OPEN STANDARDS CASE STUDY TEMPLATE

By sharing real-life case studies of how the Open Standards conservation approach is used at different scales and for different types of projects, conservation practitioners around the World can learn from each others' successes, innovations and blunders. This template has been developed so that we can collect and share lessons learned from the field in a standardized way. If you would like to submit a case study, please fill out this template, save it with a name that refers to your project and send it to Cristina Lasch at clasch@tnc.org.

This template consists of two sections. The first asks for general information that colleagues will be able to read quickly to determine if your case study interests them. The second section requests more in-depth information for people who want to know the specifics of your management approach and lessons, but you can chose which sections to fill out in more detail.

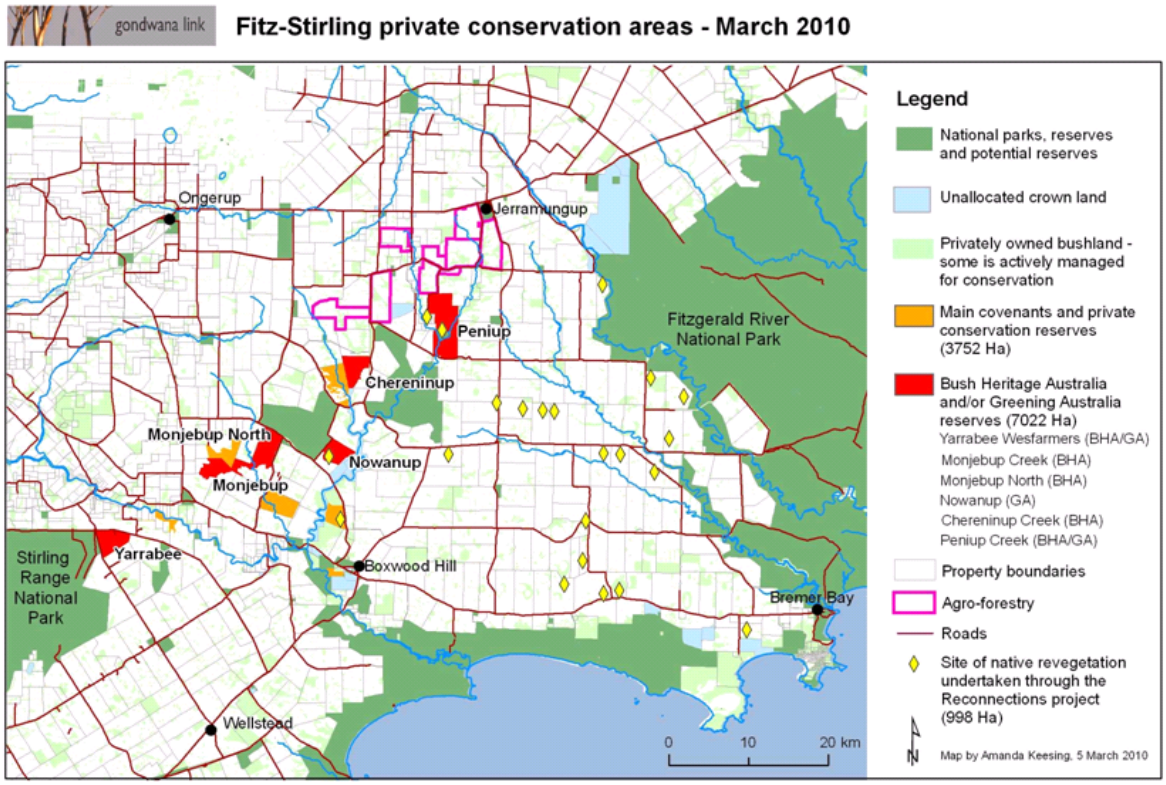
Please use the shaded fields to type, the field will adjust as you enter your information. To select a checkbox, please double click on it and chose the "checked" option.

The members of the Conservation Coaches Network thank you for your willingness to give something back to our community!

Section One: Case study at-a-glance

This section asks you to provide the basics of your project, so we can set it up in a searchable database on the internet. Required fields are marked with an *.

Project name *: The Fitz-Stirling Functional Landscape Plan (Gondwana Link, Australia)
Project URL on ConPro[1] *: *Note: if your project is not already on ConPro, please share it by accessing this link:* *http://conpro.tnc.org/*
Contact Name *: David Freudenberger
Organization *: Greening Australia (and partners)
E-mail address *: dfreudenberger@greeningaustralia.org.au
Other links to web-based project information: **http://www.greeningaustralia.org.au/index.php?nodeId=37; http://www.gondwanalink.org**
Attach a photo to illustrate your project (please indicate how it should be cited)



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[1] ConPro is a searchable project repository where members of the Coaches Conservation Network have agreed to share their projects. You can access it at the following link: http://conpro.tnc.org/

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Date this form was completed *: 30 September 2010	
Project start date *: 2002	
What main actions does your project focus on? * Please check all that apply	
IUCN-CMP classification of conservation actions (version 1.1)	Definition
☒ Land/water protection	actions to dentify, establish or expand parks and other legally protected areas, and to protect resource rights
☒ Land/water management	actions directed at conserving or restoring sites, habitats and the wider environment
☒ Species management	actions directed at managing or restoring species, focused on the species of concern itself
☒ Education and awareness	actions directed at people to improve understanding and skills, and influence behavior
☐ Law and policy	actions to develop, change, influence, and help implement formal legislation, regulations, and voluntary standards
☒ Livelihood, economic and other incentives	actions to use economic and other incentives to influence behavior

☒ External capacity building ☐ Other	actions to build the infrastructure to do better conservation please specify here:

What is the scope or boundary type of your project? Please check all that apply

Ecological boundaries:
- ☒ Large land- or sea-scape
- ☒ Multiple sites / network of sites
- ☒ Species-level crossing landscapes
- ☒ Threat-oriented crossing landscapes
- ☒ Site-based

Political boundaries:
- ☐ Global
- ☐ Multi-national
- ☐ Country-based
- ☒ State, province, municipality
- ☐ Village or community

Resource ownership:
- ☒ Indigenous or communal
- ☒ Private
- ☒ Government (federal, state, municipal)

☐ **Other:** please specify here

Who designed the project? Partnership: Greening Australia, Bush Heritage Australia, TNC, The Wilderness Society, Fitzgerald River Biosphere Group

Who implements the project? Partnership: Greening Australia, Bush Heritage Australia, Fitzgerald River Biosphere Group, private conservationist, farmers

Does this case study represent the full cycle of the Open Standards?
- ☒ Yes (if you selected this option, you can skip to the next field/box)
- ☐ No (if you selected this option, please specify the steps below

Which specific steps of the Open Standards does your case study deal with?

1. Conceptualize:
- ☐ 1A Define initial project team
- ☐ 1B Define scope, vision, and targets
- ☐ 1C Identify critical threats
- ☐ 1D Complete situation analysis

2. Plan your actions and monitoring:
- ☐ 2A Develop a formal action plan: Goals, strategies, assumptions, and objectives
- ☐ 2B Develop a formal monitoring plan
- ☐ 2C Develop an operational plan

3. Implement actions and monitoring:
- ☐ 3A Develop a detailed short-term work plan and timeline
- ☐ 3B Develop and refine your project budget
- ☐ 3C Implement your plans

4. Analyze, use, adapt:
- ☐ 4A Prepare your data for analysis
- ☐ 4B Analyze results
- ☐ 4C Adapt your strategic plan

5. Capture and share learning:
- ☐ 5A Document what you learn
- ☐ 5B Share what you learn
- ☐ 5C Create a learning environment

What adaptations/innovations, if any, did you make when applying the OS (full cycle or specific steps) to this case study?

1) Conservation and restoration at scale (100s km2), rather than just a few hectares here and there
2) New restoration techniques;
3) Delay in fox control until it can be integrated with feral cat control technology still being field tested

What key lessons did you learn in applying the OS (full cycle or specific steps) to this case study? Later on you will be able to explain these or other more minor lessons in more detail.

1) It takes a long time - lots of energy, iterations and dedication from a passionate few
2) Research partnerships (Universities and students) helps maintain momentum and brings in new perspectives and talent
3) Monitoring data for strategy effectiveness can come from outside the project - stay informed, learn from past efforts.

Based on these key lessons, what one or two things would you recommend other teams do that you found really helped your team to "keep the adaptive management wheel moving?"
1) Wake up each morning with the same haunting question - How do we improve conservation impact at the least cost?
2) Keep your eyes open and your enquiring mind fresh - Measures includes thinking about what you see or don't see during the apparently routine travels through the target landscape and learn from casual conversations.

Describe how your team's good practice of the Open Standards contributed to important conservation results so far?
Some examples:
1) Based on 25 years of on-ground activities and oppotunistic monitoring, Greening Australia and other partners came to the conclusion that small scale conservation and restoration actions were important, but not sufficient to meet the scale of threatening processes (e.g. habitat loss, fragmentation and invasive species).
2) Through casual observations, Greening Australia's restoration manager realised that 'best restoration practice' wasn't good enough and had the courage and audacity to try new approaches to revegetation at scale which have been proved, through scientific peer review process, to be an advancement on traditional techniques used for restoration of native woody vegetation.
3) By keeping informed (e.g. attending a research conference) one of the Fitz-Stirling partners realised that the feral predator control strategy for foxes identified in the CAP would be inadequate (limited conservation benefit) if not integrated with novel feral cat control techniques. Sometimes doing nothing for awhile is better than rushing off half-baked.
4) By developing research partnerships (thanks to support from TNC) we have much greater insight into cost effective monitoring of rare and small marsupials. It's likely to be better to monitor relatively common species like possums that should respond quickly to effective fox and cat control.

Section Two: Case study – detailed description

This section provides space where you can share more detailed information about best practices and lessons learned. Our intention is to focus on information that complements project data already available on ConPro, so there is no need to share basic project information here.

The structure follows the steps of the Open Standards, so we have provided reference information on what each step and associated outputs.

In the "Lessons learned" section, you only need to fill out the areas where you have something to tell, so if you feel you have nothing to share about an entire step, it's OK. Feel free to tell your story in your own style, share images or hyperlinks to videoclips and other support materials that illustrate your approach and recommendations.

Lessons learned - Open Standards for the Practice of Conservation

Lessons learned from Step 1: Conceptualize

Please share any innovations or positive findings you may have for this step.
1) A visionary project leader is critical, but not sufficient. Institutional partners (e.g. Greening Australia, Bush Heritage Australia, The Wilderness Society and TNC) supporting the leader is just as important.
2) CAP coaching (provided by Greg Low) early in the process got us started on a firm footing
3) Securing funding to support staff dedicated to developing the earlier iterations of CAP made a big difference

What, if any, opportunities are there for improving the way you implemented this step?
1) As the TNC Audit Team rightly pointed out, we (the partners) didn't successfully engage the largest landholder in the project area - the government department of conservation. For complex reasons (e.g. local geo-politics), we continue to struggle at a high level, but are making progress engaging with local park ranger (operational level).
2)Miradi, as a CAP tool, was not available early on, its use would have likely got us to the 'Situation Analysis' sooner. This step is important in building a common understanding and expose underlying assumptions.

What, if any, recommendations do you have for others implementing this step?
Get a coach, secure dedicated funding and staff for CAP, and do a Situation Analysis early on

Reference information about Step 1, which can help you think about ideas you want to share:

This first step involves the following:	Outputs for each standard practice within this step include:
1A. Define initial project team	• Selection of initial project team, including project leader, core members, and advisory members. • Identification of key skills each team member brings. • Designation of roles and responsibilities.

This first step involves the following:	Outputs for each standard practice within this step include:
1B. Define scope, vision, and targets	• A brief description of the project scope. • If appropriate, a map of the project area (GIS file or hand sketch). • A vision statement for the project. • Selection of conservation targets, including a brief explanation of why they were chosen. • A description of the status of each priority conservation target.
1C. Identify critical threats	• Identification of critical threats. • Rating or ranking of direct threats to identify critical threats.
1D. Complete situation analysis	• Identification and analysis of indirect threats and opportunities. • Assessment of stakeholders. • Initial conceptual model that illustrates cause and effect relationships among factors operating at your site. • Ground-truthing and revision of your model.

Lessons learned from Step 2: Plan your actions and monitoring

Please share any innovations or positive findings you may have for this step.
At least informal monitoring should start on day one, not year 5. Look and ask around. What's worked in the past and what hasn't? History has a lot to teach us. What strategy effectiveness and status monitoring is already out there? Ask lots of questions, there's a lot of monitoring data in people heads - there are many eyes and memories out there.

What, if any, opportunities are there for improving the way you implemented this step?
1) Results Chain analysis was not a common practice at the start of this project and might have helped better target conservation and restoration targets.
2) We're just now thinking hard about what management decisions should be influenced by monitoring and what indicator thresholds might be for management decisions. These are critical 'starting' questions.

What, if any, recommendations do you have for others implementing this step?
1) Action and monitoring planning starts with SMART objectives
2) Institutional commitment to Measures is essential and takes a lot of work to get and maintain.

Reference information about Step 2, which can help you think about ideas you want to share:

This first step involves the following:	Outputs for each standard practice within this step include:
2A. Develop a formal action plan: Goals, strategies, assumptions, and objectives	• Goals for each target. • Identification of “key factors” and draft strategies. • Ranking of draft strategies. • Results chains that specify assumtpions for key strategies.

This first step involves the following:	Outputs for each standard practice within this step include:
	• Objectives for key factors.
2B. Develop a formal monitoring plan	• Audiences and their associated information needs clearly defined. • Indicators defined. • Finalized Monitoring Plan.
2C. Develop an operational plan	• Assessment of human, financial, and other resources. • Risk assessment and mitigation. • Estimate of lifespan and exit strategy.

Lessons learned from Step 3: Implement actions and monitoring

Please share any innovations or positive findings you may have for this step.
1) Creativity and innovation can be confronting, but don't assume there is a 'recipe' for high impact conservation and restoration practices. Passionate innovators can easily become righteous - "my way or the highway", but rigorous monitoring helps break through the emotion.
2) Aim for a diversity of actions: conservative (well tested), innovative (looks promising) and out of the box (nuts?). Failure is defined as not learning from your mistakes. Insanity is defined as expecting a different result from doing the same thing over and over.
3) Useful partners can carry heavy baggage - some of us questioned partnering with Shell energy corporation, but they enabled a lot of good to happen.
4) Engaging local communities in a sensitive and caring manner is just as important as attention to non human needs in the landscape. In particular, our collective experience working with the regional indigenous community, the Noongar, has been challenging at times but deeply rewarding.

What, if any, opportunities are there for improving the way you implemented this step?
1) Effective monitoring requires planning and systems, but more importantly a day to day culture of recording what one did on the ground. Recording who did what, when, where and why is the critical starting point for Strategy Effectiveness Measures. Don't start measuring outcomes of activities if no one has recorded the actual activity linked to a CAP objective and strategy. A no brainer, but often forgotten or lost. For example, we've lost the list of species in the seed mix for the largest single restoration planting in Australia (600 ha). It's near impossible to evaluate the effectiveness of the planting not know what was planted in each hectare.

What, if any, recommendations do you have for others implementing this step?
1) Multiple partners can be hard work, but are essential for achieving large scale conservation gains.
2) Acknowledge and expect that some partners will do most of the heavy lifting at times, but may drop off as funding changes, priorities shift, so be patient, but stay persistent.
3) Formal research and research institutions should be considered as part of the monitoring effort. But use the CAP process to drive the research, rather than be driven by some one else's research agenda.

Reference information about Step 3, which can help you think about ideas you want to share:

This first step involves the following:	Outputs for each standard practice within this step include:
3A. Develop a detailed short-term work plan and timeline	• Work plan detailing the tasks, activities, and responsibilities associated with your Action Plan, Monitoring Plan, and Operational Plan. • Project timeline or calendar.
3B. Develop and refine your project budget	• Project budget. • Potential funding sources identified. • Funding proposals developed and submitted. • Financial resources obtained.
3C. Implement your plans	• Generally, implementation of strategic plan (action, monitoring, and operational plans).

This first step involves the following:	Outputs for each standard practice within this step include:
	• More specifically, implementation of your work plan, keeping in mind your project budget and schedule.

Lessons learned from Step 4: Analyze, use, adapt

Please share any innovations or positive findings you may have for this step.
1) Use, analyse then adapt practices based on information available today, don't wait to learn and adapt until new data comes in. Look around, there is much to learn.
2) Thanks to the TNC, funding was provided to analyse, write up and communicate some of the early lessons learned from innovative restoration planning and technology. This step takes time, therefore money and talent.
3) Graduate students can be of great assistance for this step. But it's not their job to communicate their results to all partners and their leadership teams. That's our job as conservationists employed by our respective organisations.

What, if any, opportunities are there for improving the way you implemented this step?
1) To date our monitoring linked to actions, strategies and objectives has been loose - done on very limited budgets and not well documented, nor coordinated. Much to improve, but we are learning in fits and starts.
2)

What, if any, recommendations do you have for others implementing this step?
Getting the right balance of planning and on-ground actions is tricky. On thin budgets all resourcing could be tied up in top-shelf planning, spatial prioritisation, statistically rigorous monitoring designs etc. But a good plan that sits on paper never improved the viability of a CAP target. Get out there and do it, but try different things and please RECORD what you did when, where and why. A lot can be learned at a later date by 'going back' to check out what some one did 10 years from now, if activity data (inputs) have been well captured and archived. Don't trust memories, one day they will walk out the door to a different job and place.

Reference information about Step 4, which can help you think about ideas you want to share:

This first step involves the following:	Outputs for each standard practice within this step include:
4A. Prepare your data for analysis	• Development and regular use of systems for recording, storing, processing and backing up project data.
4B. Analyze results	• Analyses of project results and assumptions. • Analyses of operational and financial data. • Documentation of discussions and decisions.
4C. Adapt your strategic plan	• Revised project documents (including action plan, operational plan, work plan, and budget).

Lessons learned from Step 5: Capture and share learning

Please share any innovations or positive findings you may have for this step.

1) Seeing is believing. Greening Australia ran a CEO Group and National Board meeting in the Fitz-Stirling, in the field. The view from the actual mountain top fundamentally shifted the thinking of the whole organisation. More expensive than a meeting in a city board room, but highly effective.
2) Greening Australia received an annonymous donation that it will use to convene a staff forum in the Fitz-Stirling during April 2011. We expect to similarly shift thinking and build enthusiasm for well planned conservation at scale amongst a 'community of practice' made up of key 'operational' staff across the organisation. Impassioned leadership is necessary but insufficient, don't forget the 'grunts on the ground'.

What, if any, opportunities are there for improving the way you implemented this step?
1) As partners we've yet to commit to regular reporting between ourselves using a range of old fashion technologies like face to face meetings and phone links to the latest 'Wiki' internet wizardy.
2) Making the time to analyse, use, share and adapt is always a challenge. An annual directive from the CEO or Board can help!

What, if any, recommendations do you have for others implementing this step?
1) Sharing learning takes time,energy and courage. It doesn't often happen spontaneously - it needs to be facilitated by a box of donuts, an end of the day beer, a weekly briefing, a leading question like 'what's up?'
2) Some good folk (and organisations) aren't natural 'sharers'. They can be mighty precious about their successes and failures. This is particularly evident when 'business values' start creeping into an organisation that becomes preious about 'their IP'. History shows that 'open source' provides much more adaptive solutions (and wealth) than monopolies of ideas and systems. Sharing can require coaxing and coaching and occassionally a 'leak' can be useful!

Reference information about Step 4, which can help you think about ideas you want to share:

This first step involves the following:	Outputs for each standard practice within this step include:
5A. Document what you learn	• Documentation of key results
5B. Share what you learn	• Identification of key audiences. • Development of a communications strategy. • Regular reports of other types of communication to project team members and key stakeholders. • Development and distribution of appropriate communication products. • Use of other people's communication products.
5C. Create a learning environment	• Regular feedback shared formally or informally. • Evaluations and/or audits at appropriate times during the project cycle. • Demonstrated commitment from leaders to learning and innovation. • A safe environment for encouraging experimentation and questioning the status quo. • A commitment to share success and failures with

This first step involves the following:	Outputs for each standard practice within this step include:
	practitioners around the world.

Lessons learned from applying the full cycle of the Open Standards:

Your comments here can focus on the project itself, and/or the way the full cycle was applied.

What, if anything else, would you like to share, on innovations or positive findings about closing the loop, or your application of the full cycle?

Closing the loop should be a 'nested' activity. We should try to close the loop on daily to decadal cycles. "What did you learn today young one" to "Tell us a story Grandma". We close the loop instinctively on a daily basis - we monitor the weather and adust our clothing, we monitor our bank balance and adjust our spending. It's all based on the simple "if-then" premise. If it's hot, then take off a layer. But closing the conservation loop is harder because of long time lags and multiple feedbacks. If we kill enough foxes and cats for the next 5 years, it might take 10 years to detect a reliable difference in marsupial abundance because they breed slowly and are also affected by droughts, disease and changes in habitat (e.g. wildfire). Therefore closing the loop requires commitment, thoughtful planning and a diversity of minds and tools to sort out the 'signal from the noise'.

Please share any opportunities for improvement, based on your application of the full cycle.

Please provide recommendations for others, if relevant, based on your application of the full cycle.

Thanks for sharing your work!