

Survey Report: Products to Support the Open Standards

NOVEMBER 2019 - Dr. Erica Cochrane, International Crane Foundation



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List of Acronyms and Definitions

Acronyms:

CCNet	Conservation Coaches Network
CMP	Conservation Measures Partnership
FOS	Foundations of Success
OS	The Open Standards for the Practice of Conservation or the Open Standards*
RDI	FOS's Research Development and Innovation strategy
COMMS	FOS's Communications and Outreach strategy
PPT	PowerPoint Presentation Templates

Definitions:

Product = any “thing” that fills a gap in the understanding, use, and/or adoption of the OS

Format = how the “thing” is packaged

Delivery = how audiences get the “thing”

*We use OS to include any of these three project management processes: CMP's Open Standards for the Practice of Conservation, The Nature Conservancy's Conservation Action Planning, and WWF's Project and Programme Standards



Purpose

FOS employs multiple strategies to support and expand the use of the Open Standards for the Practice of Conservation (OS). As part of their regular organizational adaptive process, FOS tracks progress towards goals by measuring the achievement of objectives. They also address other information needs to reduce uncertainty about if and how each strategy is contributing to desired outcomes.

Two core strategies that FOS employs are Research, Design and Innovation (RDI) and Communications and Outreach (COMMS). This assessment provides information to help FOS prioritize and improve their efforts under these two strategies related to product development and delivery. FOS's theory of change for the RDI and COMMS strategies is depicted in Figure 1. The objectives and other information needs are shown in the diagram. Specifically, this assessment tracked progress on RDI Objective 3: There is evidence that target audiences are widely using/sharing FOS (co)authored materials. The assessment also addresses two information needs that may explain our progress towards this objective: What are the key products needed? and What is the best way to reach key audiences?

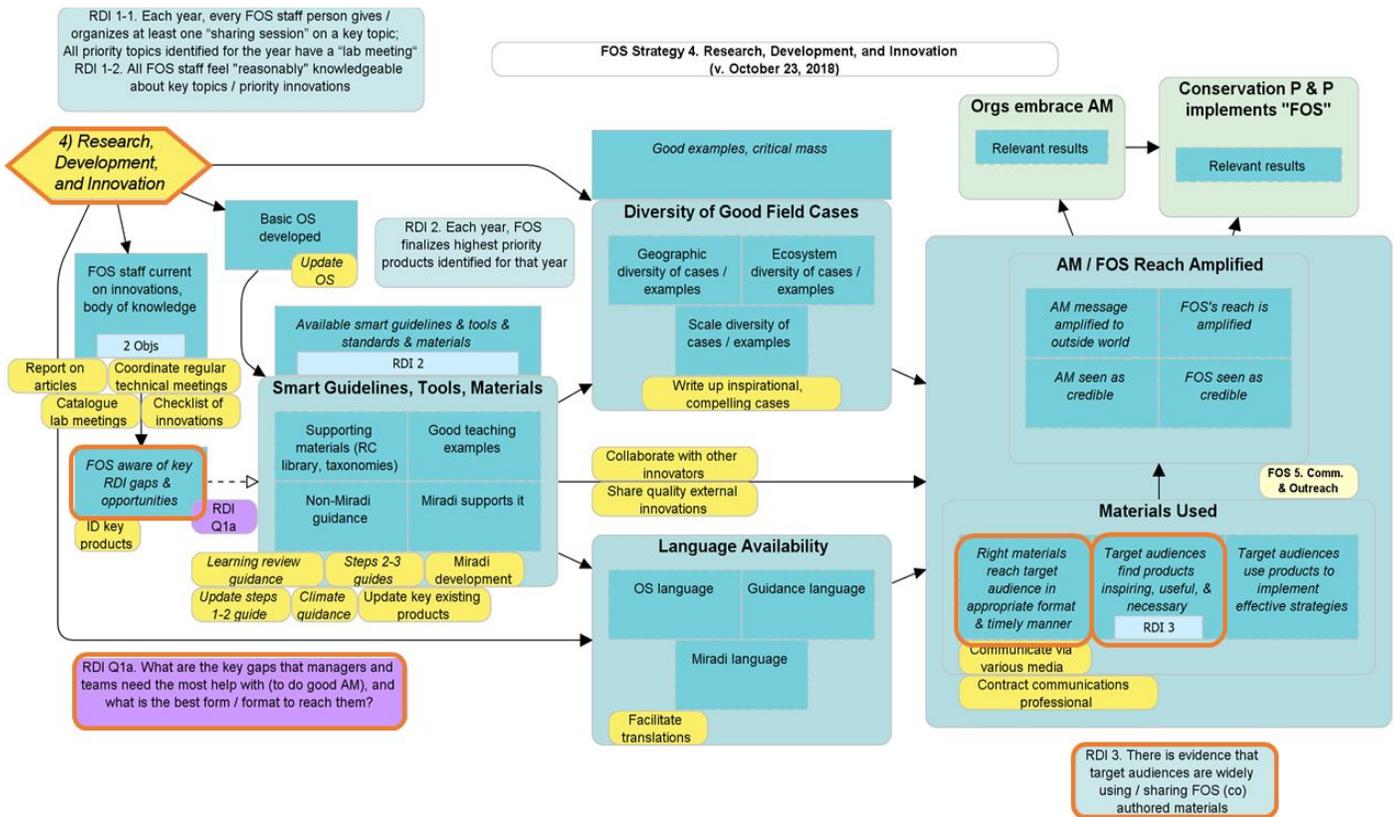


Figure 1. FOS theory of change for RDI and COMMS strategies

This assessment is also relevant to similar efforts by the Conservation Measures Partnership (CMP) and the Conservation Coaches Network (CCNet) to develop, improve and disseminate products that support the OS. Highlighted in Figure 2 are two CMP strategies under CMP’s Goal 1 for which product dissemination, improvement and develop are central; *1B. Curate existing guidance and tools* and *1C. Develop new guidance and tools*. Products are also important to other CMP strategies. For example, *1D. Share Good Examples* may involve developing and disseminating case studies and *1E. Develop OS online courses* may involve developing a set of do-it-yourself slide decks. Similarly, in CCNet’s most recent strategic plan, one of five core objectives, *Objective 4. Maintain and Improve Tools and Materials* is all about having the right products available to support coaches.

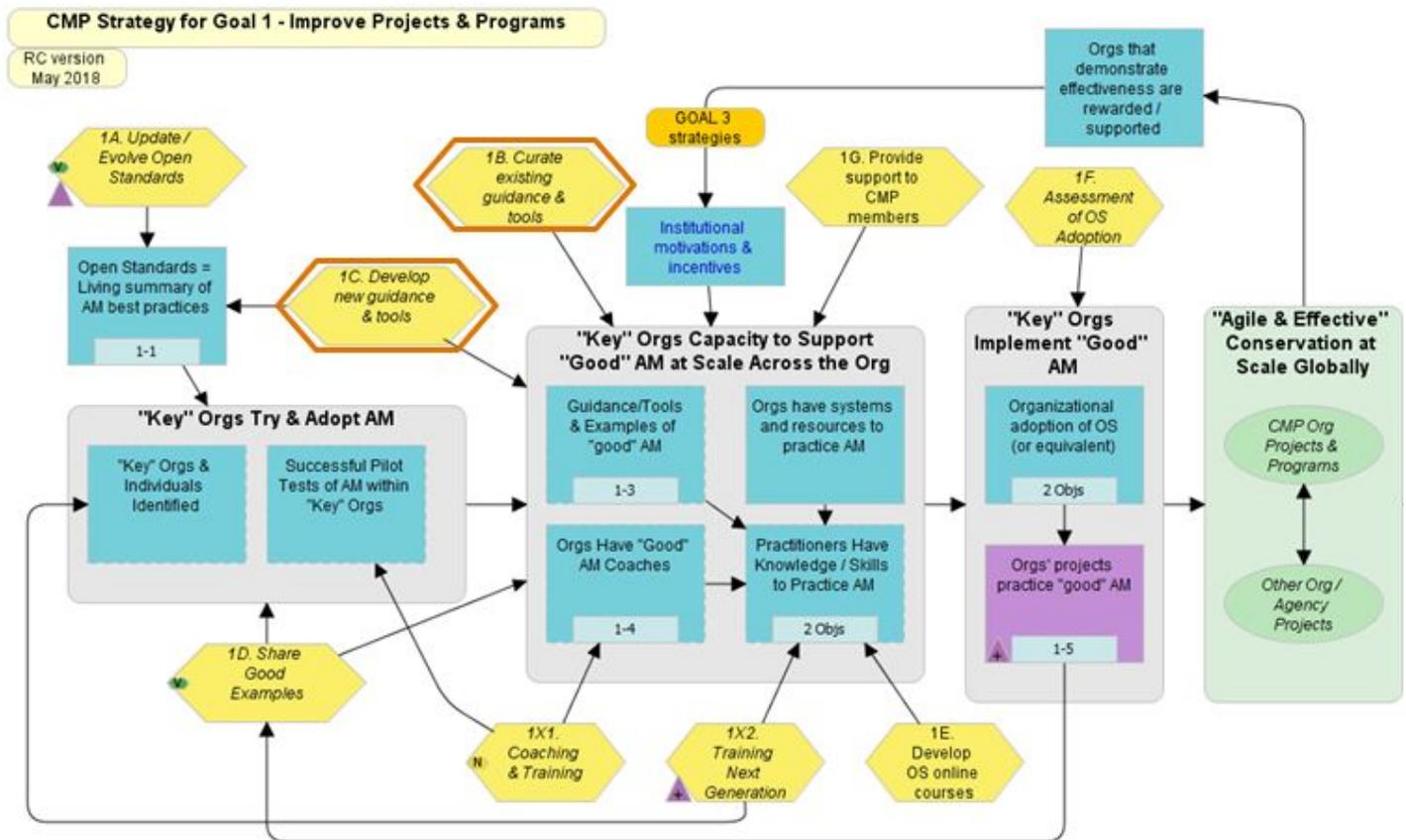


Figure 2. CMP’s theory of change for Goal 1 - Improve Projects and Programs

Methods

Most of the data for this assessment were collected via an online survey. However, to help focus the survey questions, we conducted key informant interviews and ran a workshop at the CMP biennial retreat in April 2019.

FOS chose to contract an independent consultant to help with this work, partly to help them move the evaluation forward, but mostly to have someone outside of the organization gathering information from the OS community, analyzing the data and providing recommendations. Early in 2019, Erica Cochrane was contracted to complete this work in close collaboration with Caroline Stem and Ashleigh Baker who lead FOS's RDI and COMMS strategies respectively.

Key Informant Interviews and Workshop at CMP Retreat

A Key Informant Interview questionnaire was developed in advance of the CMP retreat with the intent to pilot the survey with key informants. The survey was piloted in one interview with one informant and another interview with three informants. Of the four people interviewed, one was very experienced, two had a couple of years, and the fourth was new to using the OS. FOS and the consultant also led a workshop with 6 participants at the CMP retreat focused on product development, improvement, and delivery to address priority gaps in understanding, use and adoption of OS.

Online Survey

The Key Informant Interviews and Retreat workshop helped refine the questions FOS wanted to ask of a larger representation of the OS community. Erica designed a survey on the SurveyMonkey platform and sent it to the CCNet Listserv and the CMP contact list. A total of 110 people responded to the survey between August 12 and September 6, 2019.

Results

Key Informant Interviews

The interviewees shared the following suggestions related to FOS's priorities for products:

- Interviewees believed the highest priority actions related to OS products should be:
 - Development of OS lite
 - Crafting of compelling stories demonstrating the value of adopting OS
 - Reducing confusion about available products by improving curation and access
- The interviewees felt it was not a priority to further invest in:
 - Publishing more high-level thought pieces

CMP Retreat Workshop

Notes from the workshop are available in the CMP retreat notes available online (see links at the end of this document). The participants agreed that the highest priority action was to improve access to and curation of existing resources. In addition, the participants identified the following priority actions:

- Improve the OS website making it easier to connect users with the resources they need
- Develop OS lite and related training/coach guidance
- Collect and deliver compelling case studies/examples of the value of adopting the OS
- Develop guidance to help people enter the OS cycle where most relevant to their needs
- Develop good do-it-yourself materials (PowerPoint presentation templates (PPTs), YouTube videos, graphic cartoons, etc.)
- Develop a more generic set of PPTs that can easily be adapted
- Update the Standard Lexicon / “Rosetta Stone”

Survey Monkey Survey

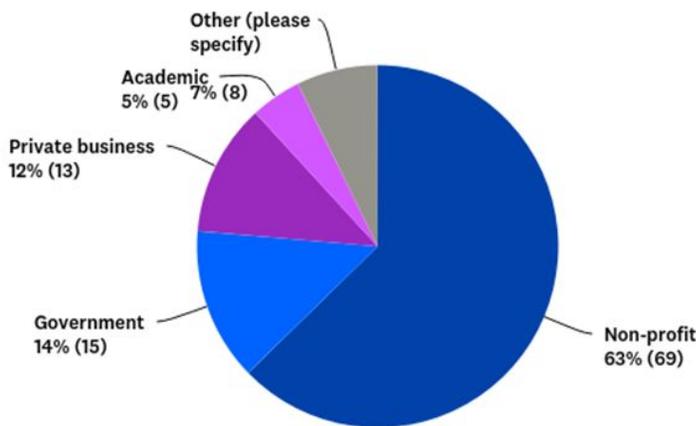
Below, we present the survey results in four main sections; Respondent Profiles, Current Products, Desired Products, and Product Delivery. Within each section, we summarize the results for each question with Summary Diagrams and Notes as relevant, we provide Example Comments from open-ended responses, and, finally, we identify Take Home Messages. Note that a list of hyperlinks for all of the available products mentioned in the survey and a complete list of open-ended comments (altered only to remove any individual identifying remarks) are available as hyperlinks at the end of this report.

Section 1: Respondent Profiles

The purpose of this section was to understand who responded and thus the audience reached.

Summary Diagrams and Notes

Q1: Which category below best describes the type of organization you currently work for? Answered: 110 Skipped: 0

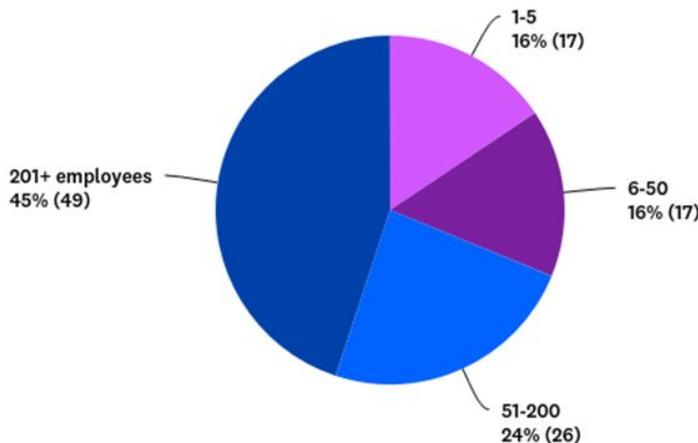


Q1 notes: Respondents represent mostly non-profits and private consultants (both Private business and Other categories). Government is underrepresented in part because of restrictions on using SurveyMonkey. Academic partners were not specifically targeted, only those actively involved in CCNet likely responded; so they are likely underrepresented as well.

Q2: Does your organization include practitioners? Answered: 109 Skipped: 1

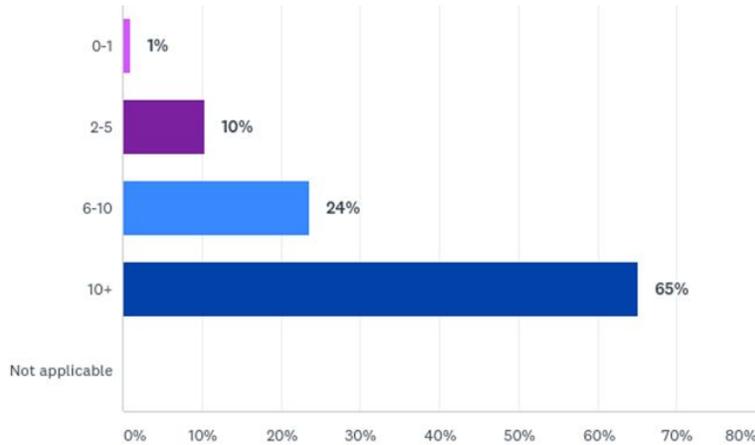
“No” 20% (22); “Yes” 80% (87)

Q3: What is your organization’s size? Please select the number of employees: Answered: 109 Skipped: 1

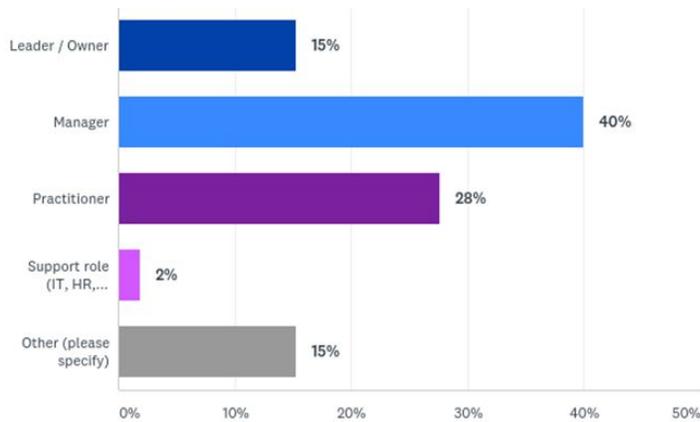


Q1-3 notes: Of the 63 respondents who gave us their organizational affiliation, they represented 41 different organizations (inclusive of 6 separate WWF branches).

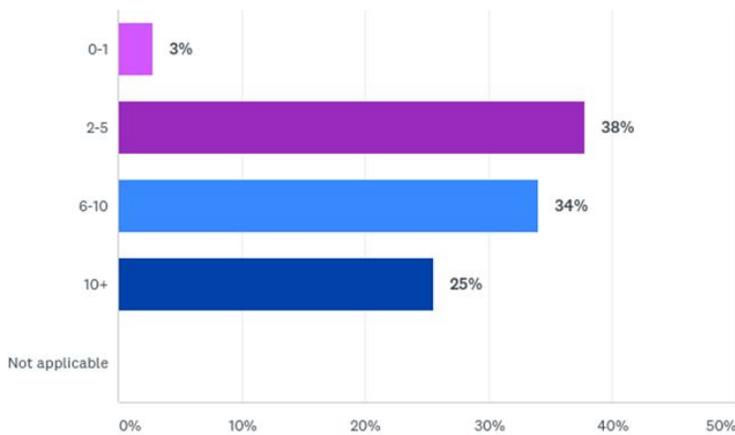
Q4: How many years have you worked as a conservation professional? Answered: 106 Skipped: 4



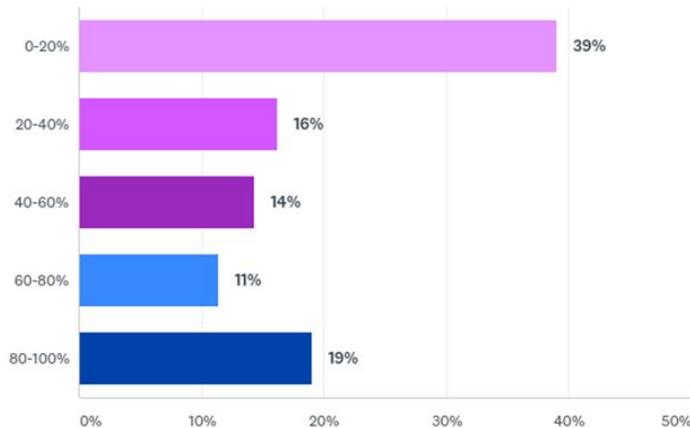
Q5: Which category below best describes your current job/role? Answered: 105 Skipped: 5



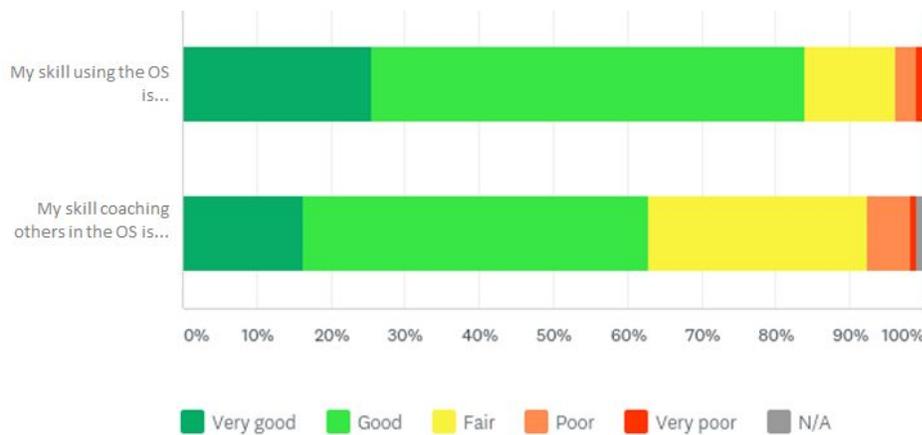
Q6: Approximately how many years have you been using the OS? Answered: 106 Skipped: 4



Q7: Approximately what percentage of your work is related to using, communicating, or supporting the OS? Answered: 105 Skipped: 5



Q8: How would you describe your overall level of skill in using and/or coaching others in the OS? Answered: 106 Skipped: 4



Q4-8 notes: The majority of respondents are experts in the field of conservation. They have been working in conservation and using OS for a long time. They are very skilled in applying and coaching others to use OS. They serve a variety of different roles within their organizations with varying emphases on using OS. As the survey was sent out via CCNet Listserv and CMP contacts, respondents are already part of the OS community and are already committed to working together to help advance the practice of conservation. These are the people who are most invested in having products that effectively support the OS. Conversely, these are not the people who need to be introduced to or convinced of the value of OS.

Take Home Messages

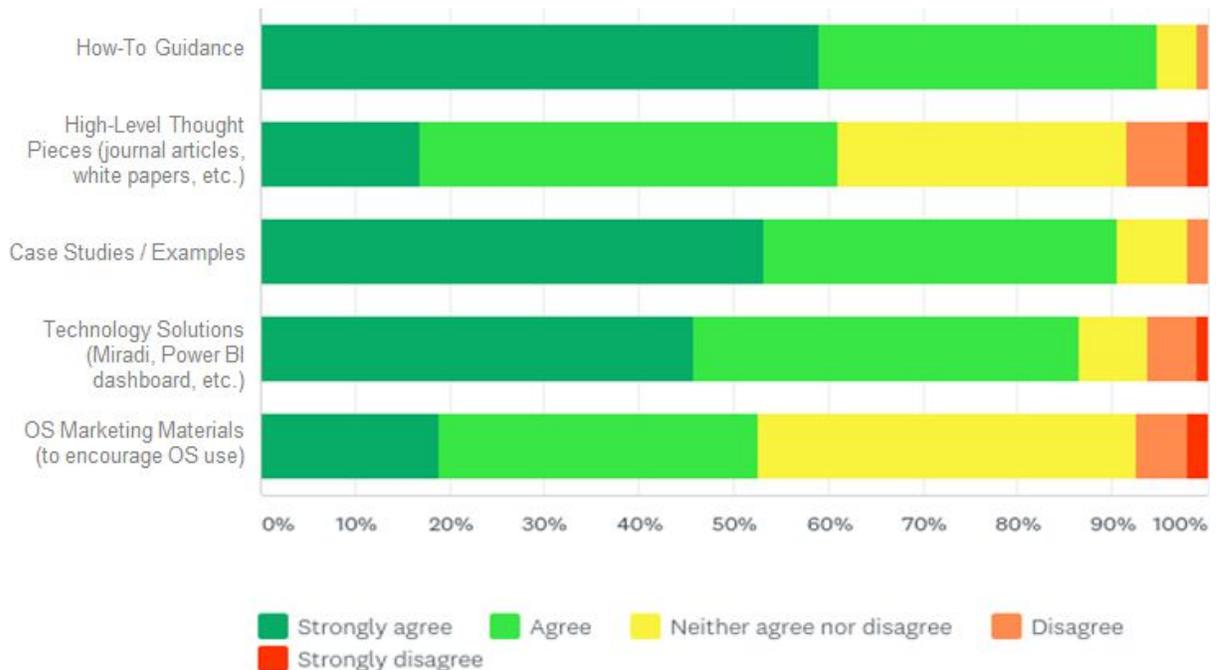
- Respondents represent a broad range of conservation orgs
- Respondents are extremely experienced and talented

Section 2: Current Products

The purpose of this section was to understand what types of products are being used by respondents and specifically to evaluate respondents' knowledge, use and perceived value of a number of specific FOS (co)authored products. Respondents identified numerous additional products they find valuable in the open-ended responses (see links at the end).

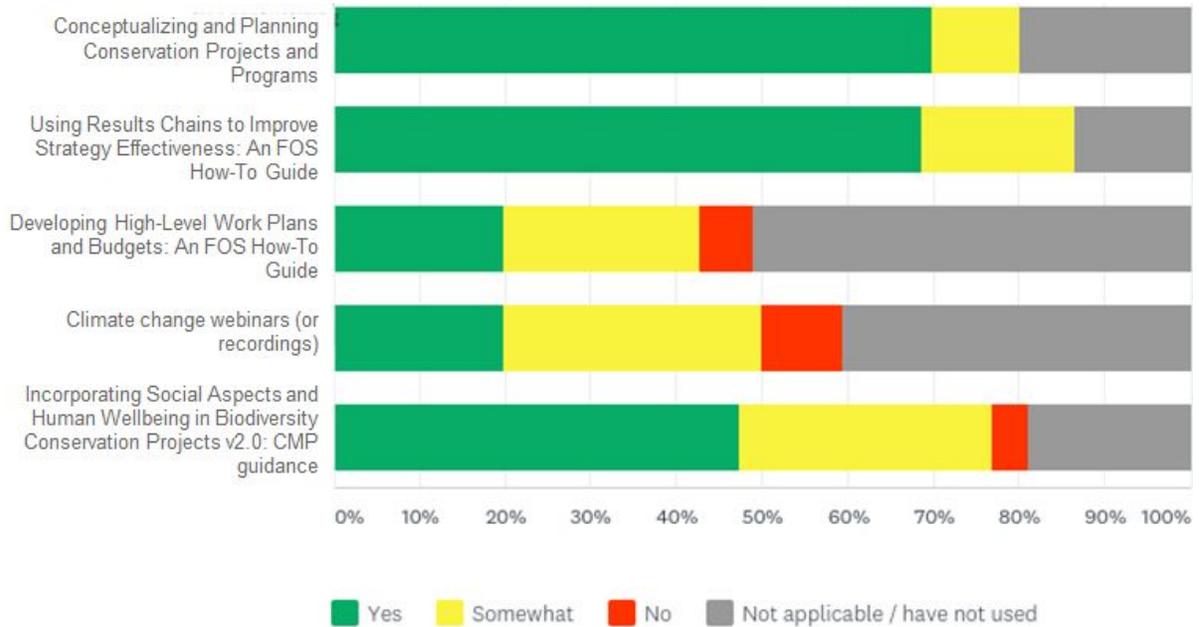
Summary Diagrams and Notes

Q9: Rank how much you agree with: "This type of product is valuable in helping me and others use, facilitate and/or communicate the OS." Answered: 96 Skipped: 14

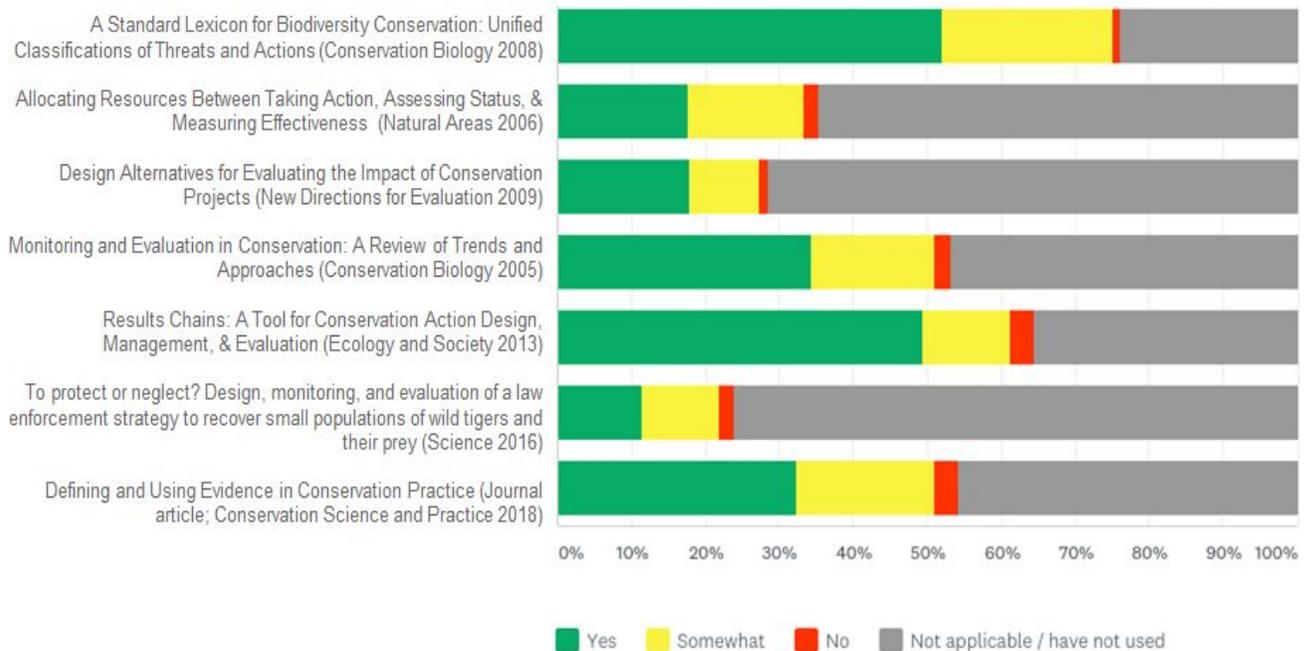


Q9 notes: All types of products (as we categorized them) are seen as valuable to most respondents. The two types that are ranked as least valuable include high-level thought pieces, such as journal articles, and marketing materials. High-level thought pieces may be highly valuable to other audiences outside of those most active in CCNet and CMP, such as academic partners and organizational leaders and others not yet bought into the OS. There are very few existing OS Marketing Materials, so it is likely that respondents had no reference when evaluating this type of product.

Q10: More specifically, which of the following GUIDANCE products have you found valuable? Answered: 96 Skipped: 14

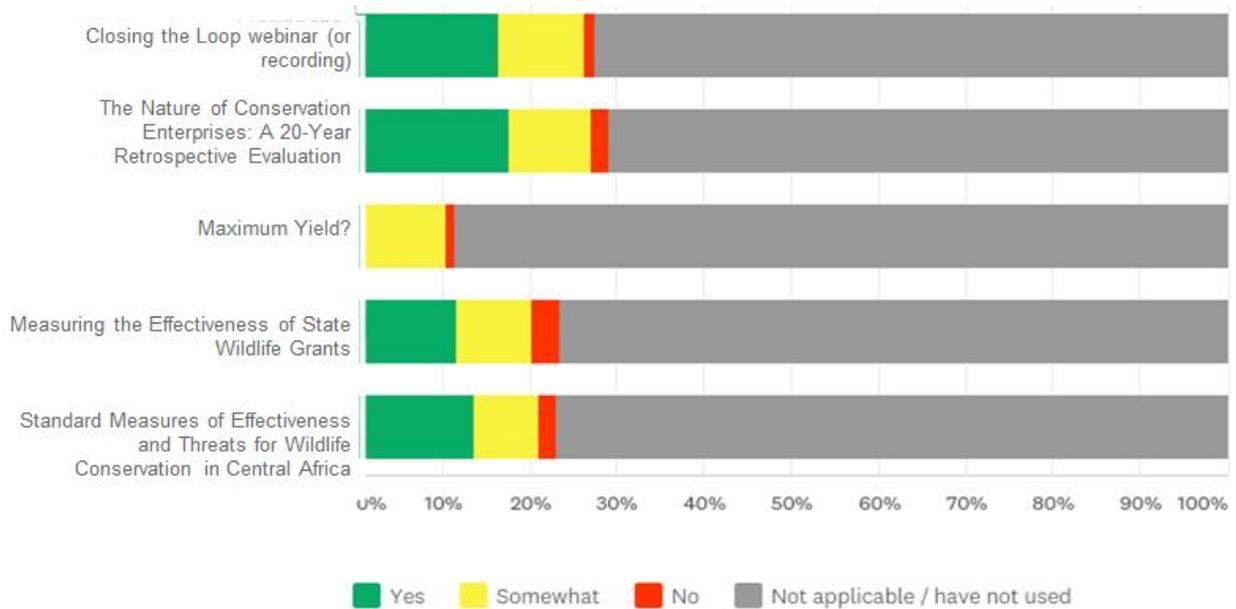


Q11: Which of the following HIGH-LEVEL THOUGHT products have you found valuable? Answered: 96 Skipped: 14



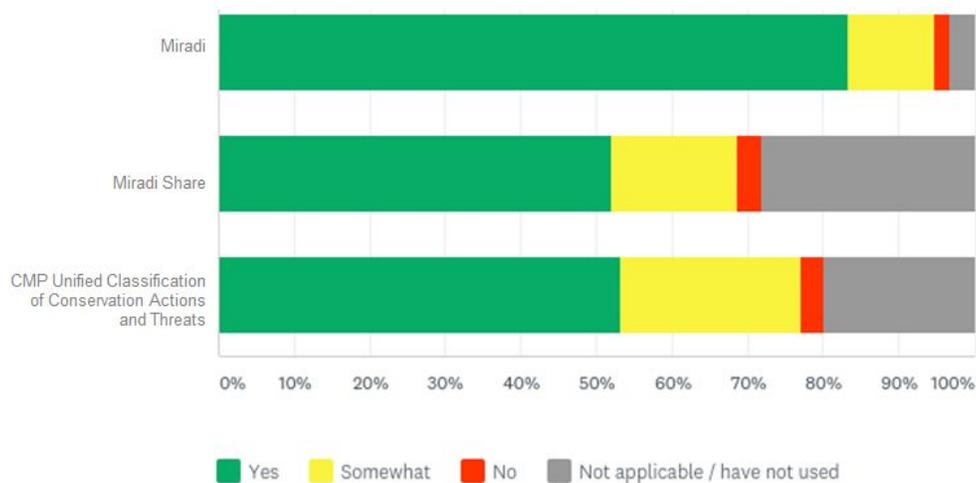
Q12: Which of the following CASE STUDIES/EXAMPLES have you found valuable?

Answered: 96 Skipped: 14



Q10-12 notes: The grey “Not applicable / have not used” category responses should be read as “did not know about it”. Most of the products known by respondents (i.e. not marked as grey) were ranked as useful or somewhat useful. Very few were ranked as not useful. The biggest note here is that many of the respondents (this highly experienced and skilled set of OS practitioners), were not aware of many of these products.

Q13: Which of the following TECHNOLOGY SOLUTIONS & TOOLS have you found valuable? Answered: 96 Skipped: 14



Q13 notes: The CMP Unified Classification of Conservation Actions and Threats, would have likely fit better under Guidance than under this category of Technology. This survey was focused broadly on all products to support the use of the OS and was intentionally not focused on Miradi and Miradi Share. Although most respondents ranked Miradi and Miradi Share as valuable, additional information would be needed to understand what users find most useful about these tools and what improvements are needed to address additional technology needs.

Select Example Comments

- I didn't know most of these existed. Great to be aware of them now!
- Some of these resources are not known to me - improved sharing could already address some objectives of this project
- There were multiple resources mentioned here (with links) that would have been extremely useful for my work, but I didn't know they existed.
- Thanks for this survey - I found the resources listed extremely helpful.

Take Home Messages

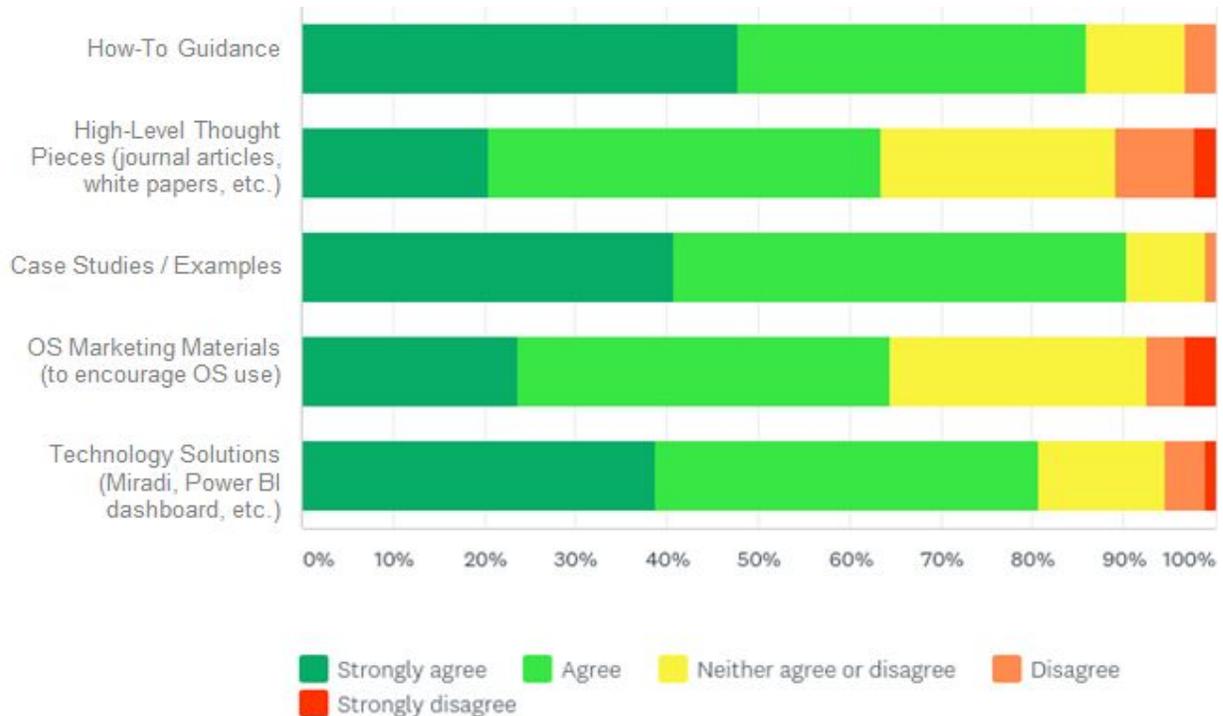
- Known products are useful
- Knowledge of and access to available products are lacking

Section 3: Desired Products

The purpose of this section was to better understand what products respondents felt were most needed to support their use of the OS and to begin to prioritize products for development.

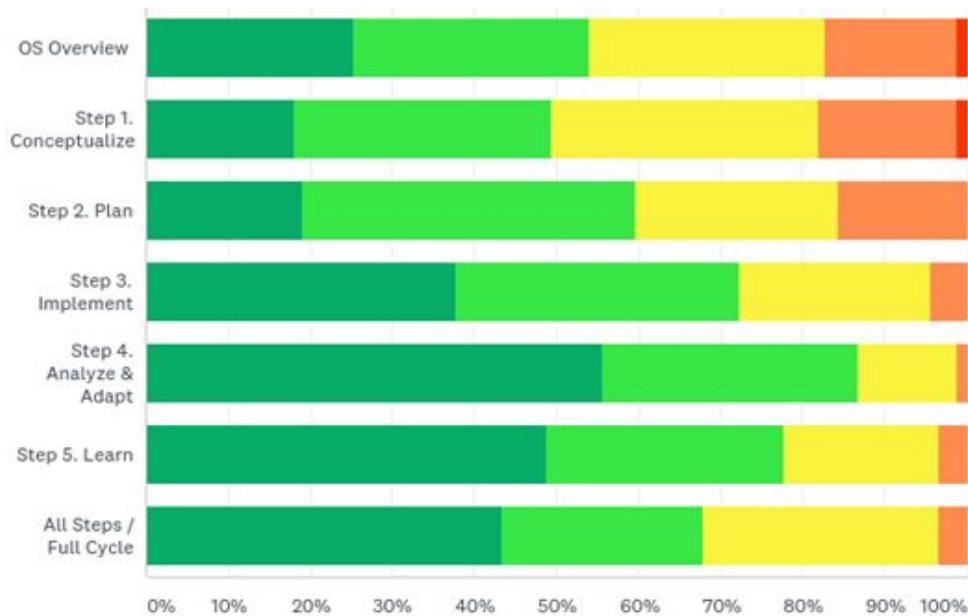
Summary Diagrams and Notes

Q15: Rank how much you agree with: "More of this type of product is needed to support the OS" Answered: 93 Skipped: 17



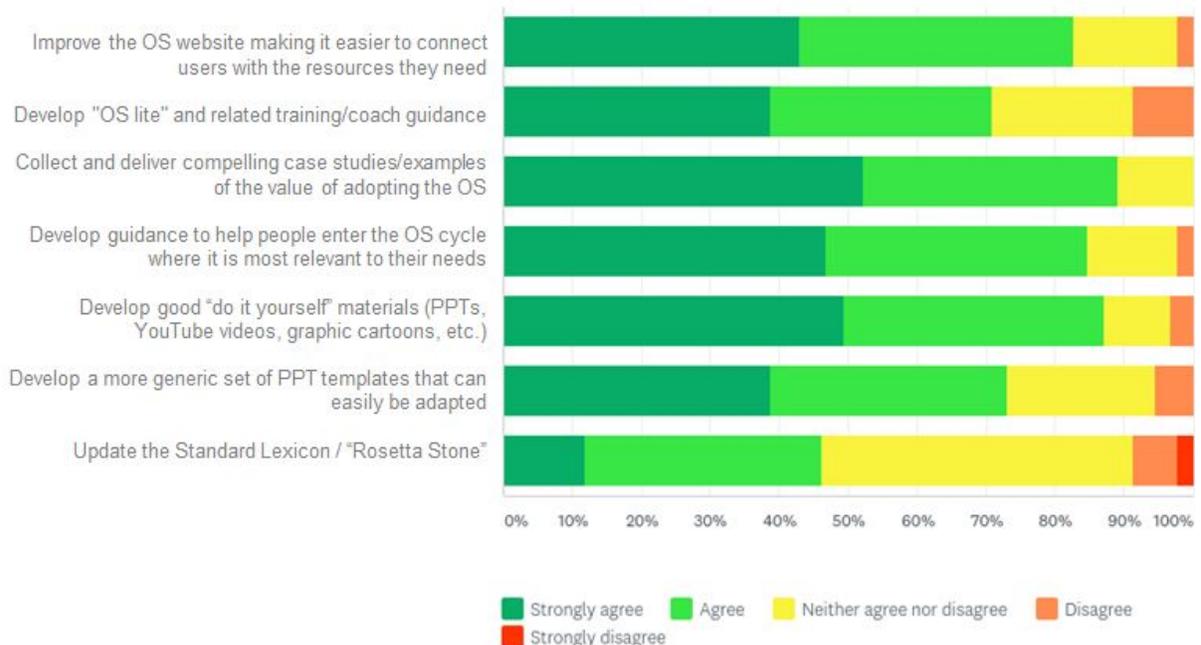
Q15 notes: Although there were comments made both in the survey responses and in the Key Informant Interviews that FOS and CMP should focus more on making available products more accessible, most respondents still want to see additional products of each type of product. They particularly want more How-To Guidance, Case Studies, and Technology Solutions.

Q16: Rank how much you agree with: "More products are needed to support this aspect of the OS" Answered: 93 Skipped: 17



Q16 notes: Most respondents want to see additional products to support each and all OS steps with an emphasis on products to support Steps 3, 4 and 5 and going full cycle.

Q17: At the 2019 CMP retreat, the following product-related actions were suggested. Rate how much you agree with: "This action should be a priority" Answered: 93 Skipped: 17



Q17 notes: The majority of survey respondents agreed with the list of actions by workshop participants at the CMP retreat, with perhaps only the action to Update the Standard Lexicon as a lesser priority.

Select Example Comments

- More than 10 comments were made in favor of OS lite:
 - A lite version that can transition into the full OS process as organizations grow their capacity would be very useful
 - OS lite, easy to manipulate and adaptable to insert deeper analysis
 - Some sort of guidance on how to develop effective plans with highly diverse teams under severe time constraints (OS "lite")
 - OS Lite is 100% needed
- Update the PPTs. Follow modern design principles. Make them more "generic" and easier for all to use and adapt without much modification.
- If case studies demonstrate how effective the OS is, it will market itself.
- Have the best OS sales pitch first thing when you get to the website.
- Focus much less on high-level thought pieces that go to academic journals and instead reorient efforts toward the needs of OS users.

Take Home Messages

- Respondents want more products!
- Products to support steps 3-5 and full cycle needed most
- Needs list from CMP workshop is spot on

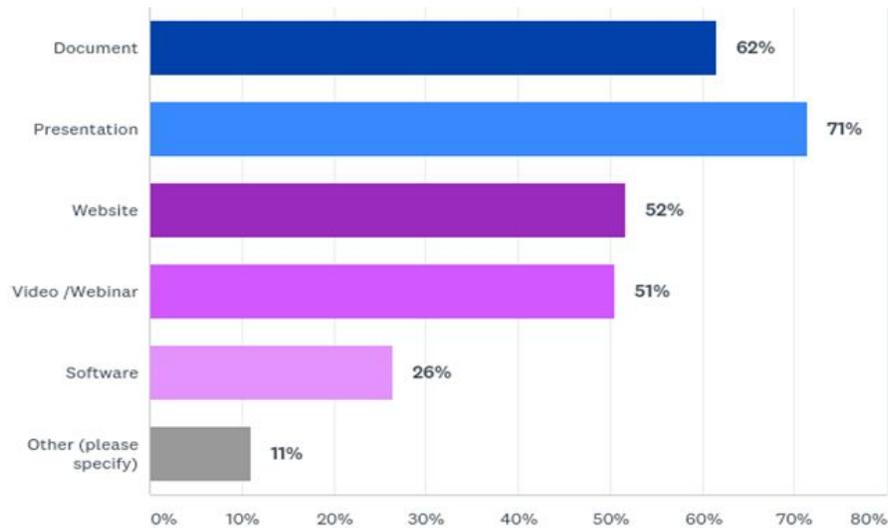
Section 4: Product Delivery

The purpose of this section was to better understand how to improve dissemination and use of available products. As respondents represented those already bought into the OS and already part of one or more OS communities of practice, responses help us understand how to improve product delivery within the existing OS community. They do not help us understand how to reach those new to or with limited exposure to the OS.

Summary Diagrams and Notes

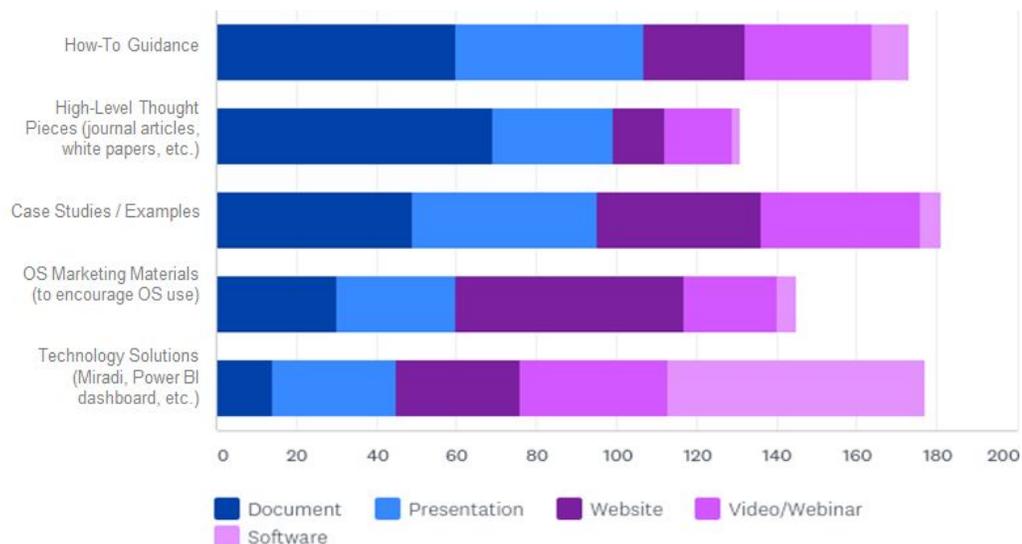
Q19: In general, which formats do you most prefer when learning new information?

Answered: 91 Skipped: 19



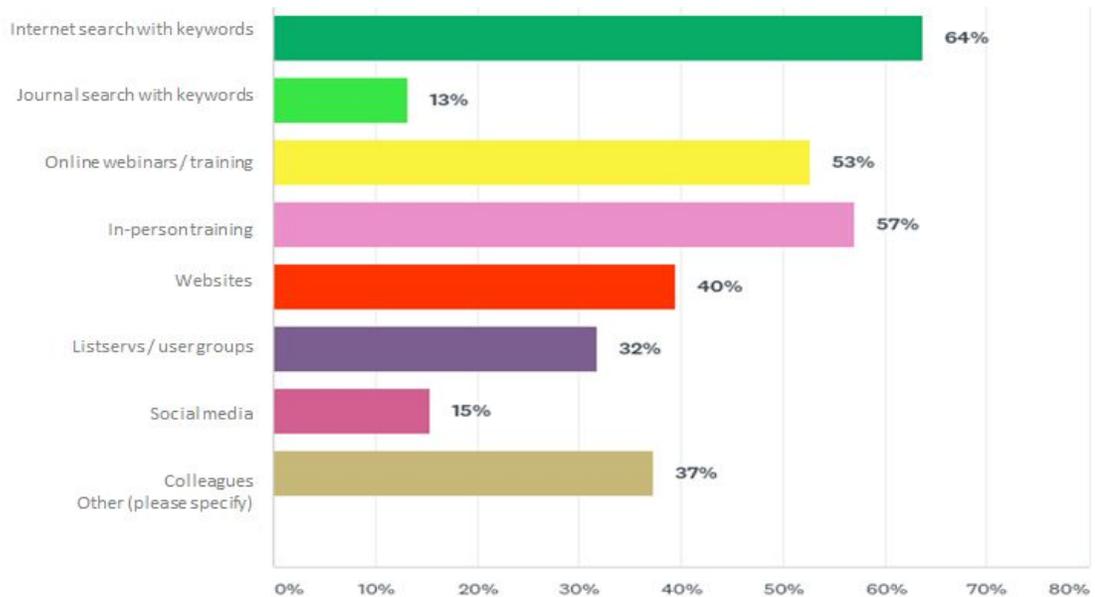
Q20: Specifically, for each type of products which format do you find most useful for your learning?

Answered: 91 Skipped: 19

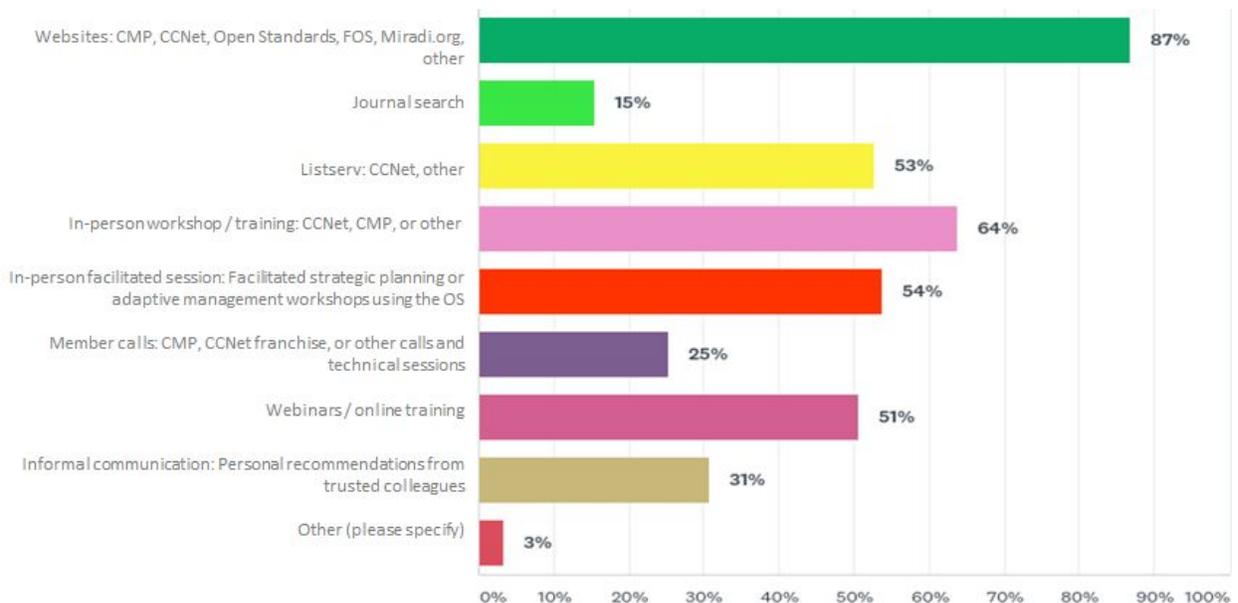


Q19-20 notes: Respondents use a variety of formats to learn new information and prefer different types of OS-related products in various formats. Software was the least preferred format except in the case of technology solutions.

Q21: In general, how do you prefer to learn about and access new information? Answered: 91
Skipped: 19



Q22: Specifically, which are your preferred ways of learning about and accessing products to support your Open Standards use now? Answered: 91 Skipped: 19



Q21-22 notes: Respondents prefer a variety of ways of learning about and accessing OS-related products. The OS-related websites are preferred for product delivery. In person workshops, trainings and facilitated planning sessions are also highly preferred delivery mechanisms. The CCNet Listserv and webinars/online trainings are similarly highly preferred, whereas CMP member and CCNet franchise calls are not.

Select Example Comments

- There were more than ten comments in support of improving websites and product curation
 - The CMP website is an important and valuable resource--which could be even more valuable.
 - Improve OS website to make it easier to search for existing products. There should be a few standard resources that are the first thing you hit.
 - Revamp website to be more DIY-oriented. We have so much great stuff but it's so hard to find. The products listed here would be helpful but I've never seen them or had them turn up in searches.

Take Home Messages

- May reach more users if increase ways to access key products
- CCNet Listserv, websites and trainings are effective means of delivery
- Journal articles and CMP and CCNet franchise member calls are not effective means of delivery

Recommendations

Some recommendations to the CMP and CCNet community are made below and are divided into two broad categories. Recommendations specific to FOS have been delivered separately. These reflect Erica's opinions and do not necessarily represent the opinions held by FOS.

Priority Product Actions

The following recommendations for actions come directly from the responses provided in the survey, Retreat workshop and Key Informant Interviews.

- Focus on improving the delivery of current resources
- Identify the most valuable products, call attention to them, put them in different formats, and deliver them on different platforms
- Clarify and publicize improvements to websites (OS, CMP, CCNet, FOS), make additional improvements, and help reduce confusion around products highlighted in those websites
- Develop compelling stories/case studies on the benefits of applying OS and risks of not
- Develop OS lite and do-it-yourself materials
- Continue improving Miradi and other technology solutions
- Build on the effectiveness of the CCNet Listserv
- Improve the effectiveness of CMP member and CCNet Franchise calls to enhance product dissemination and use

Product Development and Delivery Coordination Management

Products will be most effective at supporting the OS when the various communities of practice and related organizations and individuals work together to prioritize, divvy up and take on these actions. The following are a set of recommendations to improve how the OS community prioritizes, manages and tracks product development, delivery and effectiveness.

- Identify a regular means for the OS community to identify product gaps and prioritize product development and/or improvement needs. This action might include conducting a survey similar to the one reported on herein every other year.
- Incorporate the work of filling key product gaps into CMP, CCnet and joint workplans and working group assignments. This action might take place at a joint CMP and CCNet meeting in association with the CCNet Rally.
- Develop delivery and assessment plans for key products. Ideally each priority product would have a delivery and assessment plan that is shared with CMP and CCNet. Potentially CMP and CCNet can create a virtual working space to store and track plans.
- Collect data and assess the use and utility of key products. This action could be done via surveys, interviews or other. Assessments should be shared with the OS community. Review of these assessments could happen at joint CMP and CCNet meetings at CCNet Rallies.

Links

Available products noted in survey

GUIDANCE PRODUCTS

[Conceptualizing and Planning Conservation Projects and Programs](#) (FOS guidance on OS Steps 1 and 2)

[Using Results Chains to Improve Strategy Effectiveness](#)

[Developing High-Level Work Plans and Budgets](#)

[Climate change webinars](#) (or recordings)

[Incorporating Social Aspects and Human Wellbeing in Biodiversity Conservation Projects v2.0](#)

HIGH-LEVEL THOUGHT PRODUCTS

[A Standard Lexicon for Biodiversity Conservation: Unified Classifications of Threats and Actions](#) (Conservation Biology 2008)

[Allocating Resources Between Taking Action, Assessing Status, & Measuring Effectiveness](#) (Natural Areas 2006)

[Design Alternatives for Evaluating the Impact of Conservation Projects](#) (New Directions for Evaluation 2009)

[Monitoring and Evaluation in Conservation: A Review of Trends and Approaches](#) (Conservation Biology 2005)

[Results Chains: A Tool for Conservation Action Design, Management, & Evaluation](#) (Ecology and Society 2013)

[To protect or neglect? Design, monitoring, and evaluation of a law enforcement strategy to recover small populations of wild tigers and their prey](#) (Science 2016)

[Defining and Using Evidence in Conservation Practice](#) (Conservation Science and Practice 2018)

CASE STUDIES / EXAMPLES

[Closing the Loop Webinar via CCNet](#)

[The Nature of Conservation Enterprises: A 20-Year Retrospective Evaluation](#)

[Maximum Yield?](#)

[Measuring the Effectiveness of State Wildlife Grants](#)

[Standard Measures of Effectiveness and Threats for Wildlife Conservation in Central Africa](#)

TECHNOLOGY SOLUTIONS & TOOLS

[Miradi](#)

[Miradi Share](#)

[CMP Unified Classification of Conservation Actions and Threats](#)

Other links

[Complete set of comments](#) from survey

[OS Product Workshop notes](#) in CMP Retreat notes

