



Conservation
Measures
Partnership

CONSERVATION STANDARDS EFFECTIVENESS & IMPACT



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List of acronyms and abbreviations

Acronyms or abbreviations	
AM	Adaptive Management
CS	Conservation Standards
CMP	Conservation Measures Partnership
CCNet	Conservation Coaches Network
CSEI	Conservation Standards Effectiveness & Impact Learning Initiative
FOS	Foundations of Success
M&E	Monitoring & Evaluation
TOC	Theory of Change

Abstract

Although there is a broad assumption that using an adaptive management framework in conservation leads to improved conservation efficiency, effectiveness, and impact, there is little robust and consolidated evidence supporting this hypothesis. The Conservation Standards Effectiveness & Impact Learning Initiative aimed to investigate what evidence exists to verify that increased adoption of “good” conservation practice leads to more successful conservation projects. We developed a theory of change documenting the intermediate results we were expecting to be achieved following the successful adoption of an adaptive management framework. Data collected in an evidence library was linked to key results along the theory of change to assess the quality and quantity of evidence that exists, and generic indicators, possible methods and tools associated with results along the theory of change were identified. Through this initiative, we have an increased understanding of the positive outcomes that may result following the adoption of an adaptive management framework. Although the availability of empirical evidence is limited, we recognize the value of anecdotal data and continue to support the sharing of personal observations and testimonies to build the evidence base. However, considering the most-commonly identified barriers, such as the time and financial investment, associated with transitioning to a framework like the Conservation Standards, there is an urgency to collect robust, empirical evidence to prove that the use of an adaptive management framework is likely to lead to increased conservation impact.

Introduction

In 2021, the Gordon and Betty Moore Foundation (Moore Foundation) and the Conservation Measures Partnership (CMP) supported the Conservation Standards (CS) Effectiveness and Impact Learning Initiative, which set out to explore the availability and type of evidence regarding the value of the CS, or other equivalent evidence-based inclusive adaptive management frameworks for conservation.

Adaptive management (AM) is a systematic approach used across a host of sectors to improve management practices by implementing plans in ways that maximize opportunities to learn from experience. For this initiative, our definition of adaptive management mirrors that of Shea *et al.* (2014): “Adaptive management is a structured, iterative, decision-making approach for dynamic problems that acknowledges uncertainty and aims to reduce this uncertainty in order to improve outcomes.” The CMP [Conservation Standards](#) defines adaptive management as: “the incorporation of deliberate learning into professional practice to reduce uncertainty in decision making. Specifically, it is the integration of design, management, and monitoring to enable practitioners to systematically and efficiently test key assumptions, evaluate the results, adjust management decisions, and generate learning” (CMP 2020).

While there have been past efforts to conduct evaluations (e.g., the CMP Evaluation, the FOS evaluation) and to explore what evidence exists (e.g., CMP-Moore’s *Making the Business Case Learning Initiative*), the evidence is still limited and often based on subjective or anecdotal information. Although some alternative approaches to conservation planning and AM (such as Systematic Conservation Planning and Structured Decision Making) appear to have more robust scientific literature associated with them (Redford et al. 2018), the evidence base for the value of AM approaches in conservation remains restricted compared to other sectors, such as health and business. Without evidence, investment in the use of adaptive conservation management frameworks is not defensible to organizational leadership and donors.

Evaluation of conservation AM frameworks is methodologically and conceptually challenging, for example, project effectiveness can be defined in many ways, there are often long-time frames of conservation outcomes, there is ineffective information available to measure effectiveness, and there is a lack of motivation for such assessments. To address this challenge, we identified specific outcomes we expected projects to achieve following the adoption of an AM framework and laid these out in a detailed results chain. In doing this, the effectiveness of the AM framework can be assessed using an outcome-based approach. Potential indicators have been identified and described to track progress towards the achievement of results.

The initiative has produced a detailed results chain between *implementing the CS* and *delivering outcomes and impact*, as well as other relevant information such as barriers and opportunities for successful AM adoption. In addition, the initiative has generated an evidence resource library with descriptions and ratings of the different types of evidence. Furthermore, we have identified where gaps in evidence exist, and propose how these gaps may be filled over the medium and long term. Our hypothesis is that applying best practice will improve the likelihood of success in a conservation project, and thus we set out to

understand where, when and how the process of using AM frameworks in conservation creates improved efficiency and effectiveness.

By improving our own understanding of the value of AM in conservation and compiling an evidence base, we aim to demonstrate to others that applying AM lessens the risk of poor solution 'choices', increases the efficient use of resources and time, enhances the effectiveness of selected solutions, and ultimately leads to greater and more sustainable impact. Our core objective is to provide evidence that the use of AM in conservation increases efficiency and effectiveness leading to greater positive and sustained impact. In so doing, we, as the CS community, aim to demonstrate our achievements to build public and political will to expand our resources in the hopes of combating the unpredictable and escalating threats to global biodiversity, ecosystem resiliency, and human wellbeing.

Methods

Collaborative learning group

We identified potential collaborative partners within CMP and externally to support this learning. We held two formal learning forums on 17 September 2021, and on 5 November 2021, as well as a series of meetings and informal interviews to develop our products collaboratively and incorporate perspectives from outside the CS community. The participation in the learning forums involved those from the CCNet, CMP and wider conservation and development sectors. We also launched an online survey through social media and 33 respondents provided input to this initiative.

Learning group members and key informants

Name	Affiliation
Sheila O'Connor*	Independent
Claire Relton*	Durrell Wildlife Conservation Trust
David Wilke	Wildlife Conservation Society
Eleanor Carswell	Bush Heritage
Erica Cochrane	International Crane Foundation
Emily Gonzales	Parks Canada
Andrea D'Silva	Independent
Brenda Van Sleuwen	Parks Canada
Sarah Weber	Foundations of Success
Elizabeth O'Neil	Independent
Madeleine McKinnon	Independent
Rachel Neugarten	Independent
Samantha Cheng	American Museum of Natural History
Caroline Lees	Conservation Planning Specialist Group
Adam Barlow	WildTeam UK
PJ Stephenson	IUCN SSC Species Monitoring Specialist Group
Jamie Copsey	Conservation Planning Specialist Group
Caroline Stem	Foundations of Success
Matt Muir	US Fish and Wildlife Service

*Product lead

Theory of change

This work aligns with the CMP's Mission and Strategy for Goal 1: *Improve Projects and Programs*. We aimed to investigate the assumption that if more organizations adopt an adaptive conservation management framework (such as the CS) and demonstrate "good" conservation practice, then global conservation efforts will be more efficient and effective and will likely lead to desired outcomes and impact.

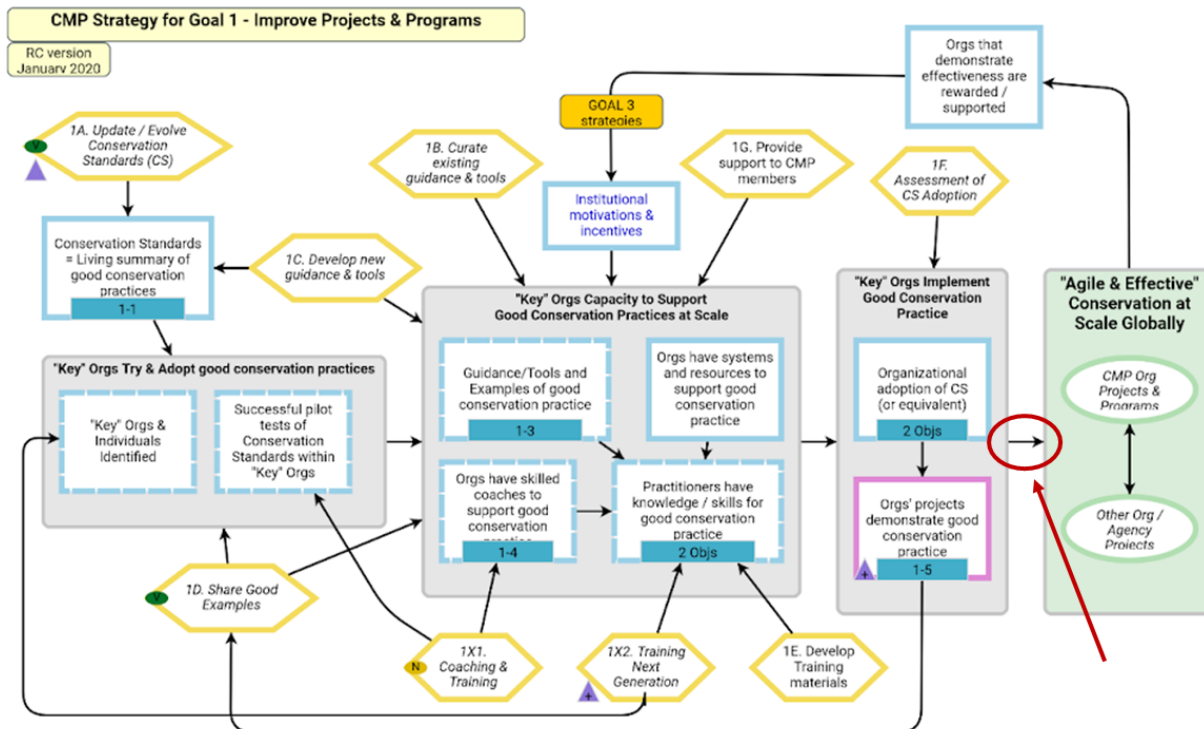


Figure 1. Theory of Change describing the Conservation Measures Partnership's Strategy for Goal 1 - Improve Projects & Programs. The red circle and arrow indicate where the lessons from this initiative aim to contribute.

To better assess the highlighted assumption in Fig. 1, we developed an expansion of the CMP theory of change for Goal 1, identifying those key groups of results we are expecting to be achieved through the adoption of an AM framework in conservation, such as the CS. The Conservation Standards Effectiveness and Impact (CSEI) detailed theory of change went through several iterations following workshop discussions with our learning group members, as well as with the broader CS community during the CCNet Achieving Collective Impact session on 5 November 2021. A simplified version of the theory of change was developed into which we incorporated available evidence associated with each result.

While a detailed evaluation of the CS approach in comparison with other AM conservation frameworks is beyond the scope of this initiative, we compiled a 'living' list of alternative/equivalent approaches, which we hope to build upon in the future, [see link to spreadsheet](#). See "Collation of the resource library" section for our definition of an equivalent approach. In addition, three key informants provided input based on their own equivalent approaches, e.g., IUCN Species Action Planning.

Measures of success

We expected that the evidence required to demonstrate improved conservation effectiveness and impact following the adoption of an AM framework is likely to be associated with any combination of the key results identified along our CSEI detailed theory of change. To assist project teams or organizations to track effectiveness of CS adoption, we identified a series of generic indicators (and possible methods and tools) associated with results along our theory of change. These indicators, tools and methods were

compiled during CSEI learning sessions and sourced from responses in the CSEI survey and the scientific literature, including the conservation sector and others that use AM frameworks, such as health and business.

Barriers and trade offs

Barriers and tradeoffs to the effective adoption of an AM framework were brainstormed and discussed during participant workshops to understand the conservation sector's experience with the adoption of AM frameworks. The identification of barriers is a critical first step to addressing them and supporting the uptake of frameworks such as the CS.

Collation of the resource library

A library of resources was collated to assess what evidence exists that the use of the CS (or an equivalent approach) leads to more effective and impactful projects. This included scientific publications, case studies, testimonials, organizational reports, and management plans. Resources were sourced from:

- [the Conservation Standards Resource Library](#),
- scientific literature databases,
- learning initiative participants,
- CSEI survey participants; and
- and the broader conservation community following calls for evidence.

Resources were screened for relevance against predefined criteria at abstract and full text levels, and evidence was compiled in [a 'living' spreadsheet](#). Equivalent approaches to the CS were defined as, other AM approaches designed for conservation that:

- emphasize the use of a structured iterative approach to decision making,
- use evidence to drive decision-making and emphasize the need for data collection to inform project planning, progress, and adaptation,
- make use of situation mapping to understand the project context,
- make use of theories of change to lay out assumptions; and
- advocate for the need to share lessons and learn from others.

Analysis of evidence within the resource library

Resources were evaluated by type (case study, report, audit, scientific paper, or other), and category of evidence was documented according to the categories defined below.

Table 1. Evidence categories used in the resource library and their associated definitions.

Evidence category	Definition
Anecdotal	Based on or consisting of reports or observations of usually unscientific observers.
Testimonial	Relaying the subjective truth as observed by the primary party.
Analogical	Comparison with a known situation – compares something that is known to something that is not known.
Statistical	Empirical evidence in accordance with a scientific method.
Unknown	N/A

As the categories above are not mutually exclusive (e.g., anecdotal, and testimonial evidence), for simplification purposes, data was then categorized into two mutually exclusive groups: anecdotal and empirical.

Linking evidence to the theory of change

Evidence collected and assessed from our resource library was used to investigate the assumptions along the simplified theory of change. Evidence notes have been captured in the “Result Progress” reporting function in Miradi. The adapted key is presented below. When empirical evidence existed to verify that a result had been achieved in at least one case, the result was ranked **dark green**. When anecdotal evidence existed to verify that a result had been achieved in at least one case, the result was ranked **light green**. When some reported evidence of achievement and some reported evidence to the contrary existed, the result was recorded **yellow**. When all cases reported evidence contrary to the result, it was ranked **red**. And finally, when no evidence was sourced to verify the assumption, the result ranked **gray**.

Key	
Empirical evidence exists to verify assumption	++
Anecdotal evidence exists to verify assumption	+
Contradictory evidence exists	±
Evidence exists contradicting assumption	-
No evidence was assessed to verify assumption	?

Figure 2. Key describing the type of evidence associated with each group result along the Conservation Standards Effectiveness & Impact theory of change.

Survey

An online survey, aiming to assess the conservation community’s perceptions of AM approaches was launched in October 2021. The survey was open to all members of the global conservation community (including scientists, planners, practitioners, donors, consultants, and evaluators), who were familiar with one or more conservation AM frameworks. The survey was shared across the CCNet and CMP networks, as well as more broadly to external partners and colleagues familiar with AM frameworks in conservation.

Results

Theory of change

Through this initiative we have drawn out the theory of change in an effort to understand how applying the CS or other AM approach results in improved efficiency or effectiveness.

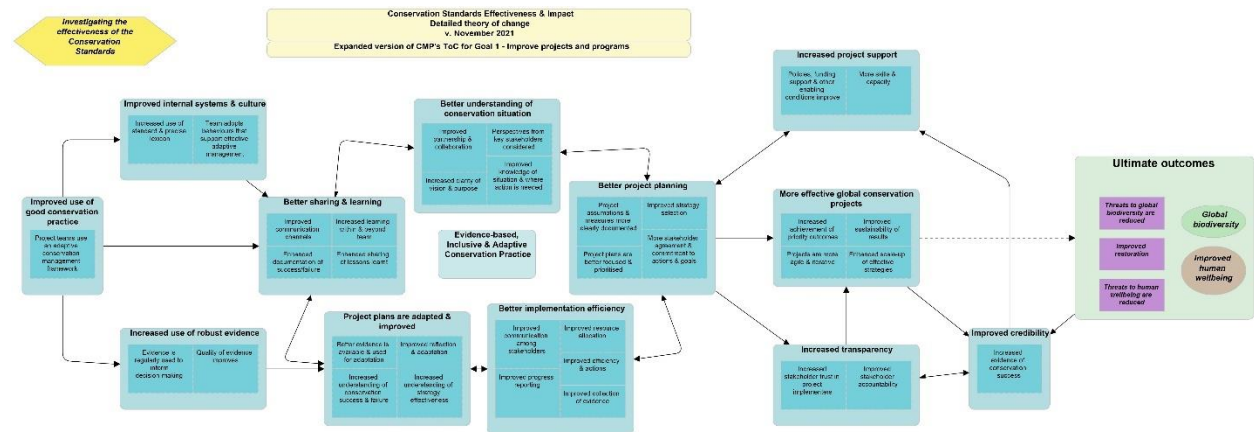


Figure 3. Detailed theory of change describing how the adoption of an adaptive conservation management approach is likely to lead to improved project effectiveness and impact. See Appendix 3 for an enlarged image.

Disclaimer: This theory of change is not exhaustive and does not include ALL the outcomes expected to follow the adoption of an AM framework in conservation (such as the CS). Similarly, one would not necessarily expect all these results to be achieved. This theory of change assumes that the steps associated with a conservation AM framework are followed according to the guidance and resources, and that teams have a collective knowledge of the framework prior to adoption. Finally, we have used bidirectional arrows to indicate that these results are not likely to be achieved sequentially as they are laid out in this model.

Measures of success

Table 2. Table of results, details, measures of success and methods for each result along the detailed theory of change. A living version of this table will remain active and is available for updates and improvements [here](#).

Results	Potential indicators & details	Possible methods & details
Project teams use an adaptive conservation management framework	<ul style="list-style-type: none"> Degree to which projects are demonstrating best practice in design and AM. Proportion of projects that have gone “full cycle” through CS Steps 4&5 and are reporting on results and adapting 	Conservation Audit Tool : to assess how well conservation projects are demonstrating best practice in design and AM, as laid out in the CS.
Increased use of standard & precise lexicon	<ul style="list-style-type: none"> Use of standard language & taxonomies (The CS establish common concepts, approaches, and 	Review funding proposals for key terms that would indicate CS use; calculate

Results	Potential indicators & details	Possible methods & details
	terminology to help practitioners better design, manage, and measure the effects of their conservation actions (CMP 2007). Ideally, this standard language should be inclusive of other major conservation communities, e.g., IUCN.)	the proportion of donor documents using a standard terminology
Team adopts behaviors that support effective adaptive management	<ul style="list-style-type: none"> • Level of organizational maturity (this may include structural, technological and culture changes). 	Conservation Capability Maturity Model : a model for assessing organizational performance and identifying potential improvements See Pomeranz et al. 2021 , describing that successful wildlife conservation requires good governance.
Evidence is regularly used to inform decision-making	<ul style="list-style-type: none"> • Degree to which documented evidence is used to inform decisions 	Evidence could be ranked according to type (see Salafsky et al. 2019).
Quality evidence improves	<ul style="list-style-type: none"> • Quantity and quality of evidence collected 	Evidence could be ranked according to type (see Salafsky et al. 2019).
Perspectives from key stakeholders considered	<ul style="list-style-type: none"> • Degree of stakeholder engagement success: <ul style="list-style-type: none"> ○ Stakeholder feeling of inclusion ○ Stakeholder opinions taken into consideration ○ Stakeholder endorsement of the review • (See Haddaway et al. 2017) 	Note: It is not enough to have a tangible benchmark such as 50% of decision-makers in the project are female. You must have intangible benchmarks such as “women feel safe to speak up” or “women feel empowered to teach others about the project”. Intangible benchmarks can be measured effectively with the right experts, such as social scientists, on your team (JEDI Final Report 2020)
Improved knowledge of situation & where action is needed	<ul style="list-style-type: none"> • Use of a situation model with cause & effect relationships 	(In AM in general and the CS in particular, the identification of specific conservation targets and their threats is best done through situation models, which can be the basis for strategy building. Only with a holistic understanding of the system under study, the conservation targets, and their threats can planning be effective (Geyer et al. 2011))
Increased clarity of vision & purpose	<ul style="list-style-type: none"> • Presence of a clear project purpose • Defined roles & responsibilities (including skills & expertise) 	Conservation Audit Tool : to assess how well conservation projects are demonstrating best practice in design and AM, as laid out in the CS.

Results	Potential indicators & details	Possible methods & details
Project assumptions & measures more clearly documented	<ul style="list-style-type: none"> • Use of a theory of change 	Results chains are a structured way of making cause and effect explicit and provide a basis for increasing understanding of why some conservation strategies will be more effective and efficient in achieving the stated objectives than others (Margoluis et al. 2013).
Improved strategy selection	<ul style="list-style-type: none"> • Use of a tool for strategy selection 	Effective planning identifies the need for action and where in the system action can be taken. Generally, conservation strategies aim to abate threats or enhance viability of targets (i.e., restoration of key ecological attributes) (Geyer et al. 2011).
More stakeholder agreement & commitment to actions & goals	<ul style="list-style-type: none"> • Measure of agreement among stakeholders (Better buy in and commitment to the work by staff, partners, government, and key stakeholders. This may also lead to increased involvement of the government and supportive policy changes). 	Bragantini & Caccamese (2015) present a methodology for measuring the level of stakeholder “agreement”
Improved collection of evidence	<ul style="list-style-type: none"> • Use of a quality M&E plan (with adequate measures of success) 	
Improved communication among stakeholders	<ul style="list-style-type: none"> • Stakeholder ratings of outreach and communications 	Survey and/or self-assessment leading to a scorecard
Improved progress reporting	<ul style="list-style-type: none"> • Donor/manager/team satisfaction of progress reports 	Rating scales for progress reporting
Increased understanding of strategy effectiveness	<ul style="list-style-type: none"> • Measure of strategy effectiveness (see Mahajan et al. 2019) 	The Management Effectiveness Tracking Tool is a globally used system developed to assess protected area management effectiveness. Similarly, Cambridge Conservation Forum’s project evaluation tool helps practitioners design and evaluate conservation projects.
Increased understanding of conservation success & failure	<ul style="list-style-type: none"> • Extent and characteristics of success and failure in project design, implementation, evaluation, and adaptation. 	See Catalano et al. 2019
Better evidence is available for adaptation	<ul style="list-style-type: none"> • Degree to which documented evidence is used to inform decisions 	Evidence could be ranked according to type (see Salafsky et al. 2019).

Results	Potential indicators & details	Possible methods & details
Improved communication channels	<ul style="list-style-type: none"> • Proportion of stakeholder types that confirm communication channels are appropriate (e.g., correct format, frequency, accessibility, and language) 	Survey responses across all stakeholder types (e.g., field officers, community leaders, donors, fundraising staff, project partners etc.)
Increased learning within & beyond team	<ul style="list-style-type: none"> • Measure of documented lessons learnt 	By deliberately including learning in the conservation planning process, future conservation decisions are likely to be more effective, as uncertainty may be reduced.
Enhanced sharing of lessons learnt	<ul style="list-style-type: none"> • # of webinars, conference presentations, meetings with government etc. where lessons were formally and appropriately shared 	Consider the audience and format (disaggregated by # of people in attendance)
Enhanced documentation of success/failure	<ul style="list-style-type: none"> • # of peer reviewed publications / reports describing conservation evidence 	
Policies, funding & other enabling conditions improve	<ul style="list-style-type: none"> • Allocated funding for conservation project. • Partnership in place with a government or traditional authority 	
More skills & capacity	<ul style="list-style-type: none"> • Staff retention/turnover • Change in quantity of roles/expertise lacking 	
Increased achievement of priority outcomes	<ul style="list-style-type: none"> • Progress against goals & objectives; • Proportion of goals & objectives met; • Return on investment 	Outcomes and impact on a large scale take up (about 10 years), so commitment is important. Importantly, goals and objectives are developed based on the team's perception of what can be achieved, and what might be considered a successful outcome. Consider that defined goals and objectives are subjective and can be overly ambitious. Evidence to suggest attainment of long-term goals exists.
Improved sustainability of results	<ul style="list-style-type: none"> • Sustainability of effort 	Organizational commitment
Enhanced scale-up of effective strategies	<ul style="list-style-type: none"> • Degree of increasing scale based on primary success 	Multiplying successful strategies
Projects are more agile & iterative	<ul style="list-style-type: none"> • # of annual iterations towards completion of a project; • Speed of response 	Increased agility or speed of response. Agile project management is an iterative approach to delivering a project throughout its life cycle. Iterative or agile life cycles are

Results	Potential indicators & details	Possible methods & details
		<p>composed of several iterations or incremental steps towards the completion of a project. Iterative approaches are frequently used in software development projects to promote velocity and adaptability since the benefit of iteration is that you can adjust as you go along rather than following a linear path. One of the aims of an agile or iterative approach is to release benefits throughout the process rather than only at the end. At the core, agile projects should exhibit central values and behaviors of trust, flexibility, empowerment, and collaboration.</p>
Increased stakeholder trust in project implementers	<ul style="list-style-type: none"> • % of participants who report increased trust in project implementation 	Survey responses across external stakeholders
Improved stakeholder accountability	<ul style="list-style-type: none"> • Measure of organizational transparency (Upward accountability refers to reporting to funders of conservation action on how resources were deployed, and downward accountability refers to reporting to the public or other stakeholders on how actions to protect a public good were intended to improve that public good (Ebrahim 2003)). 	For methods see: Rawlins 2009, this paper focuses on developing a stakeholder measurement of organizational transparency in the business sector.
Increased evidence of conservation success	<ul style="list-style-type: none"> • # of project datasets reporting an achievement of conservation impact • Proportion of goals that have been met 	

Barriers & tradeoffs

A range of barriers and tradeoffs to the use of a conservation AM framework, such as the CS were captured during participant workshops. These included topics such as:

- **Capacity and time constraints** - the lack of skills, knowledge, and coach capacity to facilitate the adoption (and institutionalization) of a new framework was recognized as a significant barrier. There may be a large financial cost of implementing the CS or an equivalent framework. Participants acknowledged that there is a low likelihood of CS cycle completion, i.e., many projects do not use evidence to analyze, adapt and learn, which may also be largely attributed to time constraints and the short duration of funding cycles. This challenge is shared across the conservation sector (Sanchirico et al. 2014). Additionally, staff turnover can cause impeded progress.

- **Lack of buy in** – internal staff and governing bodies are not supportive of the adoption of the framework, resulting in impeded progress and poor adoption. Leadership support is thought to heavily contribute to the success of adoption.
- **Complexity** – confusion over terminology. Developing results chains has been described by some users as difficult. Results chains do not necessarily represent the truth, and teams can find it difficult to remain focused on results, rather than actions. Finding the right balance of detail for different audiences is challenging. Research into viability and threat ranking may seem overwhelming to some teams.
- **Lack of evidence / data** – inadequate monitoring and evaluation systems, tools, or expertise to adequately collect evidence to inform AM.
- **Inadequate adoption** – any combination of the barriers described above (or others) could lead to inadequate adoption and inadequate use of the tools.

Evidence of improved efficiency or effectiveness

A simplified version of the theory of change was developed, which aligns with the group box results in the detailed version. Evidence collated in the evidence library was assessed for each result along the theory of change. Evidence results are described in detail in Table 3.

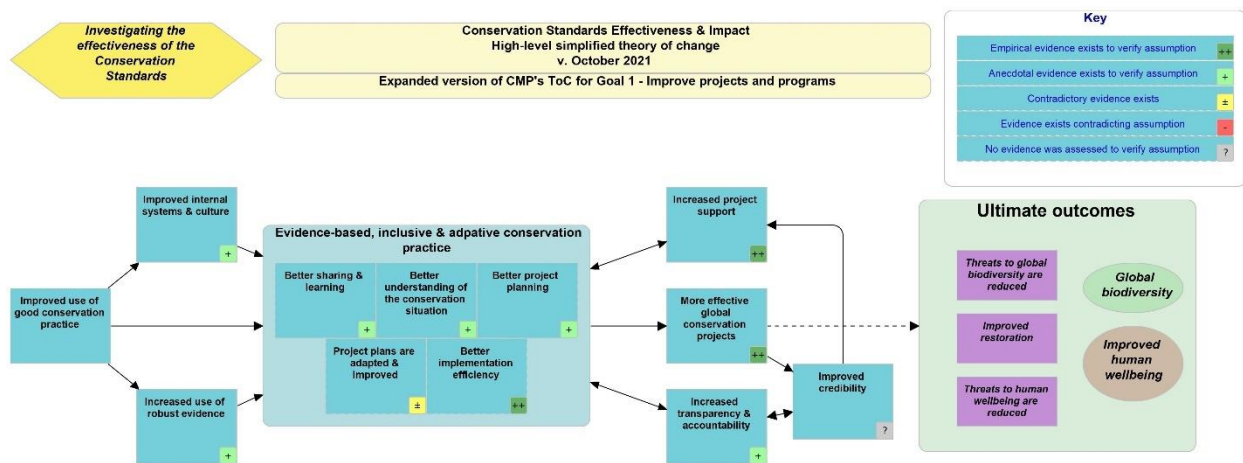


Figure 4. Simplified Conservation Standards Effectiveness & Impact theory of change with evidence scorecard and key describing the type of evidence associated with each result. [See Appendix 4](#) for an enlarged image.

Table 3. Table of evidence for each group result along the simplified theory of change. This table presents evidence that the use of evidence-based, inclusive & adaptive management conservation frameworks leads to the results presented below.

Group Result	Evidence status	Description of evidence
Improved internal systems & culture	Anecdotal evidence exists to verify assumption	<ul style="list-style-type: none"> • Redford et al. 2015: We found strong support for the contention that the OS brings stakeholders to the table and provides a common language for improving conservation decision-making. • Stewart 2016: Use of CS provides a mechanism to improve organizational performance, well beyond its immediate aim of improving conservation projects. However, this is not widely recognized. • Pierson 2018: The Wind Energy Team has continued to meet regularly and uses the tools to do its planning work. In addition, participants went on to apply the methods to new and existing projects in development.
Increased use of robust evidence	Anecdotal evidence exists to verify assumption	<ul style="list-style-type: none"> • Grantham et al. 2020: The knowledge gained through this monitoring was used to make decisions about the nature of future conservation investments in the region, and to provide lessons for other regions.
Better understanding of conservation situation	Anecdotal evidence exists to verify assumption	<ul style="list-style-type: none"> • Douthwaite et al. 2020: The use of a theory of change can be used to help stakeholders in agricultural research for development projects collectively agree on problems and visions of success. • Pierson 2018: Use of CS improves shared understanding of conservation situation. Project team members realized that saving a specific bat species involves more than managing the specific population or roost, but instead needs to consider the wider system in which the bats are living.
Better project planning	Anecdotal evidence exists	<ul style="list-style-type: none"> • Relton & Cochrane 2020: Following the adoption of the CS, 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. • Pinteá et al. 2016: Planning improved because of improved conceptualization and inclusivity. • Redford et al. 2015: We found strong support for the contention that the OS brings stakeholders to the table and provides a common language for improving conservation decision-making. • Margoluis et al. 2013: Results chains help teams make their assumptions behind an action explicit and positions the team to develop relevant objectives and indicators to monitor and evaluate whether their actions are having the intended impact. • Prinsen & Nijhof 2015: Practitioners in several Dutch NGO aid agencies valued the ToC approach, especially in the design phase. ToC better engaged practitioners and stakeholders (qualitative, anecdotal) • Douthwaite et al. 2020: This paper argues that the use of a theory of change helps stakeholders feel greater ownership for their project, motivation to achieve outcomes, and understanding of how to do so. However, the dynamic is damaged if projects are pushed to be too specific too early about the outcomes for which they are to be held accountable. This is most likely to happen when system response to project intervention is uncertain, as opposed to projects that work with existing pathways and partnerships where the role of research is well established. The paper has shown that the participatory use of theory of change can help harness complexity as well as support planning and M&E, with some caveats. • Schwartz et al. 2012: A graphical conceptual project model is then used to frame a process for ranking key threats to primary conservation targets, evaluating contributing factors, and identifying strategies that could best

Group Result	Evidence status	Description of evidence
		<p>achieve management goals for each target. These steps foster prioritization of strategies based on projected impact toward achieving conservation goals. The CS helps resource managers and stakeholders to brainstorm and then prioritize potential management actions. This situation analysis leads to a threats assessment that helps users to prioritize strategies.</p>
Better implementation efficiency	Empirical evidence exists to verify assumption	<ul style="list-style-type: none"> • Redford et al. 2015: We found support for the fact that the CS improves practitioners' capacity to deploy effective conservation actions. A strong majority of survey respondent report average to significant positive contributions of the CS toward elements of good project management. • Redford et al. 2015: Over 90% of web respondents felt that the CS contributed to developing monitoring plans. • Relton & Cochrane 2020: Since the adoption of the CS, roughly 50% of active projects are reporting on progress and impacts and have the most current information accessible in a standardized system (MiradiShare).
Projects plans are adapted & improved	Contradictory evidence exists	<ul style="list-style-type: none"> • Redford et al. 2015: Advancing to this part of the CS cycle remains a challenge, and nearly half of all respondents report not starting this stage of the process in their projects. • Eshoo et al. 2018: Illustrate the value of using a theory of change and monitoring results to inform regular review and AM (to evaluate and improve strategy effectiveness/success). • Margoluis et al. 2013: By using results chains, the conservation community can learn, adapt, and improve at a faster pace and consequently, better address the ongoing threats to species, habitats, and ecosystems. • Redford et al. 2018: A primary objective of the CS is to assist practitioners to achieve full cycle AM to better integrate learning into improving the effectiveness and efficiency of actions. However, we find that most practitioners have not yet achieved cycle completion for their projects. Respondents cited time as a primary limiting constraint on getting further on the AM cycle and that they will use the OS again in the future. • EMWG 2010: Development and implementation of an effectiveness measures framework can help agencies in these trying fiscal times in the following ways: Provide a means to evaluate conservation actions so that successful activities/programs can be continued and communicated, and less successful ones improved or abandoned.
Better sharing & learning	Anecdotal evidence exists to verify assumption	<ul style="list-style-type: none"> • Redford et al. 2015: We found mixed evidence for the CS to increase organizational capacity to share lessons across projects. Even though fewer than half of survey respondents have formally closed the AM loop, there remains a strong contingent of practitioners who believe that the CS improves cross-project learning as well as cross-organizational learning. • Salafsky et al. 2008: If project teams want to describe and share their work and learn from one another, they need a standard and precise lexicon to specifically describe each node along the theory of change. We believe that widespread adoption of these classifications will help practitioners more systematically identify threats and appropriate actions, managers to more efficiently set priorities, and allocate resources, and most important facilitate cross project learning and the development of a systematic science of conservation. • Prinsen & Nijhof 2015: During a review session of the ToC approach with senior staff members of the DCR, we concluded that ToCs could effectively be used to share knowledge at a local (programme) level in order to identify knowledge gaps and formulate learning questions.

Group Result	Evidence status	Description of evidence
		<ul style="list-style-type: none"> • Pierson 2018: Sharing knowledge and expertise across the programmatic structure was a huge lift to organizational culture by improving communication, demonstrating respect for staff expertise, and identifying new opportunities for staff collaboration within the organization.
Increased project support	Anecdotal evidence exists to verify assumption	<ul style="list-style-type: none"> • Relton & Cochrane 2020: 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. Several 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. • Salafsky et al. 2019: Our hope is that by understanding and using evidence better, conservation can both become more effective and attract increased support from society. If we use evidence to show increased effectiveness, we will be able to attract increased support for conservation from society. • Raboy et al. 2020: Based on our scoring, funded proposals included more of the practices consistent with the CS than non-funded proposals, scoring an average of 0.59 points higher. This difference, though small in magnitude, was statistically significant (p=0.036). Three criteria: Biodiversity goal/s, Outcome-based Objectives and Stakeholder Engagement were significantly associated with funding success. Also, proposals submitted by CMP member organizations scored significantly higher than non-CMP members (p=0.015). • Pierson 2018: Project team members developed results chains with phased timelines and objectives that became the basis for funding proposals for international species conservation work. It's rare that a project can be completed by a single funder. The results chains show the necessary steps required to get to a desired conservation result. An initial or intermediate action that needs funding may not appear as urgent or high-profile as later actions, but without the funding for all the steps, the work can't progress and succeed. Also, some of BCI's major funders are open standards proponents, including Disney Conservation Fund and USFWS International Programs.
More effective global conservation projects	Empirical evidence exists to verify assumption	<ul style="list-style-type: none"> • O'Connor & McShane 2013: We found that where design of a program is strong (good theory of change and high relevance), it is more likely that outcomes and impact will be high. It was also recognized that outcomes and impact take time to observe, typically around 10 years – so commitment to WWF efforts are important if the results are to be seen and evidenced. • Margoluis et al. 2013: By using results chains, the conservation community can learn, adapt, and improve at a faster pace and consequently, better address the ongoing threats to species, habitats, and ecosystems. • Lees et al. 2013: Our study provides empirical evidence that science-based, participatory approaches to planning can create a turning point for threatened species by supporting stakeholders to transition quickly to more effective ways of working together. • de Áreas Silvestres Protegidas 2017: The National Forestry Corporation, through its management of Protected Wild Areas, began in 2015 a process to strengthen AM in the System of Protected Areas of the State of Chile, under its administration. By using common language (based on open standards), capacity building, continuous learning, linking with strategic partners and the development of instruments and support techniques for

Group Result	Evidence status	Description of evidence
		effective management, processes have been developed that aim to improve management effectiveness, management reportability and organizational functionality, areas that have generated a substantial advance in the management of protected areas in Chile.
Increased transparency	Anecdotal evidence exists to verify assumption	<ul style="list-style-type: none"> • Schwartz et al. 2017: This process fosters transparency regarding perceived causal relationships between strategies and outcomes. • Pierson 2018: The CS creates a framework for measuring the impact of our conservation work. Both conceptual diagrams and results chains developed in the CS can indicate where there are knowledge gaps and needs for science as they directly relate to conservation targets and action. It demonstrates the relationship between science and conservation and provides metrics for evaluating progress, which lends accountability and rigor to the work we do.
Improved credibility	No evidence was assessed to verify this assumption	
Ultimate outcomes	Empirical evidence exists to verify assumption	<ul style="list-style-type: none"> • Redford et al. 2015: We found no documented baseline or counterfactual studies that provide evidence that use of the OS, or any other specific AM framework, has led to improved conservation status. The available evidence of reported positive biodiversity impacts driven by OS-guided practices is all correlational and/or anecdotal. Proof of impact can only be measured indirectly through the actions of practitioners and organizations who deploy the CS in their project management. The indirect evidence of a positive impact of the CS on biodiversity outcomes is strong, but circumstantial, anecdotal, and based on the strong convictions of CS practitioners. • Lees et al. 2013: Our results show that post planning, the aggregate rate of decline to extinction was slowed significantly by year 10 and reversed by year 15.

Much of the available evidence (especially that linked directly to the CS) assesses how the use of a theory of change impacts project efficiency, effectiveness, and impact. We found a limited amount of anecdotal evidence describing how the use of an AM framework in conservation has improved internal cultures and systems. Much of the anecdotal evidence linked specifically to improvements in project planning. Anecdotal evidence describes how the use of an AM framework improves project planning providing that teams are not pushed to be too specific about the outcomes they are committing to achieve too early in the planning process, especially if large amounts of uncertainty exist. Limited empirical evidence (Lees et al. 2013) suggests that science-based participatory approaches to planning (not specifically AM) allows stakeholders to be more agile and effective. Additionally, empirical evidence (again Lees et al. 2013) reveals that science based-participatory approaches to planning significantly slowed the rate of decline to extinction of threatened species.

Survey Results

The CSEI survey was completed by 33 respondents representing at least 23 organizations/individuals. Most (67%) respondents were associated with NGOs, with a small representation with research, donor, for profit, independent, social enterprise, and government affiliations. Most respondents worked in strategic planning or M&E, with others involved in project management, organizational senior management, research, networking, support and two respondents worked in field implementation. Most respondents were familiar with or used the CS. Other favored approaches included: Systematic Conservation Planning, Healthy Country Planning, IUCN approaches, Project Management for Wildlife Conservation (WildTeam), Structured Decision Making, and Conservation by Design.

When assessed on a scale from “Greatly enables” to “Greatly hinders”, most respondents (60.6% and 48.5% respectively) declared that AM approaches greatly enable “better understanding of the situation” and “better project planning”. Most (45.5%) respondents felt that AM only somewhat enables increased funding and capacity. Most respondents felt that AM will enable “greater effectiveness of implementation”, “increased transparency & accountability” and “increased credibility” to some extent.

Most people (87%) who responded to the survey, when asked the question “How effective do you think projects /programs using an AM approach are, as compared with those that have not used such an approach?” said that they would be more effective, with less than 15% stating that the projects or programs would likely be the same. The reasons they gave for increased effectiveness included:

- Better planning,
- Improved understanding of the context/situation,
- Better implementation; and
- More likely to have evidence to inform decision making.

When asked “What evidence do you have to show any increase or decrease in efficiency, effectiveness, or impact from applying AM approaches?”, respondents provided the responses in Table 4 with technical reports and scientific papers said to have the most rigorous ‘quantitative’ data.

Table 4. Percentage of evidence type identified by survey respondents, when asked: “What type of evidence do you have to show any increase or decrease in efficiency, effectiveness, or impact from applying AM approaches?”.

Type of evidence	% of respondents
Evaluation Report	37.9
Case study	27.6
None	27.6
Audit Report	17.2
Technical report	17.2
Scientific paper	17.2
Other	17.2

Some survey respondents offered to share evidence to further advance the learning in this initiative; these offers were taken up where possible. In addition, the survey provided insights about tools in use to assess or monitor their AM processes.

Discussion

Through this initiative, we have an increased understanding of the positive outcomes that may result following the successful adoption of an evidence-based, inclusive AM framework. Additionally, some of the measures and tools for monitoring these outcomes have been documented and described. We recognize that our evidence library is not exhaustive, and more effort may be required to source additional existing evidence, especially for other (non-CS) frameworks or AM in conservation more generally. Additionally, we recognize that all cases in conservation differ according to the biological, social, economic, cultural, political, and institutional context, and evidence in one case does not equate to verification of the assumptions along our theory of change. We acknowledge the need for a more robust research study that analyzes a scientifically adequate sample size of projects. Although limited empirical evidence does exist to suggest that evidence-based project planning leads to more increased effectiveness and impact in conservation, this evidence was not necessarily affiliated with an AM framework, such as the CS (but rather to the IUCN Species Conservation Planning framework).

Many of the barriers to CS adoption listed in the Results are being tackled through other CMP Learning Initiatives, for example the *Easy Conservation Standards* initiative is working to help teams get started with the CS by providing guidance that accelerates strategy development. Additionally, the *Conservation Audits* Working Group has created the Conservation Audit Tool, which helps teams address inadequate adoption by assessing how well their projects are demonstrating best practice in design and AM, as laid out in the CS. We recognize the value of flexibility in the use of these frameworks given the organizational and conservation context, and (like Schwartz *et al.* (2017)) advocate for conservation teams to integrate complementary tools associated with other conservation frameworks when it may be beneficial.

In addition to the barriers affecting the adoption of an AM framework in conservation there are a host of additional external barriers that may arise during a project, which may impede conservation success, unrelated to the project team itself and how well an AM framework has been implemented. These barriers include environmental (e.g., climatic, or ecological disasters), political instability and conflict (e.g., war), lack of law and order (e.g., poor governance, lack of enforcement, poor law), and disease (e.g., pandemics). These unpredictable external barriers to success can be overlooked if a large enough sample size of case study evidence is available and if the research design is long-term and robust. For this reason, we reiterate the need to build the evidence library and enhance the sample size of case studies documenting both conservation success and failure following the adoption of an AM framework.

The evidence-based connected to the effectiveness and efficiency of the CS and other AM conservation frameworks is sparse and patchy, but gradually growing. Following CMP's push to document case studies, we have some anecdotal evidence describing how the CS leads to improved process, effectiveness, and management of conservation projects. We recognize the value of anecdotal data and continue to rely on personal observations and testimonies to build our evidence-base. However, considering the most-commonly identified barriers to adoption, such as the time and financial investment associated with transitioning to the CS, there is an urgency to collect objective, robust, empirical evidence to prove that

the use of the CS (or equivalent) is likely to lead to increased conservation impact. Considering the pressing and mounting threats to biodiversity, the conservation community needs to ensure that we are working efficiently and effectively given our limited resources.

Conclusion

The limited empirical evidence associated with the efficiency, effectiveness, and impact of the use of conservation AM frameworks may be attributed to the limited opportunities to replicate control and treatment projects, as different ecological and social conditions will exist in different locations, and project success may be influenced by a range of contrasting external impacts, making it challenging to create a controlled experimental design. These challenges could be overcome through the establishment of a more rigorous medium- and long-term, multi-organizational comparative research study analyzing a large sample of conservation projects over a long temporal scale ([See Annex 1](#)).

During this initiative we have collated and assessed evidence to test the assumption that the adoption of an AM framework in conservation, such as the CS, leads to improved project success (in the form of organizational systems and culture, the use of evidence, project planning, efficiency, ability to adapt, sharing of lessons, effectiveness, accountability, and the ability to source resources required to sustain conservation efforts). However, there is still some way to go to fully verify the assumption that AM improves efficiency and effectiveness in conservation. As evidence directly associated with conservation impact (status of target species and habitats) was beyond the scope of this year's initiative, we hope to build upon this evidence base, focusing specifically on conservation impact in the future ([See Annex 2](#)). Finally, the success of AM frameworks in conservation depends largely on the design, development and implementation of an adequately funded monitoring and research plan. AM approaches require "good" and robust data; thus, when working in large, complex socio-ecological systems where uncertainty is high, there may be a need to slow down and to take an incremental and iterative approach coupled with close monitoring, especially when irreversible and irrevocable consequences are possible.

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Annex 1. Draft Research Concept

*Click on the image to be linked to the document.



Conservation Measures Partnership

Adaptive Management in Biodiversity Conservation: does it increase efficiency, effectiveness, and impact?

A concept submitted to the Conservation Measures Partnership by the Conservation Standards Effectiveness Learning Group

NB: A full proposal would be submitted to CMP and other donors/interested parties for support.

Introduction

Conservation organizations are often asked by senior leaders and donors for evidence that applying adaptive management (AM) approaches, such as the Conservation Standards, results in more effective and efficient conservation projects. While there have been past efforts to conduct evaluations (e.g., the CMP Evaluation, the FOS evaluation) and to explore what evidence exists (e.g., CMP-Moore's *Making the Business Case Learning Initiative* and *Conservation Standards Effectiveness & Impact Learning Initiative*), the evidence is still limited and often based on subjective or anecdotal information. We propose to design and implement a more rigorous medium- and long-term research project to start tackling this deficit.


Background and rationale

Adaptive management is a systematic approach used across a host of sectors to improve management practices by implementing plans in ways that maximize opportunities to learn from experience. For the purpose of this project, our definition of adaptive management mirrors that of Shea *et al.* (2014): "Adaptive management is a structured, iterative, decision-making approach for dynamic problems that acknowledges uncertainty and aims to reduce this uncertainty in order to improve outcomes."

We aim to undertake research that will test certain assumptions about applying adaptive management approaches in conservation, e.g., the CMP Conservation Standards. First and foremost, we will test the assumption that adaptive management increases efficiency and effectiveness leading to greater positive and sustained impact. Also, we will consider and test other assumptions such as that applying adaptive management lessens the risk of selecting the wrong 'solutions' and optimizes the use of resources and time.

Other sectors have also wrestled with "proof of concept" to advocate for adaptive leadership, and with what qualifies as acceptable 'evidence' to assess the effectiveness of adaptive management, including sustainable development (Hernandez *et al.* 2019), health (Shea *et al.* 2014), and military (Cojocar 2012)

1

Conservation Standards Effectiveness & Impact 

Annex 2. Draft Scope of Work: Conservation Standards Effectiveness Initiative

*Click on the image to be linked to the document.

Conservation Measures Partnership
Conservation Standards Effectiveness Initiative and Working Group
2022 Scope of Work
(Based largely on results from 2021 CSEI Learning Initiative and 2020-21 Audits Learning Initiative)

INTRODUCTION

In 2021, with the support of the Gordon and Betty Moore Foundation, the Conservation Measures Partnership (CMP) undertook the Conservation Standards Effectiveness & Impact Learning Initiative (CSEI), through which we sought evidence that applying an adaptive management approach strengthens the efficiency and effectiveness of conservation endeavors. During this same period, the Audits Learning Initiative and Working Group set ‘pause’ for several months as CMP encouraged its members to undertake trial audits in their own organizations.

This document provides a Scope of Work for both a continuation of the CSEI learning initiative and a revival of aspects of the Audits Working Group combining these two efforts under a new Initiative and Working Group - “Conservation Standards Effectiveness & Impact Initiative: Improving the Practice of Adaptive Management Approaches”. This new initiative and working group would involve strengthening the use of audits (and Audit Tools) as well undertaking research over several years to create a stronger evidence base for the use of adaptive management approaches with a focus on the Conservation Standards. In addition, this work would continue to build evidence of our assumptions along the ‘theory of change’ developed during the 2021 initiative that underpin the Conservation Standards and other similar approaches. During the 2021 initiative we identified some indicators, tools and methods for assessing conservation efficiency and effectiveness and in 2022 we intend to expand upon this toolset and investigate tool(s) for assessing large-scale conservation impact, potentially with Odd Industries as a partner. *[Odd Industries is an ethically-driven industrial artificial intelligence (IAI) company, using the most advanced technologies to help revert the environmental crises. Of particular importance for this initiative, Odd Industries have developed Lemu: an atlas of the biosphere, which combines multiple geospatial data sources to measure and track Earth’s ecosystems. [Find out more here.](#)]*

While the CSEI initiative made important progress towards answering the questions around ‘proof of concept’ with adaptive management approaches (see CSEI Report 2021), there continue to be important gaps in the evidence and learning around the benefits of these approaches in terms of increased efficiency, effectiveness and impact in conservation. During the research project (see Concept Note) we will explore how other sectors answer the question of using adaptive management and leadership approaches to deliver the best outcomes.

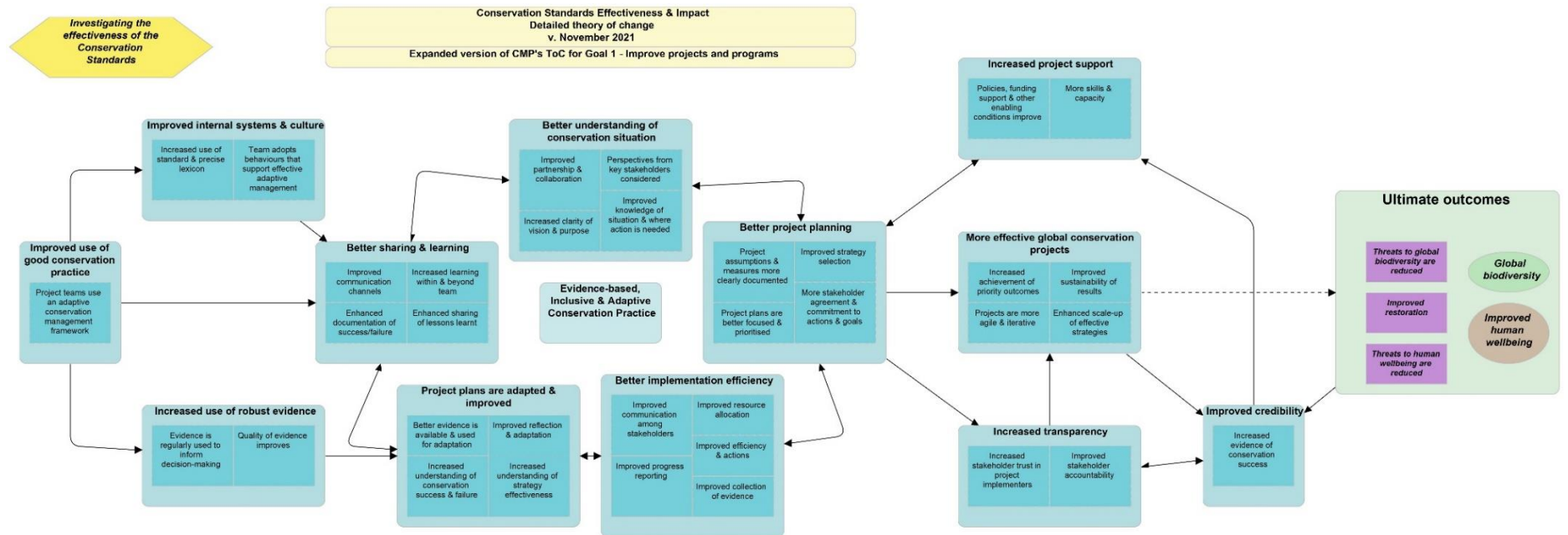
The priorities for going forward are outlined below; more detail will be provided as we develop the research concept note into a full proposal in early 2022.

PRIORITIES FOR CONSERVATION STANDARDS EFFECTIVENESS INITIATIVE 2022:

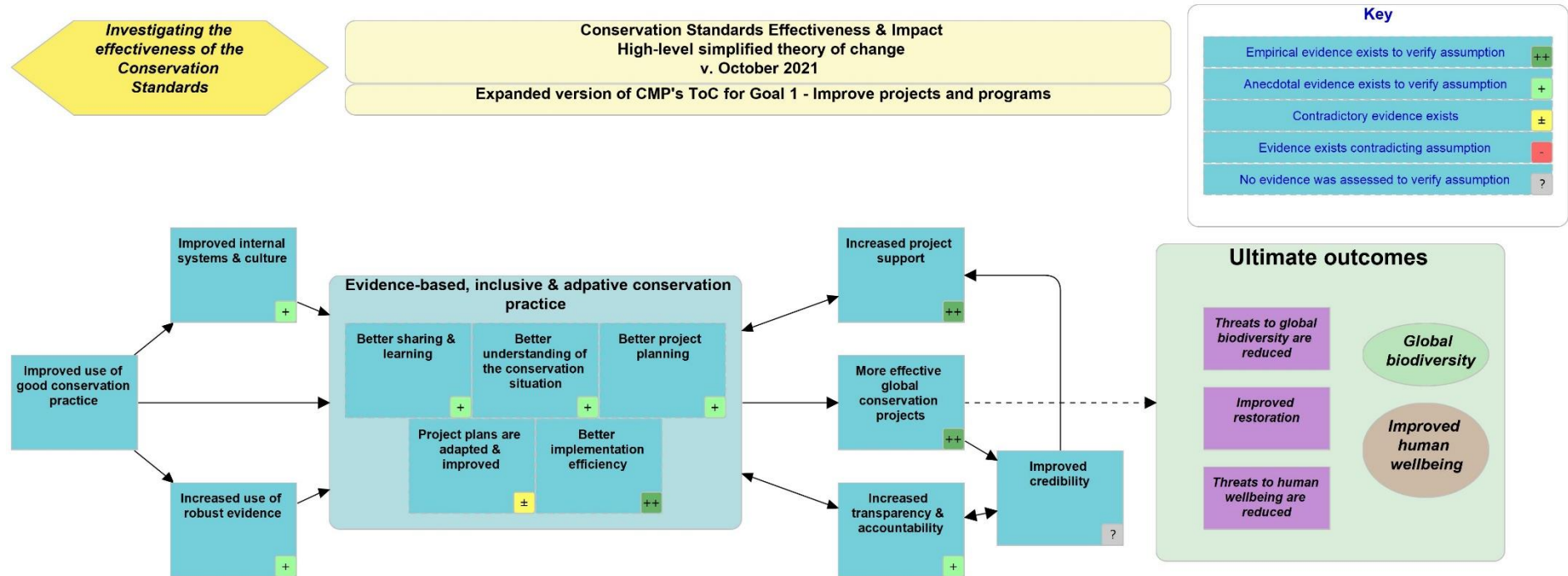
This Scope of Work (with \$15k additional funds)	
Research	<ul style="list-style-type: none"> Develop the concept note into a full proposal to conduct a long-term research project centered on the evidence and learning about application of adaptive management approaches in conservation Seek funding for implementation of the full research projects Advance at least one approach outlined in the research concept note
Learning	<ul style="list-style-type: none"> Undertake key research topics with funds and ‘staffing’ that may be available in advance of the larger proposal funding (e.g. explore other sectors, begin to fill gaps, create a systematic way to source information beyond the CMP/CCNet community)

CMP Conservation Standards Effectiveness 1 Scope of Work, 2022

Annex 3. Enlarged image of the CSEI detailed theory of change



Annex 4. Enlarged image of the CSEI simplified theory of change with evidence descriptors



Annex 5. Additional information supporting learning

1. [List of similar or equivalent conservation planning or adaptive management approaches](#)
2. [Recording of the Achieving Collective Impact video overview of this learning initiative](#)
3. [Conservation Standards Effectiveness & Impact initiative Mural Board](#)
4. [Achieving Collective Impact Miro Board Breakout 1](#)
5. [Achieving Collective Impact Miro Board Breakout 2](#)
6. [Conservation Standards Effectiveness & Impact Evidence Library](#)

Annex 6. CSEI Survey Questions

*Click on the image to be linked to the document.

Conservation Standards Effectiveness Learning Initiative

This initiative, supported by the Conservation Measures Partnership (CMP) and the Moore Foundation, focuses on understanding the use and value of adaptive management approaches in conservation, with an emphasis on CMP's Conservation Standards. It seeks to collect evidence on whether applying these approaches leads to more efficient and effective conservation efforts and impact.

Estimated time: 10-15 minutes

Question Title

1. Your Name (Optional)

Question Title

2. Your organization or institution (Optional)

Question Title

* 3. Type of organization or institution

Research/Academic

Non governmental organization

Government organization

For profit business

Independent

Donor

Other (please specify)

Question Title

4. Your email so we may follow up (Optional)

Question Title