



Open Standards for the Practice of Conservation and Miradi

10-Day & Semester Course Format

FACILITATOR REPORT

Submitted By: Dr. Heather E. Eves *

Summary: There are many formats that the OS and Miradi training has been offered over the years including 1-3 day workshops, 5-day short courses, 7 & 10-day short courses, semester-long graduate courses – both virtually and in person. It was found during the years of teaching this material that mastery of the planning process offered in Steps 1 & 2 of the OS increased with repeated opportunities to plan multiple projects. As a result, the facilitator developed a case study on Horseshoe Crabs (HSC) (*Limulus polyphemus*) as the first step in training professionals in the OS & Miradi. This topic was selected as HSCs are harvested for both commercial fisheries (bait for eel and whelk), biomedical use (blood component used to test FDA approved medicine), and play a critical role in migratory shorebird ecology (eggs from spawning feeding red knot and other species traveling to breeding grounds) with the birds offering a source of eco-tourism along shorelines. This provides many opportunities for interesting planning development. Once the case study is offered in courses (2-3 days for a 10-day course, 6 weeks of a 12 week semester) students are then offered an opportunity to plan a ‘real’ project usually working with clients that have a need for project planning. Thus, students are able to walk through a full 2-Step cycle a second time. The final testing of OS Steps 1 & 2 comes with the exams offered by Conservationtraining.org which offers challenging questions with repeat opportunities to excel and understand the nuances of the material a third time in the same course. Though no empirical evaluation has been conducted to determine effectiveness of this training method, follow-up with students and evidence seen on planning for the second project in the course indicates this method of offering the OS material likely improves student comprehension and, more importantly, ability to work with the OS in future conservation project planning.

* Dr. Eves is a member of the Board of Directors of Conservation Leadership in the Caribbean - [CLIC](#), a Visiting Assistant Professor at Virginia Tech’s Center for Leadership in Global Sustainability – [CLiGS](#) - where she teaches this material as a graduate course, Professorial Lecturer at Johns Hopkins’ SAIS Energy, Resources and Environment – [ERE](#) - Program, and consultant where she trains field personnel in the use of the *Open Standards* and *Miradi* in field projects. She has been working with the *OS & Miradi* since 2007 offering trainings on this material to a variety of conservation professionals. Please feel free to contact her for any questions or clarification related to this document:
e: heather.eves@aya.yale.edu | c: 703.254.7474 | s: heather.e.eves

DAY	OS & Miradi 10-Day Short Course Schedule Example
1	<p style="text-align: center;">HORSESHOE CRAB CASE STUDY</p> <p>AM Session – Registration for and installation of <i>Miradi</i> free trial (60 days), Registration for Conservationtraining.org online Open Standards course, Download Open Standards for the Practice of Conservation, Bookmark Miradi Tutorial for later review.</p> <p>PM Session – Introduction of Horseshoe Crab Case Study – Scope, Vision, Targets, Viability Assessment. Brief presentations of each step offered followed by fellows working in teams to apply each step following its presentation. After a selected time of working together (20 minutes or so depending on the topic) – groups share and discuss results.</p>
2	AM & PM Session – Horseshoe Crab Case Study – Direct Threats, Threat Ranking, Conceptual Model, Goals, Strategies, Results Chains, Objectives, Monitoring Plan.
3	<p style="text-align: center;">CLIENT CONSERVATION PROJECT</p> <p>AM Session – Team, Scope, Vision PM Session - Targets</p>
4	AM Session – Viability Assessment PM Session – Threats & Threat Ranking
5	AM & PM Session – Conceptual Model
6	AM Session – Strategies – Brainstorming & Selecting Final Strategies PM Session – Results Chain #1 & Objectives
7	AM Session – Results Chain #2 & Objectives PM Session – BREAK
8	AM Session – Results Chains Revisions and Additional Objectives PM Session – Monitoring Plan
9	AM Session – Work Plan PM Session – Budget
10	AM Session – Conservationtraining.org Assessment (Online Exam) PM Session – Management Plan Presentations & Evaluation of Short Course.

OS & MIRADI 12-WEEK SUMMER COURSE SAMPLE SCHEDULE		
Date	Topic	Assignment
HORSESHOE CRAB CASE STUDY		
SI Week 1:	Introduction, Project Team, Scope and Vision	PPT: Scope and Vision
SI Week 2:	Conservation Targets and Viability Assessments	PPT: Targets and Viability Assessment
SI Week 3:	Rating Critical Threats and Situation Analysis (Conceptual Models)	PPT: Threat Rating and Concept Model
SI Week 4:	Goals & Strategies	PPT: Goals and Strategies
SI Week 5:	Assumptions, Results Chains and Objectives	PPT: Results Chain (for One Strategy) and Objectives
SI Week 6:	Actions and Monitoring	Final PPT & Report including Actions and Monitoring Plan
CLIENT CONSERVATION PROJECT		
SII Week 1:	Intro, Team, Scope and Vision	PPT Scope and Vision
SII Week 2:	Targets and Viability Assessment	PPT Targets and VA
SII Week 3:	Threat Rating and Situation Analysis (Conceptual Models)	PPT Threat Rating and Concept Model
SII Week 4:	Goals & Strategies	PPT Goals and Strategies
SII Week 5:	Assumptions, Results Chains and Objectives	PPT Assumptions and Results Chain (One Strategy Only) & Objectives
SII Week 6:	Actions and Monitoring	Final PPT & Summary Report with Actions/ Monitoring

SAMPLE WEEKLY INSTRUCTIONS FOR STUDENTS IN ONLINE 12-WEEK COURSE

NR 5884 Conservation Project Design and Planning

Summer I 2015

Week 1: Introduction, Team, Scope and Vision

Summary:

The first step in the *Open Standards for the Practice of Conservation* is to conceptualize and model conditions, driving influences and biodiversity priorities for a conservation project. All students will work on the same case study in teams for the first six weeks of our course. The case study is focused on horseshoe crab conservation. This process is built step-by-step toward a 'conceptual model' that graphically represents the many factors in the conservation project and how they relate to each other. You will complete your Conceptual Model at the end of Week 3 in this course. During Week 1 you will work with your assigned team to identify a Scope and Vision for this conservation project. Review the materials and readings provided this week and communicate with your group in FORUM to develop your Scope and Vision in a PowerPoint that you will build weekly toward your final presentation and report.

Objectives:

- To understand the general purpose and potential of Adaptive Management / conservation planning and begin to learn how to use *Miradi* software;
- To apply information related to a conservation case study and develop a Scope and Vision;
- To analyze and evaluate available information related to a conservation case study enabling clear Scope and Vision that conform to established criteria;
- To create, using *Miradi*, the first steps in a case study conceptual model (Scope and Vision)

Required Readings:

1. Read Pages 1-10 in our course text, *Open Standards for the Practice of Conservation* (2013).
2. Read instructions in the FOS Training Manual pages 17-24 (Scope and Vision)
3. Review: Salafsky, N., Margoluis, R., Redford, K. H., & Robinson, J. G. (2002). Improving the practice of conservation: a conceptual framework and research agenda for conservation science. *Conservation Biology*, 16(6), 1469-1479.

Assignments (DUE 11:30 PM WEDNESDAY 3 JUNE 2015):

1. Review the following online tutorials for the course "Planning Conservation Projects and Programs Using the Open Standards Curriculum": Introduction, 1.1 Establishing the Project Team, and 1.2 Defining Project Scope and Vision found on [ConservationTraining](#) portal (1 hour).
2. Read Required Readings (1-2 hours).
3. Review background documents provided on Horseshoe Crab Case Study to inform your discussions and decision-making regarding the Scope and Vision. You may use other resources available to you (internet, library, local experts) to learn more about the context of the HSC conservation situation (2-3 hours).
4. Download and familiarize yourself with [Miradi](#) and be prepared to utilize this software in developing your case study and assignments for posting (1 hour).
5. Discuss in your team's FORUM group the readings and develop a PowerPoint presentation that includes a Title Slide (with title and name of project team), Scope Slide and Vision Slide (2 hours).
6. Prepare and maintain a corresponding narrative/report that you will build throughout the session and submit at the end of Week 6 along with the final PowerPoint. The report does not have to be turned in each week – only the PowerPoint is turned in weekly (1-2 hours).

Management Recommendation:

Teamwork and collaboration are essential skills for conservation professionals. They are also a regular topic of discussion among faculty and graduate students in terms of the challenges and opportunities they afford in learning. The material covered in this course is most effectively learned in a team setting. This requires each member of a team to contribute equally. It is recommended that members of the team take turns each week to lead the FORUM discussion and assure assignments are completed and turned in.

Miradi automatically saves work that is produced and it is highly recommended that only one member of a team has the 'hot file' that the team is working on. Ideally you will rotate the management/development of your case study and the 'hot file'. One week one person may lead the discussion and development of that week's deliverables and will be capturing that learning in *Miradi*. Then the responsibility is passed to the next person on the team for the next set of deliverables. You can also separate and have two leaders per week with one leading the discussion/organization of the deliverables and a second leader capturing the final decision in *Miradi*.

It is up to the team how you wish to distribute and manage the workload. This is a fast-paced, complex learning experience and it will be enhanced by each member of the team participating regularly and equitably.