**Conservation Coaches Network (CCNet)**

**Coach Designations**

**With Addendums for Coaching Competencies and Self-Assessment**

***March 2012***

1. **Purpose & Introduction**

The Conservation Coaches Network (CCNet) contains a diverse array of coaches who facilitate planning and training using the Open Standards (OS) for the Practice of Conservation. Some are new to coaching but know conservation planning well. Some are skilled planners and facilitators but are relatively new to being a coach or mentor. Some are specialized in various conservation planning components, some are very experienced conservation practitioners with rich intuitive strategic skills but less confidence or interest in technical tools and some are seasoned conservationists and skilled facilitators that have worked with conservation planning in many different settings and geographies.

The CCNet coach designation scheme outlined in this document is proposed for the following purposes:

1. To give “clients” and peers the ability to recognize and better understand the strengths and competencies of the CCNet’s coaches.
2. To provide a framework, and pathway for Coaches to understand and define their own professional development and growth goals as CCNet coach/practitioners.

Understanding the strengths and competencies of the CCNet’s coaches will enable the network coordinators and franchise leaders to foster more efficient exchanges, build more capacity where needed, and help practitioners find good matches to meet their coaching and workshop needs.

The coach designations are not meant foster competition. And it is not in any way designed to create hierarchy. Some coaches may *only* want to specialize in a certain area or only *climb* so high in the coaches’ designations. To reinforce the core purposes of this approach, coaches will self-rate themselves in the designations answering questions on their experiences, personal interest, and willingness to invest in supporting CCNet.

1. **Designations**

Three designations are proposed for OS CCNet Coaches: Coach, Coach/Trainer, and Coach-in-Training. Each designation is described below:

1. **Coach**

A CCNET Coach leads, mentors and/or supports conservation project teams including diverse partners and stakeholders to apply the OS process to develop effective conservation strategies and measures of success for a given project area. Coaches support teams by facilitating some or all of these elements of the OS process:

* incorporate the best available science;
* identify key conservation targets;
* determine the health of the conservation targets;
* identify critical threats;
* develop strategies with a high potential for abating the primary sources of those threats;
* establish measures to evaluate the effectiveness of these strategies in-order to adapt and learn from direct experience
* select appropriate methods for data collection and analysis
* Determine the most effective mechanisms for communicating results both internally and externally
* Analyzing projected time commitments against anticipated work in order to develop the most feasible plans.
* Describes the purpose and the key components of the workplan including actions to be taken, who will be responsible, when will tasks be undertaken, and helps build a basic budget.
* Describes how all of the OS components can be developed into a strategic conservation plan.

Coaches act as resource as requested by the project lead. While coaches typically will lead a team through an OS process to produce a meaningful plan, they may also consult, review and or troubleshoot various parts of the OS process for teams. Coaches commit to continually honing their skills, innovating, and sharing knowledge regarding OS with CCNet in order to improve the practice of conservation.

CCNET Coaches progress in their levels of experience and willingness to engage in CCNET/OS activities and network. To facilitate this process and cultivate a team of strong coaches, newer coaches are encouraged to choose a mentor coach and set goals for their development as a coach.

*Qualifications*

* Have completed a coach training.
* Competent to support a conservation team to apply OS process to a new project.
* Participated as a lead or project team member in multiple full OS processes.
* Proven applied conservation experience and/or direct field-based experience working with project teams to foster OS implementation.
* Strong facilitation skills.
* Has a strong understanding of OS basic practice, CCNet and role of coach.

*Duties*

* Supports at least one CCNET/OS project per year.
* Submits OS projects to ConPro or similar database.
* Maintains currency with method by attending CCNet Rally every other year.
* Participates in regional Franchise conference calls and meetings, working with the Franchise leader and other coaches to identify regional CCNET/OS support needs and annual plans for addressing needs.
* Shares other products from workshops and/or lessons learned with Network.
* Participates in supplemental CCNET/OS Coach trainings to hone skills as appropriate.
* Serves as mentor to coaches-in-training.
* Identifies their CCNET/OS work, personal skills training and contribution to the CCNet in their annual objectives.
* Provides basic data and self-assessment information to CCNet map/database.

1. **Coach/Trainer**

A CCNET Coach/Trainer also leads, mentors and/or supports conservation project teams to develop effective conservation strategies and measures of success for a given project area using the OS. Coach/Trainers are expected to have all of the skills of a coach, with additional skills and experience.

Coach/Trainer not only are required to continually hone their own skills, but to share their knowledge and OS skills with other CCNet coaches in order to improve the practice of conservation.

*Qualifications*

* Participated as a coach in multiple full OS processes.
* Have provided coach training to others.
* Competent to support multi-team OS planning processes and their respective coaches and coaches-in-training.
* Very strong facilitation skills.
* Has a strong understanding of OS basic practice, Coaches Network and role of coach.

*Duties*

* Supports at least one CCNET/OS project per year.
* Submits OS projects to ConPro.
* Maintains currency with method by attending CCNet Rally every other year.
* Participates in regional Franchise conference calls and meetings, working with the Franchise leader and other coaches to identify regional CCNET/OS support needs and annual plans for addressing needs.
* Shares other products from workshops and/or lessons learned with Network.
* Participates in supplemental CCNET/OS Coach trainings to hone skills as appropriate.
* As appropriate, serves as mentor to newer, “apprentice” coach
* Identifies their CCNET/OS work, personal skills training and contribution to the CCNet in their annual objectives.
* Provides basic data and self-assessment information to CCNet map/database.

1. **Coach-in-Training**

Under the supervision of a CCNET Coach or Coach/Trainer, a CCNET Coach-in-Training leads and supports conservation project teams to apply the OS process to develop effective conservation strategies and measures of success for a given project area. Coaches-in-Training commit to continually honing their OS skills in order to improve the practice of conservation.

CCNET Coaches-in-Training progress in their levels of experience and willingness to engage in CCNET/OS activities and network. To facilitate this process and cultivate a team of strong coaches, newer coaches are encouraged to choose a mentor coach and set goals for their development as a coach.

*Qualifications*

* Participated as a project team member in a full OS process.
* Has an understanding of OS basic practice.
* Proven applied conservation experience and/or direct field-based experience.
* Facilitation skills.

*Duties*

* Supports at least one CCNET/OS project per year.
* Provides basic data and self-assessment information to CCNet map/database.

1. **Designation Process**

Coach designations will be established based on a combination of training, experience, and the coach’s competencies, which the coaches indicate through a self-evaluation, using the competencies and associated observable skills found in the Addendum. The franchise leader will review the designations and will work with a coach if there are competencies that do not match the known abilities of a specific coach. In addition, the franchise leader will be encouraged to seek input from other coaches with whom a specific coach has worked to determine the designation most suited to them. There may be coaches that choose not to go through the designation process due to lack of ability to commit to assisting teams.

Designations may be displayed along with the coach’s name, their organization, their location, and other information on the Conservation Gateway site - to be updated annually or as necessary by coach.

Competencies

The six competencies to be assessed through the self-evaluation are:

1. Facilitation - skills and abilities that a coach uses to make the group process more effective, focused and successful at meeting the objectives of developing effective conservation strategies and measures;
2. Conservation Knowledge - understanding of conservation principles, systems, strategies and practices, from both a theoretical standpoint and practical experience;
3. Open Standards - skills and knowledge related to the broader adaptive management framework outlined in the Open Standards for the Practice of Conservation (Open Standards, or OS);
4. Theory of Change - skills and knowledge to assist a project team to articulate and document the logic of how a strategy or set of strategies will lead to the desired outcome;
5. Monitoring and Adaptive Management - skills that improve measures, monitoring and adaptive management component of conservation planning;
6. Operational Planning - the skills and knowledge to assist in developing a workplan and budget that bridges between a strategic plan and action.
7. **Training**

A number of organizations and institutions provide coach-specific training – either general or for specific competencies and specialties (e.g. measures, climate adaptation). In order to even consider being a coach, a candidate should generally have attended one of these coach-specific trainings.

1. **Franchise**

All coaches should be affiliated with a Franchise. If need be, an “unaffiliated” Franchise will be created, with a Franchise Leader.

1. **Workshop Evaluations**

All OS workshops would have an evaluation for the coach receive feedback. A summary of these evaluations would go to the Franchise Leader to help determine whether attribute rankings and designations are appropriate.

1. **Central CCNet Coach Map/Database**

The database is the central collection point for information about coaches. Coaches are responsible for keeping their own information up to date. Franchise Leaders are responsible for checking that the information for the coaches in their Franchise is up to date. Basic information includes name and contact information. There are other important fields for experience, including years coached and planning efforts facilitated (including month/year of last facilitation), and geographic areas covered.

1. **Franchise Leader Responsibilities**

Each Franchise Lead is responsible for individually or with a team reviewing coach designations and updating the CCNet Coach Map/Database for the coaches in their database - at least annually. The Franchise Leads would have to make sure they remind coaches to update their basic data and encourage them to self-evaluate if appropriate. This is an excellent opportunity for the Franchise Lead to understand where each coach wants to go with their coaching and to assist him/her to find opportunities to improve their skills or expand their horizons.

**Competencies for Coaching Open Standards for the Practice of Conservation**

**9 March 2012**

This checklist is intended to list the knowledge, skills, experience and attitudes a coach should have to competently coach Open Standards planning and implementation of conservation projects. We have endeavored to describe each competency in specific, observable terms, to create a useful tool that can be used by coaches to assess their current level of skills, guide their self-directed learning efforts and identify areas for professional development, as well as for use in developing training programs. Note that few if any coaches will be proficient in every skill.

*Categories of Coaching Competencies*

We divided the competencies are divided into six categories of skills and abilities. We focused principally on technical skills; strong interpersonal and management skills are also important ingredients in effective coaching.

1. [Facilitation](#_Facilitation_Skills)
2. [Conservation Knowledge](#_2._Conservation_Knowledge)
3. [Open Standards](#_Open_Standards_Knowledge)
4. [Theory of Change](#_Theory_of_Change)
5. [Monitoring and Adaptive Management](#_Monitoring_and_Adaptive)
6. Operational Planning
7. Meeting Organization

Each category is defined in greater detail on the following pages.

*How This Checklist Was Developed*

The idea for this checklist, the categories and an initial brainstormed list of measures-related knowledge, skills, experience and attitudes stemmed from a session held at the 2010 CCNet Coaches Rally in Santa Cruz, CA. The session facilitators Kirsten Evans (TNC), Rob Sutter (Enduring Conservation Outcomes), and John Morrison (WWF) refined and revised the materials, also integrating ideas from other fields, including:

* Program evaluation competencies for professional evaluators (e.g., [Canadian Evaluation Society](http://evaluationcanada.ca/txt/2_competencies_cdn_evaluation_practice.pdf), [published literature on evaluation competencies](http://aje.sagepub.com/content/26/1/43.abstract))
* [Donald L Kirkpatrick’s four levels of training evaluation](http://www.amazon.com/Evaluating-Training-Programs-Four-Levels/dp/1576753484/ref=sr_1_1?ie=UTF8&qid=1299641339&sr=8-1)
* Skills checklists used in other fields (e.g., [lacrosse referees](http://www.uslacrosse.org/LinkClick.aspx?fileticket=WiOw_qIorAQ%3d&tabid=1851))

Richard Margoluis (Foundations of Success) contributed the Operational Planning competency table and Jora Young (TNC) did likewise for the Meeting Planning competency.

A more detailed checklist is available, in which each category is further divided into two levels of skills, basic and advanced, thereby laying out a professional development ladder for coaches. The advanced skills are those that one may aspire toward and that can be found in a measures expert whom other coaches might call upon for specialized assistance and/or particularly difficult measures problems.

An optional, suggested system for self-scoring and self-rating follows the checklist.

# 1. Facilitation

These are skills and abilities that a coach uses to make the group process more effective, focused and successful at meeting the objectives of developing effective conservation strategies and measures.

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| **Basic Skills** |
| Demonstrates respect and sensitivity to different ideas, personalities and cultural and gender perspectives |
| Maintains role as facilitator, establishes and maintains ground rules, and clarifies goals and objectives |
| Demonstrates ability to design and facilitate relatively simple to moderately complex planning efforts |
| Provides opportunities for all participants to be involved using facilitation techniques |
| Understands the value of and how and when to ask key probing questions throughout the planning process, especially related to identifying critical issues and developing strategies |
| Quickly summarizes discussions and information |
| Provides and facilitates peer feedback |

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# 2. Conservation Knowledge

To be effective, a conservation coach should have an adequate understanding of conservation principles, systems, strategies and practices, from both a theoretical standpoint and practical experience.

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| **Basic Skills** |
| Gives appropriate examples of other sites and conservation projects, including first-hand knowledge examples, that have implemented similar steps in the process |
| Explains fundamental conservation biology principles such as population viability analysis, connectivity, conservation genetics, and their implications for conservation project design and measures |
| Describes the basic ecology of the major habitat types relevant in the region, including key components of habitat structure, function and processes |
| Assists teams to identify and tease apart specific aspects of climate change |
| Cites examples of major conservation strategy types available (strategy toolbox) |
| Describes the purposes and limitations in general terms of common conservation tools, e.g., GIS, remote sensing, modeling, Miradi |

# 3. Open Standards

Skills and knowledge related to the broader adaptive management framework outlined in the Open Standards for the Practice of Conservation (Open Standards, or OS).

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| **Basic Skills** |
| Clearly explains the steps and rationale of the Open Standards (OS) process and their relationship to measures |
| Tailors OS process to meet the needs of relatively straightforward projects |
| Ensures projects have a well-defined scope and vision |
| Ensures the project team has defined measureable goals for ecosystem health, based on viability criteria |
| Ensures the project team has developed a prioritized ranking of direct threats |
| Critically evaluates conceptual models to ensure that the relevant social, cultural, political, economic drivers have been considered |
| Coaches teams to develop SMART viability and threat-reduction objectives prior to strategy development |
| Leads project team to develop a set of prioritized strategies that meet the criteria for good strategies and have clear linkages to the highest priority threats and restoration needs |
| Assists teams to manage project information using Miradi or CAP workbook |

# 4. Theory of Change

This category includes a range of skills, knowledge and abilities that a coach draws upon in helping a project team to articulate and document the logic of how a strategy or set of strategies will lead to the desired outcome. A theory of change can technically be verbal, written or in a diagram. However, an open standards coach should be proficient at applying a results chain model (or comparable tool) to illustrate the theory of change.

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| **Basic Skills** |
| 1. Clearly explains the rationale for making the project team’s theory of change explicit and the value and components of a good results chain (or equivalent analytical process) |
| 1. Distinguishes results chain from flow chart/implementation diagram and situation diagram or conceptual model |
| 1. Identifies key intermediate results |
| 1. Identifies key unspoken assumptions in strategies and helps bridge gaps |

# 5. Monitoring and Adaptive Management

The skills that improve the outcomes of coaching the measures, monitoring and adaptive management component of conservation planning.

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| **Basic Skills** |
| Describes the purpose and value of monitoring and measures to strategy effectiveness and return on investment |
| Defines indicators and describes process of developing a concise list of indicators that can assess specific objectives for a target |
| Describes common monitoring methods for a broad range of targets |
| Describes different levels of monitoring intensity |
| Describes the difference between activity measures, intermediate result measures, and biodiversity outcome measures |
| Describes key components of good monitoring protocol and data management |

# 6. Operational Planning

The skills and knowledge to assist in developing a workplan and budget that bridges between a strategic plan and action.

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| **Basic Skills** |
| Describes the purpose and the key components of the work plan including actions to be taken, who will be responsible, when will tasks be undertaken. |
| Describes and gives examples of approaches to developing a timeline or work calendar |
| Describes basic structure and framework of a budget |
| Describes general sources of funding/revenue |
| Describes how all of the OS components can be developed into a strategic conservation plan |

**7. Meeting Organization**

Sometimes, a large workshop is the best format for assisting multiple teams and training coaches simultaneously. These responsibilities are in addition to basic facilitation skills.

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| **Basic Skills** |
| Reviews purpose of the meeting, ensures appropriate participation, sufficient funding, and that meeting sponsor, coordinator, facilitators, logistical support have all necessary information and understand their roles and responsibilities |
| With “client” prepares and coordinates meeting agenda, ensuring that the meeting objectives will be met in the given timeframe (or renegotiated) and that participants also have adequate time for thinking, relaxation, and good health |
| Ensures that the venue is appropriate, encouraging access to outdoor space and sufficient space and privacy for breakouts, with functioning audiovisual equipment and flipcharts, and access to adequate, healthy food for participants |
| Ensures that the meeting is on track to achieving its objectives and that adjustments are made as necessary. |

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| **Optional Self-Assessment Scoring Sheet (abbreviated skills)** | | | |
|  | Understand  ( 1 points) | Used Successfully  (2 points) | Confident Using  (3 points) |
| **Facilitation** |  |  |  |
| Demonstrates respect and sensitivity |  |  |  |
| Maintains role as facilitator |  |  |  |
| Design & facilitate simple -moderate planning efforts |  |  |  |
| Provides opportunities for all participants to be involved |  |  |  |
| Understands the use of key probing questions |  |  |  |
| Quickly summarizes discussions and information |  |  |  |
| Provides and facilitates peer feedback |  |  |  |
| **Conservation Knowledge** |  |  |  |
| Gives appropriate examples of other sites & projects |  |  |  |
| Explains fundamental conservation biology principles |  |  |  |
| Describes basic ecology of relevant major habitat types |  |  |  |
| Assists teams to identify specific aspects of climate change |  |  |  |
| Cites examples of major conservation strategy types |  |  |  |
| Describes purposes & limitations of conservation tools |  |  |  |
| **Open Standards** |  |  |  |
| Clearly explains steps & rationale of Open Standards (OS) |  |  |  |
| Tailors OS process to meet the needs of projects |  |  |  |
| Ensures projects have a well-defined scope and vision |  |  |  |
| Ensures definition of measureable goals for ecosystems |  |  |  |
| Ensures a prioritized ranking of direct threats |  |  |  |
| Critically evaluates conceptual models |  |  |  |
| Coaches SMART viability & threat objectives |  |  |  |
| Ensures a set of prioritized strategies |  |  |  |
| Assists information management with Miradi or other |  |  |  |
| **Theory of Change** |  |  |  |
| Explains rationale for clear theory of change |  |  |  |
| Distinguishes results chain from flow chart |  |  |  |
| Identifies key intermediate results |  |  |  |
| Identifies key unspoken assumptions in strategies |  |  |  |
| **Monitoring and Adaptive Management** |  |  |  |
| Describes the purpose and value of monitoring |  |  |  |
| Coaches development of concise list of indicators |  |  |  |
| Describes common monitoring methods |  |  |  |
| Describes different levels of monitoring intensity |  |  |  |
| Describes activity, result, & biodiversity outcome measures |  |  |  |
| Describes key components of good monitoring protocol |  |  |  |
| **Operational Planning** |  |  |  |
| Describes rationale & components of the work plan |  |  |  |
| Describes timeline development |  |  |  |
| Describes basic structure and framework of a budget |  |  |  |
| Describes general sources of funding/revenue |  |  |  |
| Describes how OS components fit into strategic plan |  |  |  |
| **Meeting Planning** |  |  |  |
| Clarifies meeting purpose, participation, funding, support team roles |  |  |  |
| Prepares agenda that meets objectives and cares for participants |  |  |  |
| Ensures appropriate venue and equipment |  |  |  |
| Ensures meeting is meeting objectives or adjusted as necessary |  |  |  |

**Optional Self-Assessment Rating**

The following system can be applied to derive a rating for each competency category:

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| **Competency Category** | **Score** | **Rating** | **Comments** |
| Facilitation | 1-7 | Basic | Review [guidance](http://www.conservationgateway.org/file/10-facilitation-tips-coaches) |
| 8-14 | Competent | Seek more experience and the guidance of colleagues, review [facilitation skills](http://www.conservationgateway.org/file/facilitation-skills-checklist) |
| 15-21 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |
| Conservation Knowledge | 1-6 | Basic | Review basic Conservation Biology practice and gain experience |
| 7-12 | Competent | Seek more experience and the guidance of colleagues |
| 13-18 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |
| Open Standards | 1-9 | Basic | Review [guidance](http://www.conservationgateway.org/topic/conservation-action-planning) |
| 10-18 | Competent | Seek more experience and the guidance of colleagues |
| 19-27 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |
| Theory of Change | 1-4 | Basic | Review [guidance](http://www.fosonline.org/wordpress/wp-content/uploads/2010/08/FOS_Results_Chain_Guide_2007-05.pdf) |
| 5-8 | Competent | Seek more experience and the guidance of colleagues, review [results chain facilitation tips](http://www.conservationgateway.org/file/results-chains-facilitation-tips) |
| 9-12 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |
| Monitoring and Adaptive Management | 1-6 | Basic | Review [guidance](http://www.conservationgateway.org/content/step-7-establish-measures) |
| 7-14 | Competent | Seek more experience and the guidance of colleagues |
| 15-21 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |
| Operational Planning | 1-5 | Basic | Review [guidance](http://www.panda.org/standards/2_3_operational_plan) |
| 6-10 | Competent | Seek more experience and the guidance of colleagues |
| 11-15 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |
| Meeting Planning | 1-4 | Basic | Review [guidance](http://www.panda.org/standards/2_3_operational_plan) |
| 5-8 | Competent | Seek more experience and the guidance of colleagues, check out [additional resources](http://www.conservationgateway.org/subtopic/workshop-design-coaching-fundamentals) |
| 9-12 | Fully Competent | Continue to gain experience, and review the [more detailed and advanced skills](http://www.conservationgateway.org/file/detailed-competencies-coaching-open-standards-practice-conservation) |