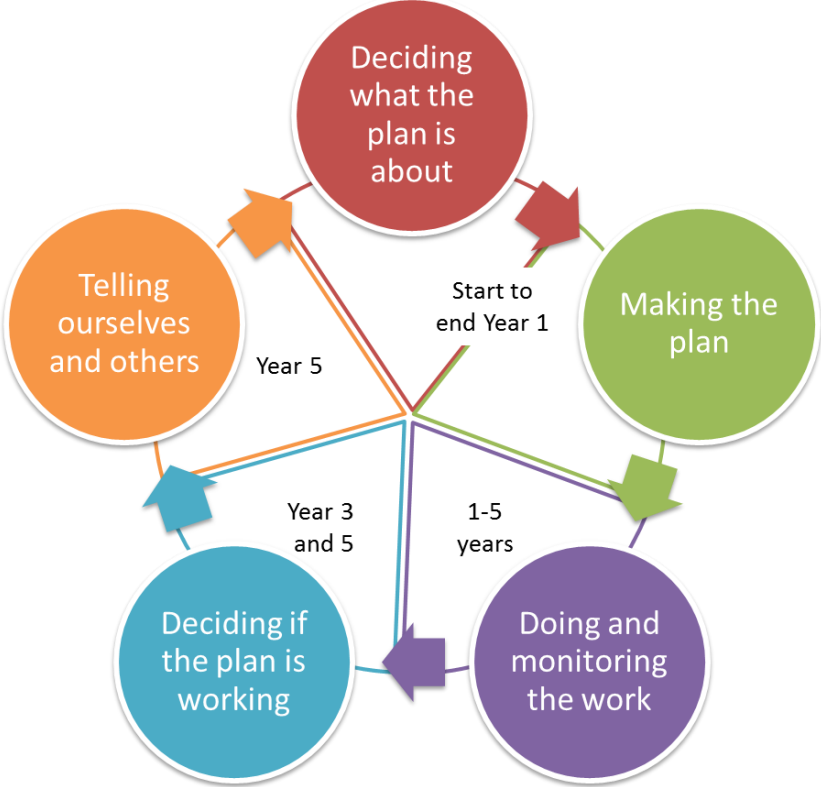# Healthy Country Planning Summary Reference Cards

A Summary guide to each step in the Conservation Action Planning / Open Standards approach to conservation planning for use by facilitators and planning teams.

MARCH 2012

Healthy Country Planning Summary Reference Cards

This document is intended as a quick 'ready reference' for facilitators, practitioners and planning teams using the Open Standards (or associated tools eg CAP) to develop their plans, particularly in a collaborative or community context.

Use the topic pages to guide your work, but adjust according to your time and resources – you can do this in a day with two people or two years with two hundred.

Each summary card contains the following:

1. Heading diagram illustrating the full planning cycle and the step being discussed, showing approximate timeline
2. Links to which CAP/Open Standard step?
   o Lists the specific step in the Conservation Action Planning and Open Standards methods that the card relates to.
3. Why should you do this step
   o Statement on why the step should be considered as part of your plan
4. How would you do this step
   o Some suggested approaches to completing the step
   o Also suggests a way to approach the step if time / resources are particularly limited
5. Who should be involved
   o Suggested participants in the step
6. Things you might need
   o Funds, timeline or tools that can help with this step
7. Questions that can help you do this step
   o Things to think about when planning or doing the step
8. Things to think about when planning
   o Some things to consider in particular if implementing the step in an indigenous / community situation
   o Also suggests ways to approach the step if time / resources are particularly limited
9. What you should have at the end of this step
   o What you should have at the end of this step for use in your plan
10. Support materials and where to find them
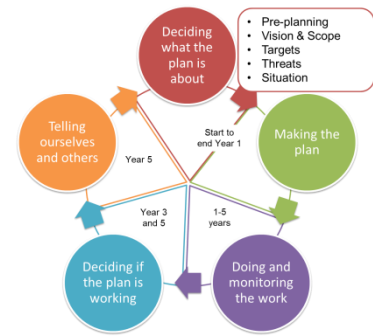   o Where to find some additional information or help.

Acknowledgements

Overview

Pre-planning

Work out how you want to do the plan

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
  a. Before you Begin

Open Standards
  a. Conceptualize
      i. Define the initial project team

Why should you do this step
- To create a rough work plan and approach to make sure the project gets done, and look at capacity and community needs
  - Making a plan can use a lot of time and money, so it is important to really think about how you will do it
  - It is also important to be really clear with yourself and others why you want to do the plan

How would you do this step
- Get together with a small group of people who are most likely to be involved in making the plan or running the planning process
- Discuss the questions below and record your answers – flip chart, video, computer
- Use the CAP Capacity Assessment tool to think about where you might need some extra support and resources

Option for Rapid approach: It is quite possible to do this with just two people as long as they are well informed about the plan and need.

Who should be involved
- Consider involving people with the following skills / background:
  - the person / people who will lead the plan (sponsor, planner, coordinator, facilitators)
  - experience in the community
  - knows the landscape and environment
  - understanding of the resources you have to use
  - will be involved in making the plan work when finished

Things you might need
- Money to bring a small group of people together
- Some basic maps of where you are making a plan for
- Paper / computer to record your answers
- You will need about a day to do this well

Questions that can help you do this step
- Why do we need a plan?
- Who is the plan for?
- Who supports this effort and our roles and responsibilities?
- Who will lead the making of the plan?
- How long we will dedicate to planning?
- What will we produce at the end of the process – books, posters, videos etc?
- How will we do the planning?
- Who should be involved in the planning?
- Who should be involved in the implementation?
- Who should do the monitoring?
- What are the major steps to develop the plan, timetable, responsibilities?
- What resources (skills, equipment, financing) do we have? What do we need?

Things to think about when planning
- Community governance and decision making is critical for the long-term success of your process and plan – make sure you think about it now
- Look at any time issues – deadlines, seasons, community events etc
- On-country (outside / field-based) workshops should be linked with management activities if possible to maximize participation, spread costs, and associate the plan with the place you are planning for.
- Are there other planning / consultation processes might be happening that will make this too great an additional load of activity? Can you fit in with them?
- Expect it to take twice as long as you planned.
- Use an approach that works with your community, understand what you need
- Never make the first workshop your first community meeting

Option for Rapid approach: At least talk to the key community decision makers once you have thought about what you will do

What you should have at the end of this step
- Planning timeline and rough budget
- List of materials needed
- Selection of the initial project team, including the leader of the team, and advisory members
- Identification of the skills each team member brings
- The roles and responsibilities of people involved is decided

Support materials and where to find them
- Open Standards outline (online)
- CAP 'Capacity Assessment' tool (in the CAP excel workbook, Capacity tab)

Vision / Dream

Make a statement about success

Scope / Area

Work out the Boundary of your Plan

Deciding what the plan is about

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
  a. Project information

Open Standards
  a. Conceptualize
    ii.   Define scope, vision, targets

Why should you do this step
- This is the first step in pointing the plan in the right direction – you need to be clear about what you want the future to look like if you are successful in making the plan work
- It is also helpful to be clear about where you are not going to be working – particularly when talking to neighbouring land holders, or other stakeholders.

How would you do this step
- Both the Vision/Dream and Scope/Area are best developed with the whole community, particularly those who will be impacted by the plan
- There are many ways to approach this. The most common way is to break up into smaller groups and have people talk about what they want in the future and record them on flip charts / cards. Look for common themes and ideas and work them into a single statement.
- Develop a 'draft' and test that with different people for the next few meetings until everyone is happy with it.
- Use paper maps to have people draw ideas for the area of the plan

Option for Rapid approach: Review existing materials and plans. Bring together a smaller carefully selected group of people to spend half a day developing the vision and scope.

Who should be involved
- As many community members as possible should have input into the vision / dream.
- The person / people who will lead the plan (sponsor, planner, coordinator, facilitators)
- Elders / people with a good knowledge of the traditional lands involved.

Things you might need
- Funds to bring together a community meeting
- Facilitators to help organise the ideas
- Ways to record the meeting outputs – paper, video, cameras
- Maps / pens

Questions that can help you do this step
- What did our country / lands used to look like?
- What is the initial scope of this project (geographical or thematic approach)?
    - Catchment
    - Property
    - Region
    - Country
- Where the project is located?
- What is our initial vision of success or our great goal for the project or area?

Things to think about when planning
- It is important to understand the history and context of the landscape as a guide to the future – ask people, particularly elders, to talk about their history in that place
- Working out a vision may take many steps, beginning with a very open discussion about what people want to achieve
- Using video, sound recording, cameras as well as pen and paper can be a good way to engage more people in the process – particularly younger people
- Using maps to draw boundaries is a terrific way to begin many discussions about country, values, threats etc. Be ready to capture these things even at this stage of the discussion
- It is worth considering investing in time on country to just talk about values, places, and boundaries (eg Ecotrust mapping) before starting the planning
- Consider using tools like Google Earth
- A lot of planning is being done around Indigenous Protected Areas. It is better to do a plan for all of country, and then see the IPA as a part of that – a strategy

Option for Rapid approach: Review existing materials and plans. Bring together a smaller carefully selected group of people to spend half a day developing the vision and scope.

What you should have at the end of this step
- A brief description of the scope of the project.
- If appropriate, a map of the area of the project (file of GIS or by hand).
- The statement of vision of the project.

Support materials and where to find them
- Conservation Gateway (http://www.conservationgateway.org/)
- Background information on EcoTrust (http://ecotrust.org.au/)
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)

Targets

Deciding what the plan is about

The key things that make project area healthy and as we want it

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
    a. Targets
    b. Viability (Optional)

Open Standards
    a. Conceptualize
        i. Define scope, vision, targets

Why should you do this step

- Your targets are the values, features, assets that you most care about improving, protecting, restoring and keeping healthy.
- They will become the things to focus most of your time and effort on, as a way of keeping your plan manageable.
- Without targets to add to your vision / dreams, it will be a lot harder to put your plan into action and see if it is working.

How would you do this step

- Use the same approach as you did in the previous step – get your community together to talk about what is important, record that (on cards / flip charts) and then organise the information into broad groups of similar things. The groups are your targets.
- You need to aim to get no more than 10 targets for your plan – you can have more, but more targets makes your plan less focussed and less clear.
- Encourage people to also talk about what makes a target healthy and how they will know if it is healthy.
- Your targets will change and evolve over time, as you do more planning and learn more – your first list is not likely to be your final list.

Option for Rapid approach: You can do this with a small group of people using existing information, and just have it reviewed by a larger group. Because your targets will change as you work and learn don't get caught up trying to make them perfect.

Who should be involved

- Planner / facilitator
- People who can speak for country / have traditional responsibility for places
- People who know the landscape well, its features and how it works

Things you might need

- Funds to bring together a community meeting
- Facilitators to help organise the ideas

- Ways to record the meeting outputs – paper, video, cameras
- Maps / pens

Questions that can help you do this step
- What are the values, features, assets that we care about most?
- How would we describe each target?
- Why we have chosen these targets?
- Are there associated or "nested" targets, which will directly benefit the conservation of the objects we select?
- What makes your target healthy and functioning? Is there more than one thing?
- How do we measure out the state of health of each attribute?

Things to think about when planning
- Look at the targets on a map of your project area
- Separating the world into elements can be a challenge for many people, but is an important part of looking at the most important activities for the plan
- Think about targets that link together different parts of the area ie river systems
- Targets can exist outside your proposed area and that you may need to talk to your neighbours
- Think about cultural, knowledge and livelihood / economic targets as well
- A background report can help in thinking about these, as can on-country visits
- Think about indicators that are most relevant to rangers and community, and that reinforce cultural practices eg hunting

Option for Rapid approach: Work with a few key people trusted by the community to do this task rapidly.

What you should have at the end of this step
- List of the targets, including a brief explanation of why they were selected.
- A description of the targets and how healthy we think they are
- Maps of the targets and their distribution
- Table of viability (if using the viability tools)

Support materials and where to find them
- Presentations
- Examples via ConPro (http://conpro.tnc.org/)
- Practitioners Guide (http://www.conservationgateway.org/)
- Open Standards (http://www.conservationmeasures.org/)
- Participatory Conservation Planning report

Threats

Problems and their causes

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
    a. Stresses and Sources

Open Standards
    a. Conceptualize
        i. identify critical threats

Why should you do this step
- To identify the most critical threats impacting on our targets or on our planning area, and stopping us from having healthy country
- To focus on the causes of the problems as a path for action, not just the problem itself

How would you do this step
- The best way to do this step is with a small well-informed and knowledgeable team
- Use information from any previous steps to identify stresses / sources (problems / causes)
- Either use the software tools (CAP or Miradi) to help rank the threats, or rank threats using criteria from the Practitioners Guide on flip charts
- If you need to do this step with a large group use participatory / visual methods instead

Option for Rapid approach: Skip the stresses step and simply identify possible causes and rank them according to severity and scope. You will still need to do some ranking but this will save a lot of time.

Who should be involved
- Planner / facilitator
- People who know the landscape well, its features and how it works

Things you might need
- Materials from previous steps
- Laptop / computer with Miradi / CAP
- Flip charts / pens etc
- Sense of humour

Questions that can help you do this step
- Ask people what is different about the planning area now, but in a bad way?
- What are the problems that stop the targets working properly? – stress / problem
- Are the problems caused by human activities? - sources / causes
- How much of the target can reasonably expected to be affected by the problem in 10

years, if current trends and circumstances keep going? - scope
- How much damage to the target that can be reasonably expected caused by the problem if current trends and circumstances keep going? - severity
- Can the effects of the problem be undone? - irreversibility
- Does the cause of the problem, acting alone, impact on the target? contribution

Things to think about when planning
- There are a lot of different terms used in a full threat ranking process – consider using some of the more visual approaches in workshops
- Many people finding splitting threats into stresses and sources difficult to understand, provide lots of examples – fire is a good one
- Things can be threats and targets –fire is also an example here
- After reviewing our list full of threats, do we have a list that reflects the problems of the project, including threats which may arise or be worsened by climate change?

Option for Rapid approach: Roll this step into the discussion about targets and just get people to talk about threats when they are talking about targets. Work will still need to be done to sort out and rank information, but this can save a meeting.

What you should have at the end of this step
- Identification of direct threats.
- Rating or ranking of the direct threats to identify the most critical threats

Support materials and where to find them
- Presentation
- Examples via ConPro (http://conpro.tnc.org/)
- Practitioners Guide and Participatory Conservation Planning report (http://www.conservationgateway.org/)
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)

Situation

Identifying who causes the problems

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
   a. Situation Analysis

Open Standards
   a. Conceptualize
      i. Complete situation analysis

Why should you do this step
- Thinking about the links between targets, threats, and the causes of those threats means our later actions are well targeted.
- The diagram can really help to explain to people how we see the plan will work, and can form the start of our later work making a results chain.

How would you do this step
- This step can be done as a well recorded conversation, or as a diagramming activity. Choose the way that is most comfortable for you.
- Diagramming is probably best for groups because everyone can see the progress of the discussion and ideas.
- Use whatever materials you have available – paper, string / tape, pens etc, give yourself a time limit and start with just one target and one threat. When you have done one, do another until they are all done.

Option for Rapid approach: Only do this with a small team, or even can be completed by an individual with sufficient knowledge of the plan.

Who should be involved
- Core planning team

Things you might need
- If using the diagram method:
   o Index cards / large sticky notes
   o Blue tac / masking tape
   o Pens
   o Wall space
   o Camera

Questions that can help you do this step
- Do we understand how things impact our targets well enough to design good strategies?
- What are the key things that drive direct threats?
- Who are the key stakeholders related to these practices?
- Are there are opportunities to improve things?
- Are there points where we can have an influence? - these are the key points of intervention
- Are there parts of the diagram where we are not sure of our information?

Things to think about when planning
- This step is best done on a wall or large tarp, but can be done on the ground
- Make it very interactive, and keep probing with 'And what causes that?' questions
- Avoid the diagram becoming too messy – it is meant to help explore and explain critical links, not be a working model of the real world

Option for Rapid approach: This step can be passed over when developing an initial plan, but should be re-visited over time as the plan is implemented

What you should have at the end of this step
- Identification and analysis of indirect threats and opportunities.
- Stakeholder analysis
- Initial conceptual model illustrating the relationships of cause and effect factors operating on your site.
- Basis for moving to Planning

Support materials and where to find them
- Examples via ConPro (http://conpro.tnc.org/)
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)
- FOS Guide to Results Chains (http://www.conservationmeasures.org/)

Goals & Strategies

Making the plan

What are we trying to do and how will we do it?

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
  a. Develop Strategies: Objectives and Actions

Open Standards
  a. Plan Actions and Monitoring
     i. Develop goals, strategies, assumptions and objectives

Why should you do this step
- This is the first step in looking back at the work you have done in 'Deciding what the plan is about' and deciding what to do about it
- Goals and Strategies are absolutely key to shifting to solution-focused thinking!

How would you do this step
- Goals are based on the Threat and/or the Target Health rankings already completed – focus on the most significant threats or targets that have poorest health
- Develop clear (SMART) Goals to reduce the threat or improve the health
- Brainstorm a list of possible Strategies to capture all possible ideas – do this in smaller groups, with each group looking at a specific Goal
- Once you have a list of possible Strategies, with a smaller planning group look at each one and evaluate it (using the Strategy Evaluation tools in CAP / Miradi) to select only the most feasible strategies to take forward

Option for Rapid approach: An initial set of Goals and Strategies can be developed by one person and reviewed by other planning team members. The Miradi evaluation tool is much simpler and quicker to utilise.

Who should be involved
- Core planning team
- At least one person who is good at thinking about strategic solutions

Things you might need
- Funds to bring together a community meeting
- Facilitators to help organise the ideas
- Material from previous steps

Questions that can help you do this step
- What do we need to achieve?

- What are the key threats we need to stop?
- Are there any Targets that we need to focus on to make them healthier?
- Are the Goals we have developed SMART:
    - o **S**pecific – be clear what the goal is about
    - o **M**easurable – you can measure progress
    - o **A**ctionable- it's a thing you can do
    - o **R**ealistic- it is actually possible
    - o **T**ime-bound – you know when it will be done
- Who is involved in causing the problems we are working on? What are their needs?
- Who or what will determine the success of our Goals / Strategies?
- What's the ballpark cost? How many zeros?

Things to think about when planning
- The development of Goals and Strategies is a good time to talk with the community about the plan
- By now you should have:
    - o Vision and Scope
    - o Targets, and target health / viability
    - o Threats, and threat ranking
    - o Situation analysis
- People will talk about Goals and Strategies all the way through the process – don't miss them or who suggested them
- Spend time reminding everyone of the work previously completed, and the conclusions before developing Goals and Strategies.
- Using the SMART tool in a large group can be hard (you don't want to tell a room full of people they are not smart!) – get close and fix later
- Pick strategies that will work quickly – this will reinforce the enthusiasm of participants and strengthen networks.

Option for Rapid approach: See 'How you would do this step'

What you should have at the end of this step
- At a minimum, good Goals for all critical threats and unhealthy targets that your project will take action to address.
- If useful, good Goals for other factors relevant to project success.
- One or more evaluated Strategy to accomplish each Goal.

Support materials and where to find them
- Practitioners Guide and Participatory Conservation Planning report (http://www.conservationgateway.org/)
- Examples via ConPro (http://conpro.tnc.org/)
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)

Results chains

Describing our Theory of Change

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
   a. Measuring Results

Open Standards
   a. Plan Actions and Monitoring
      i. Create results chains

Why should you do this step
- Results chains will help to make clear your assumptions about how strategies will actually help to reduce threats or make targets healthier
- They also help you to be clear about what you will need to monitor and know to show that your plan is working.

How would you do this step
- This step is best done with a small group of people who know the plan well, and understand the planning process.
- It is also best done somewhere you can use a wall to develop diagrams, like the Situation Analysis
- Follow the approach set out in the *Results Chains Facilitation Tips: Some ideas for Workshop Leaders* or the *FOS Guide to Results Chains*

Option for Rapid approach: Results chains can take a bit of work and thinking but really improve the quality of your plan. You will need to do them if you are using Miradi, but if you cannot do it in your first draft make it a key task for your first year.

Who should be involved
- Core planning team

Things you might need
- Index cards / large sticky notes
- Blue tac / masking tape
- Pens
- Wall space
- Camera
- At least one completed Goal with Strategies

Questions that can help you do this step

- What specific steps are you going to take to achieve your Goals?
- Why do you think the steps in your plan of action will work?
- What do you want to happen when you complete each step in this project or process?
- How will you know when you are done?

Things to think about when planning

- This step sounds much more complex than it actually is – just another diagram
- This step is best done on a wall or large tarp, but can be done on the ground
- Make it very interactive, and keep probing with 'And what causes that?' questions
- Avoid the diagram becoming too messy – it is meant to help explore and explain critical links, not be a working model of the real world

Option for Rapid approach: Do not do this step with a large group / community meeting – it will take a lot of time and resources. Use a small team.

What you should have at the end of this step

- Identification of Strategies and the steps needed to get them to work.
- Identification of indicators for monitoring
- Creates a diagram that can act as your Program Logic / Logic Model (for funding etc)
- Basis for moving to Monitoring and Action Plan

Support materials and where to find them

- Results Chains Facilitation Tips: Some ideas for Workshop Leaders
- Examples via ConPro (http://conpro.tnc.org/)
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)
- FOS Guide to Results Chains (http://www.conservationmeasures.org/)

Making the plan

Measures

How do I know if I am getting anywhere?

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
    b. Measuring Results

Open Standards
    a. Plan Actions and Monitoring
          i.   Develop Monitoring plan

Why should you do this step
- To have a clear plan about what you need to monitor, when, who will do it, and what you will do with the results.
- Everyone talks about needing to monitor, but few actually do it in a considered way.
- Monitoring takes time and resources, and can waste a lot of both – spend time now writing a monitoring plan as part of the overall plan can save a lot of time and money.

How would you do this step
- It is useful if you have completed all other steps, particularly if you have looked at the specific things that make targets healthy, how you will show you have reached your goals, and Results Chains.
- With a small team of people, for each Goal / Strategy, identify the critical indicators to monitor, and determine (in a table, the CAP tool and Miradi both allow for this also) method, where, who, cost, and what you will use the result for.

Option for Rapid approach: This step is relatively simple and can be done quickly.

Who should be involved
- Core planning team
- Supporting scientists
- Ranger coordinators / managers – people who will be doing the monitoring

Things you might need
- All previous work – including Results Chains
- Access to computer / spread sheet

Questions that can help you do this step
- What do we need to measure to see if we are making progress towards our Goals and whether our Strategies are making a difference?
- Are there other targets or threats that we need to pay attention to?
- Who do we need to tell the results to?
- What is the best way to tell the results to different audiences?

- Have we worked out at least one indicator and monitoring method for each Goal?
- Do the indicators really show a link between the actions and the Goal?
- Can we actually realistically do the monitoring plan?

Things to think about when planning
- This step is probably best completed with a small group
- Use external expertise to help – there are likely to be things that will need specialist advice
- Look for measures and techniques that are linked to day to day activities and caring for country – they are more likely to continue
- Don't discount community / traditional indicators
- Some data and results are better than no data at all – you can refine your work as you go

Option for Rapid approach: This step is relatively simple and can be done quickly.

What you should have at the end of this step
- A realistic list of the indicators your project will measure to track the effectiveness of each action.
- If necessary, a list of the indicators your project will measure to assess the status of selected targets and threats that you are not currently working on
- The method(s) for collecting each indicator and a clear plan as to how you will do this.
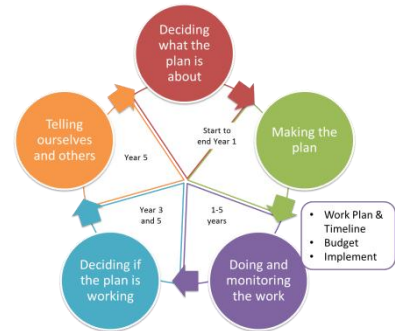- This is the last input into your Management Plan.

Support materials and where to find them
- Examples via ConPro (http://conpro.tnc.org/)
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)

Actions, time & budgets

Implementing the plan

Doing and monitoring the work

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
  a. Develop Work Plan

Open Standards
  a. Implement Actions and Monitoring:
      i. Develop Work plan and timeline
      ii. Develop and refine budget

Why should you do this step
- To develop a detailed annual budget and workplan for the people who will implement your plan.

How would you do this step
- Once the management plan is complete, sit down with the planning team and work though each strategy and identify the actions required to complete the strategy.
- For each action identify timeline, budget, source of funds, who will do it and the results expected
- Develop a budget and work program broken up into the appropriate time frame for your site (calendar year, financial year, seasons)
- This can be done on flip charts and later transferred to a spreadsheet or other eltectronic document

Option for Rapid approach: This step is relatively simple and can be done quickly. If needed, it can be completed by an individual but should be checked by the people below.

Who should be involved
- The person with overall responsibility for the plan succeeding (Manager)
- The person / people responsible for doing the work (rangers etc)
- Someone with an understanding of budgets / finances

Things you might need
- The Management Plan
- Computer / spreadsheet
- Flip charts etc

Questions that can help you do this step
- What are the specific action steps that need to be done?
- Who is responsible for each step?
- What is the timeline for the plan?

- What resources are needed, including people and money?

Things to think about when planning
- This step is probably best completed with a small group
- If they have not been actively involved yet, this is a good time to get your rangers involved – the actions will require some practical considerations
- Work first on your highest-rated Strategies, and target those that will give early results
- It might be worth considering using a tool like Excel, the CAP Excel Tool or Miradi to help organise information in this step

Option for Rapid approach: This step is relatively simple and can be done quickly. If needed, it can be completed by an individual but should be checked by the people above.

What you should have at the end of this step
- Lists of major action steps and monitoring tasks, especially those needing to take place in the near future.
- Assignments for specific individual(s) and a rough implementation timeline.
- A rough project budget.
- A brief summary of project capacity
- If needed, objectives and strategic actions for enhancing project resources.

Support materials and where to find them
- Examples via ConPro (http://conpro.tnc.org/)
- Open Standards (http://www.conservationmeasures.org/)
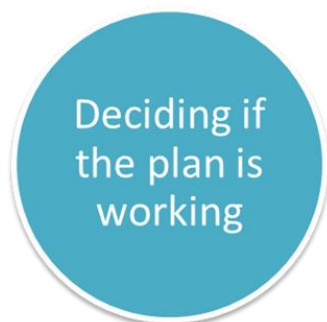
Reviewing the plan

Checking our direction & making adjustments

Deciding if the plan is working

Links to which Conservation Action Planning / Open Standard step?

Conservation Action Planning
   b. Analyze, Learn, Adapt and Share

Open Standards
   a. Analyze, Use Adapt
   b. Capture and Share learning

Why should you do this step

- Important to know whether the plan you have put in place is working and achieving what you wanted.
- A chance to learn & think about improved project management approaches & tools
- An opportunity to get assistance on specific project issues over time
- A chance for peer-review team members to reflect on their own projects
- A help for organisations to understand the status of their projects / activities

How would you do this step

- Project review should be regular eg annual, with a more detailed review half way (3 years) and at the end of the plan cycle (5 years)
- Using your measures information, review your project identify what worked as predicted, what did not, and why
- Look at tools such as the CAP Self Assessment tool to guide your questioning

Option for Rapid approach: Consider using story reporting / interviews for community input. Only complete one detailed review (Year 5) and build annual reviews of the workplan into existing budget review processes.

Who should be involved

- Core planning and implementation team
- Community leaders / clients – the people who need to be happy the plan is working
- Ideally involve partners
- Consider external peer review

Things you might need

- Management Plan
- Work Plan
- Budgets
- Monitoring results

Questions that can help you do this step
- What are our monitoring data telling us about our project?
- What should we be doing differently?
- How will we capture what we have learned?
- How can we make sure other people benefit from what we have learned?

Things to think about when planning
- Teams can be quite sensitive to perceived criticism or critique – make sure this work happens in a positive social environment – if there are underlying community tensions this can be an unhelpful process
- Agree ahead on the questions that will be asked and have a structure for review – this can help de-personalise it
- Consider having an external reviewer/s help, to provide some outside perspective
- Set up a regular review cycle for the different parts of the plan eg actions every 6 months, strategies annually, targets every 2 years, and overall plan every 5
- Stick to it!
- **Don't be tempted to undertake review instead of actually implementing your plan.**

Option for Rapid approach: As for 'How you would do this step'

What you should have at the end of this step
- Appropriate and scheduled analyses of your data.
- Updated viability and threat assessments
- Modifications to your objectives, strategic actions, and work and monitoring plans
- Regular updates of project documents.
- Summaries of what you have learned, focusing on both process and results.
- Appropriate communication outputs for each key audience.

Support materials and where to find them
- Open Standards (http://www.conservationmeasures.org/)
- Audubon Tools of Engagement (http://web4.audubon.org/educate/toolkit/)
- CAP Self-Assessment tools (http://www.conservationgateway.org/)