Tree Follow-Up Volunteer Instructions

Thank you for volunteering with Speak for the Trees!

Part of our work involves giving free trees away to Boston residents to help grow Boston's urban forest in the neighborhoods where trees are most needed. An important part of this process is following up with the recipients to see how their trees are doing.

That's where you come in!

We use a system called Nubay CiviCRM to keep track of the trees and the communication we have had with the owners. This is a large database, but you will be interacting with webforms to make data input easy.

Follow the 3 steps below to start making phone calls and connecting with our network of tree recipients….

Step 1: Create a Volunteer Account

Sign up to create a volunteer account here: https://treeboston.org/treefollowup/

After 24-48 hours, you should receive a confirmation email from nubay that an account has been created for you that includes login information.

Once your account is created, login at https://sftt.nubay.net/user and then go to step 2 below.

Step 2: Login Instructions

1. Log in to Nubay at https://sftt.nubay.net/user with your username and password.

2. You'll see a bunch of info on the landing page. You can ignore it. At the top right under "Admin Menu" click on "Tree Recipients Call List", which takes you to the Tree FollowUp Info page that has information for every tree that we have ever given away.

3. Select the campaign you've been assigned and click the green button "Apply".

4. Click on "Survey" for the first person on the list.

5. This takes you to a form that you will use to input data. Use the contact information at the to call the person. If no number is listed, please make note in the notes section, hit submit, and call the next person.

6. Follow the instructions in step 3 below to guide your conversation.

Step 3: Asking the Questions

Call the person in the survey. If no number is listed, please make note that in the notes section, hit submit, and call another person.

Question 1: Did the person pick up?

Did the person pick up?

> **Yes**- *"Hello, my name is _____ and I'm calling from Speak for the Trees to see how your tree is doing. Is this (name of person you are calling)?*
> *Do you have a few minutes to answer some questions?"*
> - If you reach the wrong person, select "No, and the phone is not working" and make a note.
> - If they don't have time, select "No, but the phone number worked" so we can follow up.
>
> **No**- Leave a message if you are able:
> - *"Hello, my name is _____ and I am trying to reach _____. I am calling from Speak for the Trees and we'd love to know how the tree is doing, so please call us back at _____ when you get a chance. Thank you!"*
> - Select whether the call is connected or not ("the phone is not working" is so we know that the phone number we have is incorrect and don't try to call again).
> - Make any notes if relevant (the mailbox is full, they hung up, etc.) see the notes section below.

Confirm the details - Confirm all relevant information (make necessary edits)
- *We have some contact information on file for you that I'd like to go through so we can make sure it is correct. Is this your (phone number, email, address)?*

Tree Info
> *We are interested in hearing more about the tree you received from Speak for the Trees.*

Tree Status
> *Did you pick up your tree? If so, did you plant it? Is it alive?*
> - Select from the drop down the answer that describes the current status of the tree.
> - Ask if the tree species listed is correct.- If they don't know, don't worry about it.
> - You don't need to worry about the campaign.

Picked up, but haven't planted
> Remind them that trees need to be planned in the ground so that the roots can grow and it can absorb water and nutrients.
> - Ask them if there is a reason they haven't planted it yet, if they are having any trouble, if there is anything that we can do to help.
> - Thank them for their time and ask if they have any further questions.
> - Put any notes about the call in the final notes section (see about notes below).

Picked up and planted (it's alive)
   Address of tree
   - *Was the tree planted at your home address?*
   - If it was not, add the neighborhood the tree was planted in - otherwise leave blank.

   How is the tree looking?
   - Use your best judgement based on their answer as to whether it is "healthy" or "not healthy." Err on the side of healthy unless there is something specifically wrong with it.
   - If it's been less than 6 months since planting it is probably not dead already, but if you confirm that it is dead go back to the tree info section and change it to "Dead".

   Have you been watering the tree?
   - **No-** Remind them that they need to water the tree 5 gallons/week in the summer for the first two summers after it is planted.
   - **Yes**, some- Select if they are watering the tree, but not consistently and/or not the full 5 gallons.
   - **Yes**, full- Select if they are watering 5 gallons/week. Thank them for taking care of the tree!
   - ***Note: They should start watering in the late spring after the last frost and water until the first frost in the fall.***

Tree Stories
   - *"We are collecting videos of "tree stories" around Boston and would love to hear some from the recipients of our tree giveaways. Would you be interested in sharing a story about your tree?"*
   - **Yes-** A staff member at SFTT will reach out to you to talk more about the project. Thank you!
   - **No-** Thank them.

Photo
   - *We'd love to see your tree! Please send us a photo at trees@treeboston.org. Please include your name and address in the email.*

Notes
   - See notes section below for instructions.

Hit Submit and use the menu in the top corner to go back to the Tree Listing page if you want to make another phone call!

Once you're done, fill out the volunteer log at https://sftt.nubay.net/volunteer-log

Thank you!

If the person has been called before
Did the person pick up?
> **Yes**- *"Hello, my name is _____ and I'm from Speak for the Trees to see how your tree is doing. Is this (name of person you are calling)?*
> *Do you have a few minutes to answer some questions?"*

- If they don't have time select "No, but the phone number worked" so we can follow up
  No- Leave a message if you are able:
- *"Hello, my name is _____ and I am trying to reach _____. I am calling from Speak for the Trees to touch base about the tree that you received from us. We would love to know how the tree is doing, so please call us back at ____- when you get a chance. Thank you!"*
- Select whether the call connected or not ("the phone is not working" is so we know that the phone number we have is incorrect and don't try to call again).
- Make any notes if relevant (the mailbox is full, they hung up, etc.) see the notes section above.

Confirm the details
- *Have there been any changes to your contact information since the last time we called you?*

Tree Info
We are interested in hearing more about the tree you received from Speak for the Trees.

Tree Status
Did you pick up your tree? If so, did you plant it? Skip if the tree status indicates it was already planted.
> **Yes**- Change the status and go to the next question.
> **No**- Remind them that trees need to be planned in the ground so that the roots can grow and it can absorb water and nutrients.
> - Ask them if there is a reason they haven't planted it yet, if they are having any trouble, if there is anything that we can do to help.
> - Thank them for their time and ask if they have any further questions.
> - Put any notes about the call in the final notes section (see about notes above).

Is it alive?
> **Yes**- Go to the next question.
> **No**- Change the status to "Picked up and planted (it's dead)."

How is the tree looking?
- Use your best judgement based on their answer as to whether it is "healthy" or "not healthy." Err on the side of healthy unless there is something specifically wrong with it.
- If you confirm that it is dead go back to the tree info section and change it to "Dead."

Have you been watering the tree?
- **No-** Remind them that they need to water the tree 5 gallons/week in the summer for the first two summers after it is planted.
- **Yes**, some- Select if they are watering the tree, but not consistently and/or not the full 5 gallons.
- **Yes**, full- Select if they are watering 5 gallons/week. Thank them for taking care of the tree!
- ***Note: They should start watering in the late spring after the last frost and water until the first frost in the fall.***

Tree Stories Skip this question unless there is no answer filled in yet.

Photo
- *If you haven't sent one already, we'd love to see your tree! Please send us a photo at trees@treeboston.org. Please include your name and address in the email.*

Notes
- See notes section above for instructions.

Hit Submit and use the menu in the top corner to go back to the Tree Listing page if you want to make another phone call!