**Open Standards for the Practice of Conservation /   
Conservation Action Planning (CAP) / Miradi**

**TWO DAY INTRODUCTORY WORKSHOP - DRAFT AGENDA**

**Introduction**

It is only during the past few decades that conservation practitioners have begun using rigorous approaches to their work. In contrast, other industries that have been operating for many decades - from accounting to medicine to manufacturing - have progressively developed streamlined processes, standard practices, and knowledge banks that allow people within those industries to work efficiently, leverage prior knowledge, interact with each other, and prove the value of their products and services to customers and investors.

This contrast has been recognised by the world's leading conservation organisations, who have recently collaborated to pool their experiences and develop a "best practice" process for doing conservation projects. This process is called the **Open Standards for the Practice of Conservation**. It outlines the step-by-step process for defining, planning, implementing and analysing conservation projects, and is supported by tools such as the **Conservation Action Planning** (CAP) process and **Miradi** software.

Adoption of the Open Standards aims to improve the quality of conservation project plans, guide their implementation, and analyse the results being achieved so that plans can be adapted as implementation progresses.

The Open Standards are organised into five steps comprising a project management cycle:

1. **Conceptualizing** the project vision and context;
2. **Planning** actions and planning monitoring;
3. **Implementing** actions and implementing monitoring;
4. **Analyzing** data, using the results, and adapting the project; and
5. **Capturing** and sharing learning.

Although these are presented as a series of steps around a cycle, the entire process is rarely applied in a linear fashion from start to finish. Instead, it is a rough approximation of the more complex back-and-forth movements through which a project goes.

Adoption of the Open Standards is supported by a number of components:

* a group of people experienced in applying the Standards, known as the **Conservation Coaches Network** or CCNet, who can guide project teams in using the Standards
* the **Conservation Action Planning** (CAP) and **Healthy Country Planning** (HCP) methods
* some tailor-made software - called **Miradi** - which guides practitioners through each step in the Open Standard cycle, and records the information produced along the way.
* a range of training materials including on-line guides and documents
* formal tertiary courses available through several universities (currently primarily in the US)

**Purpose**

The purpose of this workshop is to introduce practitioners and managers to the core concepts of the Open Standards, and to provide guidance on implementation of key steps. People who have completed the two-day workshop will be familiar with the key elements such that they will be able to work with or manage teams using the Open Standards.

The two-day workshop is stand-alone, but is a valuable stepping stone for those wanting to develop their skills further through the 6-day workshop (2 x 3 day sessions) which go more deeply into each step and its implementation. It is recommended that this workshop be completed by any team proposing to develop a management plan using the Open Standards.

For those that then want to further enhance their skills there are annual ‘coaches’ training workshops that focus on the facilitation of steps with project teams.

**Objectives**

The objective of the workshop is to introduce teams to the Open Standards process. It includes:

* Introduction to the key concepts behind the Open Standards, and the key steps in following them
* Review support and training materials (e.g. PowerPoint presentations; guidelines; “tools”; website, etc.)
* Introduction to how facilitate/undertake a consultation process using the Open Standards process
* Identify areas of the practice for which new teams would like additional support and training.

**Workshop Agenda**

The Workshop will follow the Agenda below.

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| **DAY 1** | |
| **A.M.** | **Welcome. Purpose & objectives**.   * Review objectives, agenda, logistics * Background material, notebooks and homework |
|  | **Introduction to Open Standards. (Presentation: overview of the process)** |
|  | **Participant introductions - Everyone**  Each team will have around 10 minutes, including time for questions from the rest of the group, to briefly describe their project: where it is; what the main issues are in terms of planning process; what they want to get from the workshop. |
|  | **Key Concepts**– people, places, process, language   * Targets * Threats * Situation * Results * Monitoring * Reporting   **Presentation, Tools to use, Introduction of exercise for groups** |
|  | **Exercise:** Break out session - Each team to develop Vision and Scope for their project using the steps and tools provided. Followed by **Facilitated feedback session.** |
|  | **LUNCH** |
| **P.M.** | **Targets - Landscape, Livelihood, Cultural, Bio-cultural, Language– What are we trying to Manage?**   * Presentation of the Step incl Viability (simple – using Indicators only) * Introduction of tools that can be used * Results/outputs from this step (how has it been used and adapted)? * Demonstration example |
|  | **Exercise:** Break out session - Develop targets (at least four) (biophysical and social / cultural) for their project using the steps and tools provided. Record in Miradi. Followed by **Facilitated feedback session.** |
|  | **Threats– What are we trying to Mitigate?**   * Presentation of the Step incl prioritisation (Threats only) * Introduction of tools that can be used * Results/outputs from this step (how has it been used and adapted)? * Demonstration example |
|  | **Exercise:** Break out session - Each team to develop Threats for each target for their project using the steps and tools provided. Record in Miradi. Followed by **Facilitated feedback session.** |
|  | **Review and evaluation of the day** |

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| **DAY 2** | |
| A.M. | **Situation Diagram – joining the dots to find the critical paths and strategies?**   * Presentation of the Step * Introduction of tools that can be used * Results/outputs from this step (how has it been used and adapted)? * Demonstration example |
|  | **Exercise:** Break out session - Each team to develop a Situation Analysis for at least one target (biophysical and social / cultural) for their project using the steps and tools provided. Followed by **Facilitated feedback session.** |
|  | **Strategies and Objectives: Using a Results Chain**   * Presentation of the Step * Introduction of tools that can be used * Results/outputs from this step (how has it been used and adapted)? * Demonstration example |
|  | **Exercise:** Break out session - Each team to develop a Result chain for a Target / Threat pair Followed by **Facilitated feedback session.** |
|  | **LUNCH** |
| PM | **Work Plan / Monitoring Plan**   * Presentation of the Step * Introduction of tools that can be used * Results/outputs from this step (how has it been used and adapted)? * Demonstration example |
|  | **Exercise:** Break out session - Followed by **Facilitated feedback session.** |
|  | **Reporting**   * Presentation of the Step * Introduction of tools that can be used * Results/outputs from this step (how has it been used and adapted)? * Demonstration example |
|  | **Exercise:** Break out session – Develop report focusing on: 1 plan implementation (management effectiveness), 2. Strategy impact (strategy effectiveness) and species status (management). Followed by **Facilitated feedback session.** |
|  | **Review and evaluation of the day** |