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.
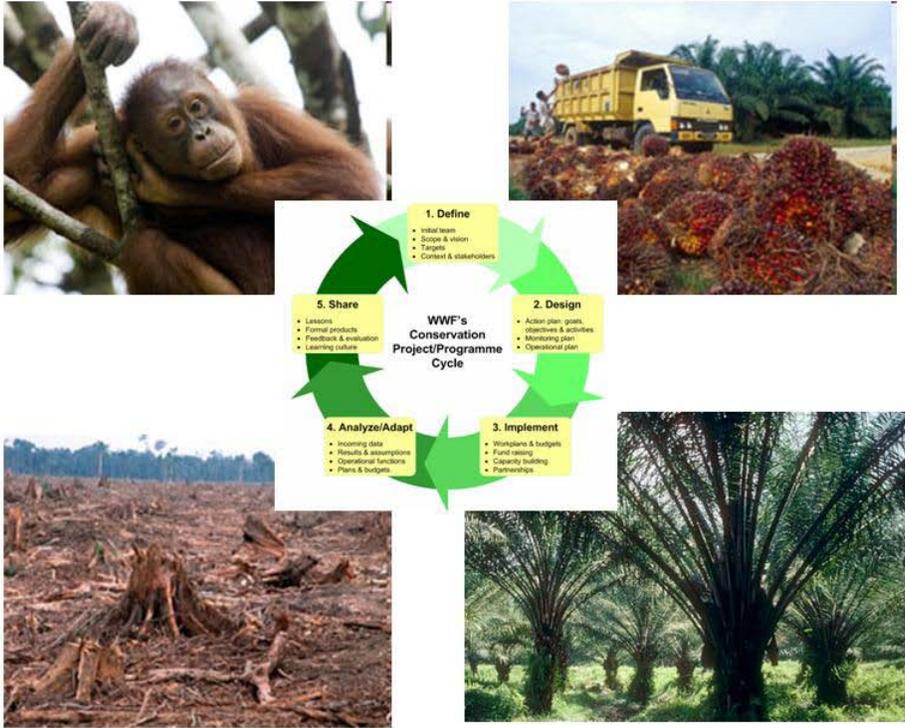
This template consists of two sections. The first asks for general information that colleagues will be able to read quickly to determine if your case study interests them. The second section requests more in-depth information for people who want to know the specifics of your management approach and lessons, 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 *: WWF-Australia Palm Oil Campaign
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 *: Lydia Gaskell
Organization *: WWF-Australia
E-mail address *: lgaskell@wwf.org.au
Other links to web-based project information: http://wwf.org.au/news/aussie-retailers-ranked-in-new-wwf-palm-oil-scorecard/
Insert a photo to illustrate your project (please indicate how it should be cited)
Date this form was completed *: 30 September 2010

[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/

Project start date *: Apr 2009	
What main actions does your project focus on? * Forest conversion to palm oil plantation, corporate social responsibility, consumer awareness and choice	
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	actions to build the infrastructure to do better conservation
☐ Other	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

☐ **Other:** please specify here

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

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

Who designed the project? WWF-Australia

Who implements the project? WWF-Australia

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?
We did not make changes per se, however we did find that we did not use the stps in sequence but more iteratively, moving backwards and forwards within steps in order to continuely test our assumptions

What key lessons did you learn in applying the OS (full cycle or specific steps) to this case study?
A key lesson that we learned: using a good knowledge of the standards and a little bit of creative flair, they can definitely be used to create Footprint project which is focused and measurerable

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?"

What was really helpful to us was a good stakeholder analysis at the start of the project and a desktop review of previously captured information. It helped us to ensure that we weren't re-inverting the wheel and importantly collaborating with the right people.

Describe how your team's good practice of the Open Standards contributed to important conservation results so far?
Our use of the standards helped us to meet our projects objectives successfully and ahead of time. This was because we were focused and iterative, we constantly tested our assumptions and sought stakeholder input. We now have to decided….what next?!?

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 – Stakeholder Analysia

1. **Stakeholder Analysis**
A full and comprehensive stakeholder analysis was key to the success of this campaign. Using the stakeholder analysis the core team was able to identify the main industry stakeholders to target in order to achieve its desired outcomes. It was also possible to identify NGOs that would be working on the issue during 2010, determining if their campaign complemented the proposed WWF campaign and how we could use each others strengths to support each other to achieve their outcomes where relevant.

Lessons learned from Step 2: Plan your actions and monitoring

Example not given in this case study

Lessons learned from Step 3: Implement actions and monitoring
2. **Workplan**
A good workplan with each team member identified next to an assigned task with deadlines was a great tool. This ensured that everyone was working towards the same activities and the scorecard was released on time with all stakeholders feeling consulted and part of the process.

Lessons learned from Step 4: Analyze, use, adapt
3. **Analyse and Adapt**
A major lesson learned was that the power of the PPMS is that it is a cycle and not static, that at any point within the cycle the team could go back, re-assess and test its assumptions. Because of this, throughout the duration of the campaign, the team was able to adapt and positively feedback into the planning process and avoid magnifying any issues that would continue if not discovered without continually testing your assumptions.

Lessons learned from Step 5: Capture and share learning

4. Share - Using shared and captured information

By collecting and using information that was available through a desktop review and stakeholder interviews at the start of the planning process the core team was able to successfully research the Australian market. As a consequence the team could create more focused and Australian relevant objectives and strategies.

Importantly the team were also able to use a lot of previously available valuable information including situational analyses, strategies and objectives identified as crucial to the success of any palm oil campaign. This great work by the MTNI team and Palm Oil Working Group ensured that the WWF-Australia team was not reinventing the wheel, saving time and more importantly contributing to WWFs global vision for this commodity – speaking with one voice.

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

5. PPMS can be used for a Footprint and Advocacy campaign

The team would like to note that they had to be creative in certain areas of the cycle to ensure that they could monitor their project effectively including choosing measures of success that were linked to their objectives but not necessarily directly linked to their biodiversity targets. They identified that a large amount of resources would be required to monitor the biodiversity targets and that there would be significant difficulty in drawing a clear link between this campaign and any direct change in the biodiversity. The team therefore chose to monitor the objectives that would contribute to the larger MTNI.

This campaign was entirely an advocacy campaign and based on footprint issues, the team used the steps within the PPMS to plan and implement the campaign, understanding that they would have to alter and adapt certain aspects of the cycle in order to fit their project. The team feels that PPMS was important in helping them to create a well managed and targeted plan that delivered the successful outcomes they were looking for and ahead of the timeframe they were expecting. The team would like to comment that having a good understanding of the PPMS cycle and process was helpful and allowed them to be creative and adapt the steps to fit their footprint campaign. The team would recommend the use of PPMS in developing footprint and advocacy campaigns and projects.

Thanks for sharing your work!