



In
partnership
with



Partnership Adoption of the Conservation Standards

Claire Relton (Endangered Wildlife Trust) and Erica Cochrane (International Crane Foundation)


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Location: Global; active International Crane Foundation and Endangered Wildlife Trust projects and programs in Africa, Asia, and North America

Summary


This case study describes how two conservation partners - the Endangered Wildlife Trust (EWT) and the International Crane Foundation (ICF) - have adopted and institutionalized the Conservation Standards (CS) across their range of projects and programs at multiple scales. Our experience – how we got started down this path, the process we took, the challenges we faced, the solutions we found, and the benefits and impacts we are seeing – will be valuable to other conservation organizations and partnerships hoping to enhance their conservation impact. Our case study illustrates the importance of collaboration and partnership to share lessons and resolve barriers across organizations.

Public Overview of Case Study

See our [online story](#)  for more details, images, and graphics associated with our case study.

Setting the Scene

The EWT is dedicated to conserving threatened species and ecosystems in Africa to the benefit of all people. The ICF works worldwide to conserve cranes and the ecosystems, watersheds, and flyways on which they depend. In partnership, we jointly manage the African Crane Conservation Program (ACCP), which represents more than one third of both organizations' conservation efforts. The ACCP partnership has active projects and relationships with other national NGOs in South Africa, Zambia, Uganda, Rwanda, Kenya, Ethiopia, and Senegal.

Both organizations were looking to improve their practice of conservation and enhance their impact. Project processes associated with planning, performing, monitoring, reporting, and evaluating, were variable and projects were frequently defined for specific funding opportunities. In our search for a more effective and efficient system, we were “pulled” by several key mentors and “pushed” by an important donor toward the CS. Our commitment to organization-wide adoption and institutionalization of the CS was cemented when the ICF and the EWT leadership allocated staff, time, and resources to the adoption of the CS, and became involved in the global CS community. Within a two-year period; the ICF dedicated Erica Cochrane and the EWT dedicated Claire Relton to support the CS adoption; the ICF and the EWT committed to the use of Miradi; the ICF became a member of the Conservation Measures Partnership (CMP); and, Erica and Claire became actively involved in the Conservation Coaches Network (CCNet) and CMP learning initiatives ([see timeline](#) .

Claire and Erica have worked in tandem to help projects and programs *Adopt the CS* and the EWT and the ICF *Institutionalize the CS*. Working together - sharing challenges and successes, seeking outside guidance, and developing common solutions - has helped each organization advance more quickly and achieve greater impacts. Our Theory of Change is illustrated in Figure 1 below. *Results 1–4* are the main intermediate results we want to see from adopting and institutionalizing CS. To achieve *Results 1–4*, barriers to adoption and institutionalization, depicted by *Result 0*, need to be continually addressed. If these results are achieved, we expect impact-related *Results 5–7* will occur, resulting in a positive feedback loop improving the quality of our projects and increasing the performance of our organizations.

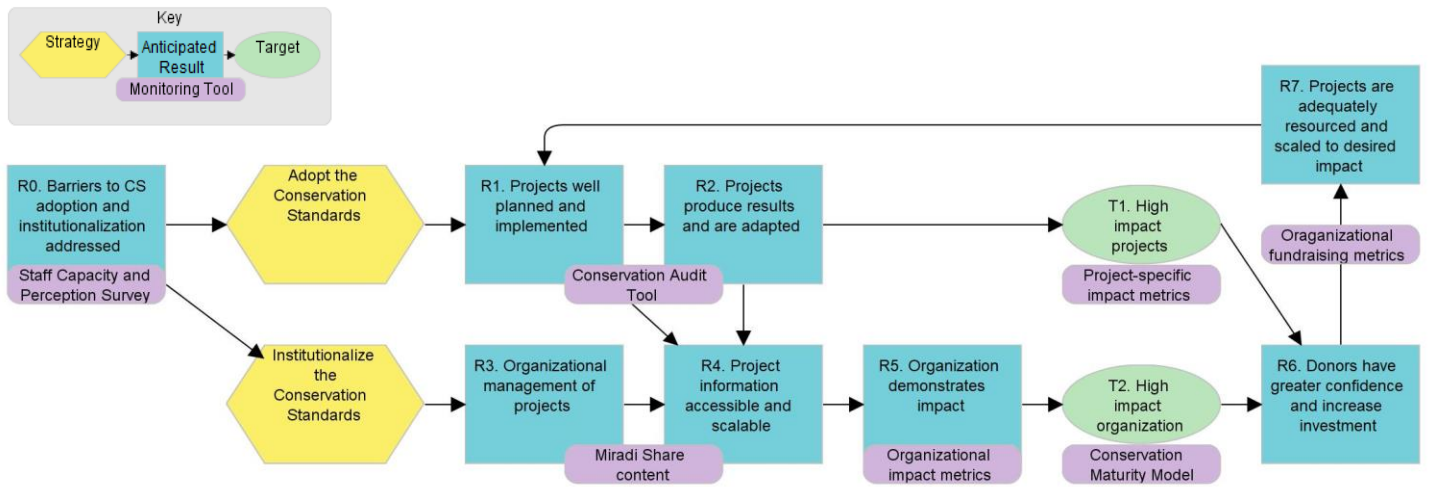



Figure 1. Theory of Change illustrating the anticipated results (R), monitoring tools and targets associated with the EWT and the ICF's adoption and institutionalization of the Conservation Standards.

Results and Lessons Learned

Progress toward achieving results

Over the past few years, we have made significant progress along our Theory of Change.

- **R1 and R2.** Close to 70% of active projects (90% EWT and 50% ICF) have been coached through the CS Steps 1 and 2 and are well planned and being implemented according to those plans. All but a few of these projects were already underway. Teams made important shifts in ongoing work; envisioning new strategies that address priority threats, divesting in strategies that do not, articulating assumptions, and altering work plans to better achieve results. Roughly 30% of active projects have now gone “full cycle” through the CS Steps 4 and 5 and are reporting on results and adapting. We applied [the Conservation Audit Tool](#) to the EWT programs and shared ACCP projects in 2019 to determine how well we were adopting the CS into our projects, to prioritize projects for coaching and support, and to identify critical areas for improvement across both organizations. We repeated the audit process later in 2020 to assess progress and re-evaluate the priority next steps.
- **R3 and R4.** All active projects have a Miradi file. Roughly 50% of those active projects are reporting on progress and impacts and have the most current information accessible in Miradi Share.
- **R0.** Much of our work, and many of the lessons that we share below, relate to addressing barriers to adoption and institutionalization. In January 2020, we conducted a survey among the ICF and the EWT staff to gauge understanding and perceptions of the CS and Miradi, uncover barriers to their use, and identify potential solutions. Our results indicated that most staff have some capacity with the CS and Miradi, that staff overwhelmingly see value in adopting the CS and believe that Miradi helps improve project management and fundraising potential, and that most staff would like to have access to more training, coaching and mentoring. See detailed survey results in our [online story](#) 🔍.
- **T2.** Although we have not formally applied the [Conservation Capability Maturity Model](#), if applied retrospectively to 2014 or before, both organizations would likely have ranked themselves at *Level 1: Initial*. Whereas today, both organizations would likely rank between *Level 2: Developing* and *Level 3: Defined* and would be making clear progress toward *Level 4: Managed*.
- **T1, R5, R6 and R7.** Although we do not have the project-specific and organizational impact metrics to report on here, through the survey noted above and a set of follow-up questions to organizational and program leaders, we have firsthand information that several projects which have adopted the CS are now demonstrating new and bigger impacts, and that many of those projects have been able to secure larger and longer term funding and scale up accordingly. A number of donors, including Disney and several investment bankers, have told us they have

increased their giving specifically because we are using the CS, allowing us to scale up in China, Kenya, Myanmar, and South Africa. See quotes in our [online story](#) .

Addressing barriers to CS adoption

An essential lesson that we learned in addressing barriers to the CS adoption and institutionalization is the need for organizational buy-in and engagement from senior management. Without the strong conviction and drive from the top, this type of organizational behavior change would be impossible. Individual projects might choose to follow the CS, but the organization would not mature as a whole. External mentorship and donor encouragement were important to convince our leadership to commit to the CS. Internal communications, such as the [ICF's Board of Director's guide to the CS](#) and the [EWT's presentation on progress and future plans](#), were important to develop a common desire for change and continuing improvement. Now, external recognition of our progress and contributions by others in the CMP and CCNet communities, as well as increased confidence from donors, reinforce that commitment.

We learned to start at the right step for each effort. During the last few years of adopting the CS, both organizations have started new projects and programs. We found undeniable value in following the CS Steps 1, 2 and 3 consecutively during the design, development, and implementation of new project plans. However, most of our programs and projects were already in place, had been running for some time, and had donor requirements to fulfill. The strategic and critical thinking that teams had already done was still valuable and needed to be respected and included. Essentially, we needed to start at the CS Step 4, evaluate what had already been achieved before working through the CS Steps 1 and 2. Teams developing project plans retrospectively were able to express assumptions explicitly through the development of results chains. The process also allowed teams to prioritize and streamline their strategies, knowing that personnel, finances, and other resources were limited. Furthermore, some teams were able to describe unintended external consequences and factors that were making certain strategies more difficult to implement than originally planned.

We learned to adapt the process and tools (even design new tools) to meet project constraints and priorities, such as; adhering to existing donor requirements and expectations; meeting time and budget constraints; and supporting varying degrees of CS experience and computer literacy. In time-constrained circumstances, we developed simplified results chains that captured critical assumptions and project outcomes for field staff and project partners, and then added factors and details that would be valuable to specialists and managers.

We learned that teams require significant ongoing guidance, mentorship, and problem-solving beyond the CS planning workshops, in order to effectively implement their planned actions and monitoring. After effective workshops, where teams developed practical and clear strategic plans with good measures for evaluating success, teams would often revert to “business as usual”. This was especially true when projects were fitted retrospectively to the CS. Indicators and outcomes were not regularly reported on, and teams tended not to revisit their strategic plans to evaluate their assumptions. To combat this, we found that follow-up sessions and the development of additional tools (see below) were significantly important to maintain momentum, assess progress towards results, goals, and objectives, and to interrogate the team’s assumptions. Project Management Plan templates ([available here](#)) were designed in Microsoft Excel to aid in the identification of activities, goals, objectives and indicators, which were easily formatted for import into Miradi Share. Drop-down options, color coding, Gantt charts, and hidden columns for reporting allowed teams to schedule activities annually, identify responsible parties, and report on activity progress monthly.

We further learned that monitoring and evaluation is a challenge to get right and get going for most teams. Results from using the Conservation Audit Tool flagged monitoring and evaluation as needing improvement across both organizations. To streamline and prioritize monitoring and evaluation, we developed a Monitoring Plan template ([available here](#)). This monitoring plan allows teams to identify, categorize and prioritize their project indicators, while allocating a monitoring

protocol, data storage location, timeframe, and responsible party to each indicator. Data should be standardized and stored systematically where it is accessible to the team, managers, and relevant science or fundraising officers.

Finally, we learned that we need additional CS coaching and Miradi management capacity, beyond Claire and Erica, to meet organizational CS adoption and institutionalization goals. Additional Miradi Desktop licenses were purchased and allocated to appropriate staff, and CS and Miradi Champions were identified in each of the programs to assist their teams. Claire and Erica are currently providing additional training and mentorship to these Champions.

Addressing barriers to CS institutionalization

We have aimed to make it as easy as possible for teams to get information into Miradi and for all consumers of project information to get data out of Miradi. To ensure that project and program information is accessible, teams use Miradi and Miradi Share software to capture and visualize strategic plans and to report on progress. The ICF and the EWT currently share a Miradi Share platform, which contains over 30 active projects. We have established taxonomies (specific to the ICF and the EWT) in our Miradi Share program to link, categorize and scale up particular features in Miradi (such as projects, targets, threats, and strategies). In this way, we are able to link features to geographic regions, species, and internal and external high-level measures, such as the Sustainable Development Goals (SDGs). Customized, coded report templates allow teams to extract attributes of their project progress reports into Microsoft Word documents that are shared both internally and externally. Capturing progress, next steps, indicator data, and lessons learnt in Miradi Share allows teams to capture institutional knowledge, store qualitative and quantitative data, and demonstrate progress towards social and conservation impact.

We have learned to simplify and standardize some of our common approaches and measures of success. Over the last three years, our teams have created and adapted a multitude of situation analysis and theory of change diagrams, specific to each project and program. We found the development and use of generic results chains, objectives and indicators for common strategies and targets a useful and effective way to capture valid and clear assumptions, ensure organizational standardization, and to guide teams in their thinking when they may be time-limited.

We are also working to scale up measures of success to be able to report on organizational, regional, and global impact metrics. For example, the EWT has three Strategic Imperatives (*Saving Species, Saving Habitats, and Benefiting People*) that are supported through ten High-level Goals. We developed a process for effectively monitoring and reporting on the progress of the High-level Goals with the aim of demonstrating measurable conservation impact and social benefit to our partners, stakeholders, funders, donors, and the general public. High-level Indicators were identified for each High-level Goal and then linked to project-level indicators (attached to project goals and objectives).

Application Beyond Case

The ICF and the EWT have benefited immeasurably from the mentorship, guidance and example solutions offered by the CS community and are committed to maintaining involvement and helping other organizations take up the CS so that we can all have a great global conservation impact. Erica serves on the CMP Board of Directors and is a Certified Coach; Claire is a CCNet franchise lead; and, both Claire and Erica serve on the Conservation Audit, CS Operationalization, and Spatial CS Working Groups. Lessons from our situation have already been used to improve the spatial features in Miradi Share, the new Miradi Share v2.0 usability, and the Conservation Audit Tool. We continue to use our experience and enthusiasm to further improve the Conservation Audit Tool, integrate the Audit Tool with the Conservation Capability Maturity Model, design a set of standard Miradi Share report templates for all Miradi Share users, and explore how population, health and environment approaches can support conservation outcomes.

The EWT is strategically placed and is committed to building additional CS capacity across the African continent – by organizing CS introductory trainings, as well as more advanced coach trainings, and by facilitating workshops for other

conservation organizations and government departments. In February 2020, the EWT and CCNet co-hosted South Africa's first Coach Training. Following that training, the EWT initiated a Southern Africa CCNet franchise node. And most recently, during South Africa's COVID-19 lockdown period, the EWT provided several online CS and Miradi introductory trainings to some of our project partners and donors. Through additional capacity building and support, we aim to share our skills, knowledge and lessons learnt across the conservation sector in Africa, with the aim of increased conservation impact for the benefit of both the continent's biodiversity and people.

Further Information

See links, files, quotes, additional information and images in our [online story](#) .

Key Words (select all that are relevant)	Put x if Relevant
Stages in Conservation Standards Cycle	
- Assess	x
- Plan	x
- Implement	x
- Analyze & Adapt	x
- Share	x
- Full cycle adaptive management	x
- Other <u>Operationalization of CS</u>	x
Case Study Scale	
- Project-level	
- Program-level	x
- Organizational-level	x
- Other <u>Multi-organizational partnership</u>	x
Specific Topics Addressed:	
- Human wellbeing	
- Climate change	
- Community-based conservation	
- Indigenous populations	
- Marine conservation	
- Freshwater conservation	x
- Terrestrial conservation	x
- Other _____	