



Monitoring and Evaluating CBSG's Conservation Impact Working Group Report

Participant list

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Background

We know that CBSG makes a significant positive impact on conservation through its tool development, training, planning workshops, and facilitation of collaboration across disciplines, cultures, and perspectives. Yet we still struggle to adequately document—and be recognized for—the successes we have enabled in one way or another. Enhancing the way we monitor and evaluate the work we contribute to conservation has the potential for us to learn from and improve our tools and processes, thereby helping us to become even more effective conservation practitioners. At the same time, this data can provide the tangible evidence of the conservation benefits of our work to our donors and supporters—as well as our detractors—and provide another valuable resource to researchers, educators and others.

Workshop Process

The workshop began with a brief synopsis of some of the recent literature on applying monitoring and evaluation processes to measure conservation impact (see references). Building on this and the outcomes of the previous day's discussion of this topic by the Strategic Committee (see Appendix), the group identified and discussed a number of issues to be considered in designing and applying evaluation to CBSG's activities. As a trial, one of these activities was selected in order to identify some measures by which this activity could be monitored and evaluated, selecting methods of gathering the data and identifying the sources of data. An invitation was extended to form a working group to progress this work with the aim of developing guidelines for integrating monitoring and evaluation into CBSG processes.

Results

Issues identified and discussed by the group were:

Who is the audience?

It was recognized that different audiences may require different measures of success. For instance, the evaluation of an organization in order to maintain its accreditation or funding source requires an auditing and evaluation process that often entails a high level of quantitative metrics. By contrast evaluation of an organization's specific projects or activities could involve a very different approach with a greater mix of qualitative and quantitative data. The group felt that, in the current context, monitoring and evaluation was, in the first instance, a means of learning from and improving the conservation practice of CBSG's own practitioners who are also its most discerning and knowledgeable critics. We want to know if our efforts are, in fact, having the intended conservation impact and, if not, to use this knowledge to adapt and focus our efforts in a more productive direction. The same data

could also satisfy the information needs of a number of the other audiences listed in the Appendix. However, the point was taken that a first step in planning a monitoring and evaluation process is the identification of the audience. For the purposes of this exercise, the audience was taken to be ourselves.

What to evaluate?

If we are not evaluating the CBSG as an organization then some of the key activities to evaluate would be tools, training and workshops.

It was suggested that the overall CBSG conservation impact could be looked at as the sum of the evaluations of the individual CBSG activities (as per the table below):

Project	Methods	Tools	Training	PHVA Workshops
1				
2				
3				
4				

Qualitative vs. quantitative metrics?

Evaluation of our impact needs to incorporate both biological and social metrics. A mix of these is likely to more comprehensively reflect our true impact.

Timeframe – at what points to evaluate?

It is recognized that CBSG’s involvement in a project is at some point on a continuum in a longer time frame for the issues being addressed. To establish the impact we have, we therefore need to monitor what happens post the intervention – was it a landmark event that changed the course of progress towards the conservation of the species? We need to distinguish between evaluating the inputs (eg workshops, training) and the outcomes (e.g. biological gain for species, human behavior change, tool deployment). Both are important but require a different approach and timeframe. We know that people say after a workshop that they have done more in three days than in 5 years and this is one level of success and differs from the success of biological gains which can only be assessed over a longer time frame.

This can be addressed by incorporating evaluation into the planning of each project or activity – evaluating the activity itself against its goals but also planning a monitoring program to evaluate the implementation and impact of the CBSG intervention. The timeframe for this will vary depending on the intervention and life of the project but should, initially, not be more than a year – when the intervention is still fresh in the minds of participants. Consequently we should include short-term and long-term goals for the conservation plan (e.g. to be reviewed in 1, 3, 5, 10 years).

Program Logic Model

One approach to planning an evaluation is a program logic model. This is a framework that is applied

from the outset of planning with stakeholders and provides a logical stepwise process, widely used and well described by Jacobson (2009) – see references. It begins with a clear and commonly agreed aim or aims for the activity or project, the individual objectives needed to achieve the aim(s) and steps to be taken to achieve each objective. This allows the evaluation questions and the sources of data to answer them to be identified and planned for from the outset.

Phil Miller noted that Frances Westley and colleagues had performed extensive participant evaluations of CBSG workshops some years ago and these included follow up at defined intervals up to 3 years. Their data is available and their process worth reviewing.

Conservation success stories: what evaluations would be useful for us?

When designing an evaluation plan we need to clarify what is meant by the term ‘success’. This could vary with each project. For instance, we know the Costa Rican orchid workshop: brought researchers together who had never met before but this did not make the book of success stories because it did not directly contribute to viability in the wild. However, could the indirect contribution of this to the future conservation of these orchids be termed a success?

We need to select stories that clearly demonstrate that CBSG’s contributions had a direct and demonstrable influence on the outcome. For instance, the Boys and Girls Club of America claim to have saved X number of kids at risk but, given the multiple influences on these kids, would they have been saved by somebody else in the absence of the club’s interventions? We need to be wary of over-claiming our impact as this would reduce our credibility. At the same time we discussed the risks associated with ‘under-claiming’ CBSG’s influence, and so striking a balance on that front will be important.

Exercise

As an exercise the group used the upcoming Chinese River Dolphin PHVA as a trial of the process of developing a monitoring and evaluation plan:

Chinese River Dolphin PHVA Monitoring and Evaluation Plan		
Measures of success	Method of collecting data	Data source
Increased status of species in the wild	Review by external participants	Field biologists
All relevant stakeholders were brought together (if not why not?)	Review by workshop organisers	Organisers post-workshop review
The PHVA incorporated the One Plan approach	Review by workshop organisers	Organisers post-workshop review
Increased protection of the ecosystem/habitat occurred	Ecological monitoring	Field biologists
Consensus stakeholder support of action plan	Workshop participants	Workshop report

Implementation of planned goals (include failures and establish why?)	Post-workshop survey at x interval(s)	Point information person for project
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Working Group

The following working group was established to progress this work post meeting:

Markus Gusset

Richard Jakob-Hoff

Maggie Jakob-Hoff

Phil Miller

Rachel Lowry

Jo Gipps

UNDP people recommended by Bill Conway:

Guillermo (Graham) Harris and Claudio Campagna (Argentina)

Key action

1. Working group to progress the development of guidelines for incorporation of monitoring and evaluation in CBSG processes
2. Phil Miller to provide the group with the data he has from previous CBSG evaluations led by Frances Westley

Additional possible next steps suggested by Strategic Committee

1. Standardizing terminology: What does 'safe' mean? What does 'success' mean?
2. Survey audiences on what they think conservation 'success' is?
3. Incorporating an adaptive management approach to avoid focusing only on end stage goals
4. Consideration of who should do the evaluation eg. practitioners? independent auditors? Both?
5. Should there be a weighting for level of the conservation challenge?
6. Review what approaches could be useful for evaluating different conservation activities e.g. UNDP results chain
7. Aligning appropriate evaluation measures to the different CBSG activities

References

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- ▶ Jacobson SK (2009) Ch 11 Evaluation and monitoring program success in *Communication skills for conservation professionals* 2nd Ed. Island Press

- ▶ Hoffman et al (2010): The impact of conservation on the status of the world's vertebrates. *Science* 330: 1503-1509
- ▶ Black and Groombridge (2010) Use of a business excellence model to improved conservation programs. *Conservation Biology* 24(6): 1448-1458
- ▶ Young et al (2014) Accounting for conservation: using the IUCN Red List Index to evaluate the impact of a conservation organization. *Biological Conservation* 180: 84-96
- ▶ Hoffman et al (2015) The difference conservation makes to extinction risk of the world's ungulates. *Conservation Biology* 29(5): 1303-1313

Appendix

Evaluating CBSG Impact – Strategic Committee, Al Ain, UAE, 8 October 2015

The CBSG Strategic Committee brainstormed two questions:

What are the range of CBSG activities that contribute to conservation?

1. For which audiences would monitoring and evaluation data on CBSG activities be useful?
2. The results included some activities and some under-pinning practices of philosophies:

CBSG Activities That Contribute to Conservation

Applying good science

- Using the best science
- Informing decision making
- Opening up decision making
- Providing international standards
- Influencing leaders (e.g. zoo directors, politicians, policy makers)

Tools

- Tool development
- Distributing conservation planning tools
- Risk assessment

Planning

- Development of Conservation Action Plans
- Flexible/adaptive approach

Training

- Conservation leaders
- Use of conservation planning and analytical tools
- Workshop facilitation

Education

- Raising awareness of conservation concepts
- Distributing information
- Understanding and communicating the complexity of conservation issues

Facilitating collaboration and information exchange

- Connecting people
- Creating links between *in situ* and *ex situ* conservation efforts (One Plan Approach)
- Bringing stakeholders together
- Bringing people together from a wide range of cultures and disciplines
- Engaging, inspiring and supporting communities to conserve their native fauna

Enhancing conservation practice

- Guideline development
- Proactively tackling emerging conservation crises

Harnessing and effectively using scarce resources

- Avoiding duplication of effort
- Facilitating fund raising

Audiences for whom CBSG evaluation data would be of value

- Species
- Ourselves
- Funding agencies
- Workshop participants/stakeholders
- Politicians/policy makers
- Researchers/scientists
- Tool developers
- General public
- Clients/users of CBSG services
- IUCN/SSC/Commissions/Specialist Groups
- Donors
- Critics/Opponents

- WAZA/Regional Associations – wider zoo community
- Educators