



## *Building Resilience and Working Together*

### SESSION DESCRIPTIONS

The Rally 2018 program will include a mix of activities such as plenary events, workshops dedicated to “training” new skills, sessions and working groups dedicated to sharing approaches and exploring specific “challenges” or producing products, and unstructured time to foster networking. You will be able to choose sessions among six tracks, which will cover a range of core and advanced skills in topics that were identified in a survey we conducted last year. Honouring interests expressed by community members, we are offering 24 sessions in the following five tracks:

1. Getting the Method Right: Open Standards Cycle Components and Applications
2. Enhancing the Network, Franchises and the Development of Coaches
3. Expanding and Increasing the Use and Reach of Open Standards
4. Indigenous Planning and Resource Management
5. Getting Ready for the Emerging Future: What Skills and Knowledge Do We Need to Strengthen?
6. Climate Change and the New Climate-Smart Open Standards

Session coordinators are identified in bold and collaborators unable to attend are identified with \*.

Here you can find updated information about the Rally: <http://www.cnetglobal.com/coach-rallies/>

### **Getting the Method Right: Open Standards Cycle Components and Applications**

#### **More Seats at the Table – How to Increase Inclusion and Equity in Conservation Planning**

**Maria Estrada, Heather Wishik and James Puerini**

This 3-part session will address effective stakeholder engagement of women, youth, indigenous peoples and people with disabilities through 3 interactive exercises. We will anchor these exercises in 2 frameworks: Conservation By Design 2.0 and Leveraging Difference, which affirm and elevate the critical role of diverse stakeholders in achieving our conservation goals. We will also provide the tools to practice skillful inclusive and equitable engagement.

#### **Planning for the big: examples and lessons for land and sea-scape strategic planning**

**Estuardo Secaira, Karen Lawrence, Ian Dutton, Jarmo Jalava and John Paskus**

Land, freshwater and sea-scape planning are increasingly needed as conservation practice looks beyond the boundaries of the protected area towards more ecologically defined land and seascapes; including regional trans-boundary and multi-country land, freshwater and seascapes. With larger planning units, grows the need to be comprehensive and strategic about the selection of planning targets, strategies and stakeholders involved. The establishment, or strengthening, of an institutional framework responsible for the development and implementation of the land or sea-scape plan, is key to ensure impact and sustainability. Participants will learn from practitioners' experiences in the first part of the session and will have the opportunity to share their own examples and ask for feedback and advice in the second part of the session, which will have a clinic-format, where all together will provide advice about how to move forward in different situations.

### **Real world examples of going full cycle: tools and processes that you can use**

**Annette Stewart, Arlyne Johnson, Hui Shim, Erica Cochrane, Caroline Stem and Houssine Nibani**

In this session, we'll hear short presentations from four practitioners who have taken their projects full-cycle in an adaptive management process. Each has worked on steps to analyse their progress and then adapt their plans, for projects ranging from small to large and over varying timeframes. We'll hear about the actual steps they took, the products they used, and the results that occurred. In small-group discussions, we'll look at various approaches and will identify how they could be applied in our own organisations. By the end of the session, you will have access to all the shared resources and some insight into how you could take your own projects full cycle.

### **Unlocking the magic of Miradi - Beyond diagrams**

**Annette Stewart, Felix Cybulla, Erica Cochrane, Dan Salzer, Nick Salasky, Arlyne Johnson, Doug Pearsall, Gustavo Gatti, Kari Stiles\* (on-line) and Catherine Payne**

Do you struggle to manage your project information? Are you tired of writing and re-writing and re-formatting documents? Then come along and learn how the Open Standards and Miradi can make your life easier. We'll use real-world examples that demonstrate the latest features of Miradi and Miradi Share and show how these systems can manage your project and program information, and help you demonstrate the benefits to your organisation. A combination of short demonstrations, hands-on use, and access to the latest resources will equip you to do a better job of managing your projects while also freeing up time for more conservation magic.

Please come to the Tools Market if you need to get set up for using Miradi or Miradi Share.

### **From evaluation that stinks to evaluation that sticks: strengthening evaluative culture and practice**

**Ian Dutton, Karen Lawrence and Mei Juin Kwek, Sheila O'Connor\* (on-line) and Elizabeth O'Neill\* (on-line)**

We'll explore what we mean by "evaluative culture" in conservation, including a short, innovative presentation on *building a culture of evaluation*. We'll also explore how to move from an over-reliance on external independent evaluations to building robust internal capacity for evaluative thinking and practice and how to get the most out of evaluations, including the pros and cons of using results chains. Finally, we will "launch" the 2018 updated conservation audit guidelines and seek input into a proposed audit framework and guidance. To close we will facilitate a rapid self-assessment, asking, "How strong is your evaluative practice now and what pragmatic steps will you take to improve?"

## **Enhancing the Network, Franchises and the Development of Coaches**

### **CCNet vs McDonalds – Selling conservation or burgers?**

**Felix Cybulla**

How can McDonald's successfully sell the same unhealthy product year after year after year after year, while we are continuously struggling to leverage funds for conservation? How come a puppy shelter raises tens of thousands of dollars in viral marketing while we must work hard to convince folks to support CCNet Coaches. This session shall serve as a think tank to assess what we have done in the past on the communications and marketing front and where we need to improve and why. Should coaches be solely responsible for marketing CCNet or do we want CCNet to market itself? Do we even want the whole world to know about CCNet? And if so, what are possible next steps?

### **CCNet Franchises. Sharing learning and strengthening leadership globally**

**Irina Montenegro, John Morrison and Cristina Lasch**

This session is especially for franchise leaders. CCNet Franchises have been the heart of our community ever since our Network was established. They support coaches and share relevant resources in local languages, train practitioners in the Open Standards method and in coordination with CCNet global they train new coaches around the world. Franchise leaders play a key role in coordinating efforts in each region and serve as representatives and liaisons to the global CCNet Board. However, each Franchise is at a slightly different stage and the needs of its members also vary, depending on when the sub-network started, how active its members are and what progress each group makes with its action plan. This session will enable leaders from newer and emergent Franchises to interact with leaders from more mature

Franchises, to exchange challenges and lessons learned and explore opportunities to strengthen leadership. This session will equip participants with key elements to energize and improve their own work at a regional scale towards a more powerful and coordinated CCNet.

### **Taking ourselves seriously: conservation coaching as a career path**

**Stuart Cowell, Cristina Lasch** and John Morrison

Many Conservation Coaches lead dual lives – mild-mannered conservation practitioners by day and world-changing coaches of amazing teams, also by day. While for many Coaches, their non-coach life is their ‘legitimate’ career path and being a Conservation Coach a labour of love, sometimes with the support of their organisation, for some it has turned into a career. One way that we can help to change this story and strengthen the role of a Conservation Coach as a career or profession is to provide that path, and signposts and maps to support it. This session will set out what work has been done to date to support the professional development of conservation coaches, what is planned in this area, and invite feedback and ongoing participation. It is a session for people who are particularly interested in refining and further developing conservation coaching as a profession or career path.

### **Make the Open Standards even greater (Again) - Get involved with OS v. 4.0!**

**Caroline Stem, Nick Salafsky, Annette Stewart, John Morrison, Brad Northrup, Lydia Gaskell** and Dan Salzer

Five years have passed since the release of OS v. 3.0. Since then, CCNet has grown from 420 to 630 coaches, CMP membership has become more diverse, community members have developed technical guidance to fill important gaps, Miradi usage has spread across the globe, and Miradi Share has come online to support learning and sharing. As a community, we have grown, struggled, matured, and still continue to do so. It’s time to start capturing that learning more formally and codifying it in v. 4.0 of the Open Standards! And, we need YOU to tell us what you think is needed! This session will focus on:

- 1) identifying and prioritizing key concepts;
- 2) specifying a process for incorporating priority topics into the OS; and
- 3) identifying individuals to support developing, editing, and vetting processes.

## **Expanding and Increasing the Use and Reach of the Open Standards**

### **Institutionalizing adaptive management in conservation entities: Examples from donors and implementers**

**Arlyne Johnson, Doug Pearsall, Annette Stewart, Erica Cochrane, Julien Semelin\*** (on-line) and **Josh Goldstein\*** (on-line)

Do you, as a conservation donor, gauge return on investment? Or as a practitioner, assess the effectiveness of your actions? Learn how donors are institutionalizing adaptive management (AM) into funding and conservation processes, working with grantees to operationalize the Open Standards (OS) and adaptively manage their own practices. Also hear how implementers have adopted and adapted the OS to integrate conservation, human health, and development, and employ Miradi as a program management and assessment tool. In a panel discussion, we’ll dissect these approaches and their methods, tools, and results. We’ll provide access to information and case studies.

### **What’s up with The Nature Conservancy’s Conservation by Design 2.0? Come help us figure it out!**

**Terri Schultz, Trina Leberer, Olivia Millard** and **Oscar Maldonado**

The Nature Conservancy’s Conservation by Design 2.0 shares a strong foundation with the Open Standards, while including a new focus on mapping strategies and building a stronger evidence base throughout the adaptive management cycle. This session will begin with a brief refresher crosswalk between CbD 2.0 and OS components, and then employ a world café format to discuss three questions:

1. What aspects of the CbD 2.0 process do coaches find most confusing or would like to see more guidance or examples of?
2. What are some good examples or preferred types of guidance that would be most useful in clarifying these aspects?

3. In what areas would you specifically need coaching assistance or training in trying to apply this in your operating unit/program?

We will then come back together to share the top findings and draft concrete next steps for filling identified gaps. All coaches are welcome, but it is likely some of the discussion will be TNC-centric.

## **Indigenous Planning and Resource Management**

### **Healthy Country Planning – What is new?**

**Stuart Cowell** and Frank Weisenberger

Healthy Country Planning (a local adaptation of the Open Standards used in Indigenous communities in Australia) has been in operation for nearly 10 years, with many successful projects. A great deal has been learned along the way, beyond the initial adaptation.

This session will explore some of the recent applications of Healthy Country planning using case studies and exercises showing how the HCP process:

1. Enabled a community (Nyikina Mangala) to assess development decisions in regard to their community values including mapping solutions to difficult to map HCP targets;
2. Has continued to be used and adapted by the Wunambal Gaambera people in plan adaptation, which is now seeing a number of groups adopt this approach;
3. Has continued to be adapted with the use of new participatory tools enabling greater engagement in plan development and implementation.

### **Trapped in webs of our own making?**

**Ellie Bock** and Nibani Houssine

Interactive session investigating effective OS specific or influenced approaches used to undertake integrated biocultural planning with Indigenous and/or local communities. All human actions, including conservation planning, take place within the wider planetary Web of Life. Biocultural approaches seek interactive, equitable dialogue between 'natural' and the 'cultural' parameters commonly applied to resource conservation. OS practitioners need to grasp and consider broader strategic and human contexts within which their planning occurs, particularly where their work intersects with biocultural resource valuing/usage.

### **Improved collaboration, sharing and learning of Indigenous OS Projects: working towards a CCNet Indigenous Land and Water Network**

**Frank Weisenberger**, Stuart Cowell, Paula Deegan, Ellie Austin, Dave Kramer, Andre Grant and David Hinchley.

An increasing number of Open Standards/Healthy Country Planning projects with indigenous communities create a great opportunity for more collaboration between indigenous people and OS/HCP coaches working with them across continents. With the growth in the development and use of tools occurring when there is a strong community ownership, this session will explore ways to establish a network of Indigenous Coaches and Coaches working with Indigenous People.

Discussion and exercises will explore needs, the appropriate structure and objectives, strategies and actions to achieve a greater collaboration and an improved practice of OS projects on Indigenous lands and waters.

## **Getting Ready for the Emerging Future: What Skills and Knowledge Do We Need to Strengthen?**

### **Baristas, Bicycles and Biodiversity: Conservation in Urban Environments**

**Rob Sutter**, Andrew Bridges, Sara Gottlieb and Paul Koch

Cities provide the home for almost two thirds of the world's human population and have an overwhelming influence on how the rest of the planet is used, managed, and protected. However, they are dependent on healthy natural systems for clean water, food, flood protection, and other ecosystem services. These urban landscapes – often discounted in the past as being too extensively modified for conservation – are increasingly a focus for biodiversity conservation and offer a unique set of opportunities and challenges for conservation planners. This workshop will explore the application and recommended adaptations to the Open Standards for urban conservation. Three presentations will provide lessons learned from working in urban environments. Session participants will then provide their input regarding application of the Open Standards in urban conservation and what adaptations would improve its implementation.

### **Planning for and with people: connecting development, human well-being and conservation**

**Terri Schulz**, Olivia Millard, Estuardo Secaira, David Kramer, Hui Shim Tan and Caroline Stem

Are you trying to figure out how to better integrate development aspects and human wellbeing into your own project planning, implementation and measures, for example how to link work and results to Sustainable Development Goals, Aichi targets, etc? Then this session is for you! In a world café setting, participants will focus on key issues dealing with the intersection between human well-being, empowerment, sustainable development and conservation. Join us to share challenges, find out how people are tackling these issues, share complementary tools & approaches we collectively are finding useful in practice, help identify parts that could be improved in our OS guidance around these issues and connect with others who are interested in strengthening linkages between development and conservation in their projects.

### **Investing in high impact conservation projects**

**Ian Dutton**, Paul Koch, Annette Stewart and Natalie Holland

Impact investing is a rapidly growing form of socially responsible investing that seeks to secure financial returns alongside positive social and environmental impact. Global responsible, social and impact assets under management reached \$22.9 trillion USD in 2016, a 25% increase over 2014 – these represent around a quarter of all global financial assets. Investments in conservation-related activities are estimated at \$8.2 billion, with much of that coming from public sources. There is strong demand for further investments in this sector and many conservation organizations have established impact investment programs (e.g. NatureVest at TNC) and funds such as the Meloy Fund for Sustainable Fisheries established by RARE. There are diverse funds and investment vehicles being established by private investors and foundations; many of these blend different types of conservation finance, including grants. One of the emerging concerns of impact investors is the ability to measure impact with the same level of precision as returns on financial investment. In this session, we plan to explore two questions:

- How can impact investing benefit your conservation projects?
- How can the Open Standards approach benefit impact investors?

### **Where are we supposed to be doing this? Integration of spatial planning and prioritization into the Open Standards**

**Frank Weisenberger**, Nick Salafsky and Paul Koch, Nate Peterson, Mike Heiner, David Hinchley and Damien Parriman.

A good plan should specify not just WHAT but WHERE we should focus our efforts to achieve the greatest impact. This session will explore how workshop-based methods can be used together with maps and GIS to enhance every step of the OS. Participants will gain insight into best practices for engaging stakeholders in a participatory mapping process and help identify critical elements of spatial planning to be integrated into Open Standards v4.0.

### **How to best mix and match OS tools with other conservation framework tools**

**Dan Salzer, Nick Salafsky, John Morrison, Anita Diederichsen, Kari Stiles\* and Gunilla Kuperus\***

The Open Standards (OS) are just one of a number of planning and decision support tools being used to improve the practice of conservation. While we all use the OS as our common language to share information across projects and many of us believe that the OS are the best “umbrella” option, there are other important tools that fit under that umbrella. This session will feature examples that have successfully integrated different tools and frameworks. Participants will learn how to broaden their toolkits to identify the most appropriate tools for their context and where and when to supplement the OS with tools such as structured decision making, systems thinking, evidence-based practice, outcome mapping, and more.

## **Climate Change and the New Climate-Smart Open Standards**

### **Dumbledore’s army - Examples of planning for an uncertain future**

**Terri Schulz, Liz Terk and Estuardo Secaira**

In this session, coaches will present recent climate change adaptation planning projects. They will address how these projects were consistent with the Open Standards as well as what innovations they used or discovered along the way. We will seek to capture lessons learned to share with the team working on climate-smart Open Standards guidance.

### **Climate-smart Open Standards overview session**

**John Morrison and Marcia Brown**

This session will provide an overview of new guidance for practicing “climate-smart” Open Standards. The overview will touch on principles, building a "seasonal calendar" for your site/region, climate change scenario planning, using socio-ecological drawings to understand impacts of different scenarios, putting information from multiple scenarios into conceptual models, climate-smart strategies. Follow-on sessions will go into more detail on several of the key steps.

### **Harry Potter and the Climate Wizard (Part 1 of climate-smart OS)**

**John Morrison and Marcia Brown**

In this session participants will get a chance to get their hands dirty, working with a site/region of their choosing, to investigate the use of Climate Wizard to looking at climate modelling results and then analyze those results to develop climate scenarios for use in the Climate Smart Open Standards. This is a technical session and participants will want to have their laptops for accessing the online Climate Wizard website (a TNC+ product).

### **Harry Potter’s divination class: divining and documenting future climate scenarios (Part 2 of climate-smart OS)**

**John Morrison, Marcia Brown and Giselle Block\***

In this session, participants will practice hands-on exercises, using ecological drawings, scenario worksheets, and conceptual models to understand the potential impacts of climate change on specific climate scenarios. We will use climate modelling results from the Climate Wizard session (part 1). This is a technical session oriented primarily toward coaches who are comfortable with the Open Standards and interested in incorporating climate change into their conservation planning.

### **Defense against the dark art of Climate Change: ranking climate threats and selecting climate-smart strategies (Part 3 of Climate-smart OS)**

**John Morrison, Marcia Brown and Giselle Block\***

In this session, participants will use the information generated in the previous sessions on climate scenario planning (part 1 and part 2) to conduct a climate-smart threat rating and prioritize climate-smart conservation strategies. This is a technical session oriented primarily toward coaches who are comfortable with the Open Standards and interested in incorporating climate change into their conservation planning.