

Find this guide and other important evaluation documents and information which are not to be shared outside of our organization at <https://americainbloom.org/Advisors-forms>.

\*Denotes Advisor documents available online.

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## **AMERICA IN BLOOM – THE ORGANIZATION**

Our mission is to plant pride in communities and create welcoming and vibrant places to live, work and play. We do that by encouraging the use of flowers, plants, trees, environmental stewardship, heritage preservation, volunteerism, and lifestyle enhancements. Learn more at [www.AmericanInBloom.org](http://www.AmericanInBloom.org)

AIB offers three programs: National America in Bloom Program, CN EcoConnexions From the Ground Up Grants Program, and the Symposium and Awards Celebration. Learn about each of these programs on the AIB website.

### **America in Bloom and How It Operates**

AIB is an incorporated not for profit 501(c)(3) organization composed of an Executive Director and Development Manager, a volunteer board with officers, committees, and volunteer Advisors. AIB has a contract for services with Second Wind Management LLC in Columbus, OH which plays an important staff support role and is where the Executive Director is located. AIB has a contract for fundraising services with Collins PR in Belpre, Ohio.

AIB is funded by sponsors and partners, program fees, CN grants program administrative fees, and various fundraising campaigns. You are encouraged to recruit sponsors and communities. In-kind donations are also an important part of AIB's funding. Sponsorships and in-kind donations are highly leveraged to allow us to present our programs and services.

Learn about AIB board members and Advisors by visiting <https://www.americainbloom.org/about/board-members/>

### **KEY CONTACTS FOR ADVISORS**

#### **Laura Kunkle, AIB Executive Director**

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#### **Sharon Hadden, Communities Coordinator**

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#### **Teresa Roberts, AIB's Contracted Travel Agent**

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Monday – Friday, 8 – 5 PM ET

## NATIONAL AMERICA IN BLOOM PROGRAM

### Entry and Evaluation Process

1. AIB sends information on the program to previous and potential participants.
2. In order to participate, communities pay a registration fee based on population and must agree to provide accommodations (typically three nights for each Advisor). Rooms may be in private homes. Also, they may be asked to provide transportation to and from the airport.
3. AIB staff or Communities Coordinator emails the current evaluation metrics and Community Profile Template to the communities that have entered.
4. AIB staff, Communities Coordinator, and Advisor Coordinator work together to assemble the evaluation schedule. A lead Advisor is assigned to each team.
5. Communities are notified by the Communities Coordinator or AIB staff with the names of their Advisors and the evaluation dates.
6. The lead Advisor corresponds with each community, provides them with updates, tracks the submittal of the Evaluation Tour Itinerary and Community Profile, keeps the co-Advisor informed of all progress, and copies the co-Advisor on all correspondence.
7. Each Advisor team shall conduct a minimum of one Zoom meeting with their communities prior to their arrival.
8. AIB staff, along with input from the Advisors, assembles travel itineraries for each pair of Advisors and shares that with the communities.
9. Each community is required to submit a Community Profile, Evaluation Tour Itinerary, and Evaluation tour Map two weeks prior to the community's first judging date.
10. The Advisors typically visit the community for three nights with two days of evaluating. They record scores in the Evaluation Report using the Evaluation Tour Itinerary and Community Profile provided by community along with their prior research, and their observations, notes, and photographs obtained during the Evaluation Tour.
11. Communities are evaluated community-wide for the following eight criteria: Community Vitality, Floral Impact, Landscaped Areas, Urban Forestry, Environmental Initiatives, Celebrating Heritage, Overall Impression, and Community Involvement. The section on the evaluation called "Evaluation Tour Preparation and Actions" is scored but is not a criterion and there is not an award.
12. Immediately following the evaluation within the community, Advisors should send letters to the editor to local newspapers and/or other media. See the Email to the Editor Template\*.
13. Within two weeks of completion of evaluation tours or July 31 (whichever is soonest), Advisors prepare a comprehensive Evaluation Report\* specific to each community, with recommendations and their benefits for each criterion. They also include the two Community Recognitions: Recognized Criterion (to be listed on the Recognition Plaque with text read at the symposium) and the Noteworthy Project or Initiative. Advisors may determine there is an outstanding criterion for a nomination for an Outstanding Achievement Award to submit on the Outstanding Achievement Award form\*. If appropriate, nominations for Special Awards (selected from the current year's list) may be submitted using a separate form\* for each one.
14. Advisors submit the Evaluation Report, at least one Outstanding Achievement Award nomination, and at least one Special Award nomination for each community. After the Evaluation Report is reviewed by an assigned reviewer, the Evaluation Reports may be returned to the Advisors for further work. Final versions are created by the Executive Director.
15. Communities are contacted by AIB to encourage them to submit Outstanding Achievement Award and Community Champion Award nominations, a YouTube video, and to attend the Symposium & Awards Celebration.
16. The Awards Subcommittee determines the award winners (except population category winners which are determined by Advisor scoring).
17. By July 31 of each year, communities are asked to provide 10 hi-resolution images of their community for use during the symposium. Advisors may be asked to supplement these images.
18. The final Evaluation Reports are transmitted by the AIB office directly after the Symposium & Awards Celebration to those individuals referenced in the community's Evaluation Report.

## Awards

Participating communities are eligible for awards, some of which are self-nominating. All award winners except the Population Category Award are selected by the Awards Committee and are presented during the symposium.

- *Recognition Plaque* – This is presented to each entrant with their community’s name, population category, and Recognized Criterion (from the Community Recognitions) shown on the plaque.
- *Population Category Award* – There is one winner in each population category.
- *Outstanding Achievement Awards* – These eight awards with one for each of the eight criteria are the most competitive: Community Vitality, Floral Impact, Landscaped Areas, Urban Forestry, Environmental Initiatives, Celebrating Heritage, Overall Impression, and Community Involvement. The category Evaluation Tour Preparation and Actions is scored but is not a criterion and there is not an award. All AIB entrants across all population categories compete for each of these awards. Advisors may nominate each community in each criterion, and communities are encouraged to self-nominate in as many criteria as they wish. The Advisors are not required to submit nominations but are strongly encouraged to do so (see more information below).
- *Special Awards* - Each year there are Special Awards. The Awards Selection Committee typically changes categories annually. Advisors and communities may nominate for these awards. It is critical that the Advisors take the time to recognize their communities for one or more Special Awards. Advisors are encouraged to suggest award categories for the following year.
- *Community Champion Award* - This award recognizes one individual who exemplifies community leadership through actions that reflect the mission of the organization. The award recipient, who must be from a community that has participated or is currently participating in the program, shall have demonstrated a vision and selfless commitment to moving the community forward. Each community may forward one nomination and Advisors may also provide nominations. Past community champion winners continue to be eligible for future nomination. Each nominee receives a \$150 discount on the full symposium registration fee, a nominee plaque, and is recognized at the symposium. Nominate at <https://americainbloom.wufoo.com/forms/x5d3zlt0x3izuh/>.
- *YouTube People’s Choice Video Award* - Many communities use the power of YouTube to showcase how participating in AIB has impacted them. There is a cash award, and the winning video is shown at the symposium. All videos can be viewed on You Tube as well as on our AIB website.
- *Spirit Award* – This award honors an organization selected by the board, whose goals and accomplishments are synergistic to those of America in Bloom. It may not be presented annually.

Required Ratings by Advisors (Note: only *Population Category* is an award):

- *Population Category Award*: this award goes to the community with the highest percentage score in a population category group.
- *Community Recognition - Recognized Criterion*: one of the eight criteria is listed on the Recognition Plaque and the text is read at the symposium. No images are needed.
- *Community Recognition - Noteworthy Project or Initiative*: briefly describe a recently completed or current project that is underway related to the AIB criteria. The text is not used elsewhere, and no images are needed.

Required Award Nominations by Advisors:

- *Outstanding Achievement Award*: nominations (one entrant in each of the eight criteria, among all AIB entrants across all population categories) shall be submitted for each community. Nomination(s) do not need to be the highest score(s). Note that communities may also nominate themselves for all or any of the eight Outstanding Achievement Awards. For all nominations, provide up to two pages of text and images. Separately, provide at least three high resolution images. If needed, ask the community to provide images.
- *Special Award*: categories are typically adjusted each year. Communities may self-nominate for these awards. Provide nominations and hi-resolution images for each community. You may nominate multiple communities for the same award and multiple awards for one community. Share suggestions for new categories with AIB.

#### How Award Winners Are Determined:

- The Awards Committee receives the nominations from the Executive Director and selects the winners. The exception is the Population Category Awards which are automatically determined by the Advisors' scores at the end of the evaluation of their assigned communities.
- All award results are confidential. Advisors shall not show favoritism toward any communities when the awards are announced.

#### Symposium & Awards Celebration

- The Symposium & Awards Celebration is held annually over three days in the fall.
- The symposium includes educational sessions with lectures, tours, and networking sessions.
- The symposium includes the presentation of awards which are held throughout the symposium with major events the first and last evenings.
- Advisors are strongly encouraged to attend the Symposium & Awards Celebration.
- Advisors at Symposium Guidelines:
  - 3+ cities visited: Registration, hotel, travel. Meals not included in registration are on their own.
  - 2 cities visited: Registration and hotel; Travel and meals not included in registration are on their own.
  - 1 city visited: Registration only. All other expenses paid by Advisor.
  - 0 cities visited: No expenses covered. Executive Director has discretion to pay partial expenses for invited Advisors.
- If your travel plans include an extension of your travel, please contact the Executive Director about these arrangements.
- Advisor training opportunities may include webinars, videos, and sessions held in conjunction with the symposium.
- Information available at [www.AmericanBloom.org/Symposium](http://www.AmericanBloom.org/Symposium).

#### ADVISORS

##### Advisor Commitment

- Advisors must be committed to the AIB program and be prepared to place the communities they are evaluating ahead of themselves.
- The Advisors, unless otherwise indicated, permit AIB to submit their names, addresses, and contact information to communities, organizations, and sponsors.
- When asked, the Advisors must let the Advisor Coordinator know their availability during the evaluation season.
- Advisors must be able to volunteer where and when they are assigned. This typically includes Advising up to four communities each year.
- Advisors must be willing to stay in residential homes. If that is not suitable and other accommodations are required, it may be at the Advisor's expense.
- Advisors must be physically able to tour their assigned communities and may need to manage extensive walking in summertime temperatures.
- Advisors must complete the Evaluation Report for each community in collaboration with their partner.
- Advisors are encouraged to attend the symposium for connection, networking, and training.

## **General Information for Advisors**

Advisors are chosen from diverse disciplines such as ornamental horticultural, education, public service organizations, municipal government, those who have led AIB efforts in their communities, landscape professions, the environmental community, historic preservation programs, design professions, etc. The composition of evaluation teams takes into consideration the complementary expertise of individual Advisors. Advisors are expected to become knowledgeable within all criteria and be empathic to the community's issues and challenges.

An evaluation team is composed of two Advisors. Typically, unless there are scheduling conflicts, both Advisors are expected to use two full days at each community with in-between travel days to evaluate all the communities in their population category. One Advisor, called the lead Advisor, is the point person for the evaluation team. Any dispute between co-Advisors regarding scoring, recommendations, and communications are his/her responsibility to resolve. All other issues should be referred to the Advisor Coordinator or Executive Director.

The evaluation categories for communities are divided according to population and change yearly based upon the entries.

Advisors are encouraged to share their AIB-supplied business cards. Advisors are also encouraged to spread the word on the valuable role they play for AIB and numerous communities. Add "National Advisor, America in Bloom" to the signature at the bottom of your emails.

## **Requirements of the Advisors**

You, as Advisors, are AIB's brain trust and our most important representatives. Advisors are expected to offer the following skills:

- Sufficient knowledge regarding landscape design, horticulture, turf, trees, environmental issues, heritage/historic preservation, community vitality, and beautification.
- Sufficient computer skills in writing and handling images. A desktop/laptop computer is required for generation of the Evaluation Report when you return home. Mobile devices may be used when evaluating communities.
- Availability to participate in evaluation tours in communities
- Be responsive to AIB officers, the Advisor Coordinator, and the Executive Director.
- Ability to understand community challenges, resources, and budgets.
- Ability to listen and to ask constructive and insightful questions
- Ability to be diplomatic and tactful in dealing with community representatives, businesspeople, and community volunteers
- Ability to be impartial and consistent in the evaluation of communities
- Ability to work with and reach consensus with your co-Advisor and be respectful of their opinions
- Ability to write and collaborate in the preparation of precise and realistic observations, recommendations, and their benefits.
- Ability to produce a professional Evaluation Report that may be viewed online and potentially shared worldwide
- Ability to participate in community social events and interact with community officials and volunteers.
- Ability to meet deadlines.
- Be cognizant of your role in representing and promoting the AIB organization.
- Ability to keep the evaluation outcomes confidential prior to their announcement at the symposium.

## Advisor Remuneration and Expense Reimbursement Request

- Advisors do not receive any financial compensation for their work. Thank you for your commitment! However, Advisors are reimbursed for qualified expenses. These typically occur during travel days and when away from host communities. Communities are not required to provide your meals while you are in their community, so encourage them to use lodging with breakfast, potlucks, etc.
- The meal allowance is \$50/per day. It is important to note that this allowance is for meals only and is not a per diem; meal expenses are reimbursed upon presentation of receipts. Alcohol expense is not covered by AIB.
- Mileage reimbursement is at the rate of \$0.21 per mile and is typically for personal mileage to and from the airport or to and from a community.
- For all other expenses, the Advisor's discretion is warranted and appreciated. AIB reserves the right to refuse reimbursement for expenses it deems non-essential. In such cases, AIB will explain the reason for refusal.
- Within 30 days of completion of travels, Advisors should submit their Expense Reimbursement Request Form\* with receipts, to the Executive Director for reimbursement. Advisors may either submit one request, or if they have a split tour, they can submit one for each portion of their tour.
- With AIB's gratitude, Advisors may decline reimbursement and further their support of AIB.

## Advisor Preparation

- Before leaving on a tour, the Advisors should review the Travel Itinerary from AIB for accuracy and are **required** to read the Community Profile and Evaluation Tour Itinerary provided by each community. These documents may reference the metrics in the current Evaluation Report and typically provide a great deal of information about the community. They are also **required** to read the previous year's Evaluation Report if it is a returning community.
- Advisors should also learn about the geography and history of the region, review community websites, Facebook page(s), and Municode ([www.municode.com](http://www.municode.com)) or General Code (<http://www.generalcode.com/resources/ecode360-library/>) to review ordinances if they are not found on the community web site. Related ordinances to research may include landscaping, tree protection, waste management/recycling, code enforcement, and historic preservation. Comprehensive Plans should also be reviewed.
- All Advisors may not have an opportunity to be assigned to an evaluation team. These Advisors shall be considered alternates or substitutes for Advisors in the field that cannot fulfill their evaluation assignment.

## Photography

While you are evaluating communities:

- Images are required for Outstanding Achievement Award and Special Award nominations.
- Always take images to remind yourself of what you saw. They will be helpful as you write the evaluation.
- Always take images at the highest resolution so they may be used in different ways by AIB.
- As required, please send your best images to the Executive Director and be sure to include the community and subject in the file name.
- Take images that represent the evaluated criteria.
- Take images of your hosts, volunteers, and events (if any).
- Action shots with people are appreciated and help tell the stories of communities and AIB.
- Please keep in mind that we count on you to take images that we can use at the Symposium & Awards Celebration, on the website, and in print pieces. Your images are very valuable to us.

## Dress Code

- Practical and conservative clothing shall be worn. When possible, wear AIB logo shirts and/or AIB logo pins.
- Advisors can order AIB apparel through our approved provider. See AIB Apparel Ordering\* for instructions.
- We want you to be comfortable, so wear clothing that is appropriate for the occasion. However, the following clothing is not acceptable for evaluation and social events: tee shirts, ripped jeans, athletic shorts, or flip flops.

## Ordering AIB Apparel

- America In Bloom has set up an online store through Lands' End. Advisors can go directly there by clicking on this link: <http://business.landsend.com/store/aib>. Once there you will be asked to set up your own account where you can order shirts and have them sent directly to you. You may wish to save this link on your favorites.
- AIB will reimburse Advisors as follows:
  - New Advisors will be reimbursed for two shirts.
  - Existing Advisors will be reimbursed for one shirt.
  - The cost of each shirt, not including logo (\$5.95), is not to exceed \$40.
  - Once you create your account you will have access to promo and coupons that can save you money. Many provide free logos, shipping, or offer sale prices on selected items.
  - AIB can also email promo codes to you when we receive them.
  - Any additional shirts purchased will be at your own expense.
- Submit an expense report and receipt to be reimbursed for your shirt(s).
- You are not required to purchase a new shirt each year if last year's still looks good.

## Advisor Behavior

- During their official functions, the Advisors shall be prepared to meet with community representatives, attend civic events, and be interviewed by the media.
- Cell phones should be turned off, or set to vibrate, during the evaluation tour. This includes texts and emails. Only emergency messages should be taken during the tour. Your undivided attention should always be given to the community.
- Advisors should take photographs and notes during the tour either with a pad and pen or electronically. These notes are critical for when the Evaluation Reports are completed. Remember that communities expect to see the Advisors taking notes and photographs.
- **Your AIB name tag should be worn during the tour and at all social events.**
- Each Advisor should ask questions in all eight criteria plus the category Evaluation Tour Preparation, and not simply in their area(s) of expertise.
- Advisors should not discuss local, regional, or national politics with communities. Advisors shall remain neutral regarding budgets, political parties, religion, and hot button social issues.
- Advisors must not attempt to sell products or services while in communities. Discuss your "consulting services" only if the community raises the topic. The community should never feel any obligation to purchase or agree to anything.

## Evaluation Tour Scheduling

- Evaluations are held from mid-April through July. The more southern states are evaluated earlier in the season.
- The duration of the evaluation tour period depends on the number of communities taking part in any given category and each community's evaluation dates.
- An evaluation team usually spends two days evaluating one community with one additional day before and after for travel.
- Evaluation days typically start at 8:00 a.m. with a late afternoon break before potential evening events.
- AIB will request communities end the tour by 3 PM. on both evaluation days so Advisors have at least three hours to work on the Evaluation Report before dinner.

## Media, Articles, and Presentations

- Advisors, when presented with the opportunity, are expected to encourage and provide media interviews and speak to community groups during their evaluation of a community. During these interviews and speaking engagements Advisors must wear their name tags, be positive regarding the community, and remember to mention AIB numerous times.
- **Never** use a negative!!
- The names and addresses of Advisors may be given to communities and organizations who wish to invite them to make presentations about the AIB program. Remuneration and travel expenses for these presentations outside of the evaluation tour is at the discretion of AIB, the Advisors, communities, or organizations.
- Advisors are invited to voluntarily write articles and/or make presentations about and for AIB. In addition, Advisors are encouraged to serve on AIB committees.

## Lead Advisor Responsibilities

The lead Advisor is responsible for the following tasks, but should share with their co-Advisor what these tasks involve, copy them on all emails, and not hesitate to ask them to share these tasks:

1. Be gracious, supportive, and flexible.
2. Handle disagreements with the co-Advisor.
3. Contact the assigned communities prior to the date of the evaluation, in order to work with them in their preparation for evaluation and offer encouragement at every step of the way. They are our "clients." Set up at least one Zoom meeting with each community prior to your visit.
4. Review past evaluations along with the co-Advisor.
5. Review community locations and potential travel methods. Work with the AIB Executive Director to review the proposed Travel Itinerary for accuracy. Confirm whether driving between nearby communities makes more sense than flying, which is subject to flight delays and is more expensive. Make sure flight arrival and departure times allow for proper evaluation as well as adequate travel time to the airport.
6. Review and confirm that the Evaluation Tour Itineraries provided by the communities are realistic. They should not start before 8 a.m. on evaluation days – we all need our sleep to be alert. In the late afternoon on the first day, ensure there are two hours reserved for the Advisors after the evaluation tour and prior to potential evening activities. On the second day of evaluation, ensure there are three hours reserved for Advisors to continue work on the Evaluation Report. You may ask communities to end the tour earlier or delay an evening event in order to secure the required time period. Imagine the three hours as a block of time that can shift forward or backward in the late afternoon. A typical time to end the tour is 3 p.m. or earlier if there is a wrap-up with the community.
7. Confirm contact information (especially cell phones numbers) for community committee leaders and especially for those that may be picking up Advisors at the airport. Save these contacts to your phone!
8. Confirm that the space provided for Advisors to use for free time both days will have a strong wireless signal.
9. Confirm evaluation duties and details with the fellow Advisor.
10. Send emails to the editors of local newspapers and on-line media immediately following completion of the evaluation. See the Email to the Editor Template\*.
11. Send a follow up email to each community. See the Follow Up Email to Committee Template\*.
12. Make sure all paperwork, including revisions to the Evaluation Reports, is complete and submitted on time.
13. Coordinate the communities for the Meet with Your Advisors session during the symposium.
14. Bring any concerns of the communities about the Advisors to the attention of the Advisor Coordinator or Executive Director for investigation and resolution.
15. Set up a wrap-up session with the community committee following the evaluation and make sure the Evaluation Tour Itinerary allows time for it. Be respectful if a community does not feel a need to have a wrap-up session.
16. Share the following with the community host committee at the wrap-up at another time at the end of the evaluation:
  - Thank everyone.
  - Ask questions if any remain.
  - Answer questions from the committee.

- Encourage them to document what they learned during the Evaluation Tour and not wait for the Evaluation Report.
- Mention and thank the AIB sponsors.
- The YouTube video deadline with a \$1,500 prize is August 26 each year.
- The Community Champion nomination deadline is July 31 each year.
- Advisors shall nominate each community for at least one Outstanding Achievement Award for one of the eight criteria, and at least one Special Award. The communities are encouraged to nominate themselves for one or more criteria and it increases their odds of winning. Deadline is July 31 each year.
- Communities need to email the Executive Director with 10 hi-resolution images of their community to use during the symposium. Deadline is July 31 each year. (Note: if an Advisor takes images that are shared, make sure the community is identified when forwarding them to the Executive Director.)
- Join AIB at the Symposium & Awards Celebration. Distribute symposium brochures.
- Distribute Participation Guides and encourage recruitment of communities, colleges/universities. They receive a 25% discount off the registration fee for the recruitment of a community.
- Evaluate us, the Advisors, when contacted by AIB. We would like to do even better. AIB uses an online survey tool.
- Confirm a minimum of three names and emails for who should receive the Evaluation Report from AIB.
- Have the community share their intent about entering next year. Do not lose the momentum. We would like to be able to announce returning communities at the symposium.
- If they have won before, share with them that they may want to participate in international evaluation through Communities in Bloom International.
- Provide a thank you note to communities for their hospitality at the end of evaluation or send one as soon after the evaluation visit as possible. Make sure to send a special thank you note to those who may have hosted you in their home.

#### **Advisor Responsibilities at the Symposium & Awards Celebration**

- Contact communities and encourage them to attend the annual Symposium & Awards Celebration.
- Review your Evaluation Reports and be prepared to discuss issues with community attendees.
- Attend sessions and take notes. Meet the Showcase of Innovation exhibitors as they have products and services of value to our AIB communities.
- You are the best promoters for AIB, so please mentor new attendees, whether it is during or in-between sessions, during tours, or during meals.
- During the Meet with the Advisors session, the Advisors gather their communities together for sharing what Advisors look for during the evaluation, networking, and sharing experiences. A room is provided for each evaluation team. Use the How to Successfully Prepare and Implement an AIB Evaluation Tour document\*.
- Some Advisors may be involved in symposium presentations.
- Do not show favoritism during the awards. Congratulate the winners as well as the other communities you evaluated.
- Welcome community members from past years.
- Encourage communities to join you for meals and join them at their table.
- Encourage communities to register for the next year.
- Thank the sponsors and presenters. The sponsors have given generously and each of the presenters has paid their own way.

## **COMMUNITIES**

### **Community Responsibilities**

The Communities Coordinator, in cooperation with AIB staff, will call communities prior to the Advisors' arrival to answer questions and ensure that they are prepared for their arrival. Detailed arrangements for the Advisors' actual arrival and departure shall also be clearly established.

Each community is required to provide the following:

- Payment for accommodations and meals. They should cover all your meals while in the community including the first and last. Note that at times a private residence may be provided for accommodations.
- A Community Profile, Community Map with boundaries, and Evaluation Tour Itinerary with names and contacts of people the Advisors will meet.
- Names and contacts for committee members.
- Name tags for people the Advisors will meet, showing their affiliation, are greatly appreciated.
- Transportation for the Advisors as needed during the evaluation and perhaps to and from an airport or car rental facility.
- Images for use during the symposium.

### **What Communities Expect from Advisors**

- They want to know that we are prepared and did research beforehand.
- Our undivided attention during evaluation tours.
- Advisors not criticizing their co-Advisor, past Advisors, or other communities.
- Some want and expect advice during the tour while others do not. Ask the communities about their expectations.
- They expect Advisors to be supportive, not critical, and to appreciate their efforts.
- See us taking notes and photographs.
- Provide feedback to them on what they are doing right.
- Well-written and fair evaluations.
- Well-conceived recommendations appropriate to the climate and other limiting factors.

## **TRAVEL**

### **General Travel Information**

- The Communities Coordinator, in cooperation with AIB staff, will work with the communities to establish the travel schedule and Evaluation Tour Itinerary for the Advisors, including accommodations.
- All travel expenses, meals, and accommodations are provided by AIB or the community. When meals are not provided by the host community, AIB will reimburse the Advisor for out-of-pocket expenses.

### **Air Travel**

- Make sure the Executive Director has your current information on file for: frequent flier and hotel awards numbers. The Travel Profile\* form is available on the Advisors website. If the Executive Director does not have your profile, or it needs to be updated, fill out this form and return it as soon as possible.
- It is very important to note that airline tickets are not refundable and that, while changes are possible, they are costly to make. It is essential to be on time and arrive at the airport at least two hours prior to domestic flight departure. Note that cancelling one leg of a flight may cancel the whole segment.
- Photo identification (and possibly passports) is required for all airline travel. Make sure your driver's license is current, uses the same name as on your airline tickets, and is not expired. Note that some states are lagging in updating their driver's licenses to meet the latest TSA standards. The use of a passport will solve this issue.
- In case of an AIRLINE TICKET PROBLEM, Advisors should contact Teresa Roberts at 937.224.2878 or after-hours desk: 937.224.2867, Emergency - 800.354.4514.
- When a flight is cancelled, the fastest way to get a new flight is to IMMEDIATELY contact the airline directly by

phone. If Teresa Roberts is available, she can be of assistance. (Monday – Friday 8:00 AM to 5:00 PM ET).

- Airlines apps that send text messages are very useful for tracking flight delays and saving boarding passes. Be sure to download airline apps prior to travel.
- If your tickets have not arrived at least one week prior to departure, please contact Teresa Roberts at 937.224.2878 or Laura Kunkle at 614.453.0744 (office) or 614.580.9039 (cell) or [aib@americanbloom.org](mailto:aib@americanbloom.org).
- Selection of airlines will be based on ticket prices and schedule. With prior approval from the executive director, Advisors may assist by booking their own flights (with economy in mind) and then receive reimbursement. This is recommended if you are adding on travel before or after judging.
- AIB may be able to accommodate personal travel before or after an evaluation trip. Advisors shall pay for any additional costs.
- The Department of Transportation's rules state that within two hours of the flight being delayed, United States airlines must provide passengers on the tarmac with food, water, and access to bathrooms. Airlines cannot allow tarmac delays longer than three hours on domestic flights without giving passengers an opportunity to leave the plane. Visit: [www.transportation.gov/airconsumer/fly-rights](http://www.transportation.gov/airconsumer/fly-rights).

### Surface Travel

- In most cases, communities will provide transportation to /from the airport, rental car offices, and in certain cases, between communities. AIB will work with the Advisors and communities to determine transportation to/from the airport or rental car requirements. If a rental car is needed, AIB's travel agent (or the Advisor) will arrange this when finalizing an Advisor's travel itinerary.
- Both Advisors should be listed as drivers on the rental agreement in case one Advisor is incapacitated. Do not drive a rental vehicle for which you are not authorized.
- **Advisors are required to use their personal credit card for rental vehicles.** They shall check with their personal auto insurance company to be certain that their personal auto insurance policy will transfer and provide them with full coverage (bodily injury liability, property damage liability, medical payments, comprehensive, collision, and uninsured/underinsured motorist coverage) while they are renting a vehicle as a volunteer Advisor for AIB. If both drivers' personal insurance provides this rental coverage, Advisors should decline the rental company's additional insurance coverage.
- Be aware that car rental companies will check an Advisor's motor vehicle report for traffic violations at the time of the vehicle rental and many car rental companies are stringent about not renting vehicles to individuals with traffic violations.
- AIB vehicle mileage reimbursement for use of personal vehicles (typically transportation to and from your local airport) is \$0.21/mile. The mileage allowance covers the cost of gasoline, so only the mileage should be included for expense reimbursement.

### Accommodations

- All accommodations should have been reserved under the Advisor's name, the name "AIB," or the host community. Try to obtain reservation numbers from the host community. If at the time of check-in, the room reservation cannot be located, make sure the desk clerk checks thoroughly under all potential names including the other Advisor's name.
- It is very important to notify the hotel in case of cancellation or late arrival.
- Communities must provide or pay for the accommodations unless it is a travel day.
- If the accommodations must be paid for by the Advisor, he/she shall be reimbursed by AIB upon presentation of receipts. This is a rare occurrence, usually caused by flight delays or cancellations. All reservations are typically made by AIB or the community before travel starts.

## Travel Tips

- Check the AIB Travel Itinerary for accuracy as soon as you receive the information.
- If possible, travel with only a carry-on and personal item to eliminate wait times at baggage claim, make it easier to change flights if they are cancelled, eliminate baggage fees, and eliminate the potential of lost luggage.
- Pack a refillable water bottle so you can stay hydrated and be green. Here is a compact 20 oz. BPH-free one from Camelbak that seals well: [https://www.camelbak.com/en/bottles/R02023--Chute\\_Mag\\_20oz?color=09e6b07a54714912bebd3bc8f3b8f7d8](https://www.camelbak.com/en/bottles/R02023--Chute_Mag_20oz?color=09e6b07a54714912bebd3bc8f3b8f7d8) . Pack a hat for sun and rain protection, hand sanitizer, sun block, and insect repellent (max 3.4 oz. each for carry-on).
- When packing bags, you carry onto the airplane, remember there is a 3.4 oz. limit for each liquid. They must all be placed inside one maximum quart size Ziploc bag. Medically necessary liquids, medications, and creams in excess of 3.4 ounces are allowed and need not be in a bag. Visit: <https://www.tsa.gov/travel/security-screening/liquids-rule>
- TSA pre-check registration is advised to cut down on security check-in times. TSA pre-check typically has much shorter lines and allows you to not remove shoes, laptops, or bags of liquids. Note that some airports do not offer TSA pre-check and some offer abbreviated versions of it. Once you arrive, ask someone familiar with the airport to find out what is required.
- You may register for TSA pre-check for a period of five years for an \$85.00 fee <https://www.tsa.gov/tsa-precheck/apply>. This is not a reimbursable AIB expense. For international travel, consider Global entry which includes TSA pre-check.
- Flight changes: flights may be cancelled due to weather, mechanical, or flight crew issues. Immediately call the airline to reschedule the flight. Any hesitation will increase the odds of missing out on the next flight. Have apps on your smart phone for each airline so you receive text messages for flight delays. Text messages will typically include a phone number to call. Have your airline reservation number readily available. If you are waiting in line, also place a call since available seats are disappearing fast. Be sure to update the community you will be visiting to keep them informed of delays in your travel plans.
- Rental vehicle: know ahead of time what insurance you need and make sure both Advisors are authorized to drive. If both drivers do not have collision and comprehensive insurance on their personal vehicles, they are most likely not covered and should purchase insurance. Prior to leaving the rental facility, photograph your rental car license plate for reference, the whole vehicle, and especially ANY damage to the vehicle. Have an employee note all damage and sign for it before you leave the facility. Photograph the whole car at return and have an employee verify in writing the condition of the vehicle. Save the images for at least six months since claims may be filed months later. Ask for a toll transponder if cash-less toll roads will be used. Confirm the toll transponder is on the receipt and is activated.
- Communities may provide gifts which may not fit into your luggage. Ask them if they can provide shipping since your schedule will rarely permit enough time to make shipping arrangements. Take all gifts and all literature with you that are not shipped to your home. Do not leave anything behind in your accommodations.
- List of things to make your Advising easier: laptop with charger, camera and/or cell phone capable of taking numerous photos, battery charger for cell phone, data cable to connect devices to download photos, separate notebook for each community, several clickable pens, water bottle, small snacks, umbrella, sunscreen, and an additional small bag for travel ease.
- Pack medications in your carry-on.

## EVALUATION OF COMMUNITIES

### Evaluation Requirements

- The Advisors shall meet with representatives of each community to understand the community's organization and its commitment. It is expected that the community will provide the Advisors with a Community Profile referencing the Evaluation Report metrics, Community Map with boundaries, Evaluation Tour Itinerary referencing the Evaluation Report metrics with contacts, designated representative, or representatives (often a committee) to guide them to various sites, lodging, meals, and transportation.
- Should Advisors arrive in a community and find that it is unprepared for an evaluation, the Advisors shall evaluate the community and provide information which will guide the community in preparing for an effective future full evaluation.
- The Advisors must realize their social responsibilities with the host community and ensure that interactions are courteous, professional, and appropriate. Understand that volunteers have worked hard over the past year and longer preparing for the evaluation period.
- If an issue comes up during the tour, contact the Executive Director for a resolution. If the Executive Director is unavailable, contact the Advisors Coordinator.
- The Advisors shall evaluate each community using the Evaluation Report. After each visit, the Advisors shall reach a consensus when completing the Evaluation Reports, including relevant observations formulated in a positive manner. The Evaluation Reports are invaluable to communities, are scrutinized as consultant reports, and are used to determine future expenditures and initiatives. The evaluations are seen by a wide cross section of people and reflect directly on the value of the AIB program to communities. Communities have invested large sums of money and time to compete in this program and expect quality Evaluation Reports.
- A well-written evaluation with images and web links provides information for the community concerning where improvements can be made while also highlighting the community's successes.
- Advisors are required to provide informational resources, such as website links, for referenced organizations, procedures, or suggested products in their recommendations. Advisors are also encouraged to recommend AIB sponsors' services or products when appropriate.
- To maintain a professional image the Evaluation Reports must be completed with images included on a computer (not a hand-held device) and transmitted electronically to the Executive Director.
- A minimum of three recommendations is required for each criterion.
- The Evaluation Reports, Outstanding Achievement Award nomination, and Special Award Forms are to be transmitted to the Executive Director **within two weeks of completion of evaluations or by July 31 (whichever is sooner). If additional time is required, you must consult with the Executive Director and Advisor Coordinator. Submit your Evaluation Reports after your tour is complete as you should double check your work and fine-tune recommendations after visiting each community.**
- The Advisor Coordinator will follow up with communities by email or phone soon after the Advisors leave the community to obtain immediate feedback about the evaluation process.

## **Evaluation Report**

The Evaluation Report provides a roadmap for communities to improve. Along the way, communities can use it as a checklist to note their progress as they prepare for evaluation.

There are eight criteria and each criterion plus a category for the Evaluation Tour preparation.

- Community Vitality
- Floral Impact
- Landscaped Areas
- Urban Forestry
- Environmental Initiatives
- Celebrating Heritage
- Overall Impression
- Community Involvement
- Category - Evaluation Tour Preparation encourages communities to properly prepare for the evaluation process by having the opportunity to be awarded points for providing information the Advisors need.

## **Use of the Evaluation Report Metrics**

- Communities are evaluated as a whole including, municipal, business, and residential.
- Evaluating the metrics: place a value in only one box for each metric. The automatic tabulation will calculate the scores. The use of N/A does not raise or lower a score.
- Prior to travel for the evaluation of communities, work through the Evaluation Report researching implementation of some of the metrics in each community. Knowing ahead of time about landscape, urban forestry, historic preservation, and recycling ordinances or policies is helpful. Encourage your comments about the use of the Evaluation Report. If you feel there are metrics that cannot be evaluated or should be added please share that with us.

## Evaluation Process Tips

- Review the Community profiles and Evaluation Tour Itineraries from the communities prior to travel. The communities are encouraged to block schedule a block of two hours on Day 1 and two hours on Day 2 to allow Advisors to make a good start on their Evaluation Reports. Lead Advisors should ensure the itinerary has this time scheduled. To protect the Advisors' time on each day of evaluation, suggest to the community that the two- or three-hour blocks of required time can slide forward or backward in the afternoon. Advisors are not expected to put in three hours of work after a dinner that ends late in the evening.
- Use the Evaluation Tour as a checklist while evaluating. Refer to it to determine what questions need to be asked.
- If using a cell phone for taking images, make sure there is enough memory. Delete old images as needed.
- Use the word "community" which covers towns, villages, cities, counties, colleges, etc.
- Use the word "resident" and not "citizen" since some residents are not citizens.
- To save time after evaluating, prior to travel, fill out portions of the Evaluation Reports for each community.
- During the evaluation and report writing, divide the eight criteria, General Observations and Evaluation Tour Itinerary between the Advisors. For example, one Advisor can take the lead for Community Vitality, Floral Impact, Landscaped Areas, Urban Forestry, and Environmental Initiatives, while the other Advisor handles General Observations, Celebrating Heritage, Overall Impression, Community Involvement, and the Evaluation Tour and Itinerary. Consider switching them for the next community. However, each Advisor should be engaged and ask questions for each criterion.
- It is essential for Advisors to take notes during the tour. Not only is it easy to forget something, but communities, especially if they have participated in the past, expect to see Advisors taking notes. Photograph your notes as a backup before leaving the community.
- For note taking during evaluations, the side spiral notebook with pockets by [Staples \(#749565\)](#) is very handy. Tie a thin pen onto a string and tuck it into the spiral. Bring spare pens.
- Do not expect community members to carry personal items for you during walking portions of the tour. Have a method such as a small shoulder bag or fanny pack to carry your water bottle and other items.
- Bring a packable bag that scrunches into itself so there is a way to carry items given to you during the tour.
- You may mention the other communities you are evaluating that year but do not brag about or disparage other communities.
- Share, but do not dwell on outstanding achievements of your own community or others.
- Do not disparage any programs or places you view on the tour. Make note of potential improvements to use in recommendations.
- Do not suggest any community is a probable winner for any awards.
- Do not slow the tour with excessive photography or chatting with participants. The community is often on a tight schedule.
- Do not argue with community members.
- Do not invite host committee members out for private drinks, etc.
- When writing the Evaluation Report, information from the tour may be lacking. During the tour, anticipate those potential gaps by photographing street signs, names of buildings, and plaques to capture information which cannot be written down due to lack of time.
- Photograph volunteers and committee members so they are recognized in the images used during the symposium.
- **At the end of the first day of evaluation** use your time to start backing up images by downloading them to a cloud application (Google Drive, iCloud, Dropbox, etc...), confer with each other, compare notes, do web research, determine what information is missing, and who in the community can best provide the information. Start finalizing scores and determine missing information. Create a list of questions to share with committee members that evening and the next day.
- The previously published AIB Best Ideas books are excellent sources of inspiration for recommendations. However, make sure to customize each recommendation to fit each community.

## ADVISORS' PAGE INFORMATION

- Find the Advisors' Page on the AIB website at <https://americainbloom.org/Advisors-forms>
- It contains this guide, other important evaluation documents, and information which are not to be shared outside of our organization.
- Please review them and download the ones needed while traveling.
- \*Denotes Advisor documents available online at the link above

## TECHNOLOGY/APPS

- Smart phones and tablets have many useful apps (some are free) available to ease travel angst. Some popular ones include: TripList for creating packing and to do lists and TripCase for creating itineraries. Triplt Pro is good for flight alerts. You can Google your flight number to check for delays.
- Individual airline apps are critical for check in and tracking flight delays. Set up text messaging for flight alerts within each app.
- Boarding passes can be uploaded and saved in "Wallet" on Apple devices or "Google Now" on Android devices. This eliminates having to print them. Wi-Fi is not needed since they are saved to the phone. Just make sure your phone/tablet is charged when you head to the airport.
- The "Livetrekker" app tracks and saves your travel route on a map as you walk or drive through a community.
- Use the "NOAA Radar Pro" app for weather.
- Stock up on batteries and/or portable battery backups for phones and electronics.
- Grammarly is an online spelling and grammar checker that is easy to use and simple to install as a free browser extension on either Chrome or Safari. Visit: <https://www.grammarly.com/1>.

## INTERNATIONAL JUDGING

Advisors can be nominated by AIB to participate in Communities in Bloom international tours and evaluations. Below are the qualifications for nomination:

- Minimum of three years AIB judging experience.
- Has received excellent reviews from communities advised
- Demonstrates ability to write an outstanding, high quality evaluation.
- Participates enthusiastically in other AIB programs and projects. For example, speaks at symposiums, recruits participants, conducts workshops, serves on committees, and/or recruits sponsors.

The Advisor Coordinator will:

- Accept requests from Advisors from October through January to be considered for international judging.
- Prepare a list of candidates and contact candidates to determine availability
- Review the list with the AIB Executive Director
- Inform the AIB Board and Communities in Bloom of their decision.
- Keep a list of those who have served in this capacity.