED

- Copy of the homeowners workbook with checklist of all the recommendations
- Camera
- Funds to offer rebates. This has a substantial cost. We offer two approaches to rebates below. Not all programs will be able to secure the funds to offer rebates.
- Optional: Sierra Friendly Yard & Garden yard sign. These can be a way to promote to neighbors.

WALKTHROUGH GOAL

To complete final inspection of project, gather 'after' photos and document successful implementations.

WALKTHROUGH STEP-BY-STEP PROCESS

1. **Track homeowners who have implemented recommendations.**
2. **Setup final walkthrough site evaluation.** This usually takes around thirty minutes.
3. **Print out "before pictures" prior to your site evaluation.** It is most effective when the 'after' pictures are in the same location and angle as the 'before' pictures.

4. **Print out the homeowner's landscaping checklist.**
5. **Complete final walkthrough.** Allow the homeowner to describe their implementation process. Note challenges during their process that can help you improve your tip sheets and treatment handbook.
6. **Document the number of implementations completed on a checklist.**
7. **Thank the homeowner for their participation.** Reiterate the positive impact that their actions have made in the community and in natural resources preservation.
8. **Ask if they would be willing to promote the program to others.** One great promotional tactic is yard sign in front of a successful property saying they have a Sierra Friendly Yard (or name of your program).
9. **Ask if the homeowner has any recommendations to improve the program.**
10. **Input the final data in your tracking systems and finalize the homeowner file.** Include the final checklist and 'after' photos in the file update.

WALKTHROUGH TIPS FOR SUCCESS

1. **Review the workbook before final walkthrough.** Be sure to review your files before the final walkthrough to refresh your memory.
2. **Be supportive.** If someone made an honest effort, commend them for it. Make them feel great about their voluntary actions, which improve local natural resources. This is not to say that ineffective installations/changes should be ignored or swept under the rug (see Pitfall below.)

WALKTHROUGH PITFALLS TO AVOID

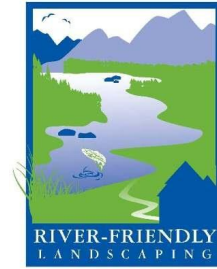
1. **Help them if they made an implementation mistake.** If the homeowner misunderstood a recommendation and incorrectly implemented it, there could be a real problem. This misunderstanding halts the programs' resource preservation goals and generates homeowner dissatisfaction. In the worst case scenario, this could create a safety hazard. Ensure they understand how the recommendations were supposed to be implemented and encourage them to make the necessary changes.

GOAL OF REBATE PROGRAM

To offer financial incentives to complete your Sierra Friendly recommendations.

REBATE STEP-BY-STEP PROCESS

1. **Establish funding for rebates.**
2. **Design your rebate program.**
3. **Include rebate information with every workbook delivered.** Home consultants should review the rebate application process.
4. **Encourage homeowners to contact your program to setup a time for a rebate walkthrough.** This walkthrough should document implementation work.
5. **Conduct the rebate walkthrough.** This usually takes 30 minutes on site. This walkthrough should provide more detailed documentation with the final checklist. The home consultants should ensure the homeowner meets basic implementation standards. Consultants may request more work or installation tune-ups in order to have the rebate approved.
6. **Homeowners submit their rebate application.** The application should be complete with receipts for construction costs and hired consultants. The application should be retrieved by the home consultant.
7. **The home consultant forwards the approved application for processing.** This includes ensuring that all the receipts are present and accurate.
8. **The administrative team should process rebate applications within 2-3 weeks.**
9. **Have the home consultant enter the results of implemented work into your central tracking system for final program results.**



Truckee River-Friendly Case Study "Super-Rebate Deadline"

In an effort to encourage quick homeowner implementation of the recommendations in workbooks, Truckee offered a temporary "super" rebate of \$1,000 to homeowners that implemented within a certain time frame. After the deadline, homeowners could still apply for the rebate, but it would be reduced to \$400.

The rebate incentive led to a surge of homeowners implementing immediately before the deadline. However, because of insufficient outreach, the deadline was pushed back a month to allow more homeowners to apply.

After the deadline, Truckee experienced a lull of participation. Homeowners procrastinated implementing changes without an eminent rebate deadline.

REBATE TIPS FOR SUCCESS

1. **Ensure your rebate application is self-explanatory and clear.** Ensure that residents understand how to submit a successful rebate application.

REBATE PITFALLS TO AVOID

1. **Not planning time for rebate walkthroughs.** It's easy to get focused on the home consultation evaluations and the workbook production. However, the rebate walkthroughs are important to your program success. Plan time each week for final walkthroughs.

WALKTHROUGH AND REBATE CONCLUSION

Finish strong! The walkthrough is the last piece of the puzzle and it will help you measure the success of the program. It's easy to get sidetracked with new evaluations and other treatment books, but dedicate time to those in the implementation process. Share the 'before' and 'after' photos (when you have permission) in your grant reports, newsletters and other materials. Pictures tell a compelling story!

"We received the TRWC rebate check! Thank you very much for your help in introducing us to this program and for recommending the rebate program. We are encouraged that the work done will help to prevent sediment runoff. And, it looks so good. We have gotten many compliments on the front yard. We will be diligent in maintaining the gravel and wood chips in place."

- Marilyn Modafferi, Truckee Homeowner

CHAPTER 11: CONCLUSION

The Sierra Nevada Alliance is committed to strengthening and supporting the work of grassroots groups who endeavor to protect and restore the natural, historic and community values of the Sierra. Efforts both big and small can help Sierra yards protect the greater environment. These actions, yard-by-yard, keep our Sierra rivers, lakes and streams clean. They conserve our waters so communities can count on reliable water well into the future. Homeowners who protect wildlife help ensure our grandchildren will enjoy the diverse bounty we do today. With increasing fire in our natural landscape, increasing fire defensible yards can help save lives.



We hope that this Sierra Friendly Landscaping Program Cookbook, paired with the Sierra Yard and Garden Guide, inspires and provides you with some helpful tips and insights on creating your own successful Sierra Friendly Landscaping Program and saves you from “recreating the wheel.” Together across this entire 400 mile region, we are making a difference.

Please contact our office if you have suggestions or need further assistance:

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Location: 2311 Lake Tahoe Bld Suite 5, South Lake Tahoe CA 96150

APPENDIX A

ADDITIONAL RESOURCES AND MODEL PROGRAMS

- Bay Friendly Landscaping - <http://www.stopwaste.org/home/index.asp?page=8>
 - The Bay-Friendly Gardening Program offers the home gardener tools for creating a beautiful and healthy Bay-Friendly garden. Likewise, the Bay-Friendly Landscaping Program provides resources for the professional landscaper to design, construct and maintain Bay-Friendly landscapes for clients.
- Cal Recycle Sustainable Landscaping - <http://www.calrecycle.ca.gov/organics/landscaping/>
 - Resources Section of Cal Recycle's Landscape Waste Prevention Section
- Central Valley Friendly Landscaping - <http://ucanr.edu/sites/cvlandscape/>
 - Landscapes that strive to protect and conserve our water and other natural resources can receive the designation *Central Valley Friendly*.
- Florida-Friendly Landscaping - <http://www.swfwmd.state.fl.us/yards/>
 - Florida-Friendly Landscaping™ is a set of nine guiding principles which help protect natural resources and preserve Florida's unique beauty.
- Louisiana-Friendly Landscaping
 - The program, which is implemented through the parish LSU AgCenter Extension agents with the support of Louisiana Master Gardener volunteers, provides education and outreach activities in the community to help residents reduce pollution, conserve water and enhance their environment by improving home and landscape management.
- Nevada Tahoe Conservation District Backyard Conservation Program - www.ntcd.org
 - Provides private landowners with conservation education, technical assistance and whole parcel conservation plans.
- River-Friendly Landscaping, Sacramento - <http://www.calrecycle.ca.gov/organics/landscaping/>
 - The mission of the River-Friendly Landscaping Coalition is to provide individuals, businesses and institutions access to information, resources and ideas so that landscapes are designed, built and maintained according to the sustainable practices of the River-Friendly Landscaping principles.
- Truckee River Friendly Landscaping - <http://www.truckeeriverwc.org/>
 - A program that provides incentives and free services to help homeowners establish yards and gardens that are easy to maintain, reduce erosion and help keep the Truckee River clean and healthy.



SIERRA NEVADA ALLIANCE