1. Conceptualize
- Define planning purpose and project team
- Define scope, vision, targets
- Identify critical threats
- Analyze the conservation situation

2. Plan Actions and Monitoring
- Develop goals, strategies, assumptions, and objectives
- Develop monitoring plan
- Develop operational plan

3. Implement Actions and Monitoring
- Develop work plan and timeline
- Develop and refine budget
- Implement plans

4. Analyze, Use, Adapt
- Prepare data for analysis
- Analyze results
- Adapt strategic plan

5. Capture and Share Learning
- Document learning
- Share learning
- Create learning environment

Fundraisers Guide to the Open Standards for the Practice of Conservation

Introduction

This guide aims to help fundraisers talk with project teams who are planning and implementing conservation projects using the *Open Standards for the Practice of Conservation*. The guide gives a background to the Open Standards, and the organisations supporting it. It then outlines the key steps in the design, management and monitoring of conservation projects, and defines the standardised terminology.

The intent is not to make you an expert in the Open Standards – that's the role of the conservation project teams. Instead, it aims to give you a basic knowledge of the Standards so that you can critique the projects that you are being asked to support. The project team is ultimately responsible for the quality of their project, however donor relations, and therefore fundraisers, can be impacted when projects perform poorly.

Fundraising is a challenging task, but it can be made a little easier if project teams give you easy access to clear, high-quality, up-to-date project information at all stages of the project's life-cycle. Any deficiencies in this information require fundraisers to spend more time and effort than would otherwise be necessary, and can ultimately imperil donor relationships.

This guide uses black text to provide general background and descriptions of the Open Standards, and blue text to show the fundraising perspective.
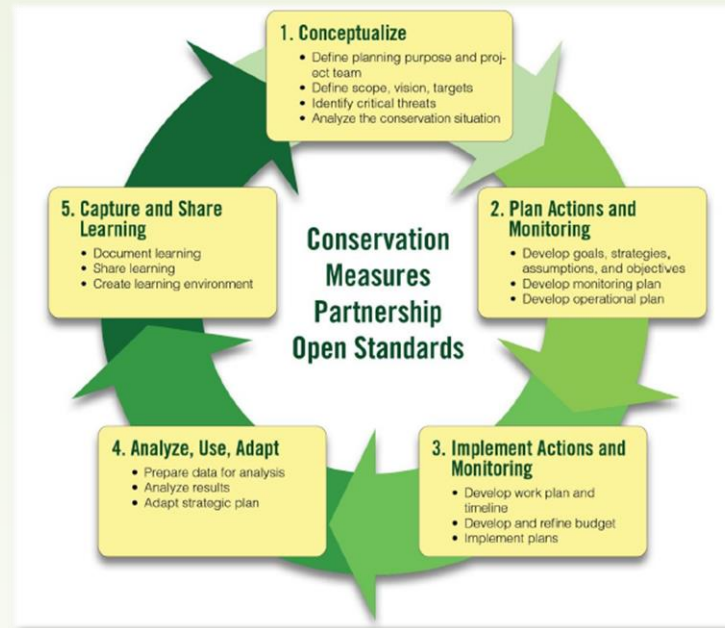
Contents

For further details . . . .

- Conservation Measures Partnership website has details on the membership and activities of the CMP.

- Open Standards for the Practice of Conservation, Version 3.0, http://www.conservationmeasures.org/ - Pages 1-8 provide a general background and introduction to the Open Standards.

- Open Standards website contains more details on the history of the Open Standards, and some further guidance.

- Conservation Coached Network is a global network of experienced people who can help teams to apply the Open Standards;. The website has training resources, and options to contact local coaches who could help you to learn more about the Open Standards in your region.

- The Teach Adaptive Management network connects universities who are teaching the Open Standards to the next generation of practitioners

- Miradi is the software that captures and reports project information.

- Miradi Share is a public database that holds conservation projects; you can search for examples of projects using the Open Standards all around the world, potentially including those of your own organisation.

- Conservation Training website has a self-paced tutorial which will give you a comprehensive understanding of the first 2 steps in the Open Standards.

What are the Open Standards ?

The biodiversity conservation community is tackling large, complex, and urgent environmental problems where the stakes are high. People around the world are counting on us; they trust us, they work alongside us, and they are giving us significant resources to act effectively to save the planet. But we have a problem – we don't have a fully functional system to assess the effectiveness of our actions. While many inspiring advances have been made, few conservation organizations can say consistently what is working, what could be improved, and what approaches need to be changed.

To address these issues, the Conservation Measures Partnership (CMP) has combined principles and best practices in adaptive management / results-based management, from conservation and other fields, to create the *Open Standards for the Practice of Conservation.*

The *Open Standards* guide practitioners through the a series of steps to design, manage, monitor and adapt their projects. It provides standard terminology that helps teams communicate, and recommends standard outputs form each step to document the project's information.

Conservation Measures Partnership Open Standards

1. **Conceptualize**
   • Define planning purpose and project team
   • Define scope, vision, targets
   • Identify critical threats
   • Analyze the conservation situation

2. **Plan Actions and Monitoring**
   • Develop goals, strategies, assumptions, and objectives
   • Develop monitoring plan
   • Develop operational plan

3. **Implement Actions and Monitoring**
   • Develop work plan and timeline
   • Develop and refine budget
   • Implement plans

4. **Analyze, Use, Adapt**
   • Prepare data for analysis
   • Analyze results
   • Adapt strategic plan

5. **Capture and Share Learning**
   • Document learning
   • Share learning
   • Create learning environment

"The Conservation Measures Partnership is committed to the vision that global conservation efforts will be more efficient and effective as we increasingly know how to leverage or replicate what works, and not repeat what doesn't, based upon credible measurement of our effectiveness and the open sharing of the lessons we learn. To realize this vision, our respective organizations aspire to –
- *State our desired results in terms of conservation outcomes, not actions.*
- *State how our efforts will lead to our desired results.*
- *Track our progress toward achieving desired results.*
- *Adapt our strategies based on what we have learned.*
- *Share our results respectfully, honestly, and transparently to facilitate learning."*

Current CMP members:
- African Wildlife Foundation,
- Bush Heritage Australia
- CATIE (Protected Areas & Biological Corridors Program)
- Conservation International
- David and Lucile Packard Foundation,
- Defenders of Wildlife
- Forever Costa Rica
- Foundations of Success
- The Gordon and Betty Moore Foundation
- International Crane Foundation
- John D. and Catherine T. MacArthur Foundation
- Keith Campbell Foundation for the Environment
- Latin American School for Protected Areas Management
- The Leona M. and Harry B. Helmsley Charitable Trust
- Margaret A. Cargill Foundation
- National Audubon Society
- National Fish and Wildlife Foundation
- Nature Conservancy Canada
- Rainforest Alliance
- Rare Conservation
- The Nature Conservancy
- US Fish and Wildlife Service (Wildlife Without Borders)
- Walton Family Foundation
- Wildlife Conservation Network
- Wildlife Conservation Society
- WWF.

How do the Open Standards help fundraising?

The Open Standards guide practitioners through 5 steps to develop, implement and adapt their conservation projects. Each step produces consistent, quality information that can keep all stakeholders informed about the project.

1. The **Conceptualise** step defines the project's context - it's scope and vision, the conservation targets that the project aims to protect (e.g. species, habitats), and analyses the broader socio-political situation.

2. The **Plan** step produces strategies and their theory-of-change, the results expected, and a high-level workplan and budget; this provides the key details that inform investment decisions and funding applications.

3. The **Implement** step performs the planned actions and monitoring, producing information that allows people to see how the project is going - progress reports, and measures.

4. The **Analyse / Adapt** step is performed regularly to review the monitoring data against expected results, to assess progress and to decide any adaptations required to the plan. This creates an objective assessment of the project's progress and identifies whether the project is achieving it's planned results and impacts.

5. The **Share & Learn** step is performed periodically to capture and share the project's experiences and insights.

The Open Standards is supported by systems to capture and share this project information – Miradi desktop software, and the cloud-based Miradi Share.
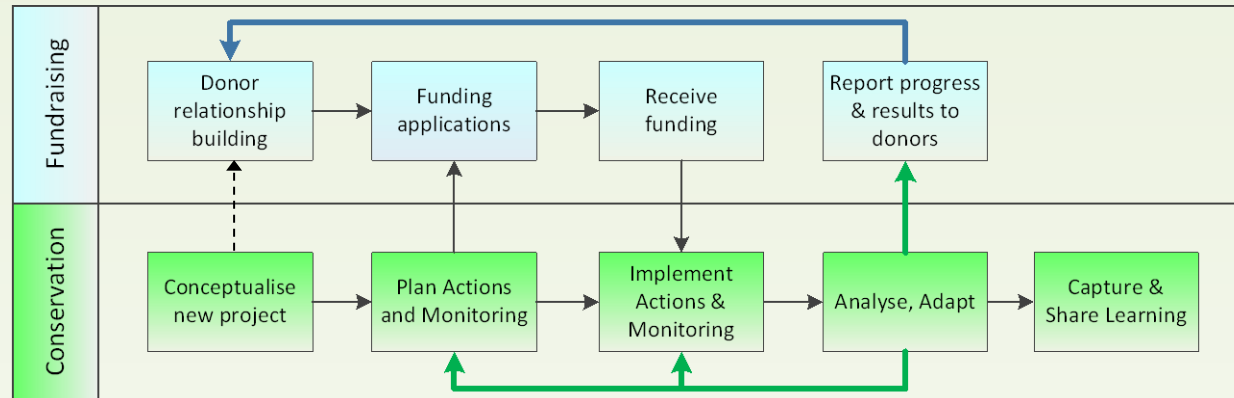
Interconnected business processes

This "swim lane" diagram shows the high-level steps performed by Fundraisers as conservation projects move through the 5 steps of the project management cycle.

1. The constant work of fundraising is focused on building donor relations.

2. Funding options need to be assessed during the early stages of a project. At the Conceptualise step, discussions between fundraisers and program managers should analyse the feasibility of fundraising for the project . During the Planning step, there should be an ongoing dialogue between fundraisers and program staff to match funding available and prioritised conservation outcomes. The project team should supply a clear project plan that shows what the project aims to do, and why, as well as the results expected and how they will be measured.

3. During this process, funding applications are made and then received and managed.

4. The next steps with these funders rely on the project team analysing and reporting the results being achieved relative to those expected, so that funders can be informed of progress & results.

This information creates the **critical feedback loop** that maintains donor relations; relationships are imperilled if this loop breaks down. The Open Standards and Miradi allow this information to be collected and reported, in a consistent way, which streamlines the work of fundraisers who would otherwise need to spend considerable time locating and interpreting project information.

MIRADI™ Adaptive Management Software for Conservation Projects   MIRADI SHARE™

# Information available at project initiation

The Conceptualise step sets the basic parameters for the project, in preparation for the design work that will follow. This early stage can give fundraisers a valuable introduction to the project and it's rationale. This should help to test the feasibility of funding the project and help to identifying potential donors and funding sources. The project has not yet identified its strategies so cannot define the funding required in any detail.

This step involves identifying who will be involved on the initial **project team**, defining the project's **scope** (usually a geographic area, or a theme like reducing wildlife trade), the team's **vision** of what they hope to achieve, and the conservation **targets** that will be the focus of the project. It also analyses the project's context, including identifying **threats and opportunities**, and **key stakeholders**.

The key work of this step requires the team to think through the reason for initiating this project, and to be clear about what it is aiming to do and what it hopes to achieve. It should provide a solid foundation on which to build the project – any flawed thinking at this stage will likely cause the project to stumble, or fail, further down the track.

The result of this thinking documents a situation analysis, which builds a common understanding of the project's context. This includes relationships between the biological environment and the social, economic, and political systems and drivers that affect the conservation targets. A sound understanding of the context helps the team to select strategies and activities that will achieve their vision.

The results of a situation analysis should be expressed either in a concise text description or in a conceptual model, such as the one at right, which portrays the relationships among the different factors in the situation analysis. This sample project will be used throughout this guide. The model shows that our key conservation target is seabirds, specifically those nesting on islands within the project's geographic scope. These seabirds are threatened by rats, which arrive on the islands via tour boats. As will be discussed in the next step, the team has set a goal for their target and identified two strategies for dealing with these contributing factors.
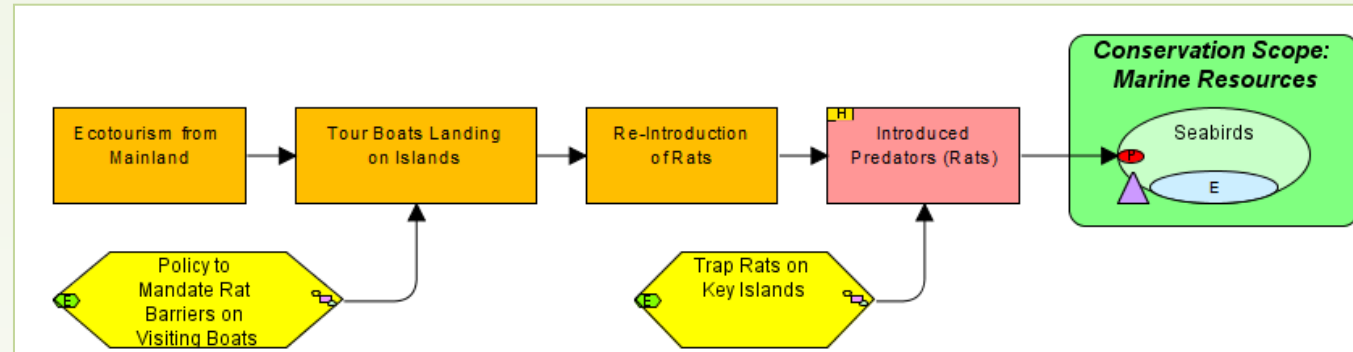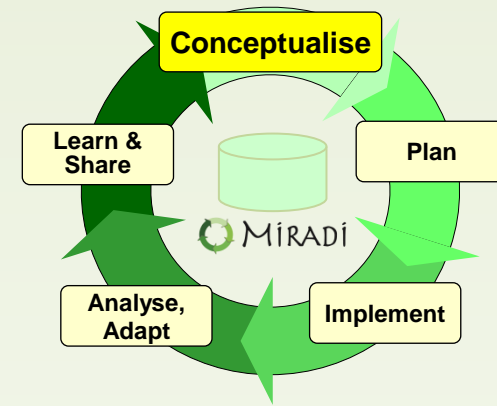
Example Situation Analysis or Conceptual Model – in diagrammatic and text form

Details

The Eastern Bay Conservation Project (EBCP) is focused on working with the residents of Eastern Bay Village to help manage and conserve the marine resources of their traditional fishing grounds. Key partners on the project team include the residents of Eastern Bay Village, Eastern Bay NGO, and researchers from the local university. Our conservation targets are coral reefs, sharks, seagrass beds, mangroves, and seabirds. Major threats include unsustainable fishing by local people, invasive rats eating seabird eggs, and commercial shark finning operations. Climate change driven threats such as increased seawater temperatures which lead to coral bleaching and increase storm intensity which leads to increased sedimentation from rivers are also of growing concern in the future. The project is implementing strategies to rid key breeding islets of rats, establish alternative income sources for local fishermen, and to liaise with an international conservation organization to combat the demand for shark fin soup. We are also exploring adding a new strategy to combat river sedimentation.

Legend: ◯ Conservation Target ◯ Human Well-being Target ◯ Goal ▢ Threat ▢ Contributing Factor ⬡ Strategy △ Indicator

Review of project initiation information

Project information that fundraisers should expect to have access to at this stage includes . . . . .

Conceptualise

Learn & Share

Plan

Analyse, Adapt

Implement

MiRADi

1A. Define Planning Purpose and Project Team
- Identification of planning purpose and decisions that the plan will support.
- Identification of decisions already made and any constraints or limits.
- Selection of initial project team, including project leader, core members, and advisory members.
- Identification of key skills each team member brings.
- Identification of gaps in skills or knowledge your team should fill.
- Designation of roles and responsibilities.

1B. Define Scope, Vision, and Conservation Targets
- Brief description of the project scope.
- If appropriate, a map of the project area (GIS file or hand sketch).
- Vision statement for the project.
- Selection of conservation targets, including a description and brief explanation of why they were chosen, and if appropriate, a map showing each target's location.
- Description of the status of each priority conservation target.

1C. Identify Critical Threats
- Identification of direct threats and if appropriate, a map showing the spatial footprint for each threat.
- Rating or ranking of direct threats to identify critical threats*.

1D. Analyze the Conservation Situation
- Identification and analysis of indirect threats and opportunities.
- If relevant, selection of human wellbeing targets, including a brief explanation of why they were chosen.
- Assessment of stakeholders and their primary interests.
- Initial conceptual model that illustrates key cause and effect relationships among factors operating within the scope of the project.
- Ground-truthing of the model with key stakeholders and partners.
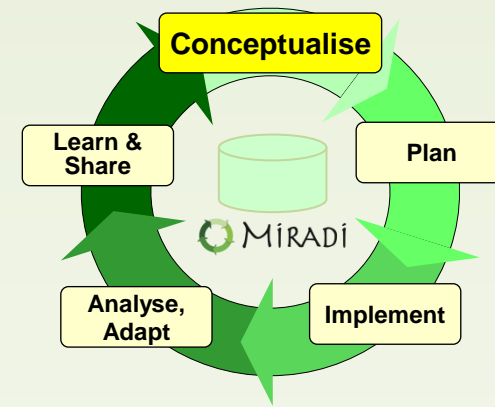
Things to look for in projects at this stage.

- Has the project been through some sort of peer or managerial review to test it for appropriateness and do-ability? (i.e. can you assume that the following factors have been adequately considered ?)
  - Does the project team seem to have the right skills and capacity to deal with the scope and context of this project?
  - Does the project scope seem to be at an appropriate scale required to protect the targets?
  - Has the team defined which targets are most in need of attention (based on how healthy each target is), or are they trying to do everything?
  - Has the team ranked the threats to aid prioritisation?
  - Have the right stakeholders and partners been involved (e.g. is the team talking to those who might be opposed to the project?)
  - Does the conceptual model seem to cater for the social, political and economic factors at play (e.g. is it too focused on just biodiversity aspects?)
- Is the project's context and content likely to be of interest to current supporters, and is the general size of the project likely to be within the capacity of current supporters, or do you need to consider donor acquisition strategies?

Information available from the Project Plan

The Plan step analyses and defines the actions to be taken by the project, the results expected, and the monitoring that will be done to test for those results. This informs the project's timeline, workplan and budget. Collectively, this information is often sufficient to inform funding applications, although some may require the detailed budget information available in the next step.
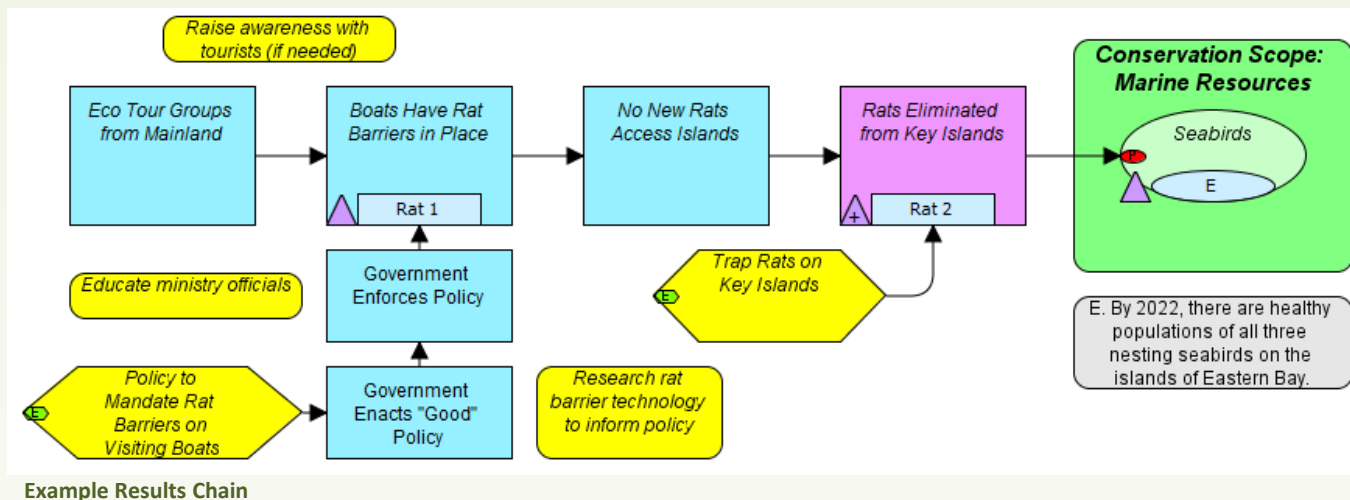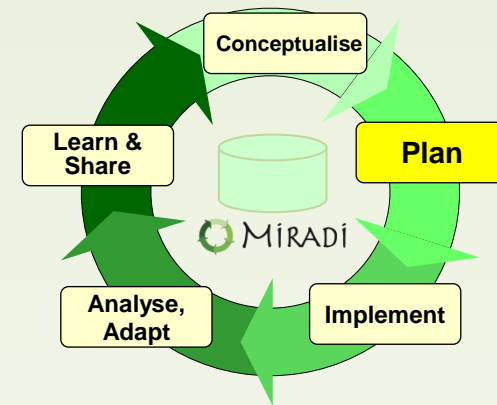
This step involves developing the project's **goals, strategies**, and **objectives**, and clearly identifying the assumptions being made about how the strategies will indeed achieve the project goals. These assumptions are documented in a theory-of-change, or **results chain,** along with the **indicators** that will measure progress. A high-level **Operational Plan** outlines the financial and human resources required to implement the project.

The key work of this step requires the team to be explicit about the goals and objectives they aim to achieve, and to develop and rigorously test their theory-of-change – to be able to clearly explain how the actions they plan to take will lead to the results they aim to achieve.

The outcome of this thinking should be documented in a results chain, showing the strategies and activities to be performed, the intermediate results that those actions should lead to, and how those results will reduce threats and ultimately protect the health of the targets.

A Monitoring Plan should then define the specific indicators to be measured over time to understand whether the work is indeed leading to the expected results.

The results chain at right shows the ultimate goal that is being targeted in the sample project, along with two strategies and several activities to be undertaken, and the intermediate results expected to occur. Indicators have been defined to allow progress to be monitored and results evaluated. Results chains are generally derived from conceptual models – they reveal how a strategy intends to affect the "current state of the world" (portrayed in the conceptual model) to achieve the "desired state of the world" (portrayed in the results chain).

Example Results Chain

Example Monitoring Plan

Legend: ◯ Conservation Target ◯ Human Well-being Target ◯ Goal ▢ Objective △ Indicator ⬡ Strategy ◯ Activity ▢ Intermediate Result ▢ Threat Reduction Result

5

Review of Project Plan information

Project information that fundraisers should expect to have access to at this stage includes . . . . .
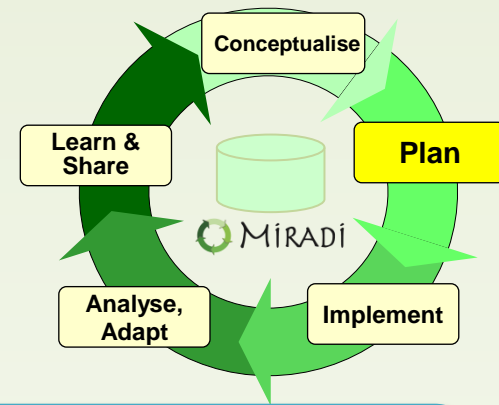
2A. Develop a Formal Action Plan: Goals, Strategies, Assumptions, & Objectives
- Goals for each conservation target and, if appropriate, human wellbeing target.
- Identification of key intervention points and draft strategies or portfolios of strategies.
- Prioritization of draft strategies.
- Results chains that specify assumptions for key strategies.
- Objectives for key intermediate results.
- Finalized strategies, results chains, and objectives.
- Finalized Action Plan.

2B. Develop a Formal Monitoring Plan
- Audiences and their associated information needs clearly defined.
- Indicators and methods defined.
- Finalized Monitoring Plan.

2C. Develop an Operational Plan
- Assessment of human, financial, and other resources required to perform the project (hi-level workplan and budget)
- Risk assessment and mitigation.
- Estimate of lifespan and exit strategy.

Things to look for in projects at this stage.

- Has the project been through some sort of peer or managerial review to test the plan for quality? (i.e. can you assume that the following factors have been adequately considered ?)
  - Are the project's goals and objectives clear and measurable? Will it be clear if progress is being made ? Are the team measuring what matters most?
  - Are the strategies tackling the key contributing factors identified in the conceptual model? Are they focused on the priority targets and threats?
  - Do the results chains stand up to the logic test (each pair of boxes should read "if this (activity or intermediate result), then that (result)"); any flaws in this logic will likely lead to poor results.
  - Does the high-level workplan and budget adequately resource the monitoring work required to know if the project is progressing and achieving its impacts?
- The timeframes to achieve the project's goals may be very long (decades or more); has the team adequately identified shorter-term phases, with measurable outcomes, that will fit the timeframes envisaged by donors?
- Has the team provided the information required by the potential funders, at an appropriate level of detail and quality?
- Has the team provided enough images and stories to inform donor communications?

Information available during Implementation

The Implement step takes all of the thinking and planning done to date, and puts the strategy into action. Depending on the size and nature of the project, funding applications may already be in train, or may be waiting on the detailed workplans and budgets developed at the start of this step.

While the earlier two steps are often done as discrete pieces of work, this Implement step and the following Analyse / Adapt step generally continue for the life of the project in a progression of Do-Check-Adapt stages. Fundraisers should expect to receive regular information on the progress of the project and the results being achieved so that funders can be kept informed of progress. New and updated funding applications may be required periodically for long-running projects.
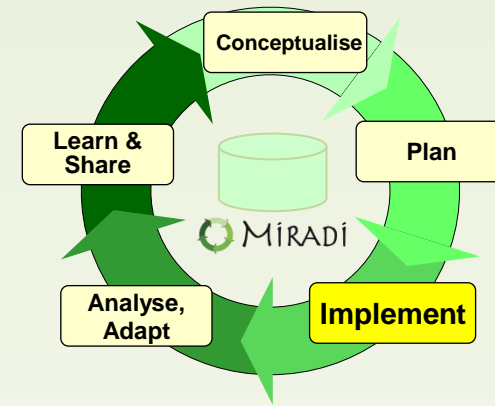
The key work of this step requires the team to expand their high-level workplan and budget into sufficient detail to allow assignment of people to activities, itemisation of project expenses, and scheduling of the work.

The work to be done includes undertaking the activities defined within the priority strategies, the recording of measures against indicators, and recording progress reports as work is performed.

Example Workplan and Budget

The workplan at right shows the two strategies from the results chain, along with their more-detailed activities. People and teams have been assigned to perform the work over the coming years (yellow columns) and the expected expenses have been identified; the Budget Total shows the full project cost (expenses plus days of effort at defined daily rates. The lower images show examples of tracking the funding sources for particular items. The image over-leaf shows examples of progress reports.
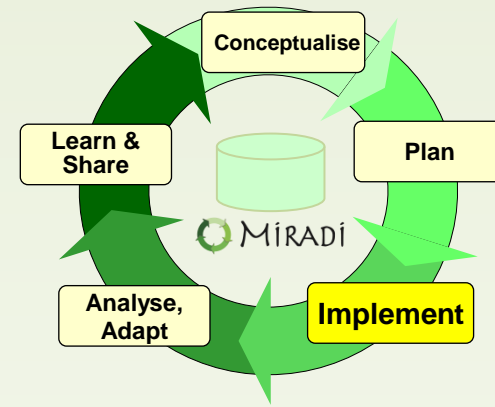

Example of tracking funding sources

Review of Implementation information

Project information that fundraisers should expect to have access to at this stage includes . . . . .

3A. Develop a Detailed Short-Term Work Plan and Timeline
- Work plan detailing the tasks, activities, and responsibilities associated with the Action Plan, Monitoring Plan, and Operational Plan
- Project timeline or calendar.

3B. Develop and Refine the Project Budget
- Project budget.
- Potential funding sources identified.
- Funding proposals developed and submitted.
- Financial resources obtained.

3C. Implement the Plan
- implementation of the work plan, keeping within budget and schedule
- Record progress
- Measure indicators

RC1. Eliminate Rats from Islands		
Policy to Mandate Rat Barriers on Visiting Boats	Completed	Policy work has been completed and Rat Barriers are now mandated for all visiting boats to priority islands.
Research rat barrier technology to inform policy	Completed	Research has been completed; we've looked at five different options and documented the features of each and their potential pros and cons.
Educate ministry officials	Completed	Briefing documents have been produced ad several meetings held to discuss the issues and policy options.
Raise awareness with tourists (if needed)	Scheduled	This doesn't seem necessary at this stage; but the Activity will be started if results are not tracking to plan.
Trap Rats on Key Islands	Minor Issues	We're making reasonable progress on this work although bad weather has impacted our schedule; expect to get back on track in next Dry Season.
Select islands for priority rat elimination	Completed	We have completed the spatial analysis and field surveys on most islands, informing our prioritisation of islands for treatment.
Survey islands to determine suitability	Minor Issues	Most islands have been surveyed but bad weather has stopped us form getting to some of them.
Implement initial control efforts	Scheduled	We aim to start this work at the beginning of the Dry Season.

Example of Progress Reports

Things to look for in projects at this stage.

- Is the project going through regular reviews to ensure that the team is running broadly on-time and on-budget, managing risks, dealing with issues, and requesting support as needed? (i.e. are you confident that the following factors are being routinely considered ?)
  - Does the detailed workplan and budget reflect the highest priority work? Are roles clearly assigned?
  - Are there enough of the right resources available to implement the planned actions and monitoring, and conduct the analysis of results?
  - Is the plan being implemented, on-time and to budget? Is progress being recorded and reported widely?
  - Is the team following through with the Monitoring Plan - recording measures against Indicators.
  - Is the project maintaining support from partners, stakeholders, upper management, and donors?
- Is the team regularly providing quality progress information to keep funders appropriately informed of progress and meet their expectations?
- Are the financial management processes in place and being used to allow tracking of expenditure of donor funds?

Conceptualise
Learn & Share
Plan
MIRADI
Analyse, Adapt
Implement

Information available after Analysis

The Analyse / Adapt step periodically reviews the project's progress and monitoring data to determine whether it is on track to achieve its expected results, and if not, to identify how the plan should be adapted. This information is critical for demonstrating impact to funders, or for explaining the rationale for any necessary variations to the work that they are funding.
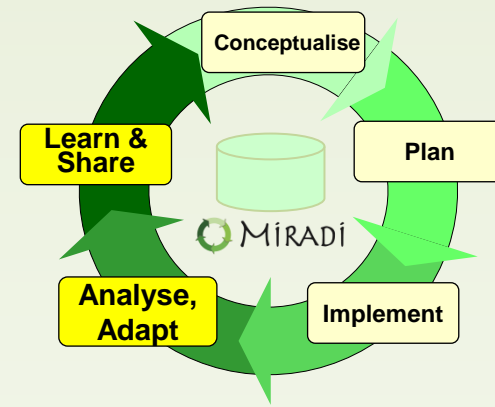
The key work of this step requires the team to analyse the project's results and core assumptions, as well as operational and financial data, and then adapt their work plans as necessary.

Some adaptations to the project might involve changes to items funded by particular donors, perhaps in timing, or quantity. The progress and monitoring data should provide forewarning of these changes, as well as the evidence necessary to explain to funders to need for the variations.

Item	Status	Poor	Fair	Good	Very Good
⬭ Seabirds	Poor				
🗝 Population Size of Ruby Crested Puffin	Poor				
△ E1. Number of breeding pairs of ruby crested puffins	Poor	<250	250-500	501-1000	>1000
📏 2012-03-19: 210		⬇ 210			
📏 2005-03-02: 1200					➡ 1200
⬭ 2022-01-01				△ 750	

Example of Monitoring data, measuring the health of a Target.

The monitoring data here shows measures being taken to assess progress against the project's goal for protecting seabirds. The goal, as shown earlier, is "By 2022, there are healthy populations of all three nesting seabirds on the islands of Eastern Bay". This snapshot shows one of the Indicators for assessing progress towards the goal, being the number of breeding pairs of one species. The target by 2022 is 750; the latest measure was 210, which is in the Poor range. This isolated measure suggests the project is not on track to achieving its expected results and therefore, depending on the analysis of other measures, the plan may need to be adapted.

Conceptualise
Plan
Learn & Share
Analyse, Adapt
Implement
MIRADI

Review of Analyse / Adapt information

Project information that fundraisers should expect to have access to at this stage includes . . . . .

4B. Analyse Results
- Analyses of project results and assumptions.
- Analyses of operational and financial data.
- Documentation of discussions and decisions.

4C. Adapt Strategic Plan
- Revised project documents (including action plan, monitoring plan, operational plan, work plan, and budget).
- Documentation of discussions and decisions.

5A. Document What You Learn
- Documentation of key results and lessons.

5B. Share What You Learn
- Identification of key audiences.
- Development of a communications strategy.
- Regular reports or other types of communication to project team members and key stakeholders.
- Development and distribution of appropriate communication products.
- Use of other people's / partners communication products.

5C. Create a Learning Environment
- Regular feedback shared formally or informally.
- Evaluations and/or audits at appropriate times during the project cycle.
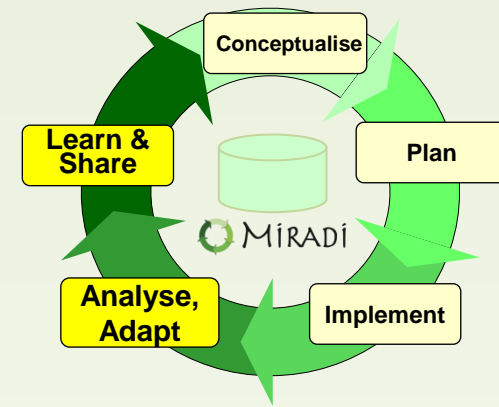
Things to look for in projects at this stage.

- Is the project periodically analysing its results to test whether their theory of change remains appropriate? (i.e. can you assume that the following factors are being considered ?)
    - Are Progress reports & monitoring data being analysed and interpreted regularly and explicitly?
    - Is this analysis being used to update the plan, particularly to re-assess assumptions and strategies to ensure progress towards Goals and Objectives?
    - Are results being regularly and clearly communicated with partners, stakeholders, supporters and other audiences?
    - Does the team periodically review and communicate lessons learnt
- Is the team providing insightful analysis of their progress and results, and meeting funder expectations?
- Are adaptations to the plan clearly articulated with supporting evidence?

Closing the loop

The Open Standards outlined in this document are presented in the form of a cycle. It outlines the general process necessary for the successful implementation of conservation projects. The entire process is rarely applied in a linear fashion from start to finish, however the general principles and information are relevant for most conservation projects and can be readily adapted to the particular circumstances.

A typical project team might go through Steps 1 and 2 fairly quickly (perhaps over a 4-5 day workshop) to sketch out the basic strategic plan for their project. They may then circle back and fill in the details over the next few months for Steps 1 and 2 while they are also beginning the implementation work in Step 3. The team might then conduct its first analyses in Step 4 after six months and use this work to develop their first communication products in Step 5.

Adaptive management is a dynamic process that requires teams systematically evaluation their results and use this information to learn about what works and what does not work, share those results and apply the learning. Well-run projects will routinely move around the cycle, "closing the loop" by applying their learnings to the project's next phases.

As projects go around the loop Fundraisers should expect to see updated project information, which might entail changes to priorities, timeframes and funding needs. In all cases, teams should be able to provide evidence supporting the changes and adequate forewarning of changed funding needs.
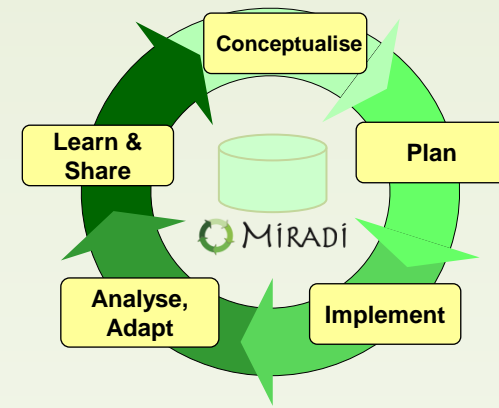
Things to look for in projects at this stage.

- Has the project applied the findings of their analysis and lessons-learnt review to improve the project plan? (i.e. can you assume that the following factors are being considered ?)
  - Has the plan has been revised and priorities adjusted based in updated analysis of Target viability and Threat levels.?
  - Has the workplan, budget and funding needs been revised based on these new priorities?
  - Have all partners and stakeholders been involved in these revisions and are supportive of them?
- Have the team adequately considered the impact on funding and funders of the changes to their plan?
- Have any new commitments to funders been incorporated into the plan?

Example Fundraising Products

Example of a Fundraising "prospectus" produced from information in Miradi

Example of a project scorecard produced from information in Miradi after a Step 4 Analysis

We can do a much better job of fundraising when we can easily access clear, consistent, up-to-date information about your project."

Kate Eddy
Manager Major Gifts & Planned Giving ,
Bush Heritage Australia

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Glossary

Adaptive management - The incorporation of a formal learning process into conservation action. It is the integration of project design, management, and monitoring, to provide a framework to systematically test assumptions, promote learning, and supply timely information for management decisions.

Evaluation – An assessment of a project in relation to its own previously stated goals and objectives.

Goal – defines a desired impact of a project, such as the desired future status of a target.

Impact – The desired future state of a conservation target. A goal states the desired impact.

Indicator – A measurable entity related to a specific information need such as the status of a target, change in a threat, or progress toward an objective.

Monitoring – The periodic collection and evaluation of data relative to stated project goals and objectives (also referred to as monitoring and evaluation (abbreviated M&E).

Objective – A formal statement detailing a desired outcome of a project such as reducing a critical threat. A good objective meets the criteria of being: results oriented, measurable, time limited, specific, and practical. If the project is well conceptualized and designed, realization of a project's objectives should lead to the fulfilment of the project's goals and ultimately its vision.

Outcome – The desired future state of a threat or opportunity factor. An objective is a formal statement of the desired outcome.

Output – usually a measure of activity which, if the theory of change is correct, will lead to outcomes.

Process – or Business Process, a collection of related, structured activities that produce a specific service or product (serve a particular goal); "Processes are the behaviours of real people and events – not documents!"

Program – A group of projects which together aim to achieve a common broad vision.

Project – A set of actions undertaken by a defined group of practitioners to achieve defined goals and objectives. The basic unit of conservation work.

Portfolio – a high-level grouping of projects and programs, managed together to achieve a strategic objective; portfolio management aims to focus resources on the right projects and programs.

Result – The desired future state of a target. Results include impacts which are linked to targets and outcomes which are linked to threats and opportunities.

Results-Chain - A graphical depiction of a project's core assumption, the logical sequence linking project strategies to one or more targets. In scientific terms, it lays out hypothesized relationships.

Target – An element of biodiversity at a project site, which can be a species, habitat, or ecological system that a project has chosen to focus on; can also be a human wellbeing target which, in the context of conservation projects, focus on those components of human wellbeing affected by the status of conservation targets.

Criteria for key terms

Vision Statement: A general statement of the desired state or ultimate condition that a project is working to achieve.
– **Relatively General** - Broadly defined to encompass all project activities
– **Visionary** - Inspirational in outlining the desired change in the state of the targets toward which the project is working
– **Brief** - Simple and succinct so that that all project participants can remember it

Goal: A formal statement detailing a desired impact of a project such as the desired future status of a target.
– **Linked to Targets** - Directly associated with one or more of your conservation targets
– **Impact Oriented** - Represents the desired future status of the conservation target over the long-term
– **Measurable** -Definable in relation to some standard scale (numbers, percentage, fractions, or all/nothing states)
– **Time Limited** - Achievable within a specific period of time, generally 10 or more years
– **Specific** - Clearly defined so that all people involved in the project have the same understanding of what the terms in the goal mean

Objective: A formal statement detailing a desired outcome of a project.
– **Results Oriented** - Represents necessary changes in critical threat and opportunity factors that affect one or more conservation targets or project goals
– **Measurable** - Definable in relation to some standard scale (numbers, percentage, fractions, or all/nothing states)
– **Time Limited** - Achievable within a specific period of time, generally 3-10 years
– **Specific** - Clearly defined so that all people involved in the project have the same understanding of what the terms in the objective mean
– **Practical** - Achievable and appropriate within the context of the project site, and in light of the political, social and financial context

Strategy: A group of actions with a common focus that work together to reduce threats, capitalize on opportunities, or restore natural systems. Strategies include one or more activities and are designed to achieve specific objectives and goals.
– **Linked** – Directly affects one or more critical factors
– **Focused** - Outlines specific courses of action that need to be carried out
– **Feasible** – Accomplishable in light of the project's resources and constraints
– **Appropriate** – Acceptable to and fitting within site-specific cultural, social, and biological norms

Indicator: A measurable entity related to a specific information need such as the status of a target, change in a threat, or progress toward an objective.
– **Measurable** – Able to be recorded and analyzed in quantitative and qualitative terms
– **Precise** - Defined the same way by all people
– **Consistent** – Not changing over time so that it always measures the same thing
– **Sensitive** – Changes proportionally in response to the actual changes in the condition being measured

Fundraisers Guide to the
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Annette Stewart - Fulbright Scholarship 2016
**Improving the *practice* of conservation
by improving the *management* of conservation**

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