

# Operationalising the *Open Standards for the Practice of Conservation*

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**Guidance for using CMP's systems – Miradi and Miradi Share - to support implementation and management of Open Standards projects**

Purpose	This report provides some guidance for exploiting the CMP systems supporting the Open Standards – Miradi and Miradi Share - to manage project information and streamline workflows within conservation teams and supporting functions.
Who should use this, and with whom?	Integrators / M&E staff, with systems / support people and managers who are responsible for multiple projects.
When	In discussions about how to improve the capture of conservation knowledge and improving the flow of information within and between project teams.
How	Review the guidance here and adapt it to your organisation's context, when preparing to adopt the Open Standards and / or when looking for ways to manage project information.

Annette Stewart - Fulbright Scholarship 2016

**Improving the *practice* of conservation  
by improving the *management* of conservation**

## Contents

Introduction.....	2
Preparation for Full-cycle support.....	3
Operationalising OS Step 2 – Plan Actions and Monitoring .....	14
Operationalising OS Step 3 - Implementation.....	25
Operationalising OS Step 4 – Analysing / Adapting.....	35
Going full-cycle - Support for multiple iterations around the cycle .....	39

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# Operationalising the Open Standards

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This report provides some guidance for “operationalising”<sup>1</sup> the Open Standards – that is, exploiting its supporting systems – [Miradi](#) and [Miradi Share](#) - to manage project information and streamline workflows.

The report draws on findings from a Study of Practices, which worked with several organisations that are using the Open Standards for planning steps and are at different stages of operationalising. The report is primarily targeted at “integrators” (often people with a Monitoring & Evaluation role) in small-to-medium sized conservation organisations in the initial pilot stages of using Miradi and Miradi Share.

The Open Standards guidelines are explicitly “*not designed to fully address administrative processes and functions related to, for example, budgets, contracts, and human resource management*”<sup>2</sup>. This guide aims to address some of these areas.

The guide specifically focuses on use of the CMP’s systems which support the Open Standards - Miradi and Miradi Share. Some of the benefits described here could be obtained by storing project information in documents or spreadsheets for single projects, however this will not give you the data integration and analysis capabilities required to manage a portfolio of projects, or to efficiently manage single projects regularly going full-cycle.

Refer also to [these related tools](#) -

- [Institutionalising the Open Standards](#)
- [Open Standards and Collective Impact](#)
- [Conservation Business Process Model](#)
- [Promoting change in cause-driven organisations](#)

**Please Note:** Operationalisation can be tackled in many ways. This document focuses mainly on the “technical” aspects, however the success of any operationalising efforts will be determined much more by “people” factors. Before starting work on the technical side of things, please review the guidance in the related document “[Institutionalising the Open Standards](#)” which outlines factors to consider when selecting a pilot project and gathering a project team. This document assumes you have already identified a pilot project and considered who should be involved in the team.

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<sup>1</sup> “Operationalising” generally refers to the routine function of putting processes and standard practices into use, and exploiting all of their key features. In contrast, “Institutionalisation” generally means “the building of infrastructure and culture that supports practices so that they are the ongoing way of doing business. The result is the deployment and implementation of processes that are effective, usable, and consistently applied across the organization. Institutionalisation implies that the process is ingrained in the way the work is performed and there is commitment and consistency to performing the process.”

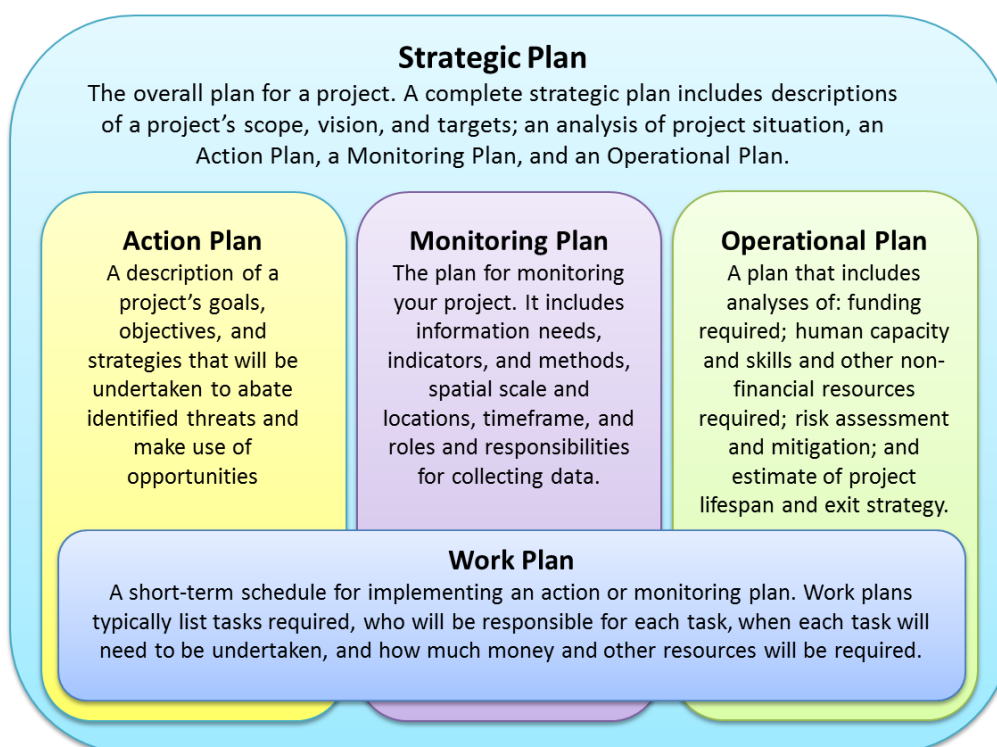
<sup>2</sup> CMP Open Standards v3 2013, page 2

## Introduction

Operationalising the Open Standards involves putting in place the systems that support management and reporting of project information, and management of the projects themselves. Project information is produced by working through the guidance in each step of the Open Standards, with continual analysis and refinement as projects go around the cycle. The key Steps and information products in the OS cycle are –



The content of the key information products is shown below. This document focuses on systems support for the Operational Plan and Work Plan, along with factors that support projects moving around the full-cycle.

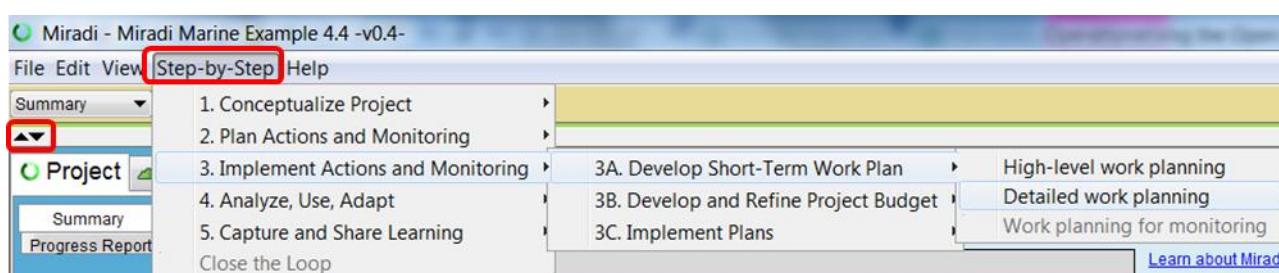


## Preparation for Full-cycle support

The Open Standards systems – Miradi and Miradi Share – provide support for each individual step within the Standards. However the greatest benefit of the systems comes from their “whole of cycle” support – enabling project information to be captured, regularly updated, reported and shared, as projects move through the cycle.

Dealing with some initial design options will make it easier for projects to make best use of the systems’ capabilities. These options are described below, along with a starting **Recommendation** for each option. Most options are relevant for circumstances where you will be managing multiple projects. The “right” answers will evolve over time, but it’s worth knowing what options are available, making a start with a pilot project, and then building on each option as experience is gained.

Keep in mind that support is available if you want help with any of these options. For Miradi questions, contact [support@miradi.org](mailto:support@miradi.org); for Miradi Share, use the Support link on the miradishare.org website. Guidance is also available from within Miradi’s help features (the Step-by-step guide in the top menu as well as the guides available for each by opening up the wizard window with the black triangles), and on Miradi’s Community web-page at [www.miradi.org/community](http://www.miradi.org/community).



This section includes the following items –

Preparation for Full-cycle support.....	3
Choose your starting point and scope.....	4
Projects and Programs.....	5
Reporting options.....	6
1. Audiences & information needs .....	6
2. Report automation .....	7
Use project templates .....	7
Using Miradi Share’s Classification schemes.....	8
Business rules and Naming conventions .....	10
Privacy and Security considerations.....	10
Capture the <i>Details</i> .....	11
Use Diagrams <i>and</i> Words .....	12
Data Management.....	12
Version Control.....	13

## Choose your starting point and scope

You can start a pilot project from anywhere in the Open Standards cycle. Ideally you would start at the beginning with a new project, and work through most of the guidance in Steps 1 and 2 before moving into Implementation. But if you already have some projects being implemented, you could equally well just “move” them into the cycle as-is, and then gradually build up the project information over time by continuing around the cycle. A key advantage of having project information stored in systems is that it supports their gradual development – data can be easily added and new plan documents produced with minimal effort.

Different types of projects involve different levels of risk and complexity – some demand a detailed planning effort to ensure that the most appropriate strategies are adopted, while simpler ones, or projects that are repeating a known effective strategy, can follow a simpler path. The key is to have a **viable first iteration plan** before spending time and money on Implementation. Trained coaches can help you determine what would constitute a viable first iteration plan for your particular project(s). You can find a coach in your local area via the Conservation Coaches Network - [www.ccneglobal.com](http://www.ccneglobal.com).

Here are some **Recommendations** for getting started -

- If you are starting a pilot with a new project, gather an appropriately resourced team and work through the Open Standards Steps 1 and 2, under the guidance of a skilled coach. Enter details into Miradi as the information is developed, and use one of the reporting features to produce your project documentation. Then move into Implementation (Step 3 and 4) of the project. Note that Miradi is best used “offline” by entering information developed on sticky notes during a workshop, rather than using it directly within the workshop – you want your team focussed on the content of their project, not the operations of a computer.
- If you have an existing project, and you are comfortable that it is implementing a sound strategy, then you could move straight into developing Workplans or Monitoring Plans depending on your need –
  - o If you primarily want a Workplan and Budget to manage implementation of your project, enter your Strategy and Activities into Miradi’s Workplan View then build up the workplan and budget following guidance in OS Step 2C and/or 3A.
  - o If you primarily want a Monitoring Plan to monitor the health of your key biodiversity targets, enter your Targets on a place-holder Conceptual Model, then build up the Viability Table to identify your Indicators and enter your Measures (OS Step 1B).
  - o If you primarily want a Monitoring Plan to monitor and analyse the outcomes being produced by your project, create an initial Results Chain, identify the basic intermediate results that you are expecting (through a quick run of OS Step 2A) then identify the best Indicators and start recording your measures (OS Step 2B).

Before starting on any of these paths, quickly review the guidance in the rest of this document and act on the pieces that seem relevant at the early stages of your pilot project. Over time, more pieces will become relevant. Pilot projects are much like the Open Standards cycle itself -

*“the entire process is rarely applied in a linear fashion from start to finish. Instead, it is a rough approximation of the more complex series of back-and-forth movements through which a project goes.”*

## Projects and Programs

Miradi and Miradi Share provide a few options for delineating projects and programs<sup>3</sup>. In its simplest form, a single project is best managed as a single Miradi file, with the scope of the project determined by working through the guidance for Open Standards Step 1. Moving beyond one simple project, Programs create the capacity and stability that allows individual projects to function well and to simplify their management.

Several factors can influence decisions around lumping / splitting projects and programs –

- As per Open Standards guidance, projects should be defined around achieving particular conservation outcomes, rather than for specific time-based actions, individual capacity, or funding opportunities. This results-based delineation of a project provides the structure for overlaying these other considerations; for example, a project to restore habitat might need to run for 10+ years, with separate funding options supporting specific interim milestones over a 1-2 year timeframe. Projects are made up of groups of related activities (Results Chains and Strategies). Ideally a project is the “investment unit” that the organisation can choose to invest in, re-invest in, or close down.
- Most Miradi-based reporting can only view the details within a single Miradi project. Reporting and analysing information across multiple projects requires the capabilities of Miradi Share (or an external reporter such as the [Miradi Companion](#)).
- Miradi Share provides capabilities to “roll-up” selected information within projects to provide a program-wide perspective. For example, if multiple projects are managing marine protected areas that have similar targets, such as sea-grass beds, then the viability of those targets can be rolled-up to monitor changes in the overall health of the marine protected areas. This is achieved by tagging the targets within each project with a common **classification**, then using that classification in Miradi Share’s reports (see [Using Miradi Share’s Classification schemes](#) below).
- The Miradi Share concept of “**Portfolios**” allows projects to be grouped in many different ways, such as by name or by using a Classification scheme. For example, you can group all projects within a geographic region, or an organisation unit, or involving a particular type of Target. Once grouped, reports can be run across all projects within the group. A project can exist in multiple Portfolios. Well-structured Portfolios mean users need only navigate the subset of projects relevant to their area, rather than wading through all of an organisation’s projects.
- Miradi Share also offers the concept of multiple “**Programs**” within an Organisation. A project can exist in only one Program.
- Privacy and security options should also be considered when determining project & program structures (see [Privacy and Security considerations](#) below).
- The delineation of projects and programs might also be influenced by partners within a collaboration (The Collective Impact model has some guidance to offer here).

**Recommendation:** The basic recommendation is to start small, with just one or two Miradi projects plus the Miradi Share Community Library. After an initial pilot period, you could start adding more Miradi projects and move to a specific Miradi Share Program for your organisation, so that you can exploit its more advanced reporting and security capabilities.

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<sup>3</sup> In Open Standards terminology:- Project = “a set of actions undertaken by a defined group of practitioners to achieve defined goals and objectives. The basic unit of conservation work.”  
Program = “a group of projects which together aim to achieve a common broad vision.”



## Reporting options

Paying attention to reporting requirements up-front will have many payoffs over the longer term. There are two key items to work through, and these are described in more detail below -

1. “Start at the end and work backwards” – identify the broad types of audiences interested in your projects, and then think about the information that they need. This helps to define the main types of information, and level of detail, that you need to capture within a project; it provides a good constraint on the tendency to “over-think” projects or to capture enormous amounts of detailed information only to find later that it is not really required. People can more quickly develop a good understanding of what to put *in* to the system when they know what they want to get *out* of it.
2. Decide on a minimum number of basic reports that satisfy most of the information needs of most of your audiences, then automate the production of these reports from the systems. This removes much of the time-consuming tasks around producing and reproducing project documentation, which allows the team to spend their limited resources on the actual work of the project, focusing on the quality of the content rather than documentation formatting.

### 1. Audiences & information needs

This analysis is best done with a small working group of people who can represent a broad cross-section of project stakeholders. Identify 3-5 types of audiences that will use information from your project. For each of these groups –

- Identify around 3-5 questions they might ask of your project, or the decisions they need to make
- identify the types of data that will answer these needs; start with the information provided through the Open Standards, and over time extend this to information that could be provided by other systems (such as finance systems, donor systems)
- work out how these data elements can be identified – most are likely to be standard reports and data items within Miradi so can be readily located, but some may need specific identifiers or customised reports (see also later section on [Classifications below](#)).

The examples in this table illustrate the type of information that you might develop.

What questions might they ask? What decisions do they need to make?	How is this answered? (raw data elements)	How is this answered? (how are data elements identified?)
<b>Program managers</b>		
How are our projects going?	Progress reports, for Strategies and Activities; and for Goals & Objectives	Standard reports in Miradi or Miradi Share; could use Classifications to show sub-sets of all projects
Is the health of our targets (of type x) improving?	Viability ratings for relevant Targets, and trend of recent measures	Targets tagged with IUCN habitat codes or specific Classification
What investment is required for project x?	long-term workplan & budget	Customised long-term workplan report (eg Miradi Companion)
<b>Donors</b>		
What are you aiming to achieve, and why? How will you know if you are succeeding? What will it cost?	Project vision, Key targets and goals, results chains and objectives, workplan and budget	Custom report combining all factors (eg Miradi Companion) or tailored Miradi Full report
Are you achieving your aims?	Progress reports;	Commentary built from Miradi Share report Results Chain progress report
<b>Team members</b>		
What do we need to work on next?	Workplan - strategies and activities assigned to team members	Customised short-term workplan report (eg Miradi Companion)



What questions might they ask? What decisions do they need to make?	How is this answered? (raw data elements)	How is this answered? (how are data elements identified?)
What is working and what is not, and why?	Progress of Objectives, and Measures of Indicators, relative to expectations	Standard Miradi Share report – Results Chain progress
<b>Future Team members</b>		
What has happened here in the past?	Progress Reports against Strategies, Activities, Objectives. Measures.	View full history of Progress Reports and Measures within Miradi.

## 2. Report automation

Once a reasonable range of needs have been identified, aim to define a minimum number of reports that can be used to meet these needs. Note that these examples focus on paper reports to illustrate the concept, but the information could equally be provided on-line as tabular reports or dashboards. Current reporting options are listed below; more options are expected to become available in future. Refer here for [demonstration of these options](#).

- standard reports available through Miradi's Reports View
- customised tables defined in Miradi's Strategic Plan view, reportable through Report Templates
- export any page from Miradi
- Tabular reports from Miradi Share
- Some add-on reporting tools -
  - o TNC's [Miradi Companion](#) reporting tool which produces narrative reports for PCs
  - o Customised reports using XSL templates which produce narrative reports with pictures and maps, for PCs and Macs (some templates available; others require programming)

The last two options allow for descriptive text from Miradi (see [Capture the Details](#) below) to be combined with images and maps, to automate production of quality narrative documents. These options allow teams to quickly produce project documentation such as project plans, and to easily reproduce new versions as their project information is updated.

**Recommendation:** start by identifying just a few key audiences – perhaps the project team, their managers and their funders – and their key information needs. Decide on a few initial reports, and the method you will use to produce them. Then build on this over time.

## Use project templates

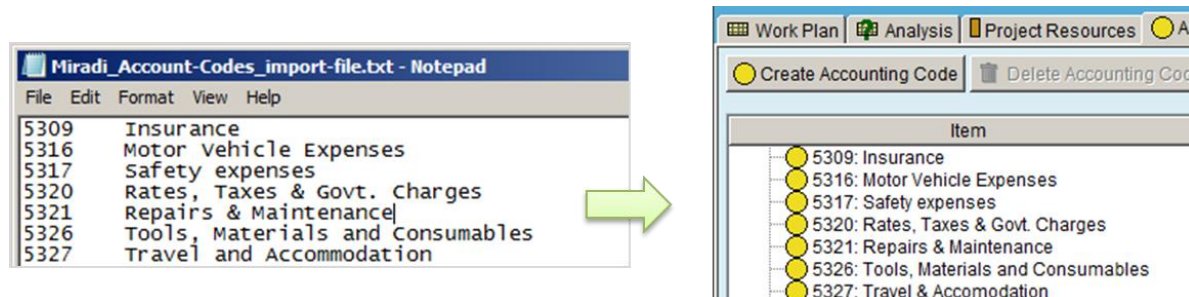
Templates help to get some consistency of information across projects. There are two options –

- If you are *not* using Miradi Share, you can create a Miradi project and load the information suggested below, then save that project with a name such as “Template project”. Then each time you want to start a new Miradi project, open this and use “Save As . . .” to create your new project.
- Miradi Share has a more advanced template capability, which will prepopulate any new Miradi project with the types of information below along with all Classifications that you have set up.

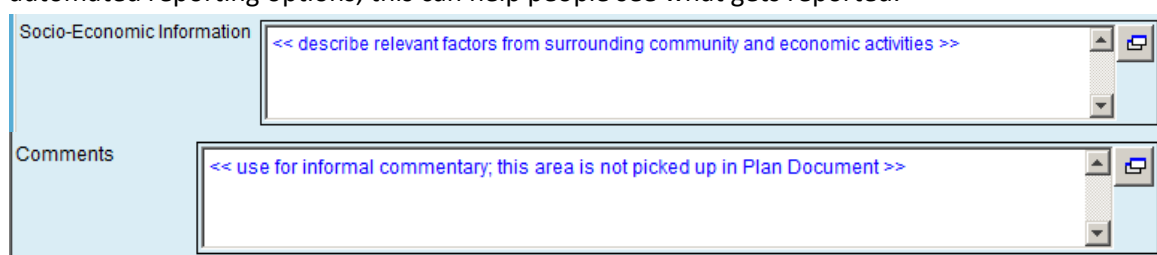
The types of information you might choose to put in a template includes –

- Load your General Ledger account codes, so that these are ready for use when project teams are developing workplans and budgets. To do this, create a text file with each code on a separate line, starting with the code itself, then a TAB, then the name of the account. In *Workplan View*,

Accounts Codes tab, use *Import Account Codes* to pull in your codes.



- If you will be using standard lists in other workplan information (such as funding sources), enter this information into the template project
- Include hints to guide the team in filling in factors within the project, suggesting the type of information to enter, or even telling them to not bother with some sections. If you are using automated reporting options, this can help people see what gets reported.



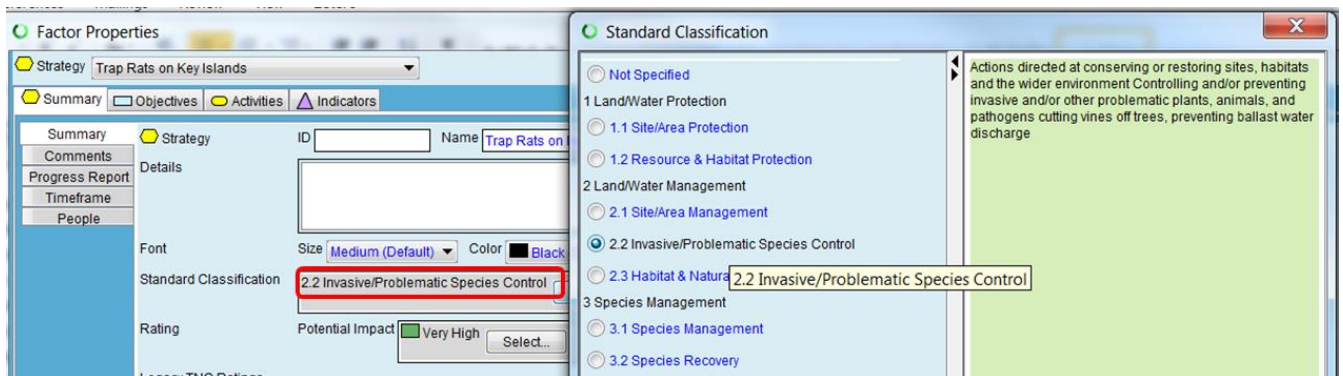
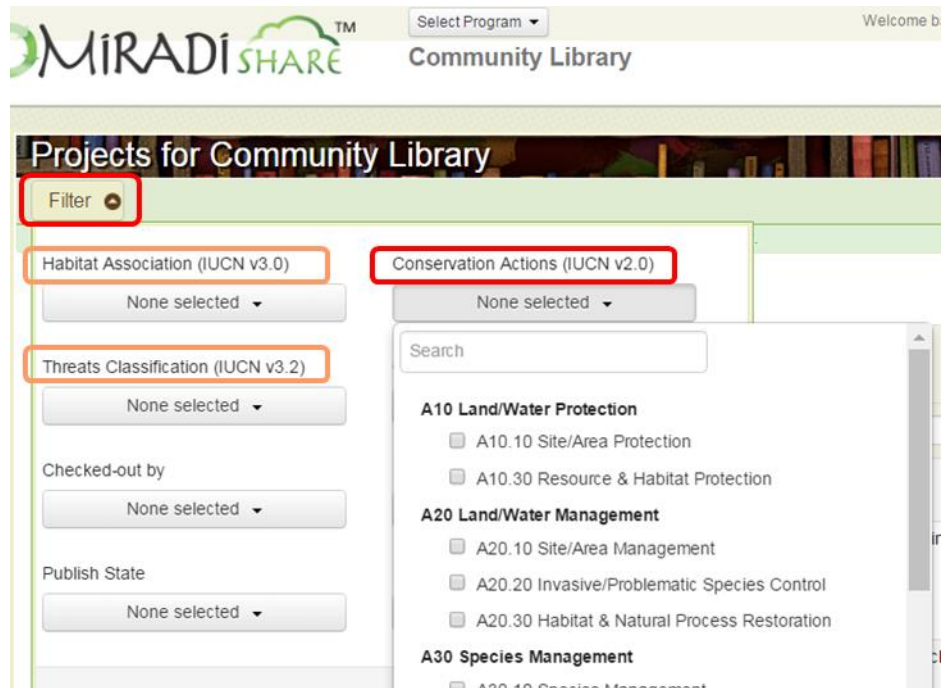
**Recommendation:** start by defining a template that holds your General Ledger codes and just a few pointers about which boxes to fill in. Then the template will become part of your normal operating procedures and you can create updated versions over time.

## Using Miradi Share's Classification schemes

Classification schemes provide the ability to “tag” objects in a Miradi project with terms drawn from customised drop-down lists. This allows objects in multiple projects to be located and analysed. Miradi already has several sector-standard Classification Schemes available – see table below. Miradi Share extends this concept to organisation-specific lists that can be attached to most objects in the project.

Classification Scheme	Description / Usage	Miradi object
Project Language	Standard list of languages	Project
Country	Standard list of countries; use to analyse or report on projects taking place in particular countries	Project Location
Protected Area Category	IUCN Protected area Category codes	Project Scope
IUCN Habitat Association code	Global list of habitat types; use to locate Projects and Targets operating in particular types of habitats, for analysis and reporting	Targets
IUCN/CMP Threat codes	List of standard conservation threats or pressures; use to locate projects dealing with a particular type of threat, and analyse the status of threats across all or a subset of projects	Threats
IUCN/CMP Conservation Action codes	List of standard conservation actions; use to locate projects taking a particular type of action, to analyse the details, and review progress etc across all or a subset of projects	Strategies
Organisation-specific classification schemes	As defined by each organisation based on their needs.	Most Factors

The screenshot at right shows an example of the standard Classifications in use – in Miradi Share you can query the Community Library to find projects working on similar actions, such as projects dealing with “Invasive / Problematic Species control”. Miradi Share then provides the ability to download the project’s Miradi file, or contact the project team, so that we can all learn from each other’s experiences. These settings are made using the classification lists with Miradi (screenshot below)



Organisation-specific Classification schemes work the same way. These schemes define –

- The Objects to be classified – schemes can be attached to Project, Biodiversity Target, Threat, Strategy, Objective, Goal, Activity, Key Ecological Attribute, Contributing Factor, Indicator, Stress.
- The drop-down lists – these can be defined as a single level, or multiple levels (as shown). If a list is multi-level, selections can be defined as 'Any Node' which means that the user can select a value at any level, or 'Leaf' which means the user selects only at the lowest level.
- Lists can be defined as Multi select or single select.

Classification schemes get embedded into your Program’s template, and Projects receive the new schemes immediately, or after the next Check-in. Projects can then select items in the list, either by editing the project in Miradi desktop or by using the Edit Classifications function in Miradi Share.

Contact the Miradi Share administrators (using the Support link on the website) if you want to establish some Classification schemes for your project.

**Recommendation:** start by using the standard classification schemes that already exist within Miradi. Then as analysis and reporting requirements are determined, set up organisation-specific schemes to support these requirements. Start with just a few lists and then expand them over time as you gain experience and new reporting and analysis requirements arise.

## Business rules and Naming conventions

Like any system, Miradi has many options and variations built in so that it can cater for the varying needs of different conservation organisations. You might find it helpful to narrow down the variety of options that get used, so that there is some consistency across your projects and to simplify training and reporting. One way to do this is to define a small set of “business rules” that explain the options and nominate the chosen option including the rationale for that choice.

The key options are described in the relevant sections below. For example, workplans and budgets can be defined for different time periods (years, quarters, months), and at different levels (Strategies, Activities, Tasks); defining some business rules will simplify training, use and analysis, and support linkage of data through to finance systems.

In addition, you may want to define some standard naming conventions for various Miradi objects. For example, the add-on reporting tools identified above use some of the “ID” fields associated with objects like Targets and Threats to identify related pictures and maps. Also, “ID” fields for project resources can allow collation of an individual’s workplan assignments across all projects.

**Recommendation:** It is recommended that you keep all this in the back of your mind at the outset, and start to define appropriate guidelines as you gain experience with the systems and get a better understanding of your reporting needs.

## Privacy and Security considerations

Privacy and security options should also be considered. A Miradi project is accessible to whoever you choose to give the project file to (provided they have the Miradi software). Miradi Share offers a several privacy and security settings.

- **Project Access State** – determines whether the Project is available to everyone (Public) or is restricted to members of the Organisation, or the Program, or the Team.
- **User roles** – an individual is assigned a role (Manager, Editor, Partner, Viewer) which determines the project information they can access – see screenshot below
- If your organisation has a Miradi Share Program, you can set the **Program Type** as being available to everyone (Public) or just to people within the Program (Private).

The screenshot shows the Miradi Share Community Library interface. At the top, there is a header with the Miradi Share logo, a 'Select Program' dropdown, and a 'Welcome back' message. Below the header, the main title is 'CCNet Rally - Implementation - Manage Project Team'. There are three tabs: 'Explore', 'Edit', and 'Manage'. The 'Manage' tab is selected. Below the tabs, there is a section titled 'View and manage the project's sharing status and the composition of the project team.' This section contains two main areas. On the left, there is a 'Project Access' dropdown menu with options: 'Public', 'Team', 'Program', and 'Organization'. The 'Public' option is selected. Below this, there is a 'Project Team' section with a 'To add member' dropdown menu also showing 'Public' as the selected option. To the right of these dropdowns, there is a 'Publish State: Review' label and a note 'To change Publish State, go to the Timeline'. Below the 'Project Team' section, there is a table listing project team roles and their permissions. The table has two columns: 'Role' and 'Permissions'.

Role	Permissions
Project Manager	Able to view, check-out, check-in, edit and delete project at all stages of the project.
Project Editor	Able to view, check-out, check-in, and edit project at all stages of the project.
Project Partner	Able to view and download project at all stages of the project (full content).
Project Viewer	Able to view and download project at all stages of the project (public content).

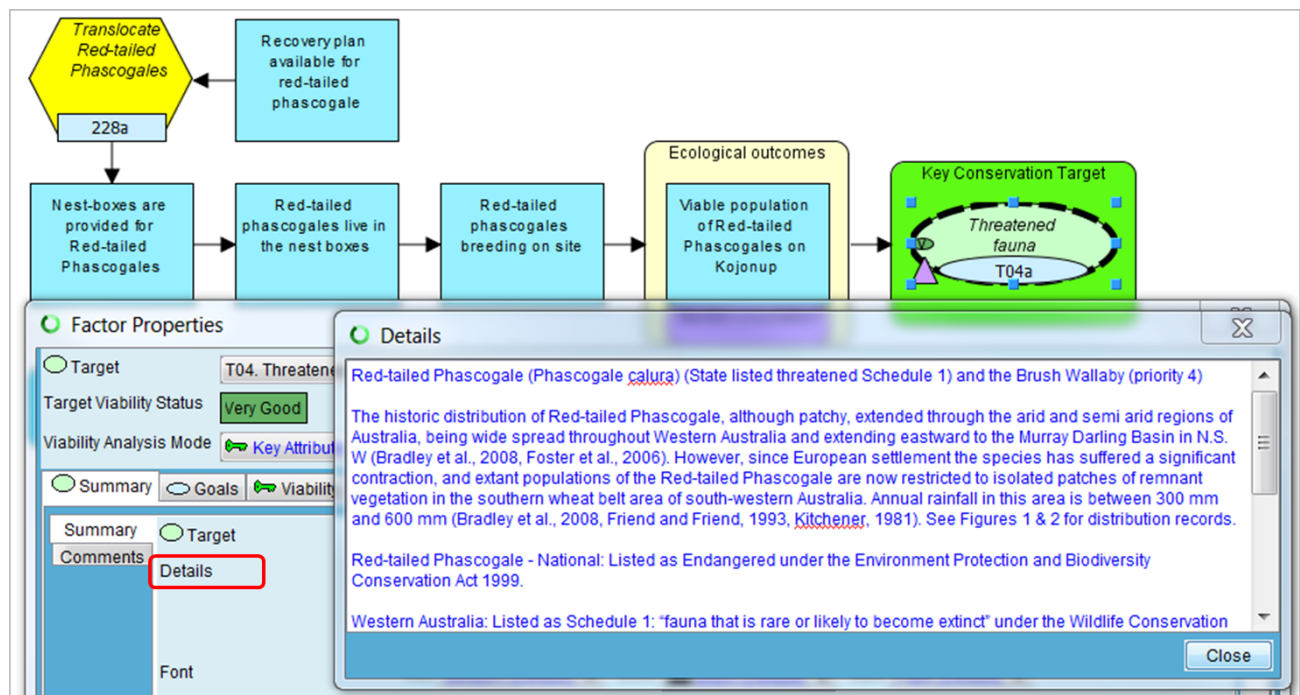
- If your organisation has a Miradi Share Program, you can also use the **Data Privacy** feature, which lets you nominate a list of 'private data' fields. These are fields that may contain sensitive information and that you want to restrict to team members with appropriate access. Then you can confidently allow sharing of the project more widely.

**Recommendation:** It is recommended that you start with the simplest options, such as Public access within the Community Library, and decide on these options after the initial pilot phase.

## Capture the Details

Miradi provides *Details* boxes for all of the key factors in a project – such as Targets, Threats, Objectives, Strategies, Activities, etc. The information entered into these boxes can range from nothing to several descriptive paragraphs. Exploiting these boxes allows you to capture the information in context, in one place (rather than scattered through various pieces of documentation), and sets up the content for automated narrative reports. It also provides a “single source of truth” which helps team members and other stakeholders to develop a common understanding of each object.

For example, writing 3-4 paragraphs describing a Target will create a strong foundation for reference during the life of the project. Similarly, a few paragraphs describing a Strategy will avoid later confusion about exactly what work the Strategy entails and what it is trying to achieve. Also, if the first paragraph is well-written, it can be easily re-used in a wide variety of reports and documents, such as funding applications and website stories.



This is one option where you should think about defining a “business rule”, to give guidance about an appropriate amount of information, and describing the best style so that the information reproduces well in reports and can be easily re-used. For example –

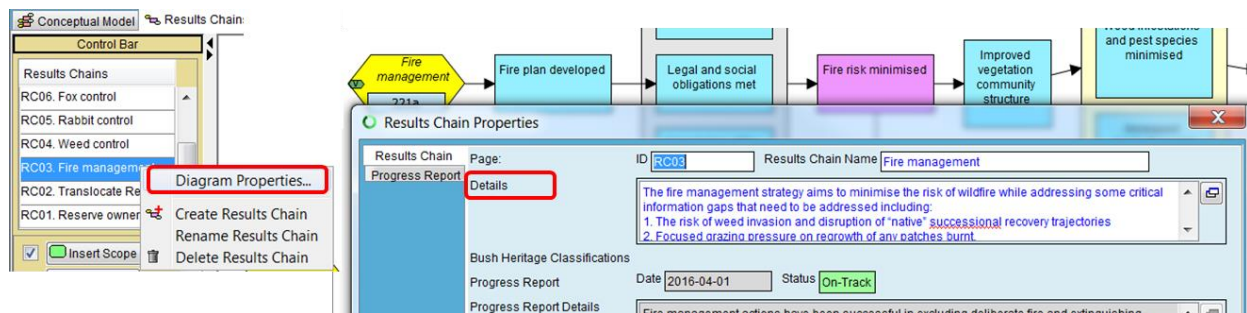


### Text data is entered into Miradi using correct grammar and observing style conventions to aid re-use and readability

1. Most of the items entered into Miradi get reproduced in reports targeting various audiences, without additional editing, so it's important that information gets entered correctly.
2. For example, item Names are entered with an initial Capital then lower case - e.g. "Restore vegetation on connectivity block", not "RESTORATION"
3. Descriptions are entered as full sentences, not shorthand that might not be understood by a wider audience.
4. For descriptions that need a few paragraphs, the first paragraph should be written in such a way that it provides a summary that can be extracted for use in reports or website stories.
5. Species names are entered using normal scientific conventions; specific names of organisms are written using a capital letter for the genus name (*Homo*) and a small letter for the species name (*sapiens*); italics are used for specific names in printed works (in Miradi, highlight the text, then right-click to make it italics).

## Use Diagrams and Words

Miradi's diagramming capabilities - Conceptual Models and Results Chains – are powerful features that lay out the relationships between factors affecting a project's situation, and the logic that the project will pursue to achieve results. Experience has shown that most people are quite comfortable with diagrams and prefer to see the logic laid out in this manner; however a sizable proportion of people struggle with interpreting them and prefer the written word. Both forms can be produced in Miradi and shown in reports, to cater for all types of users. To enter Details - right-click on the name of the diagram, click Diagram Properties, then enter your description in the Details box.

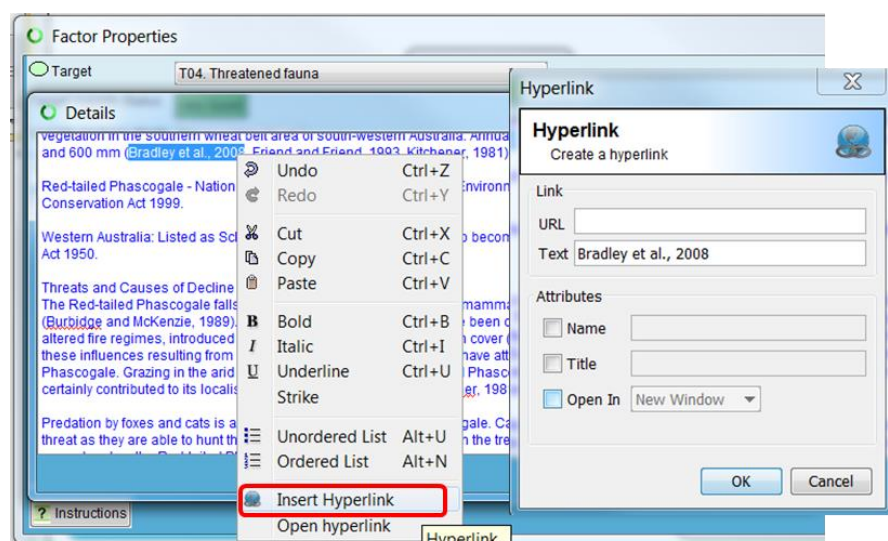


**Recommendation:** capture the Details of key objects within Miradi, to provide a consistent record, aid common understanding, and to set up information for reporting and re-use.

## Data Management

You can capture a lot of information within Miradi, but it is not designed to manage all supporting project documentation. For example, you will need to manage documents such as scientific references or contractual agreements. If your organisation does not supply guidance or filing structures, you might want to set up a shared folder that the whole team and key stakeholders can access (such as a Google site or drive).

Within Miradi's Details boxes, you can add hyperlinks to this supporting information (right-click within the Details box, then add the location to the Insert Hyperlink menu).



Miradi Share provides a capability to load a limited number of associated files and links to your project. They are then accessible to whoever has access to your project. For example, if you are producing a range of maps or narrative reports to document your project plan, you might want to store the latest versions here so that all stakeholders can readily access them.

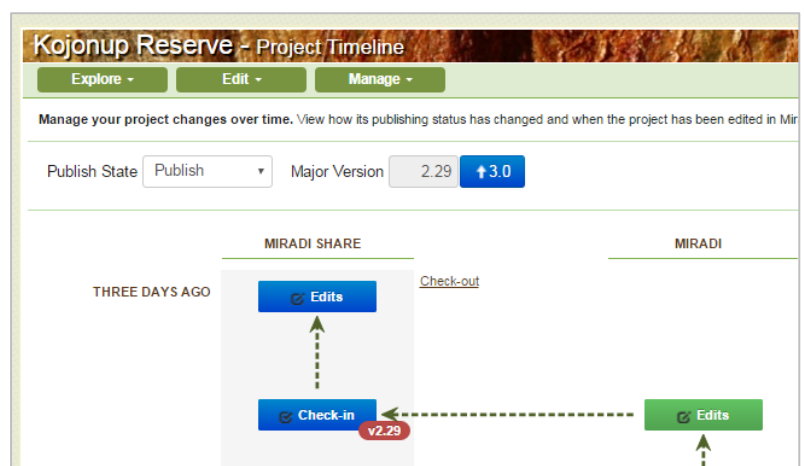


You should also think about where you will store broader information of use to multiple projects, such as the guidelines and “business rules” you develop from your pilot project. A good location would be your organisation’s intranet or equivalent. If you don’t have access to this type of facility, consider setting up a shared drive or site.

### Version Control

Miradi Share performs all version-control tasks for you. The *Timeline* feature increases the minor version number each time your project is checked in (e.g. v1.2 becomes v1.3); you can manually increase the major version number at any time (e.g. v2.29 becomes v3.0). A useful convention is to increase the major version number each time your project goes around the loop, making adaptations identified by guidance in *OS Step 4 Analyse / Adapt*.

If you are not using Miradi Share, you might want to adopt a naming convention to give you some basic version control capabilities. For example, append something like “v1.2” to the project name, and manually modify the numbers using a similar philosophy to that used within Miradi Share.

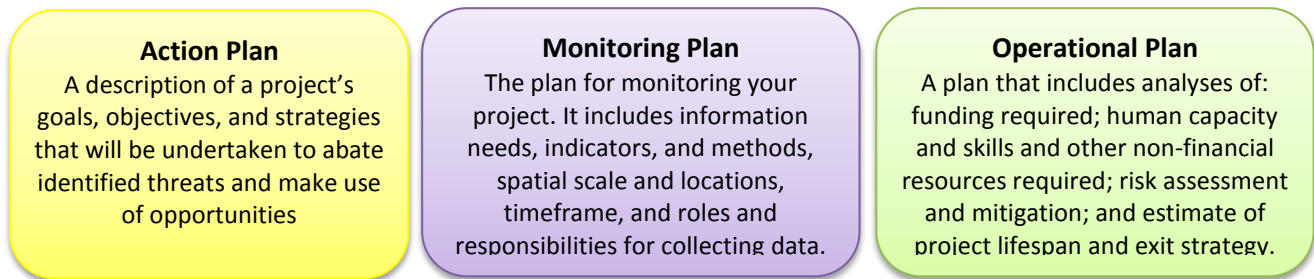


**Recommendation:** decide on some basic filing and versioning standards to help manage your projects.



# Operationalising OS Step 2 – Plan Actions and Monitoring

OS Step 2 builds the Action Plan, Monitoring Plan, and Operational Plan, creating all of the information required to manage the next and most important step – Implementation of your project. This section provides guidance on using the systems to support the information produced through Step 2.



This section includes the following items –

<a href="#">Operationalising OS Step 2 – Plan Actions and Monitoring</a>	Error! Bookmark not defined.
<a href="#">Developing a high-level Workplan and Budget</a>	Error! Bookmark not defined.
<a href="#">Set the parameters for your Workplan information</a>	Error! Bookmark not defined.
<a href="#">Manage your People</a>	Error! Bookmark not defined.
<a href="#">Decide on the right level of detail</a>	Error! Bookmark not defined.
<a href="#">Supporting your Monitoring Plan</a>	Error! Bookmark not defined.
<a href="#">Managing the Project</a>	Error! Bookmark not defined.
<a href="#">Managing the project risks and stakeholders</a>	Error! Bookmark not defined.
<a href="#">Ensuring your people have capacity to do the work</a>	Error! Bookmark not defined.
<a href="#">Finding the Funding</a>	Error! Bookmark not defined.
<a href="#">Management Reviews</a>	Error! Bookmark not defined.

## Developing a high-level Workplan and Budget

This section provides guidance for developing a high-level Workplan and Budget, which is the key component of the Operational Plan (OS Step 2C); it outlines the resources and timeframes needed to implement your plan. First follow existing Open Standards guidance and supporting materials (Steps 2A & 2B) to develop your Action Plan and Monitoring Plan, which define your project's Strategies and Activities (including Monitoring activities). Alternatively, if you are retro-fitting an existing project into the Open Standards data structures, you should translate the project's current work into Strategies and Activities and enter the key details<sup>4</sup>.

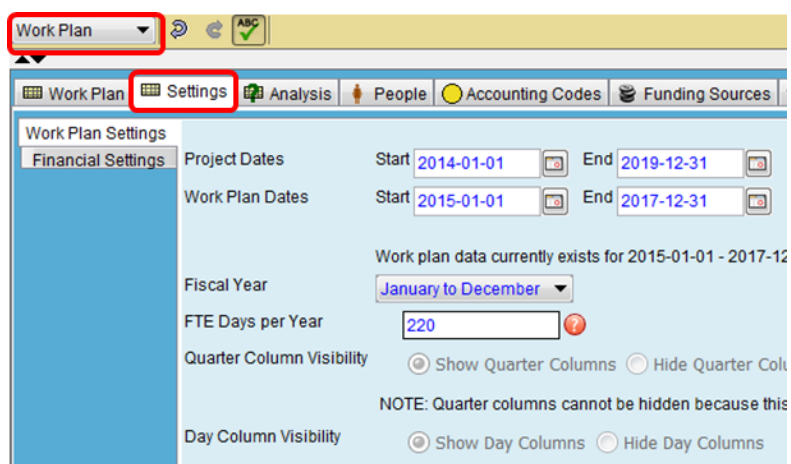
### Set the parameters for your Workplan information

Several options define what information is used to populate your Workplan. These can be set individually for each project, or you may choose to standardise them with some business rules to get consistency across all of your projects. The key parameters are in WorkPlan View, in the Settings and Workplan tabs –

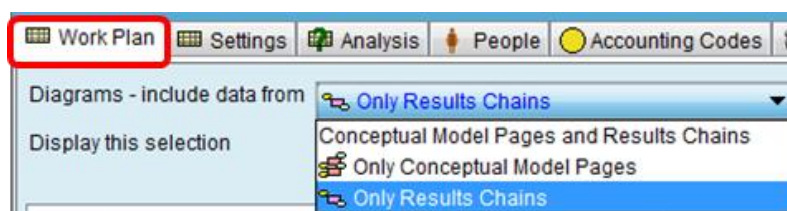
- **Project Dates - Start and End** - can be any time period relevant for your project
- **Work Plan Dates - Start and End Dates** – these should be within the period of your project, and are used to restrict the amount of information displayed in Workplan View, which speeds performance.

**Recommendation:** display the current year plus a few, to match your desired funding timeframe. The specific dates should match your fiscal year setting (otherwise partial years will appear).

- **Fiscal Year** - set to the period required by your finance people (often July-June, of Jan-Dec)
- **Quarter and Day column visibility** – can be hidden or displayed, depending on your preference for detailed planning (described below)



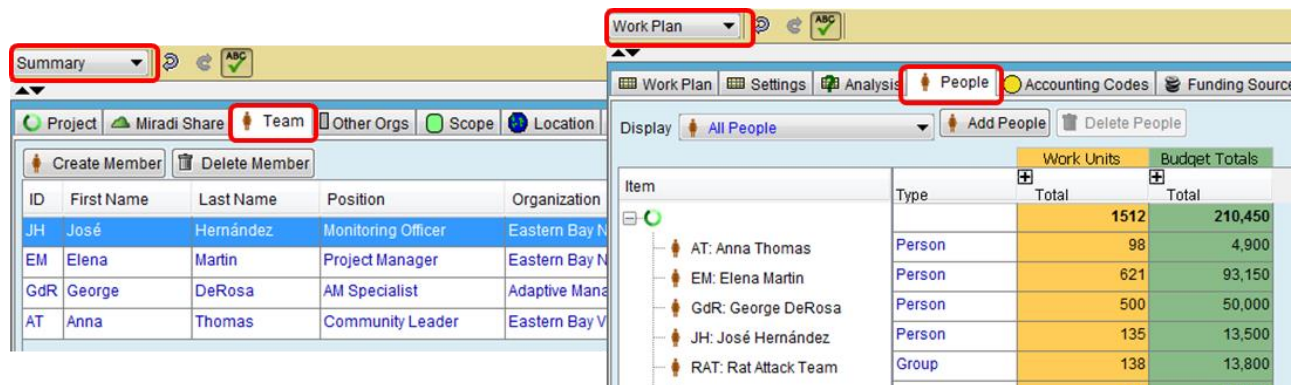
- **Include Work plan data from** – offers 3 settings to define the strategies that will appear in the Workplan. Strategies can appear on Conceptual Models, where they just represent an action to be taken; or they can be described in more detail on a Results Chain, where they are presented in context of an expected chain of events leading to a conservation result. **Recommendation:** include strategies from **Only Results Chains**, as this means that budgets will be oriented toward achieving results and not just conducting activities - the essence of results-based management.



<sup>4</sup> One way to do this is to list out the key pieces of work involved in your project; group them up if it's a long list. Then in Miradi create a Results Chain and add a Strategy for each group, then create Activities for each piece of work. Also add Indicators for any factors (outputs / outcomes) that you are using to monitor progress.

## Manage your People

**People** working on your project can be defined in two places:- team members are often defined in the Team tab (in Summary View) during the early planning stages; additional people beyond the core team can be assigned in the People tab in Workplan View; ticking the Team Member box will include them on the Team tab. A useful delineation is to restrict “Team Members” to the core team, so that the team table can be included in various project reports; and use the People tab in Workplan View to define a broader range of people and groups who are assigned work but may have limited involvement in the project.



Consider setting a consistent format for the ID field so that information for related resources can be extracted within and across projects.

You can also develop estimates for the cost of your people's time – often this is the major cost of a project so is worth focusing on to ensure time is well allocated. The Financial Settings in Workplan View allow the costing rate to be defined, such as

cost per day,  
or cost per  
FTE.

Item	Type	Work Units Total	Budget Totals
AT: Anna Thomas	Person	98	4,900
EM: Elena Martin	Person	621	93,150
GdR: George DeRosa	Person	500	50,000

Type: ☒ Person ☐ Group

Name: First Name  Elena Last Name  Martin ID  EM

Program Classifications: Roles (people only) ☒ Team Member ☒ Team Contact ☒ ☐ Process Facilitator ☐ Project Advisor ☐ ☐ Other

Organization:  Eastern Bay NGO

Position:  Project Manager

Location:  Main Office

Phone Numbers: Office  555-2374 Mobile  555-902 Home  Other

Email:  elena@ebngo.org

Alt Email:

IM Address: Address  elenamartin Service  Skype

Date Updated:  2012-03-19

Work Unit Rate:  150 Cost per day

Comments:  Elena is the primary manager of the project.

Work Plan Settings

Financial Settings

Currency:  Franc (Switzerland) Type:  Franc (Switzerland)

Currency Decimal Places:

Total Budget for Funding:  500000

% Budget Secured:  60

Key Funding Sources:  Adaptive Management Found Island Development Bank

Comments:  Funds are in place for this ye

Work Unit Rate Description:  Cost per day

This text displays next to the W

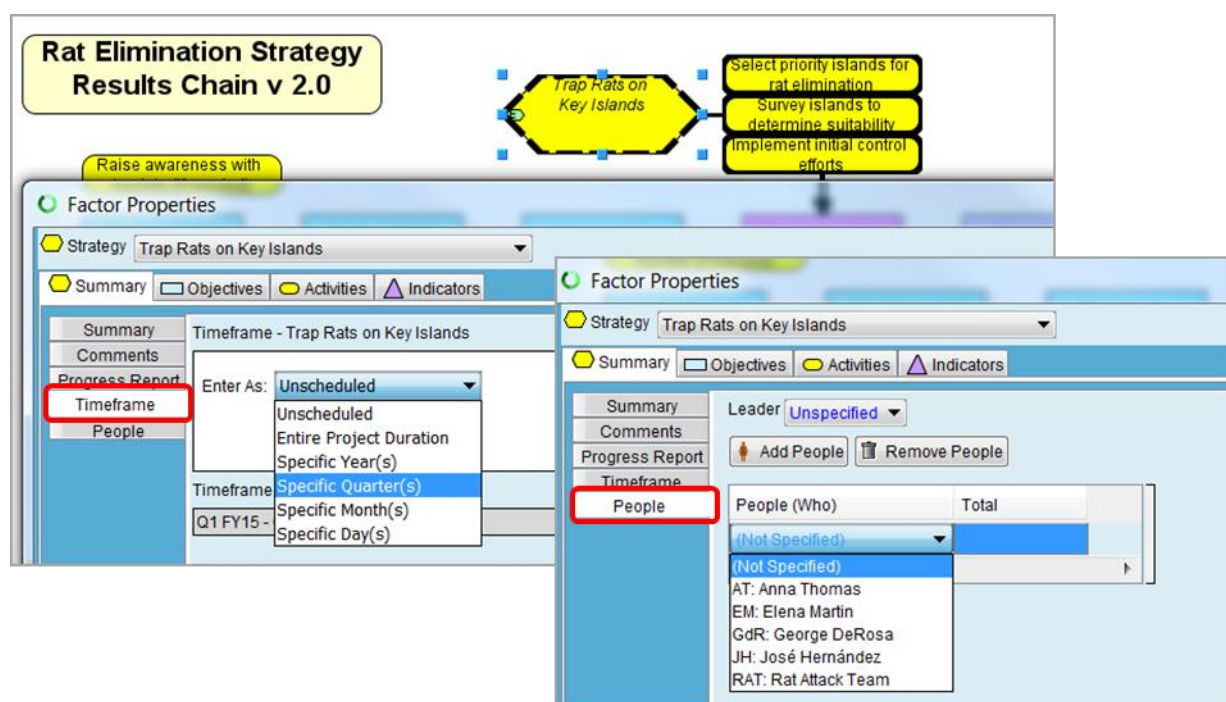
Then in the People tab you can define the Work Unit Rate for each person and group. Note that this rate does not need to reflect salary costs, which are often confidential and budgeted separately; instead, it could represent a fully-loaded cost or generic charge-out rate for resources of particular types

As you assign work to people, Miradi will add the calculated cost to the project's total budget. For example, in these screenshots Elena's daily rate is set at 150 (screenshot at left), and she has been assigned a total of 621 days (top-right), creating a budget cost of 93,150.

## Decide on the right level of detail

Miradi offers several different ways to prepare the workplan, to cater for projects of different scales and complexities. It is worth experimenting with these options during a pilot project, and then setting some “business rules” to get some consistency across projects. There are several dimensions to think about –

- **High-level Planning (“Timeframe and People planning”)** – this feature lets you assign People or Groups to work items (Strategies or Activities) and define the timeframe (years / quarters / months) when the work should occur. It is best used in the early planning stages, when you are trying to schedule the project’s work and figure out who is going to do what.
  - This type of planning offers a first-filter to understand whether the work you are envisaging can actually be done with the resources that you are likely to have. It may prompt you to reprioritize the work, or stretch it over a longer timeframe, in which case you may need to update the timeframes defined in the associated Objectives and Goals.
  - This information can be entered when viewing a Results Chain, or in Strategic Plan view, or in Workplan View. It is worth experimenting with these alternatives the setting a “business rules” to define the preferred way, so that training and usage is simplified.
  - For some projects, this level of planning might be as much detail as you need.



- **Detail-level Planning** – at the detail level you can add information about the expenses that will be incurred to do the work, and assign people to work on particular Strategies /Activities and schedule the amount of time (“work units” – e.g. days or weeks) , to estimate the cost of that work. The detail level is best tackled once you have done some high-level planning and concluded that the planned work is viable, however you could also choose to just do this detailed level planning.
  - This finer level of detail helps you to estimate the cost of your project. It may prompt you to reprioritize the work once you see how much it will cost, relative to the funding that you have available or that you think you can obtain.

- This information can be entered in Workplan View – see screenshot below and further details in Section 3 below. More guidelines for this level of planning are available by opening up the wizard window with the black triangles at the top-left of the Miradi screen.

Item	Timeframe	Who	Work Units			
			2015	2016	2017	Total
Miradi Marine Example 4.4 -v0.4-		JH, EM, GdR, AT, RAT, Not Specified	402	598	512	15
RC1. Rat Elimination		JH, EM, AT, RAT, Not Specified	228	123	28	3
Policy to Mandate Rat Barriers on Visiting Boats	Q1 FY15 - Q4 FY17	AT, EM, JH	42	91	22	1
RAT 1-1. Rat Elimination	Q1 FY15 - Q4 FY16	EM*, JH	18	7		
EM: Ele...		EM	6	2		
JH: Jos...		JH	12	5		
RAT 1-2. Rat Elimination		EM	20			
RAT 1-3. Rat Elimination	Q1 FY16 - Q4 FY17	EM*, AT		75	20	
Su...	Q1 FY15 - Q4 FY17	EM	4	9	2	
Trap Rats on Key Islands	Q1 FY15 - Q4 FY17	JH, RAT, Not Specified	186	32	6	2

- **Work items - Strategy vs Activity vs Task** - you have the choice of planning assignments and expenses at the Strategy level, or for the individual Activities that make up the Strategy, or for the detailed Tasks making up an Activity.
  - You can choose either the Strategy or Activity levels for each of the High-level planning and Detail-level planning; the choices are independent.
  - If you plan at the Activity level, Miradi will roll up the assignments and expenses to give you a summary at the Strategy Level.
  - If you have several related strategies grouped onto one results chain (i.e. several strategies required to achieve a particular result), Miradi will roll the strategy totals up to the Results Chain level, which gives you insight into the investment required to achieve a particular conservation outcome.

Item	Work Units	Projected Expenses	Budget Totals
	Total	Total	Total
Miradi Marine Example 4.4 -v0.4-	1512	35,100	210,450
RC1. Rat Elimination	379	24,000	61,300
Policy to Mandate Rat Barriers on Visiting Boats	155		14,900
Trap Rats on Key Islands	224	24,000	46,400

- Your circumstances will help to determine the right approach, but a suggested “good” approach is to do high-level Planning at the Strategy level, then do detailed planning for the near-term work at the Activity level. Planning at the Task level is generally too much detail for most projects; use with care.
- **Timeframes – Years vs Quarters vs Months** - you have the choice of planning assignments and expenses to occur either in a particular year, quarter, month or day.
  - If you plan at the Month level, Miradi will roll up the assignments and expenses to give you a summary at the Quarter and Year Level. You can hide the Quarter amounts.



- If you plan at the Quarter level, Miradi will roll them up to the Year level.
- Your circumstances will help to determine the right level, but a suggested “good” approach is to use Months or Quarters for near-term work, and Years for longer-term work. If you aim to flow your budgets through to your finance system, discuss these options with your finance staff.

Item	Work Units		Projected Expenses							Budget Totals	
	Total	Q1	Q2	Q3	Q4	2015	2016	2017	Total	Total	Total
Miradi Marine Example 4.4 -v0.4-	1512	3,500	2,500	7,500	2,500	16,000	10,750	7,750	35,100		210,450
RC1. Rat Elimination	379	3,500	2,500	2,500	2,500	11,000	6,500	6,500	24,000		61,300
Policy to Mandate Rat Barriers on Visiting Boats	155										14,900
Trap Rats on Key Islands	224	3,500	2,500	2,500	2,500	11,000	6,500	6,500	24,000		46,400

**Recommendation:** Start simple and add detail as you become more familiar with your needs and the system capabilities. The computer can handle lots of detail but most humans can't, so aim for simplicity and indicative higher-level details, even if this is at the expense of precise accuracy. One combined option might be to –

- Initially prepare a High-level plan at the Strategy and Year levels, to get a reasonable estimate of the cost and ‘do-ability’ of your project, and make any necessary adjustments given the amount of resources available.
- As the project starts to be implemented, take the near-term work in this high-level plan down into more detail – at the Activity and Quarter or Month levels.
- If your project is long-running, develop a High-level plan for 3-5+ years, and a detailed plan for the first 12 months, then continue “rolling forward” as time moves on, taking the next year’s high-level data down to the detail level and adding another year of high-level data to the end.

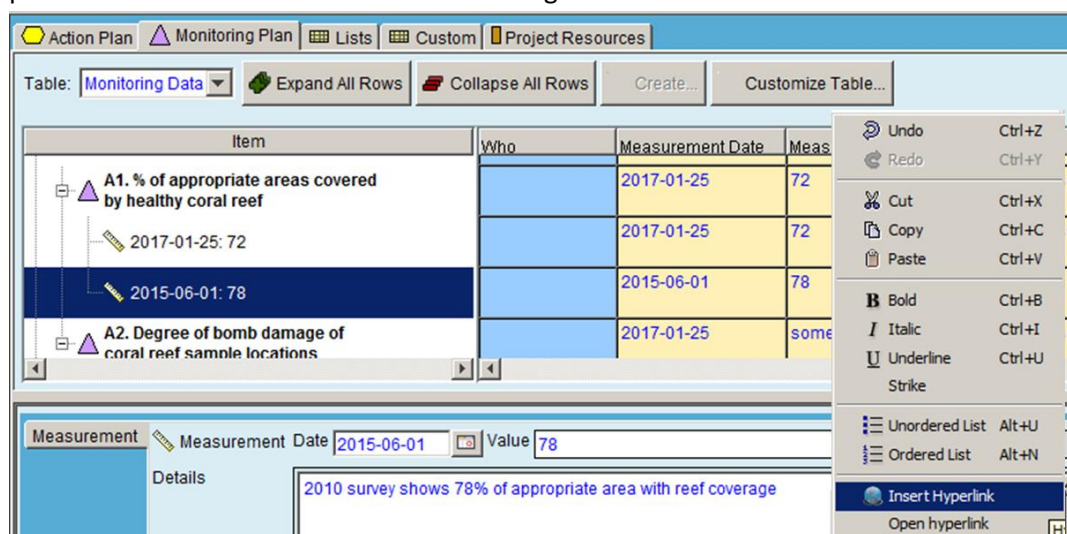
## Supporting your Monitoring Plan

The Open Standards provide guidance on developing a Monitoring Plan (refer Step 2B). From an Operationalisation perspective, there are a few considerations –

- **Plan your Monitoring Activities** in the same way that you plan all other Strategies and Activities (described above) – i.e. initially at a High level and longer-term then in more detail for the short-term. This will help to estimate the resources required and ensure that the monitoring work can actually be implemented.
- **Prioritise your indicators.** Monitoring Plans often include a long list of items that need to be monitored; being clear about the relative priorities helps to ensure that measures data is gathered for the most important parts of the plan. Better to have a few key indicators monitored well, than a lot of indicators monitored irregularly. Priorities can be set in the Monitoring Plan tab for each Indicator. This in turn helps to identify whether the actions are leading to the expected results, which allows the team to decide how the plan should be adapted.

Item	Priority
A1. % of appropriate areas covered by healthy coral reef	High
A2. Degree of bomb damage of coral reef sample locations	Low
B1. Number of sharks in Bay	High
C1. Area of seagrass beds	Medium
D1. % of shoreline with healthy mangroves	Medium
E1. Number of breeding pairs of ruby crested puffsins	Very High

- **Exploit technology** and shared datasets to reduce costs and increase the amount of relevant monitoring information available to you. Field-based collection is required for many factors, but is relatively expensive. Other options include remote sensing technology (e.g. satellite imagery, and devices like camera traps and sound recorders that are increasingly being connected through the “Internet of Things”) and broader projects or citizen-science efforts that are collecting similar information or data that could be a proxy for your Indicator. The [Mira App](#) is one field-based monitoring application aligned with Miradi data.
- **Manage your monitoring data** - For your prioritised indicators, think about the best options for storing your source data. During Implementation you will likely enter Measures against Indicators in Miradi, but these Measures are often indexes or averages derived from multiple observations. The original source data needs to be stored so that it can be accessed and interpreted in the longer term when project outcomes and results are being analysed – this could be occurring 10+ years later, by different people and with different technology, so the monitoring data needs to be stored in a manner that will stand the test of time. This generally requires a shared storage location to hold the source data, along with its “meta data” (definitions of the data). Miradi Share’s “Associated Files” feature provides a simple storage option; local facilities affiliated with the [Global Biodiversity Information Facility](#) provide much more sophisticated options. When you enter the Measures into Miradi, it’s a good idea to add a hyperlink (right-click in Details box) to provide a permanent reference to connect with the original source data.



## Managing the Project

The planning completed to this point ought to have developed a quality plan in terms of sound Strategies, focused Monitoring, and reasonable estimates of the resourcing required to deliver the project’s results.

A quality plan needs to include the activities and expenses required to manage the actual project itself. You may wish to add a “Project Management” Strategy to your plan, to provide a place for adding the Activities, assignments and expenses required to efficiently run the project; some examples are covered below.

Detailed project management guidance is beyond the scope of this document, but for simple projects some basic considerations include –

- Ensuring the project risks have been identified and critically assessed, with mitigation actions addressed or added to the plan (see below)



- Ensuring that stakeholder analysis has been conducted, and that the plan includes appropriate activities to involve stakeholders and keep them informed (see below)
- Adding periodic review meetings to the project schedule. The frequency will depend on your circumstances, but in general terms a “good” model involves monthly or quarterly team discussions to review progress and agree actions for the next period, plus regular (e.g. annual) reviews of monitoring results to identify any changes required to the plan (OS Step 4) and to produce reports informing funders and stakeholders of the project’s progress,
- Adding activities to the project schedule to ensure that any required reports are appropriately timed and resourced, such as reports to funders.
- Critically review the project’s resourcing needs to ensure that right quantity and quality of skills are available to perform the work, and schedule any actions required to address gaps, such as additional training or mentoring (see below).
- Obtaining peer reviews of the plan if desired or required.
- Obtaining funding for the project (see below)
- Obtaining management reviews or sign-offs as required.

Large or complex projects, particularly those involving partner organisations, require much greater attention to project planning and management. The Collective Impact model is a useful framework for these types of project; refer to the [Open Standards and Collective Impact](#) document for an introduction, particularly regarding the role of a backbone organisation to facilitate management of the project.

## Managing the project risks and stakeholders

The Open Standards provides guidance for risk management (Step 2c) and stakeholder assessment (step 1d) but the OS systems do not yet provide all the associated data elements to manage these factors. It is recommended that you use two tables or spreadsheets to hold this information, and keep these stored with your project files. Examples are provided below.

Your detailed project plan should include Activities to regularly review your risk assessment and stakeholder analysis, as well as Activities to regularly act on stakeholder communication.

Risk assessment templates and guidance are widely available, and include information such as this -

What is the Risk Event?	Impact	Probability	Mitigation Actions.	Contingency Plan / Control Measure
A specific description of what could happen that would threaten the success of the project is needed. It must address who, what, where, when, why and how the risk could occur – in order to be able to be controlled effectively	<p>Rate the impact on the project, should that risk event occur:</p> <p><b>Very Low:</b> very small delay (1 day) AND/OR minor cost increase (&lt;5% of total budget)</p> <p><b>Low</b> - some delay (2-3 days) AND/OR minor cost increase (5 - 10% of budget)</p> <p><b>Moderate</b> - key parts of the project delayed &gt; a week &amp;/or cost increase (10-15% of budget)</p> <p><b>High</b> - key parts of the project will be delayed &gt; a month &amp;/or hi cost increase (&gt;15% of budget)</p> <p><b>Very High</b> - the project will completely stop &amp;/or major cost increase (&gt;20% of budget)</p>	<p>This is the probability of the Risk event occurring,</p> <p>Very Low - 10% chance</p> <p>Low - 30% chance</p> <p>Likely - 50% chance</p> <p>High - 70% chance</p> <p>Almost Certain - 90% chance</p>	Describe what steps will be taken to reduce the likelihood of this risk occurring.	What steps have been taken to reduce the impact on the project if this risk occurs.

Stakeholders are often identified in your situation analysis (OS Step 1d) and key details can be stored in the Other Organisations tab in Miradi's Summary View. Stakeholder analysis involves considering the type of information shown below (sample templates are widely available) –

Stakeholder and Area of Interest	What impact does the project have on them?	What is their potential impact on success?	What are the key messages for this Stakeholder from this project?	How will they receive information on the project?	How will they be able to provide feedback to the project?
	L / M / H	L / M / H	(e.g. what is important for them to understand in order to obtain their support for the project)	(e.g. via email, status report, etc) And how often (e.g. weekly, by exception)	How will they be able to provide feedback to the project?

### Ensuring your people have capacity to do the work

Once you have developed a high-level workplan and budget, you should critically review the resourcing requirements against the capacity that you either have, or can reasonably expect to receive.

For relatively small projects, some basic cross-checks of *quantity and quality* will help to test whether your project has the resources it needs to be successful -

- The People tab in Workplan view will show the amount of work units that have been assigned to specific people and groups. It will also show the amount of work units that have been defined but not yet allocated ("Not Specified" row). You can use this information to check that the assigned work is within the time that each person actually has available to work on the project. Time limitations are a key reason for Projects being delayed or failing to deliver their results as expected.

Item	Q1	Q2	Q3	Q4	2015
AT: Anna Thomas	73.5	65.5	115.5	113.5	402
EM: Elena Martin	7.5	7.5	28.5	27.5	73
GdR: George DeRosa			50	50	100
JH: José Hernández	43	18	16	16	114
RAT: Rat Attack Team	23	40	20	20	104
Not Specified					

- The Workplan will summarise the people that have been assigned to each Strategy (refer "Who" column). Now that you have a good understanding of the work required within each strategy, you can assess whether the assigned people have the skills and experience required to complete the work, and if not, consider ways to fill any gaps. This could include additional training or mentoring. These actions and costs should be added back into your plan.

Item	Who
Policy to Mandate Rat Barriers on Visiting Boats	AT, EM, JH
RAT 1-1. Research rat barrier technology	EM*, JH
RAT 1-2. Educate ministry officials	EM
RAT 1-3. Raise awareness with tourists (if possible)	EM*, AT
RAT M1. Survey boats for rat barriers	EM

- These types of cross-checks are often adequate for a single project. If people are assigned to multiple projects, try to determine the amount of time available to each project and check that assignments are within these limits. Miradi Share's Strategy/Activity Workplan report provides a roll-up of assignments across multiple projects so that capacity can be assessed at the Program or Organisation level.

## Finding the Funding

Your high-level plan should now show all of the actions required, and the people and expenses required to do the work. Miradi's Workplan View will summarise this information – use the options shown in the screenshot below to control the level of detail displayed. When you have the information displayed to your liking, you can export the page (File, Export Current Page as , RTF) and include it in reports or funding applications. The key rows are the results chains, which can be broken down by displaying the individual strategies if required. The key columns are the work units (yellow columns), direct expenses (middle columns), and the total budget (right-hand columns). The total budget is calculated by adding direct expenses to the cost of the work units<sup>5</sup>.

Item	Work Units				Projected Expenses				Budget Totals			
	2015	2016	2017	Total	2015	2016	2017	Total	2015	2016	2017	Total
Miradi Marine Example 4.4 -v0.4-	402	598	512	1512	16,000	10,750	7,750	35,100	59,300	81,300	69,250	210,450
RC1. Rat Elimination	228	123	28	379	11,000	6,500	6,500	24,000	35,300	17,100	8,900	61,300
RC2. Campaign to Stop Shark Fin Soup Demand	14	13	9	36	5,000	1,250	1,250	8,100	6,000	2,500	2,100	11,200
RC3. Sustainable Ocean Fishery	140	450	450	1040					16,000	57,500	57,500	131,000
RCM. Status Monitoring of Project Targets	20	12	25	57		3,000		3,000	2,000	4,200	750	6,950

This budget information informs investment decisions, showing the investment required to achieve particular results (as defined by results chains) or to achieve the project's total result (as defined in Goals and the Vision). Often the results can't be quantified in financial terms, so the decision requires a qualitative judgement about the merits of the project relative to its cost, and an assessment of the ability of the team to deliver the expected results.

This is the type of judgement that will be made by organisational management and potential funders. The related information should be packaged up in a way that allows these decisions to be made. Such a package could include the information shown below. If you have set up your project broadly following the guidelines in this document (in particular, identifying your audiences and their information needs), then all this information will be available to you in Miradi (field sources as noted) -

- The Project's Vision (Summary View, Scope tab, Vision field)
- A summary of what the project is aiming to achieve (Summary View, Project Description field)
- High-level details of the key Targets, including their current state of health and the desired state of health with associated timeframe (Targets, Details, and related Goals)
- High-level details of the key Threats impacting on the key targets (Threat Details)
- The strategies you will pursue, the associated objectives and intermediate results, and the indicators you will use to monitor progress (Results Chain Details).
- The cost of the project, or selected strategies or timeframes (Workplan View)

Some funders are comfortable receiving information structured in Miradi reports, however many funders have their own unique funding application forms. In general, it should be possible to fill in most fields on

<sup>5</sup> The cost of work units is calculated as the number of Work Units times the relevant Work Unit Rate. Work Unit Rates are entered for each person / group in the People tab.

these funding applications by extracting the information from Miradi; this gives you a consistent source of structured information to apply for and report on funding.

## Management Reviews

Once projects have completed most of the work of Steps 1 and 2, it should be in a position to inform the key review decisions

Key Management Decisions	Supporting Information from Open Standards
<b>Assess a new opportunity / project / program</b> <ul style="list-style-type: none"> <li>- Does this project contribute to our broader strategies?</li> <li>- Is the Vision sufficiently visionary?</li> <li>- What conservation values is the project protecting? Are they consistent with / complementary to broader programs?</li> <li>- Is the project scope at the right scale to protect the targets?</li> <li>- Is the project context realistic? Has it adequately considered the cultural, social, economic &amp; political factors?</li> <li>- Have key stakeholders and partners been identified? Involved?</li> <li>- Step into each stakeholders shoes - are there potential adverse / unintended consequences and can these be managed? How?</li> <li>- Are there any unmanageable project risks or constraints?</li> <li>- Is it feasible for us to take on this project, or is someone else better placed to do so?</li> </ul>	<b>Conceptualise Project (OS Step 1)</b> <ul style="list-style-type: none"> <li>- Planning purpose, Initial team, partners</li> <li>- Project Scope and Vision</li> <li>- Key Targets (biodiversity, human well-being)</li> <li>- Project context (situation analysis) – key threats and opportunities, key stakeholders</li> </ul>
<b>Review the Project / Program Plan</b> <ul style="list-style-type: none"> <li>- Are the goals clearly stated and easily understood?</li> <li>- Are the expected results / Goals (Impacts) worth striving for?</li> <li>- Is the theory-of-change robust, and achievable? Are results stated in terms of outcomes, not actions?</li> <li>- Is the required investment appropriate given the Impact (Goals) being sought?</li> <li>- Can we resource the work over the project's timeframe (funding, people, skills, partner capacity)?</li> </ul>	<b>Plan Actions &amp; Monitoring (OS Step 2)</b> <ul style="list-style-type: none"> <li>- Action Plan - Goals, Strategies, Objectives, results expected and theory-of-change (results chains)</li> <li>- Monitoring Plan – indicators and methods</li> <li>- Operational Plan - high-level workplan &amp; budget - resources (\$s, people, partners), project timeframe</li> <li>- (adaptations as projects go around the cycle)</li> </ul>

## Operationalising OS Step 3 - Implementation

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OS Step 3 is where the planning effort is put into action. It involves regular development of short-term work plans to guide the actions and monitoring efforts of the team, and the ongoing project management tasks to keep things on track. This section provides guidance on systems supporting Implementation.

### Action Plan

A description of a project's goals, objectives, and strategies that will be undertaken to abate identified threats and make use of opportunities

### Monitoring Plan

The plan for monitoring your project. It includes information needs, indicators, and methods, spatial scale and locations, timeframe, and roles and responsibilities for collecting data.

### Operational Plan

A plan that includes analyses of: funding required; human capacity and skills and other non-financial resources required; risk assessment and mitigation; and estimate of project lifespan and exit strategy.

### Work Plan

A short-term schedule for implementing an Action or Monitoring plan. Work plans typically list tasks required, who will be responsible for each task, when each task will need to be undertaken, and how much money and other resources will be required.

This section includes the following items –

<a href="#">Operationalising OS Step 3 - Implementation</a> .....	Error! Bookmark not defined.
<a href="#">Developing a detailed Work Plan and Budget</a> .....	Error! Bookmark not defined.
<a href="#">Assigning People to do the project's work</a> .....	Error! Bookmark not defined.
<a href="#">Managing the project's Expenses</a> .....	Error! Bookmark not defined.
<a href="#">Linking Miradi budgets to your Finance Systems</a> .....	Error! Bookmark not defined.
<a href="#">Managing Funding</a> .....	Error! Bookmark not defined.
<a href="#">Recording and Viewing Progress – Actions and Measures</a> .....	Error! Bookmark not defined.
<a href="#">1. Progress Reporting</a> .....	Error! Bookmark not defined.
<a href="#">2. Measuring Indicators</a> .....	Error! Bookmark not defined.
<a href="#">Management Reviews</a> .....	Error! Bookmark not defined.

## Developing a detailed Work Plan and Budget

Refer to the discussion above under



[Developing a high-level Workplan and Budget](#) for related guidance. This section assumes you have developed a high-level workplan, and perhaps set some business rules governing the preferred options regarding the levels of planning. It provides more details about systems features supporting detailed workplans and budgets. While some of the high-level planning tasks can be done in several different parts of Miradi (Diagram View, Strategic Plan view, Workplan View), the detailed plans are best developed within Workplan View.

Generally, a detailed workplan and budget should be prepared for the near-term work. Your organisational context will determine the right time period, but a “good” option is to have a detailed plan for the current and possible next financial year, with higher-level plans for later years.

## Assigning People to do the project’s work

See [Manage your People](#) above for the key parameters governing how people are allocated within a project. People can be assigned to Strategies or Activities, including Monitoring activities. The effort associated with the work can be entered at the Month, Quarter or Year level; if you need some consistency across projects consider defining some business rules to govern these choices.

- To assign resources to work, right-click on the relevant Strategy or Activity, then *Create Assignment*, then select a person and enter the work units in the white columns.

The screenshot shows the Miradi Workplan interface. On the left, a tree view lists items: 'Miradi Marine Example 4.4 -v0.4-', 'RC1. Rat Elimination', 'Policy to Mandate Rat Barriers on Visiting Boats', and 'RAT 1-1. Research rat barrier technology to inform policy'. A right-click context menu is open over 'RAT 1-1', with 'Create Assignment' highlighted. To the right, the 'Assignment' dialog box is open, showing fields for 'Work Assignment' (set to 'Unspecified'), 'Work Unit Rate', 'Program Classifications', 'Accounting Code', 'Funding Source', 'Category One', and 'Category Two'. A red arrow points to the 'Work Assignment' dropdown menu.

- Once assignments are made, you can produce a workplan for a particular person or group by using the “Filter by People” button on the main Workplan tab.
- You can also check the total work assigned to a particular person or group by reviewing the rolled-up totals in the People tab.

The screenshot shows the Miradi Workplan interface with the 'Filter by People' button selected. The 'People' tab is active, displaying a table of work units assigned to various people. The table has columns for 'Item', 'Q1', 'Q2', 'Q3', 'Q4', and '2015'.

Item	Q1	Q2	Q3	Q4	2015
AT: Anna Thomas	73.5	65.5	115.5	113.5	402
EM: Elena Martin			1		11
GdR: George DeRosa	7.5	7.5	28.5	27.5	73
JH: José Hernández	43	18	16	16	114
RAT: Rat Attack Team	23	40	20	20	104
Not Specified					

## Managing the project’s Expenses

The main options available when estimating the expenses for your project include –



- At the simplest level, it is possible to enter estimates of total expenses directly into the row for a Strategy or Activity<sup>6</sup>. Miradi will roll up these amounts to give you an estimated total budget for your project. If this is sufficient for your purposes then there's no need to work through the following items for detailed planning.

Item	Who	When	Work Units				Projected Expenses			
			2016	2017	2018	Total	2016	2017	2018	Total
MarineExample 2016	JH, EM, GdR, AT		304	162	110	576	15,550	6,500	6,500	28,550
RC1. Eliminate Rats from Islands										
Policy to Mandate Rat Barriers on Visiting Boats	AT, EM, JH	2016-0	38	82	20	140				
Research rat barrier technology to inform policy	EM, JH	2016-0	18	7		25	1000			
Educate ministry officials	EM	FY16	20			20				
Raise awareness with tourists (if needed)	AT, EM	2017-0		75	20	95				

- Your account codes can be imported to your project – see [Use project templates](#) above – or you can enter them manually through the Accounting Codes tab.
- Expenses can be assigned to Strategies or Activities, including Monitoring activities. The expense amount can be entered at the Month, Quarter or Year level; if you need some consistency across projects consider defining some business rules to govern these choices.
- To create expenses, right-click on the relevant Strategy or Activity, then *Create Projected Expense*, then add the details. The *Name* field lets you put in a description of the expense. Choose an *Account Code*, and a *Funding Source* if you need to track the allocation of funding. Two other fields are available for use (*Category One* and *Category Two*); for example, these can be used to group items or to provide a linkage to other systems. Then enter the required amount in the white cells.

The screenshot shows the Miradi software interface. The top navigation bar includes 'Work Plan', 'Settings', 'Analysis', 'People', 'Accounting Codes', 'Funding Sources', 'Category #1', and 'Category #2'. The main table displays 'Work Units' and 'Projected Expenses' for various items. A context menu is open over the 'SHARK 1. Plan campaign with CAI' item, with 'Create Projected Expense' highlighted. Below the table, the 'Expense' form is visible, showing fields for Name, Accounting Code, Funding Source, Category One, and Category Two. Red arrows point to the 'Create Projected Expense' menu item and the 'Expense' form fields.

- Once all expenses have been entered, you can review the total amounts for each type of account in the Accounting Codes tab. You can also see whether expenses have been entered but not yet

<sup>6</sup> There are restrictions on these features; once you start entering data at a lower level (eg for an Activity, or Month) you can't enter details at the higher level (eg Strategies, or Year); refer to the Miradi wizard panel for further details. Deciding on some standard approaches will help to get consistency across projects and limit confusion

assigned to an account (these appear in the “Not Specified” row).

Accounting Codes									
<div> <div>Create Accounting Code</div> <div>Delete Accounting Code</div> <div>Import Accounting Codes</div> </div>									
Item	Code	Projected Expenses							Total
		Q1	Q2	Q3	Q4	2015	2016	2017	
		3,500	2,500	7,500	2,500	16,000	10,750	7,750	35,100
1000: Salaries & wages	1000								
1100: Consultant wages	1100								
1200: Other wages	1200								600
2000: Equipment	2000								
2100: Field equipment	2100	3,500	2,500	2,500	2,500	11,000	6,500	6,500	24,000
2200: Computer & office equipment	2200								
3000: Rent	3000								
3100: Utilities	3100								
3200: Telephone	3200								
4000: Travel	4000			5,000		5,000			5,000
4100: Meetings and workshops	4100								
5000: Fundraising expenses	5000								
Not Specified							4,250	1,250	5,500

Miradi will roll-up your expenses to the Activity, Strategy, Results Chain and Project level, so that you can see the funding required at these different levels of detail.

Category #2												
<div> <div>Diagrams - include data from</div> <div>Expand To...</div> <div>Move Item Up</div> <div>Create...</div> <div>Customize Table...</div> </div>												
<div> <div>Display this selection</div> <div>Collapse All Rows</div> <div>Move Item Down</div> <div>Delete Item</div> <div>Filter by People...</div> </div>												
Item	Work Units				Projected Expenses				Budget Totals			
	2015	2016	2017	Total	2015	2016	2017	Total	2015	2016	2017	Total
Miradi Marine Example 4.4 -v0.4-	402	598	512	1512	16,000	10,750	7,750	35,100	59,300	81,300	69,250	210,450
RC1. Rat Elimination	228	123	28	379	11,000	6,500	6,500	24,000	35,300	17,100	8,900	61,300
Policy to Mandate Rat Barriers on Visiting Boats	42	91	22	155					5,700	7,400	1,800	14,900
Trap Rats on Key Islands	186	32	6	224	11,000	6,500	6,500	24,000	29,600	9,700	7,100	46,400
RAT 2-1. Select priority islands for rat elimination	10			10					1,000			1,000
RAT 2-2. Survey islands to determine suitability	126			126	4,500	5,000	5,000	14,500	17,100	5,000	5,000	27,100
RAT 2-3. Implement initial control efforts	48	30		78	6,500	1,500		8,000	11,300	4,500		15,800
RAT M2. Count rats caught in traps / check for predation	2	2	6	10			1,500	1,500	200	200	2,100	2,500
RC2. Campaign to Stop Shark Fin Soup Demand	14	13	9	36	5,000	1,250	1,250	8,100	6,000	2,500	2,100	11,200
RC3. Sustainable Ocean Fishery	140	450	450	1040					16,000	57,500	57,500	131,000
RCM. Status Monitoring of Project Targets	20	12	25	57		3,000		3,000	2,000	4,200	750	6,950

## Linking Miradi budgets to your Finance Systems

It is possible to link the workplans and budgets developed in Miradi straight into your finance system. This has two advantages –

1. It avoids the work associated with a duplicate exercise to prepare budgets, which often result in just broad estimates or aggregates; and
2. It produces budgets that are directly aligned toward achieving results (e.g. the budget required to implement a particular results chain), and not just conducting activities (e.g. the budget required for travel). This allows informed investment decisions to be made.

The method for linking Miradi data to the finance system depends on the capabilities and needs of your specific finance system. In general terms, the table shown below can be exported (*File, Export current Page as, tab-delimited file*) in a format that meets the basic needs of most finance systems – all systems require different formats, but the common requirement is a file with rows showing account numbers, and columns showing monthly amounts, plus a total column.

The screenshot shows the 'Accounting Codes' window in Miradi. It features a table with columns for months (Jul to Jun) and a 'FY17' total column. The table lists various accounting codes and their corresponding projected expenses. A 'File' menu is open, showing options like 'Save As...', 'Print', and 'Export Current Page as...'. The 'Export Current Page as...' option is highlighted, and its sub-menu is visible, showing 'Tab-Delimited Table' as one of the export formats.

Item	Code	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	FY17
1400: Buildings & Infrastructure	1400				2,100					4,250	1,850	6,500		14,700
1600: Plant & Equipment	1600													
4520: Grants	4520													
5000: Staff charge-out-rate	5000													
5001: Placeholder for Volunteer	5001													
5002: Placeholder for Contractor	5002													
5152: Staff Training & Developme	5152													
5153: Staff Recruitment & Reloca	5153													
5301: Telecommunications	5301													
5302: Consultancy / Contractors	5302													
5309: Insurance	5309													
5316: Motor Vehicle Expenses	5316													
5317: Safety expenses	5317													
5320: Rates, Taxes & Govt. Char	5320													

There are additional fields in Miradi (*Category One* and *Category Two*) which can be used to collect additional data that might be required by the finance system.

See also [Rolling budgets and forecasts](#) below.

## Managing Funding

Managing project funding can be time-consuming and fraught with error unless systems are leveraged to help with record keeping. Miradi can hold details of funding sources (see screenshot below), and the Funding Source Code then allocated to particular expenses and assignments.

This Funding Source Code offers an opportunity to link with other systems; for example using the same code in your donor management system will provide options for combining information.

The screenshot shows the 'Funding Sources' window in Miradi. It features a table with columns for 'Work Units' (2015, 2016, 2017, Total) and 'Projected Expenses' (2015, 2016, 2017, Total). The table lists various funding sources and their corresponding work units and projected expenses. Below the table, there is a form for creating a funding source, with fields for 'Funding Source Code', 'Funding Source Name', and 'Comments'.

Item	Code	2015	2016	2017	Total	2015	2016	2017	Total	Budget Totals
AMF: Adaptive Management Foundati	AMF	123	91	22	236					23,000
IDB: Island Development Bank	IDB	105	32	6	143	16,000	6,500	6,500	29,000	43,300

Funding Source Code:

Funding Source Name:

Comments:

The summary table rolls-up all of these allocations so that you can see how much of the grant funding has been allocated, and deal with any variances. The Comments field can be used to show details such as the total amount available, any particular timing restrictions, and the reporting requirements. Creating and scheduling Activities to meet the funder’s reporting requirements will help to ensure that these deadlines are not missed.

## Recording and Viewing Progress – Actions and Measures

As work is performed, two types of information should be regularly collected –

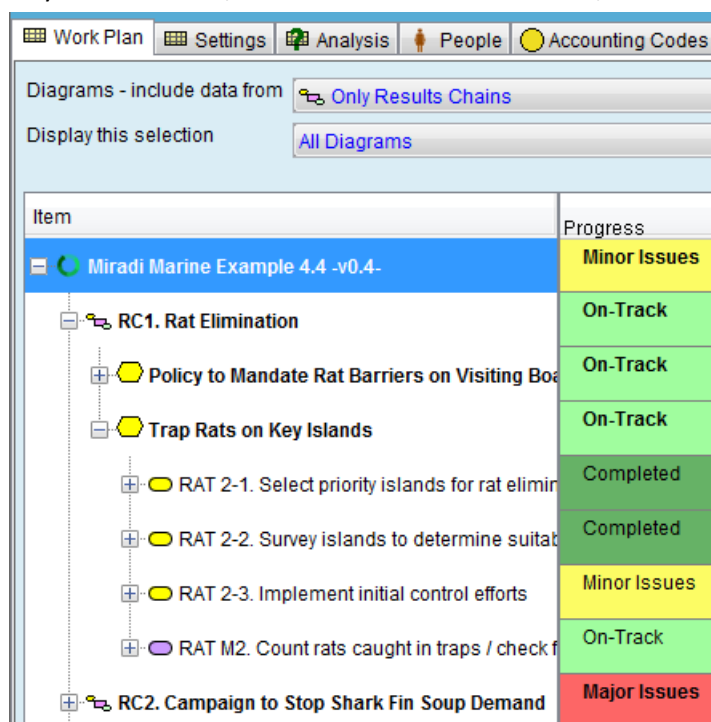
1. **Progress Reports** on the work being performed and results being achieved
2. **Measuring Indicators** that will indicate whether the expected results are being achieved.

### 1. Progress Reporting

Progress Reports can be created at the Project, Results Chain, Strategy and Activity levels. Each level of reporting can serve a different purpose, as outlined below. Progress information provides a record for short-term communication and analysis, and as a long-term history so that in years to come people will be able to learn what actions were taken. Progress information can be entered into Miradi at any time, for example when an event occurs or when some activity is undertaken, while the details are still fresh; or periodically such as monthly or quarterly.




Consider creating business rules about the frequency and level of detail for reports at the different levels.

- **Project level reports** can provide a high-level summary of the project’s actions and results. The frequency of this high-level view should fit with your organisation’s required reporting; for example, it is useful for annual reports.
- **Results Chain level reports** should focus on reporting the results being achieved (or not), communicating whether the theory-of-change is playing out as expected, and as evidenced by monitoring of Indicators on the results chain.
- **Strategy level reports** can comment on whether the Strategy is being executed as planned and progressing towards it’s intended impact, summarising the aggregation of progress of all activities within the strategy. This provides a useful summary for higher-level managers.
- **Activity level reports** are the lowest level of detail, and usually of most use to the team for sharing details of the work they have underway. These reports should describe the actions recently taken or factors that are impacting on the activity



Item	Progress
Miradi Marine Example 4.4 -v0.4-	Minor Issues
RC1. Rat Elimination	On-Track
Policy to Mandate Rat Barriers on Visiting Boats	On-Track
Trap Rats on Key Islands	On-Track
RAT 2-1. Select priority islands for rat elimination	Completed
RAT 2-2. Survey islands to determine suitability	Completed
RAT 2-3. Implement initial control efforts	Minor Issues
RAT M2. Count rats caught in traps / check for rat infestation	On-Track
RC2. Campaign to Stop Shark Fin Soup Demand	Major Issues

Progress Reports can be entered from multiple places (Diagram View, Strategic Plan View, Workplan View); consider providing guidance on the preferred option to simplify training and usage. Details that can be entered are a date, Progress Status (traffic-light indicators from a drop-down menu), and some descriptive text (including hyperlinks to further information if desired).

		Work Units	Expected	Budget Totals
Item	Progress	Total	Total	Total
 RC1. Rat Elimination	On-Track	155	24,900	24,900
 Policy to Mandate Rat Barriers on Visiting Boats	On-Track	155	14,900	14,900
 RAT 1-1. Research rat barrier technology to	Completed	25	2,900	2,900

Summary

Progress Report

Timeframe

People

Create Progress Report

Delete Progress Report

Progress Report: 2

Progress Date	Progress Status	Details
2016-06-30	Completed - Successfully	Research completed
2015-06-30	On-Track - Ongoing	Research is going well so far

Project-level reports can only be entered from the Summary tab. Project-level progress reports and Results Chain progress reports have additional fields for recording next-steps and lessons learned.

Summary

ABC

Dash

Project

Miradi Share

Team

Other Orgs

Scope

Location

Planning

TNC

WWF

WCS

RARE

FOS

Summary

Progress Report

Create Progress Report

Delete Progress Report

Progress Report: 2

Progress Date	Progress Status	Details	Next Steps	Lessons Learned
2016-06-30	Minor Issues - Ongoing, has minor	We have completed the project's first 3-year phase and are now in the 2nd year of the next phase. We	Need to do the planning for the sustainable ocean fishery strategy. Also, need to continue	It is a challenge to get the local fishermen to adopt the ocean fishing strategy
2015-06-30	On-Track - Ongoing, generally on track	We have completed the project's first 3-year phase and are now just starting the first year of the next	Focus on the status monitoring.	

These reports will be of most value if the teams have access to some guidance on the type of information to be recorded, such as -

- Record any significant events that occurred relevant to the Strategy or Activity.
- Note any problems arising or anticipated, and comment on progress with any outstanding issues relating to the Strategy or Activity
- Comment on any variances to what was planned to occur, particularly where there are implications for future actions, budgets, or relationships with donors and other stakeholders
- Teams should be encouraged to use the traffic light Status fields to raise awareness of where the team needs assistance, tagging reports with "Minor Issues" or "Major Issues" as the case may be. A learning culture encourages open reporting so that timely corrective action can be taken (encourage a philosophy of "red is good").



## 2. Measuring Indicators

Monitoring Activities can be created within any Strategy, to plan for the work and expenses associated with monitoring the related indicators which will reveal progress of the Strategy and associated Results Chain. These Monitoring Activities can be created in Diagram View or Workplan View; a regular Activity can be changed to a Monitoring Activity by ticking the box illustrated below (this can only be done in Results Chain view). These monitoring activities provide details of which Measures need to be taken, when, and by whom, as well as the specific method to be followed.

The screenshot shows the software interface with a table of activities and a detailed view of a monitoring activity. The table lists activities under the heading 'Trap Rats on Key Islands'. The detailed view shows the 'Monitoring Activity' checkbox is checked, and the 'Details' section contains a text box with instructions: 'Count the rats as part of the initial trapping efforts and then in out years set up additional traps to ensure that islands remain rat free.' The 'Indicators' section lists 'RAT 2a. Number of rats caught in traps' and 'RAT 2b. Evidence of nest predation'.

Item	Progress	Work Units Total	Estimated Expense Total	Budget Totals
Trap Rats on Key Islands	On-Track	224	24,000	46,400
RAT 2-1. Select priority islands for rat elimination	Completed	10		1,000
RAT 2-2. Survey islands to determine suitability	Completed	126	14,500	27,100
RAT 2-3. Implement initial control efforts	Minor Issues	78	8,000	15,800
RAT M2. Count rats caught in traps / check for predation	On-Track	10	1,500	2,500

For monitoring of indicators associated with Target Viability, consider creating a separate Results Chain or Strategy to bundle these monitoring activities – see example below.

The screenshot shows the software interface with a table of activities and a detailed view of a monitoring activity. The table lists activities under the heading 'RCM. Status Monitoring of Project Targets'. The detailed view shows the 'Monitoring Activity' checkbox is checked, and the 'Details' section contains a text box with instructions: 'Count the rats as part of the initial trapping efforts and then in out years set up additional traps to ensure that islands remain rat free.' The 'Indicators' section lists 'RAT 2a. Number of rats caught in traps' and 'RAT 2b. Evidence of nest predation'.

Item	Progress	Work Units Total	Estimated Expense Total	Budget Totals
RCM. Status Monitoring of Project Targets	Not Specified	57	3,000	6,950
Status Monitoring of Project Targets	Not Specified	57	3,000	6,950
M-A1. Organize expert reef workshop	On-Track	10	3,000	4,000
M-A2. Vet expert assessments	Scheduled	20		0
M-B. Research shark monitoring method	Major Issues			
M-C. Quick mapping of seagrass	Completed	20		2,000
M-D. Organize community mangrove mapping	Scheduled	5		750

As the monitoring is performed, the Measures are then entered against the appropriate indicator – this can be done in Results Chain View or Strategic Plan View, and displayed in the “Monitoring data” table. Note earlier comments about the need to retain the source data if the measure is derived from more detailed information ([refer Data Management](#))

Item	Measurement Date	Measurement Value	Trend	Source
A. Healthy Coral Reefs Across Eastern Bay				
A1. % of appropriate areas covered by healthy coral	2016-01-25	72	Mild Decrease	Rapid Assessment
A2. Degree of bomb damage of coral reef sample	2016-01-25	some	Mild Decrease	Rough Guess
B. Healthy Shark Populations				
B1. Number of sharks in bay	2016-09-21	200	Not Specified	Expert Knowledge
C. Healthy Seagrass Beds				
C1. Area of seagrass beds				

## Management Reviews

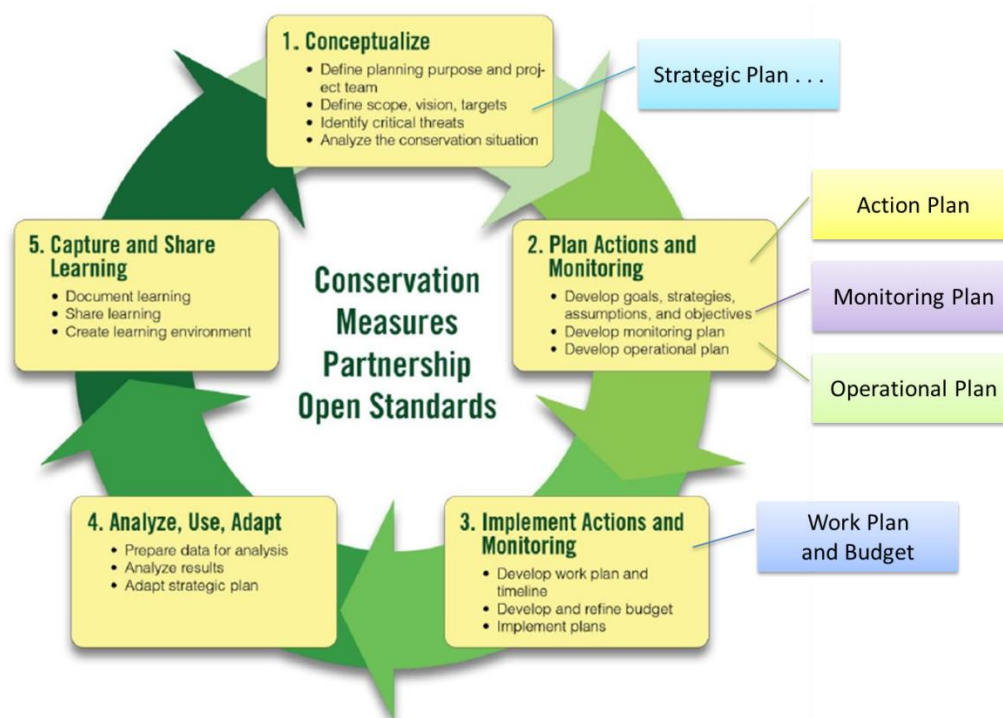
During Implementation, project information should be available to inform the key review decisions -

Key Management Decisions	Supporting Information from Open Standards
<b>Monitor Implementation of the Project / Program</b> <ul style="list-style-type: none"> <li>- Is the workplan focussed on the highest priority actions (e.g. as identified by threat ratings and target viability)?</li> <li>- Are the required resources in place (quantity and quality)?</li> <li>- Do our team members have enough time to do their assigned tasks (across all projects)?</li> <li>- Do our partners have adequate capacity for their roles?</li> <li>- Which parts of the project are on-track and on-budget, and what issues need addressing?</li> <li>- Are measures being collected?</li> <li>- Should Implementation continue?</li> </ul>	<b>Implement Actions &amp; Monitoring (OS Step 3)</b> <ul style="list-style-type: none"> <li>- Workplan &amp; Budget allocations relative to Threat Ratings and Target Viability desired ratings.</li> <li>- Detailed Workplan (activities, responsibilities, timelines) across all related projects</li> <li>- Budget (\$s, people, partners)</li> <li>- Progress reports for Strategies, Objectives, Goals</li> <li>- Measures against Indicators</li> <li>- Related Finance reports from Finance System</li> </ul>



## Operationalising OS Step 4 – Analysing / Adapting

OS Step 4 is executed periodically to assess how the project is tracking, and determine any adaptations required to the plan. The Workplan should have scheduled and resourced these review activities as part of the early planning. The Open Standards document provides guidance for how to analyse and adapt your plan; this section provides guidance on using systems to support this work.



This section includes the following topics –

<a href="#">Operationalising OS Step 4 – Analysing / Adapting</a> .....	Error! Bookmark not defined.
<a href="#">Information to be analysed</a> .....	Error! Bookmark not defined.
<a href="#">Analysing Progress</a> .....	Error! Bookmark not defined.
<a href="#">Documenting recommended adaptations</a> .....	Error! Bookmark not defined.
<a href="#">Management Reviews</a> .....	Error! Bookmark not defined.

## Information to be analysed

Project information should be accessed from all relevant sources, which might include –

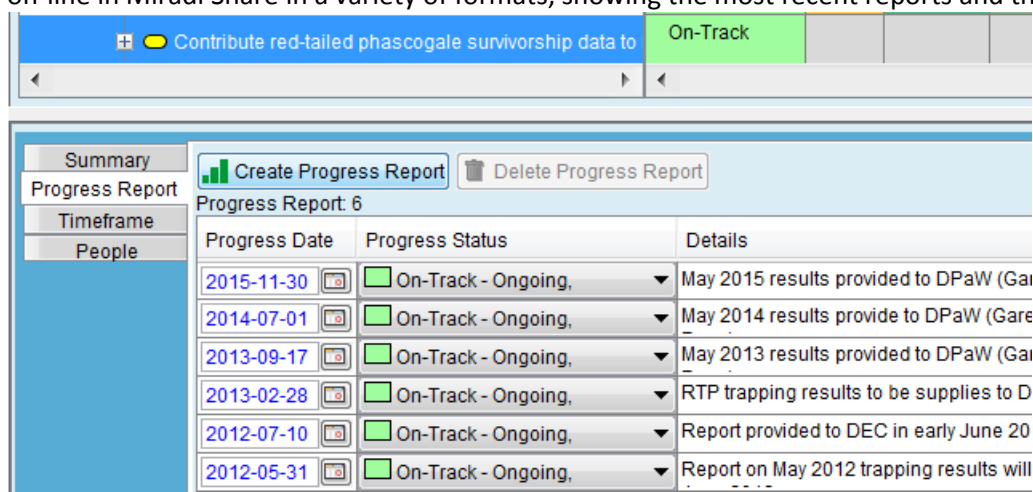
- Progress Reports and Measures against Indicators – these should be available within Miradi, along with hyperlinks to relevant supporting information ; Miradi Share provides table and graph views of this information
- Financial reports from related finance systems, showing the actual expenses relative to budget
- Information from fundraising systems regarding actual or planned interactions with key funders
- Stories prepared for websites or social media
- Any recent research reports on topics relevant to the project's targets, threats or actions

Gathering some of this information is made easier by sharing codes between systems. For example, using project and strategy codes in Miradi which are shared with the finance system allows matching of financial reports; using Funding Source codes in Miradi that are shared with the donor system allow matching of funder information.

## Analysing Progress

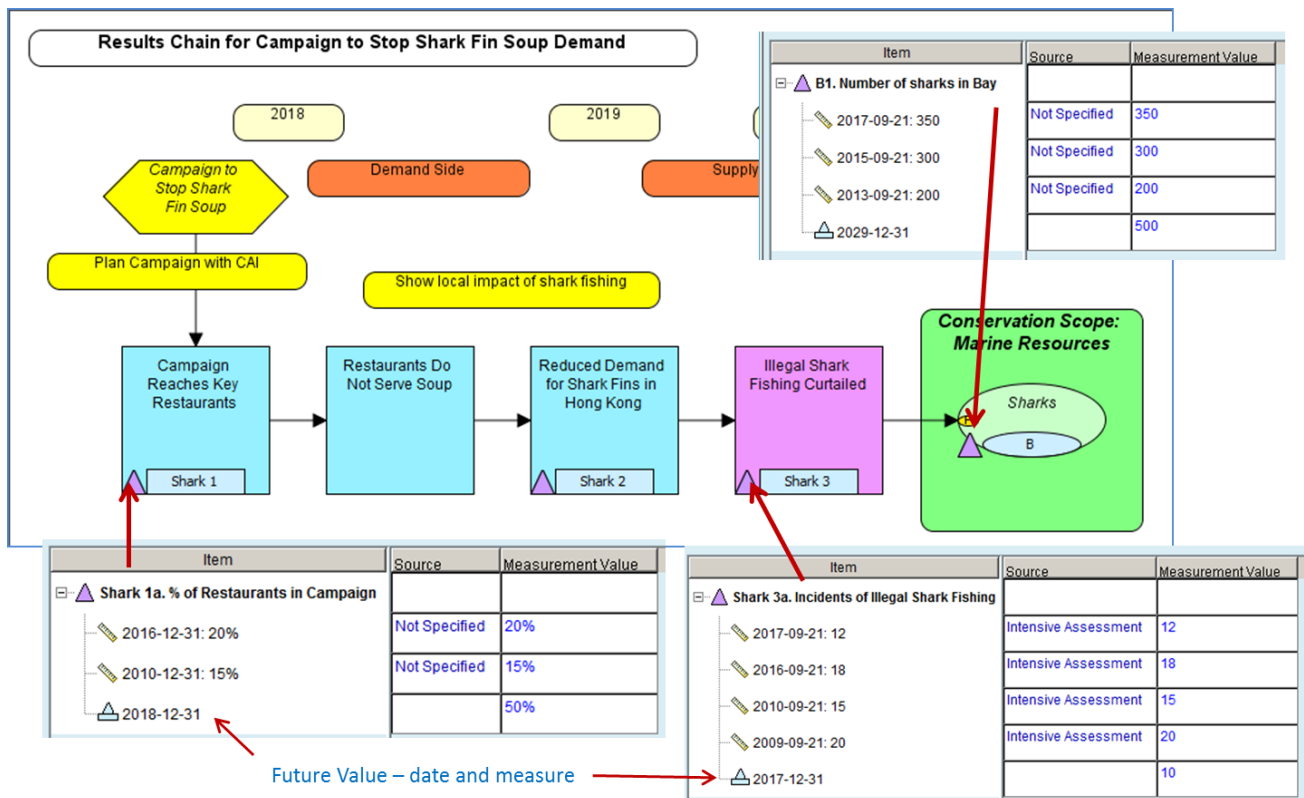
The key information to be assessed includes the following -

1. Completed Progress Reports can be viewed within Miradi, where the full history of work on Activities and Strategies can be seen in context. Completed Progress reports can also be viewed on-line in Miradi Share in a variety of formats, showing the most recent reports and the full history.



Progress Date	Progress Status	Details
2015-11-30	On-Track - Ongoing,	May 2015 results provided to DPaW (Gai
2014-07-01	On-Track - Ongoing,	May 2014 results provide to DPaW (Gare
2013-09-17	On-Track - Ongoing,	May 2013 results provided to DPaW (Gai
2013-02-28	On-Track - Ongoing,	RTP trapping results to be supplies to D
2012-07-10	On-Track - Ongoing,	Report provided to DEC in early June 20
2012-05-31	On-Track - Ongoing,	Report on May 2012 trapping results will

2. Measures taken for each Indicator, in the context of the related Results Chain, will show what progress is being made relative to the results expected, as indicated by the Future Values.



- Measures added to the Target Viability Table will show the progress being made towards improving the health of the key Targets, relative to the Future Values and Goals.

Viability

Create Goal Delete Goal Create from Existing...

ID	Name	Details
A	Healthy Coral Reefs Across Eastern Bay	By 2024, there are healthy coral reefs across all appropriate areas in Eastern Bay.

Create KEA Delete Item

Item	Status	Poor	Fair	Good	Very Good
Miradi Marine Example 4.4 -v0.4-	Fair				
A. Coral Reefs	Good				
Area of coral reef	Good				
A1. % of appropriate areas covered	Good	< 50%	51 - 70%	71 - 90%	> 90%
2016-01-25: 72				72	
2014-06-01: 78				78	
2024-12-31				80	
Coral reef without bomb damage	Fair				
A2. Degree of bomb damage	Fair	lots	some	minimal	none
2016-01-25: some			some	minimal	
2014-06-01: minimal				minimal	
2017-12-31				minimal	

## Documenting recommended adaptations

Analysis of this information should be documented and stored with the project files (see [Data Management](#) above) so that it is available during future reviews. This analysis should inform discussions with the team and with relevant advisors to determine the adaptations that should be made to the Plan.

## Management Reviews

During this Analysis step, project information should be available to inform the key review decisions -

Key Management Decisions	Supporting Information from Open Standards
<b>Analyse progress of the Project / Program</b> <ul style="list-style-type: none"><li>- Is the project achieving its planned results, and on-track to achieve its long-term impacts?</li><li>- What adaptations should be made?</li><li>- Are we meeting donor expectations?</li><li>- How can we help individual / team performance?</li><li>- Should we continue investing in this project?</li></ul>	<b>Analyse, Use, Adapt the project</b> (OS Step 4) <ul style="list-style-type: none"><li>- Analysis of project results and assumptions</li><li>- Analyses of operational and financial data</li><li>- Record of discussions and recommendations for adaptations of the project plan</li></ul>

## Going full-cycle - Support for multiple iterations around the cycle

The information that periodically comes out of Step 4 is used to make adaptations to your plan.

This section contains the following items –




<a href="#">Going full-cycle - Support for multiple iterations around the cycle</a> .....	39
<a href="#">Adapting your plan</a> .....	39
<a href="#">Checking Priorities</a> .....	40
<a href="#">Rolling budgets and forecasts</a> .....	41

### Adapting your plan

The common types of adaptations are shown below. Before making these changes, you may want to archive a copy of your project, or use comments in Miradi Share's timeline to indicate when and why the adaptations were being made (see Version Control above).

- **Update Target viability comments** – the Measures added to the target Viability Table will automatically update the *Status*. The support commentary on *Current Status Justification* should also be updated at this time to provide a record of the change.

- **Update Threat ratings** if required - if analysis indicates that the Threat level has changed, the threat details should be re-rated using the 3 factors of Scope, severity and Permanence. The Comments field should record the details, including the old and new levels to provide a record of the change.

Threat Ratings   Simple Threat Rating Mode 

Threats \ Targets	Coral Reefs	Sharks	Seagrass Beds	Mangroves	Seabirds	Summary Threat Rating
Unsustainable Fishing By Locals	Very High		Very High			Very High
Introduced Predators (Rats)					Very High	High
Increased Storm Intensity	High		High	High		High
Illegal Shark Finning by Mainland Boats		High				Medium
Increased Seawater Temperature	High					Medium
Diver & Anchor Damage	Medium					Low
Upland Logging			Low	Low		Low
<b>Summary Target Ratings:</b>	High	Medium	High	Medium	High	<b>Overall Project Rating: Very High</b>

☒ Direct Threat: 
☐ Target:

Scope: 
 Severity: 
 Irreversibility: 
 Summary Target-Threat Rating:

Comments:

- **Updating Strategies, Activities and Workplans** – If the adaptations require changes to priorities or actions, the related Strategies and Activities should be revised, and the Workplan updated to reflect any changes to assignments and / or expenses.

## Checking Priorities

As time moves on it's possible for priorities to become muddled, with variations between the priorities as expressed in the Action Plan, and the actual work that is being resourced in the Work Plan. This can be easily avoided by a periodic cross-check.

For example, the summary table below shows the Marine Example project's target viability and threat details. It indicates that the "Seabirds" target is currently in a Poor state of health (viability), and that by 2023 the team hopes to have restored it to a Good state of health (as defined by its associated Indicators and ratings). The Seabirds target is threatened by rats. The other key threat is unsustainable fishing.

Targets	Coral Reefs	Sharks	Seagrass Beds	Mangroves	Seabirds	
Current Viability	Good	Fair	Good	Very Good	Poor	
Future Viability	2022	-	-	-	2023	
Threats						Summary Threat Rating
Unsustainable Fishing By Locals	Very High		Very High			Very High
Introduced Predators (Rats)					Very High	High
Increased Storm Intensity	High		High	High		High
Illegal Shark Finning by Mainland Boats		High				Medium
Increased Seawater Temperature	High					Medium
Diver & Anchor Damage	Medium					Low
Upland Logging			Low	Low		Low
Summary Target Ratings:	High	Medium	High	Medium	High	Very High

The associated workplan shows where project resources are being allocated – primarily to addressing the threat of rats and developing a sustainable fishery. This demonstrates good alignment between the Work Plan and the priorities in the Action Plan.

Item	Work Units				Projected Expenses				Budget Totals
	2015	2016	2017	Total	2015	2016	2017	Total	Total
Miradi Marine Example 4.4 -v0.4-	402	598	512	1512	16,000	10,750	7,750	35,100	210,450
RC1. Rat Elimination	228	123	28	379	11,000	6,500	6,500	24,000	61,300
RC2. Campaign to Stop Shark Fin Soup Demand	14	13	9	36	5,000	1,250	1,250	8,100	11,200
RC3. Sustainable Ocean Fishery	140	450	450	1040					131,000

In cases where there is poor alignment, the team should investigate the reasons and bring them back into line. Poor alignment can often be because the workplan has been regularly adjusted based on the “realities” being experienced in the field, such as a particular threat having faded away, in which case the Threat ratings may need adjusting. Other times the threats might still be there, but resources have been diverted elsewhere.

## Rolling budgets and forecasts

As your project moves along, you can use your adapted plans to regularly update the associated workplan and budgets to create what finance people call “rolling forecasts”. For example, as time moves on, take the next year’s high-level workplan and budget data down to the detail level (e.g. expense amounts allocated to particular months / quarters) and add another year of high-level data to the outer year. This data can be exported and, depending on your finance system, imported to inform the organisation’s ongoing longer-term financial planning and well as short-term forecasting