

Institutionalising the *Open Standards for the Practice of Conservation*

**A guide for fully exploiting the Open Standards to
improve organisational performance and
enable data-informed investment decision-making**

Purpose	This guide outlines the steps that can be taken to integrate conservation projects and their associated information with business processes operating in other support areas of the organisation, such as financial management, people management, and fundraising. It outlines how to systematise the flow of information between these key business processes, and attend to the culture change required to fully exploit a standardised business process. Taking these steps leads to significant efficiency improvements and enables data-informed investment decision-making, both of which are characteristics of high-performing conservation organisations.
Who should use this, and with whom?	Integrators / M&E staff, with people responsible for systems and /or business processes in other parts of the organisation such as Finance, HR and fundraising.
When	In discussions about improving decision-making and the efficiency of workflows across an organisation.
How	Use the guide to develop an action plan for achieving streamlined workflows between conservation projects and supporting business processes.

Annette Stewart - Fulbright Scholarship 2016

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

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Institutionalising the Open Standards

This report outlines some of the steps and considerations when adopting and institutionalising the Open Standards. It builds on a related report for operationalising the Open Standards. While these terms may be unfamiliar to conservation practitioners, they are management terms commonly used in other industries -

- **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 organisation. Institutionalisation implies that the process is ingrained in the way the work is performed and there is commitment and consistency to performing the process.”¹
- **Operationalisation** generally refers to the more routine function of putting processes into use.

The report draws on findings from a **Study of Practices**, which worked with several organisations at different stages of the adoption process. The report is primarily targeted at “integrators” (often people with a Monitoring & Evaluation role) in small-to-medium sized conservation organisations, who are looking for ways to improve their organisation’s conservation practices.

Adoption and institutionalisation is a gradual process working through these broad stages –

- A Pre-Positioning phase to build support for the change
- A Preparation phase, defining the results desired from institutionalisation and developing a project plan to achieve them
- An Implementation phase to execute this plan; this will typically involve full exploitation of Open Standards in a pilot conservation project
- A Review phase, checking the value being obtained, and modifying the approach based on initial learnings
- A continual process of expansion to other conservation projects, review of results, quality improvements, and expansion to cater for broader usage.

This sequence is basically the adaptive management approach embodied in Open Standards cycle. You can use the Open Standards and its tools to plan your implementation and continually refine the project over time. Full adoption and institutionalisation can take several years; emphasising an adaptive management approach helps to get people more comfortable with constant change.

Refer also to these related tools -

- [Operationalising the Open Standards](#)
- [Promoting change in cause-driven organisations](#)
- [Conservation Business Process Model](#)

¹ [CMMI](#) – Capability Maturity Mode Institute

Why do this?

Fully exploiting the Open Standards and its supporting systems can transform the practice of conservation in your organisation, and it can also transform the way your organisation manages its work. But like any major change program, it will be difficult. Having an agreed view of the problem you are trying to solve, and the end-point that you are trying to reach, will help to maintain focus and momentum during the inevitable rough patches. The pre-positioning tasks provide guidance to help create this picture.

Define the problem, and the potential benefits, in terms that are relevant to your organisation, and keep them front and centre throughout the project. It will take several years to fully adopt, operationalise and institutionalise the Open Standards, so regular check-points need to be built into the plan to allow review and refinement.

The types of benefits being obtained from this approach by other organisations include –

- improved insight into projects - for example, by linking strategies and associated monitoring of results in conservation projects with data in financial systems, it becomes possible to understand the return on investment for particular strategies (e.g. results obtained per \$ spent). This information helps to adapt strategies within projects, and compare across projects. In addition, linking of longer-term workplans in conservation projects with HR systems enables the HR team to do longer-term workforce planning of the types of skills and quantity or resources required.
- improved investment decision-making – having ready access to consistent information on all projects allows management to use data to inform their decisions, such as – which projects are achieving their aims and which aren't?; where should we be investing more, or less? what level of resourcing do we need for this project to achieve its desired impact?
- improved reporting, to internal and external audiences – includes reporting of outputs, outcomes and impacts, drawn directly from detailed monitoring data to provide the required evidence.
- improved efficiency of workflows within and across key business processes, freeing up resourcing to focus on the core business of doing more conservation work

Pre-positioning tasks

A project like this can't get started unless there is some support from key stakeholders; in the first instance this is probably your direct manager, and ultimately a broader range of managers. The guidelines below suggest a range of tasks that will need to be tailored to your organisation's unique context, particularly regarding the level of support that you already have for adopting and institutionalising the Open Standards.

Depending on your circumstances, some of these tasks might be best done initially as solo research to develop information for broader discussion, or it might be appropriate to do collective workshops with some key people, or some combination and progression of the two approaches over time. Reach out to other practitioners undertaking this kind of work (via CMP and CCNet); if possible, access external support with expertise in areas such as facilitation and organisational change.

While much of this work is about identifying deficiencies and looking for improvements, it's critical to avoid painting problems in isolation of the great work that your organisation is doing; it can quickly be seen as too negative and therefore easily ignored. For instance, you could start every conversation along the lines of *"Isn't it great that we're doing xxx, but imagine if we could also do yyy"*. This whole approach is one of constantly learning and improving; the "lessons learnt" approach is a useful model.

Analyse the current situation

A key first step is getting an understanding of the issues currently being experienced, agreement that there is a problem to be addressed, and agreement on the nature of that problem. Treat it as a problem solving exercise; identify the points of discomfort – the things that are making people's jobs harder than they should be – before working towards resolving them. Developing a conceptual model might be a useful tool for drafting this; to identify the contributing factors behind the problems being experienced, and then to use these to feed discussions on potential strategies for resolving them. Refer to [Attachment A – Example Situation Analysis for Institutionalisation](#). This first step is ideally conducted prior to or as part of your organisation's periodic strategic planning exercises.

Aim to get input from people beyond those "doing" the conservation work; conservation is probably the core business of your organisation but it can't function without a range of support roles. Seek input from people in areas such as fundraising, finance and HR management - they are probably also experiencing problems relating to conservation information and projects. At a higher level, your finance manager is likely to be aware of the inefficiencies in the organisation, and your HR manager can offer useful insights into successful change processes, and how best to work across different parts of the organisation.

As well as seeking views from individuals, a more analytic approach can provide facts and insights to help make the case for change. Some options include –

- Do a self-assessment of your organisation against the **Conservation Capability Maturity Model**, to identify where your organisation sits relative to a model high-performing conservation organisation; this will help to identify areas where your organisation's current processes could be improved. If appropriate, ask others to do their own assessment, or discuss the findings with them. Ideally the tool is best used by a small working group involving people from across the organisation. Use caution to avoid negative reactions to the "bad news" that this type of assessment can deliver.
- Review the business performance frameworks (identified in **Positioning OS within business performance and reporting frameworks** document) to see if which ones best resonate within your organisation's context, and use the insights and exhibits to generate discussion.

Describe the “ends”

Prepare a very high-level view of how things could be different if all the current problems were resolved; paint a picture of what a new business model might look like, of how roles would function more smoothly, and the benefits that would follow. Keep in mind that full adoption of Open Standards and its supporting systems (OS/M)² is a means to an end; having agreement on the *end* helps to open up discussion on the *means*. The *end* might be embodied in your organisation’s Vision or Mission. (In reality the *end* is never achieved – the target will be constantly moving forward as improvements are made.)

- Review the **Conservation Business Process model** in the context of your organisation, to get ideas for potential changes to your organisation’s current operations.

Decide on the “means”

With agreement on the starting point, and the potential *ends*, the discussion can turn to the *means* for getting there. A key means is adoption of a standardised adaptive management framework across the organisation’s conservation projects. There are a range of adaptive-management frameworks available, however the supporting infrastructure is relatively limited. The Open Standards stands apart from other adaptive management frameworks due to its supporting infrastructure - an experienced group of practitioners ensuring that the standards are of high-quality and continue to evolve (CMP), supporting systems to manage information (Miradi and Miradi Share), supporting classification schemes that support shared measurement and learning (Threats & Action codes; CAML), and a wide network of experienced people who guide teams in using the standards (CCNet). In the author’s experience, the Open Standards and its supporting systems and networks is the best-available mechanism for improving both the *practice* and the *management* of conservation.

- Review the **Benefits of adopting the Open Standards** document to get ideas on communicating the role and benefits of OS/M for your organisation.

It will probably take a lot of discussion to move towards agreement that OS/M is the best mechanism for your organisation; not because of any particular issue with OS, but just because it will involve a change of practices by a range of people. The information collected through the above steps provides some “facts” to support the change, but in cause-driven organisations like conservation, appealing to facts alone is not sufficient; there needs to be an appeal to values – finding some way to show that these changes will lead to better conservation, more resources available to do conservation, and less angst along the way. The recommended method is to get agreement for a pilot project to demonstrate the feasibility of this approach.

- Review the **Promoting change in cause-driven organisations** document to get ideas on communicating new practices that require people to change the way they do things.
- Refer to the **Operationalising the Open Standards** document for factors that need to be considered during a pilot project.

Hopefully by the end of this pre-positioning phase you have obtained agreement of the organisation’s current performance gaps, understanding of the desired characteristics of future performance (or the *ends*) and that, of all the options available, use of the Open Standards and its supporting systems is worth piloting as a potential *means* to achieve this *end*.

² OS/M will be used throughout this document as short-hand for the Open Standards guidance documents and its supporting systems - Miradi and Miradi Share.

Preparation / Planning tasks

Once you have some degree of support you can start preparations for your institutionalisation work. You will effectively be managing two related projects – the institutionalisation work itself, and a pilot conservation project that is starting to fully exploit the Open Standards. This pilot conservation project could be an entirely new project, or an existing project which can be transitioned to fully exploiting the Open Standards and supporting systems.

Consider using the Open Standards to structure your institutionalisation project, with results chains to show your intended actions and expected results, building your project plan in Miradi and using it to prepare and track your workplan and budget. It will help create more familiarity with the approach.

The work done so far is effectively the Situation Analysis (part of OS Step 1); this preparation phase involves visioning and preparing your team (remainder of OS Step 1), then planning your actions (OS Step 2). The guidelines below will need to be tailored to your organisation's unique context. Institutionalisation is not a top-down waterfall-style implementation task; the project planning and design needs to be participatory and iterative - "think adaptive management".

Establish support for the institutionalisation work

Establish a **Steering Committee** and agree "**what success looks like**" for the pilot phase, to guide prioritisation of work and define the criteria for evaluating outcomes of the pilot project, which will inform next steps beyond the pilot. Ideally the Steering Committee is sponsored by a member of the organisation's leadership group and contain managers from support functions (finance, fundraising, HR) as well as conservation. Defining "success" helps to identify the benefits being sought. This could be done through a working session or series of interviews asking questions such as -

- what can't you do today that you would like to be able to do?
- what (lack of information or poor process) is frustrating or limiting?
- in utopia, what information would you want at your finger-tips for managing the organisation - day-to-day, and over the longer-term? "do you ever wish you could . . ."

Aim to brainstorm a long list, then prioritise and identify the items that can be addressed through OS/M adoption - these help to identify things that the project needs to produce (e.g. particular reports or dashboards of key information). For priority items that are beyond the scope of OS/M, consider if they can be met through changes to other systems (e.g. fundraising or finance) and then either include them within the scope of your pilot work or pass them on for others to think about.

Ultimately, document a clear list of the benefits being sought and a clear vision for the work; include a pithy summary - "this is why we are doing this . . .". A good vision will paint a compelling view of the future, and sets realistic expectations of what the journey will entail. It should have a "what's in it for me" element that will motivate people, and answers the question, "Why change?" The vision provides something to continually communicate to people, and to check back against as the project progresses. This helps to keep focus, and to ride out the inevitable bumps in the road.

Build a **supporting coalition** of people who can see the benefits of the new approach; fundraisers can be great allies as their work can benefit significantly from easy access to high-quality project information. Their involvement could range from being formally part of the project, or just a helpful sounding board. Involve your HR person early and often - they usually have great insights into managing change, which is

especially challenging in cause-driven work like conservation. Include some external people in your supporting coalition, such as other members of CMP or CCNet who have experience in this area and can be a useful sounding board as your project progresses.

Choose a pilot conservation project

Ideally the project should be of meaningful but manageable size, with staff who are willing to trial this approach, are comfortable with ambiguity (prepared to stumble as mistakes are made and corrected), keen to try new things, and who have insight into the organisation's broader needs around raising funds, managing people & finances, and reporting impact. Ideally the project leader is well respected by peers - their endorsement will help to communicate benefits to other people. If this is an existing Open Standards project, enter its current information into Miradi so that people can start to see the process and system in the context of their own data. If it is a new project, or one that hasn't used Open Standards concepts, then the projects information will need to be build up by working through the Open Standards steps.

Decide how "**deep**" to go with the pilot conservation project – options are to just focus on high-level plans (Results Chains, Strategies, Activities), or go further into monitoring plans and detailed workplans and budgets. If institutionalisation is your aim, then going deeper into workplans and budgets, with links through to finance systems, should be your ultimate aim.

Decide what **initial training** is needed for people involved in the pilot conservation project. At a minimum, this should explain the key terms and concepts in the Open Standards, ideally using the pilot project's information. It might involve external support to run formal training in Open Standards interspersed with working on the project through the first two steps of the Open Standards, to prepare the project plan and high-level workplan and budget.

Establish a formal project team

Establish a formal **project team** for the institutionalisation work. People on the team should have some capacity to take on tasks, or at a minimum have capacity to attend regular meetings to provide input. Members could include -

- key members of the team for the pilot conservation project
- people with responsibility for raising funds and dealing with current and potential future supporters and external stakeholders
- IT representative to help with systems usage and analysis of options for data management
- people with responsibility for managing the organisation's finances, particularly budgeting for conservation work.
- HR representative to help guide the change process.

Consider whether this initial phase of the institutionalisation work can be done with existing people, or whether you need some **external support** - either to bring in specific skills (e.g. facilitation, experience with change programs, etc), or to provide dedicated resources (or back-fill of your position) for planning and overseeing the project – planning and project-management is time-consuming and will require dedicated attention to oversee implementation.

Full adoption of the Open Standards needs not just process change but also behavioural change. Behavioural change doesn't happen by chance so specific activities need to be built into the plan to achieve this; without behavioural change, the needed process changes will not happen, the benefits won't follow, and trust and confidence fades away.

Consider the “people” factors

A **stakeholder analysis** will help to identify the people affected by the project, their interests, the impact of the project on them and vice versa. Look for opportunities to build engagement and understanding; organisational change occurs one person at a time, and people change at different rates and in response to different things; peers are usually the biggest influence, not facts or managers. A number of templates are available online to help with stakeholder analysis.

Assess how the changes will **affect each role**, and how the changes are likely to be received by individuals in those roles. Identify key messages for them – e.g. highlighting what-it-means-for-them, but also what it means for other roles and the bigger organisational picture – “the greater good”, which they often don't see because they're so busy with their own work. Identify ways to involve them in the design, and keep them in the loop as the project progresses.

A project **Risk Assessment** will help to identify the things that could go wrong during your project and how to avoid them or mitigate their consequences. Templates are available to help with this.

Create a **Communications plan**, to keep all the stakeholders involved. Have an online place for storing project information and updates, so people can easily find up-to-date details of what the project is hoping to achieve. Use face-to-face communications as much as possible; email generally doesn't have much impact; record presentations / team chats and make them available. Include in the implementation plan regular communications about what the project is doing, tailored to specific audiences - make it seem part of “the new normal”, a continual improvement from where we are now; not a big scary new thing.

Design the specific institutionalisation tasks

With your team, develop a results chain to brainstorm and agree the strategies and actions you will take, the intermediate results you can expect to see along the way, your objectives, and the indicators you could measure to monitor your progress. This will inform your project plan. The tasks will depend on your organisational context, but there will be two key groups of tasks common to most institutionalisation efforts – systematising conservation information, and integrating this information into other organisational processes.

Systematising conservation information and reporting

A key reason for adopting the Open Standards and its supporting systems is to **improve the capture and reporting of conservation information**. This preparation phase should focus a fair bit of effort on preparing the groundwork to allow this to happen. Suggested actions include -

- Define the **key audiences** at each phase of the project cycle, the decisions they need to make or the questions they routinely ask, and then the information required to aid those decisions; this technique of “start at the end and work backwards” ensures that focus is applied to the information that matters. This will help prioritise the information that needs to be collected into the systems, and the reports that need to be produced from the systems. It will help to prevent

people from “over-working it” (gathering and entering information that is not really required). It will also help determine the information that needs to flow between different roles and systems. You can sometimes group similar needs into one report, which minimises the number of reports you need to produce. And a “report” can equally be a paper report or a display on screen. Document this in an “Audiences & Information Needs” document (examples are available), and potentially include some guidance for entering projects into Miradi (what boxes to fill in, and not).

- Use the information needs of the “senior leadership” audience to draft an initial dashboard that can be populated as information becomes available. Review samples of current manual reporting and identify information that can and can’t be captured through core systems (Miradi, Finance, and Fundraising). Decide what information can be automated in the short-term, and aim to fill the gaps with continued manual reporting. A mock-up dashboard will help illustrate one of the end-points that the project is targeting.
- Develop a set of “classification schemes” for categorising information to support these information and reporting needs. These classifications will allow roll-up of information to populate the dashboard. Refer to the [Operationalising the Open Standards](#) document for guidance.
- Develop draft **standard report formats** for project documentation – based initially on making minimal change to available reporting programs, pending development of user-generated narrative reports from Miradi or Miradi Share. Test these with the pilot project information entered into Miradi; even mocked-up information can be useful. It will greatly help people’s understanding if they can see a physical report of what they would get once they have worked through the Open Standards steps and entered their information into Miradi. People generally need to see information coming out of a system, and being used, to understand the need for putting data in to the system.

Integrating conservation information into other organisational processes

A key reason for institutionalising the Open Standards is to integrate conservation project information into the broader organisation, to improve efficiency of workflows and also to improve decision-making. This requires investigation of **systems integration options**. The effort here can range from a small-scale analysis by a few people through to a major investment in systems analysis and architecture design. In the latter case you are likely to be engaging external consultants who will manage this work; the guidelines here provide a flavour of a small-scale analysis.

With your institutionalisation team, review the workflows between the conservation process and other key business processes in your organisation – the [Conservation Business Process Model](#) provides some guidance.

A common first-step is to integrate conservation projects with the finance system; this involves developing budgets in Miradi and importing them directly into the finance system. This is the mechanism for achieving “budgets aligned to results”, a characteristic of high-performing organisations. Refer to Part 3 of the [Operationalising the Open Standards](#) document for guidance on how to do this.

Another common first-step is to produce information to feed the fundraising process, either via extracted reports or as data feeds into donor management systems. This could be information to support initial funding applications, or to report to donors on project progress.

Build and maintain awareness of institutionalisation

You will need to continually educate your leadership about OS terminology and the project information it produces; showing how it helps them make decisions. An initial formal introduction session might be appropriate, then take every small opportunity to illustrate the benefits from systematised project planning and implementation.

Aim to measure and report progress, regularly. Also aim to measure understanding, sentiment and adoption actions, not just activities and outputs; “tell – listen – adapt” - actively seek out concerns and address them. Identify the small-wins, and communicate them, often; don’t wait for the big wins which inevitably take time.

Collate your project plan

The results of these activities will create your project plan to guide the next phase of institutionalisation work. It should define your key strategies / activities, and indicators for monitoring progress; and a workplan and budget showing the resources required. It should include regular team meetings to keep the work moving, and regular check-points with the steering committee to provide direction and deal with issues.

Your project plan will likely reflect that your effort will be split across two key areas – managing the “people” factors in a change process, and managing the “technical” factors of process implementation and systems integration. These require very different skillsets, so ensure your team has a good proportion of these skills.

Your own internal processes will determine the documentation you need to produce and the sign-offs you need to obtain. At a minimum, your steering committee needs to review, refine and ultimately endorse your plan.

Implementation phase tasks

This phase will primarily involve executing your project plan, with regular team meetings to review work and refine the plan, and periodic reviews with your steering committee. The key steps will likely include –

- Overseeing development of the pilot conservation project. The effort and time required here depends on the stage of the project – a new conservation project starting from scratch will need to work through all steps in the Open Standards, while an existing Open Standards based project will be simpler. Your project plan should have mapped this out.
- Overseeing the tasks in your institutionalisation project plan developed above. This can include developing and testing the standard reports, running regular team meetings to review progress and adapt actions, and regular reporting to the steering committee.

As with most projects, the Implementation phase takes the most time and effort, but is made easier with a quality project plan and regular attention to project management. Use your supporting coalition as a sounding board to help you monitor implementation of the project and respond to issues as they arise.

Review, adaptation, and continued expansion

The results of the Implementation phase will inform whether you have been achieving the results desired, which will inform next steps. These next steps might involve fully-exploiting the Open Standards in additional pilot conservation projects to build more capacity, a gradual roll-out of the approach as new projects come along, or possibly a migration of existing projects to fully exploit the Open Standards and Miradi. These decisions should be made with the support of your Steering Committee. Based on the results to date, refine your approach, for example -

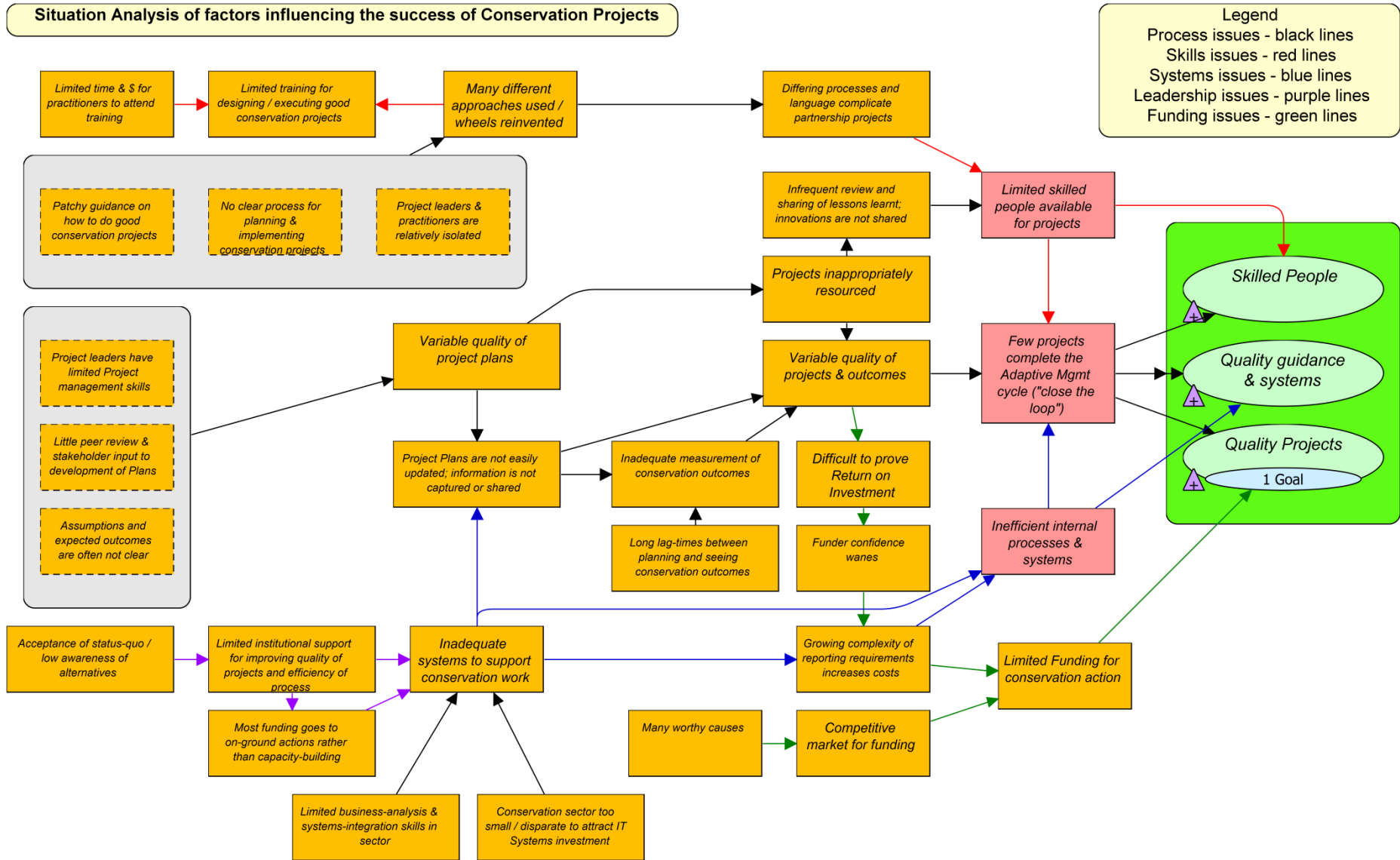
- Update your stakeholder assessment and risk assessment
- Expand the requirements for training, to identify who needs to be trained and how much training is required to ensure projects are effectively managed full cycle
- Determine appropriate structures for projects / programs / portfolios in your organisation
- integrate your conservation project information into additional organisational systems

Keep in mind

- If issues are presented in isolation from the great work that the organisation is doing, it can be seen as highly critical / negative
- Focus on the business benefits you are targeting; OS/M is a just the means to an end
- avoid setting high expectations - under-promise and over-deliver, at every step
- avoid making it bigger than it needs to be – continual improvement will achieve the big things

Attachment A – Example Situation Analysis for Institutionalisation

Situation Analysis of factors influencing the success of Conservation Projects



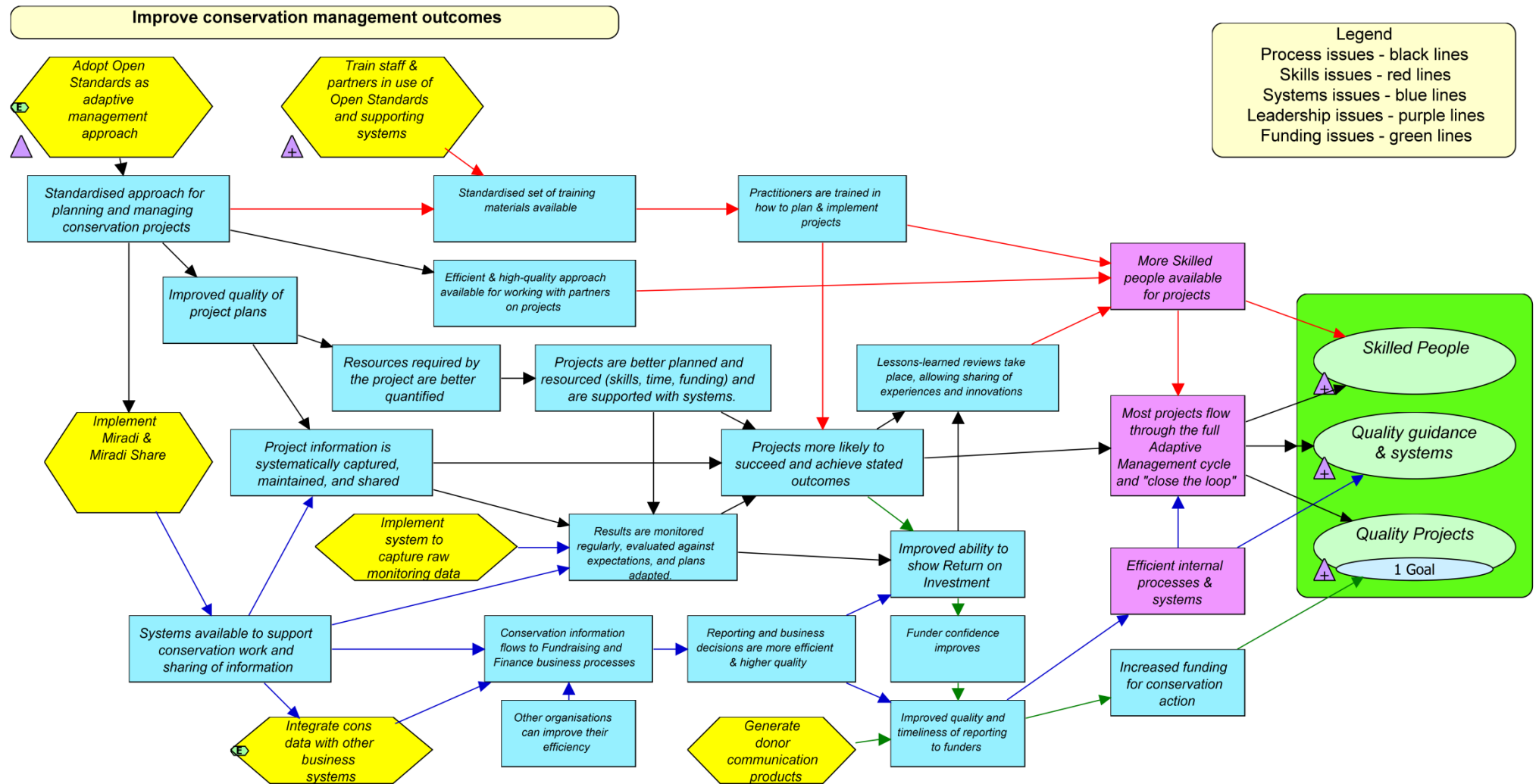
Description of the conceptual model

The diagram above illustrates the factors that affecting our ability to "do good conservation work". The key consequences are that projects were not as targeted as they could be, and thus not as effective as they should be. Related consequences are that expenditure is not always closely aligned to delivering the highest priority conservation outcomes, project success or failure is hard to measure and account for, and knowledge gained is not be easily captured or shared. This Conceptual Model outlines these issues, which all impact on the success of our conservation projects. The diagram shows the factors (orange boxes) contributing to the key issues (pink boxes), that are impacting on our desired "end-state" of having Skilled People, Quality Guidance and Systems, and Quality Projects (green ovals).

Analysis of the current situation has identified several key themes -

- **Process issues** (factors linked with black lines) are the core problem; these factors impact on the quality of project plans, the effectiveness of Implementation, and the ability to prove the results achieved by the project. These factors can be addressed by helping teams adopt a "best-practice" adaptive management process such as that embodied in the Open Standards.
- **Skills issues** (factors linked by red lines) impact on the quantity and quality of people available to conduct conservation projects. These factors could be addressed through activities aimed at training practitioners, identifying new coaches, and teaching emerging practitioners through tertiary education channels.
- **Systems issues** (factors linked with blue lines) impact on the efficiency of projects and limit teams' ability to capture and store information, which in turn limits their ability to measure results, share information, and learn from each other. These factors can be addressed by implementing systems to capture conservation information, and integrate these systems with other core business systems such as donor and financial management.
- **Leadership and sponsorship issues** (factors linked with purple lines) allow the current situation to exist and will need to be a key focus if the situation is to be improved.
- The level of **funding** available for conservation projects (factors linked with green lines) is both impacted by and contributes to the above issues. Inefficient processes mean that the impact of available funding is less than it could be, while the limited ability of projects to prove their results means it is difficult to prove the value of further investment.

Attachment B – Example Results Chain for Institutionalisation



Description of the results chain

The diagram above outlines the steps that could be taken, and the results that could be achieved, by addressing the issues identified in the Situation Analysis. The diagram shows the strategies (yellow hexagons), the intermediate results expected to be achieved (blue boxes), and the outcomes targeted (purple boxes) in order to reach the desired "end state" of having Skilled People, Quality Systems and Quality Projects.

An early step is to adopt a "best-practice" adaptive management framework - Open Standards for the Practice of Conservation, developed by the Conservation Measures Partnership. The Open Standards bring together common concepts, approaches, and terminologies in conservation project design, management, and monitoring in order to help practitioners improve the practice of conservation. The CMP have also built some supporting software, called Miradi, to capture project information generated through the process. Standardising on one approach, with clear terminology and a robust structure, provided us with the means to improve both the effectiveness of our projects, and the efficiency by which we developed and implemented them (refer black lines in diagram for anticipated outcomes).

With a standardised process in place, a structured training programme can then be built to develop the skills of our people and our key partners (refer red lines in diagram). Improving the planning and project management skills of our people should contribute to improved quality of projects and increased likelihood that projects will deliver results.

An ongoing strategy to "Implement Adaptive Management" will progressively work through all projects to ensure that the conservation targets and threats have been well analysed, clear goals and objectives are articulated, appropriate strategies have been defined and costed, and clear monitoring activities are undertaken to assess progress against predefined expectations. Periodic reviews of these plans, aligned with broader business plan reviews, will ensure that plans are adapted in light of results, and future expectations and funding requirements are adjusted accordingly.

As well as adopting a standardised process, we needed much better systems to support our conservation work. To achieve this, we will implement the supporting software for the Open Standards, called Miradi and Miradi Share (refer blue lines). This software provides a means to capture information at all stages of a project; information that would otherwise be held in static documents or not captured at all. Systematically capturing this information improves analysis of projects and facilitates improved management decisions around priorities, resourcing, and performance, delivering much greater effectiveness, efficiency and accountability. Miradi Share enables collaboration amongst conservation practitioners across the globe, enabling sharing of knowledge and experiences.

With information now captured into systems, it creates options for integrating our conservation work, which is our core business process, with other business processes such as financial management and fundraising. Miradi Share enables reporting for management decisions across the full portfolio of projects, and provides the means to pass budget information through to the finance system.

Improved access to quality information should then see benefits within the fundraising process (refer green lines), in terms of efficiency improvements for fundraisers and significantly-improved quality and frequency of reporting to funders.