

# Measuring Conservation Effectiveness - Implementing Orgs

## Performance Measurement in the Conservation Community

Research survey for "Measuring Conservation Effectiveness Summit," May 5-6, Palo Alto, California.

Over the past few years, there have been major advances in measuring the effectiveness of biodiversity conservation projects, programs, and organizations. There is still, however, a major gap between the rhetoric of organizations and funders in terms of the desirability of measuring conservation effectiveness, versus the reality of actually adopting and implementing systematic and transparent systems that allow us to improve our collective work. To this end, the members of the Conservation Measures Partnership (CMP) and representatives of key environmental funders are planning a Measuring Conservation Effectiveness Summit May 5 & 6th 2010 that will focus attention on these critical issues. In anticipation of the summit, a committee has been formed to conduct original research on the current state and direction of systematic performance measurement (SPM) among summit attendees. We define SPM as:

**the regular monitoring, evaluation and adaptation of conservation actions**

**based on clearly stated goals, objectives, and assumptions**

**so as to assess effectiveness, promote learning, and report achievements**

For the purposes of this survey, our use of the term SPM is roughly synonymous with the terms "adaptive management" and "systematic effectiveness measurement." We now look to you for the status and direction of SPM within your organization, and examples of its use in conservation.

**Please note that your willingness to respond honestly and critically is essential to this survey's success.** Responses will be shared in aggregate and anonymously. We will thus not be sharing responses attributed to either specific people or organizations unless subsequent permission is granted.

### Instructions for Lead Respondent

The survey should take 2 hours to complete, depending on the availability of information within your organization. The lead respondent is not expected to be able to complete the survey by him/herself, but rather act as the data facilitator for the organization. Fill out as much as you can and pursue missing information from key informants within the organization. Examples of key informants may include programmatic officers, HR, IT, and project audit staff. You can forward this link to colleagues, use the link to access and complete the survey over multiple days on multiple computers, BUT *please be advised that you and other respondents must hit the "NEXT" button on each page to save responses* when you exit the survey. You should also have received the survey as a Word document to facilitate copying and pasting relevant questions and forwarding them to the appropriate colleague.

The survey is divided into five sections: (1) Contact and Org Info, (2) Importance of SPM within Org, (3) Scale & Quality, (4) Factors supporting SPM adoption, and (5) Obstacles to SPM. It is admittedly detailed in the scale, extent, and audience in which questions are based. Recognizing that many lead respondents will not have precise answers to some questions (if at all), we ask you to do the best you can and, where necessary, note your confidence or level of precision in the commentary box associated with each question. *We would rather have rough guesses for each question, rather than have them left blank.*

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Matt Muir is available for assistance in all aspects of survey completion. He can be reached at [muirmatthewj@gmail.com](mailto:muirmatthewj@gmail.com), 530-902-6476, skype: matthewjmuir, and is located in Washington, DC. If needed, Matt would be glad to walk through the survey with folks on the phone. Matt will also review answers and may email the lead respondent for clarification.

## General Information

### Contact & Organization Info

#### 1. Lead Respondent

<b>Your Name:</b>	<input type="text"/>
<b>Institution or Organization:</b>	<input type="text"/>
<b>Position:</b>	<input type="text"/>
<b>Country in which you are based:</b>	<input type="text"/>
<b>Email Address:</b>	<input type="text"/>
<b>Phone Number:</b>	<input type="text"/>

#### 2. Additional people who assisted in completing questionnaire, if applicable:

Person 1 Name & Position	<input type="text"/>
Person 1 Email	<input type="text"/>
Person 2 Name & Position	<input type="text"/>
Person 2 Email	<input type="text"/>
Person 3 Name & Position	<input type="text"/>
Person 3 Email	<input type="text"/>

#### 3. Additional comments on data facilitator & contributors:

## General Information

### Contact and Organization Info

#### 4. Organization you are reporting for:

#### 5. Within your organization, what is the approximate number of...

...organizational staff?	<input type="text"/>
...programs?	<input type="text"/>
...projects?	<input type="text"/>

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## 6. Notes

Staff notes:

Describe what you mean by 'program' in your org:

Describe what you mean by 'project' in your org:

## 7. Approximate annual conservation budget in US\$ for FY2010

## 8. Budget Notes

## 9. Approximate % of conservation work in US & Canada vs outside:

US & Canada

Outside US & Canada

## 10. Additional comments on your organization

## How is performance measurement important in your organization?

The goal of Section 1 is to understand the basic nature and importance of systematic performance measurement (SPM) in your organization, including the types of questions that might be addressed by SPM.

## 11. How strongly do you agree/disagree with the following statement:

**My organization does systematic performance measurement (SPM) well.**

Strongly Agree

Moderately Agree

Moderately Disagree

Strongly Disagree

**12. Please describe what SPM means in your organization. Where possible, give specific examples of SPM practice and/or frameworks employed by your org.**

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## 13. If your organization does or attempts SPM, how important are the following reasons behind that effort?

	Very important	Somewhat important	Minimally important	Not at all important
To improve organizational effectiveness and/or efficiency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To improve strategic fundraising	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To improve evidence-based communication	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To improve coordination and/or integration across programs	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To enable project managers to evaluate effectiveness	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To facilitate adaptive learning of what works in conservation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To satisfy pressure from donors and/or supporters to show results	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To satisfy requests from board and/or upper management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To satisfy requests from project managers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To guide funding decisions by board and/or upper management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
To guide capacity building decisions by board and/or upper management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## 14. Comments on reasons listed above, additional reasons (please indicate importance), and general commentary if your organization does not practice SPM:

## 15. How important is answering the following questions within your organization?

	Very important	Somewhat important	Minimally important	Not at all important
Are our projects having their intended impacts?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are our programs having their intended impacts?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are our actions cost-effective?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are our actions being adapted and improved?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can our actions be better coordinated across the org?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can credible results be demonstrated to our board, donors, and supporters?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do we understand why a project/program fails when it does so?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What can be learned to improve our organization's work?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

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## 16. Using your organization's current SPM system(s), how well can your organization answer the following questions?

	Very well	Somewhat well	Minimally well	Not at all
Are our projects having their intended impacts?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are our programs having their intended impacts?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are our actions cost-effective?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Are our actions being adapted and improved?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can our actions be better coordinated across the org?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Can credible results be demonstrated to our board, donors, and supporters?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Do we understand why a project/program fails when it does so?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
What can be learned to improve our organization's work?	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## 17. Comments on questions listed above and any additional questions (please indicate importance within org and how well you're able to address them currently):

## 18. In general for each audience, how strongly do you agree/disagree with the following statements:

	Project managers	Program directors	Upper management	Board
Has a thorough understanding of what SPM is and how it is implemented at the organization	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Has a thorough understanding of what the possible benefits of SPM are to the organization	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Has a positive/favorable attitude towards implementing SPM within the organization	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Views the implementation of SPM in the near future as a high priority	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Comments on statements and audiences:

## At what scales is your organization doing SPM well?

The goal of Section 2 is to understand the scale and quality of SPM practiced at your organization.

We are using two scales of organization: project-level and program-level. The terms 'project' and

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'program' mean different things to different people. Please use the definition of those terms that you gave on Page 3, Organization Info.

## 19. At the scale of projects and programs, is SPM....

	...mandated at your organization?	...practiced <i>well</i> at your organization?
Project	<input type="text"/>	<input type="text"/>
Program	<input type="text"/>	<input type="text"/>

Comments on mandate and extent at program & project scales:

## 20. For each scale (project, program), indicate the extent to which your organization does each of the following SPM practices well:

	Projects	Programs
A well-defined scope of work	<input type="text"/>	<input type="text"/>
Identification & outreach to key stakeholders in planning process	<input type="text"/>	<input type="text"/>
Identification & outreach to key organizational partners in planning process	<input type="text"/>	<input type="text"/>
Identification of conservation targets (aka focal biodiversity, landscape species, biodiversity conservation priorities)	<input type="text"/>	<input type="text"/>
Identification of threats	<input type="text"/>	<input type="text"/>
Prioritization of threats to be addressed	<input type="text"/>	<input type="text"/>
Situation analysis (aka conceptual model development, situation assessment, threat & opportunity analysis)	<input type="text"/>	<input type="text"/>
Identification of conservation actions	<input type="text"/>	<input type="text"/>
Prioritization of conservation actions to be implemented	<input type="text"/>	<input type="text"/>
Articulation of logic models for conservation actions (aka results chains, theories of change, explicit identification of the core assumptions behind conservation action)	<input type="text"/>	<input type="text"/>
Development of conservation action plan	<input type="text"/>	<input type="text"/>
Development of monitoring plan	<input type="text"/>	<input type="text"/>
Implementation of monitoring plan	<input type="text"/>	<input type="text"/>
Development of operational plan	<input type="text"/>	<input type="text"/>
Implementation of operational plan	<input type="text"/>	<input type="text"/>
Assessment of conservation status	<input type="text"/>	<input type="text"/>
Assessment of performance of conservation action	<input type="text"/>	<input type="text"/>
Use of data from monitoring and assessment to adapt future conservation action	<input type="text"/>	<input type="text"/>
Sharing of lessons learned from monitoring, assessment, and adaptation outside the project or program team but within the organization (internally)	<input type="text"/>	<input type="text"/>
Sharing of lessons learned from monitoring, assessment, and adaptation outside the organization	<input type="text"/>	<input type="text"/>
Other (please specify)		

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**21. Please list any primary SPM frameworks, systems, and tools used at your organization to undertake the practices above. If you specified an additional SPM practice, please describe here.**

**22. Estimate the total number of projects that have...**

...good conservation plans in place (i.e., planned)

...implemented plan and monitoring (i.e., planned, implemented plan, and monitored)

...gone full cycle (i.e., planned, implemented plan, monitored, evaluated, & adapted)

**23. Of the total budget for your organization's conservation efforts, roughly what % of total conservation spend is...**

...guided by SPM? 0-20%, 21-40%, 41-60%, 61-80%, 81-100%

...spent on SPM? less than 1%, 1-5%, 5-20%, more than 20%

**24. How many full-time equivalent staff are dedicated to implementing and supporting SPM?**

**25. Please specify numbers of SPM...**

...coaches (i.e., someone who is qualified to work with a project to facilitate SPM):

...trainers (i.e., someone who can lead workshops in SPM, train coaches):

...auditors:

...system/IT staff:

**26. Additional comments on resources (\$ and staff) spent on SPM at your organization:**

## What factors have supported adoption of SPM in your organization?

The goal of Section 3 is to understand the adoption of SPM within your organization.

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**27. Where you do see SPM happening in your organization, how important were the following 'key ingredients' or 'catalysts' to SPM adoption? (Please answer this question ONLY if you feel that SPM has been adopted)**

	Absolutely essential	Very important	Moderately useful	Not necessary
A vision for what could be accomplished with SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Evidence that SPM led to increased effectiveness and/or efficiency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Seeing it being successfully implemented by other conservation or development NGO	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
A comprehensive plan that integrated SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Presence of a champion within organization	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dedicated SPM program with staff supporting implementation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Dedicated funding for SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Institutional mandate	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donor requirement to adopt SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Donor reporting requirement	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Software tools that support SPM collection, management, & reporting	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

**28. Additional comments on key ingredients:**

**29. In rank order and using the list above, what are the top 3 most important key ingredients or catalysts to SPM adoption within your organization? Please do not list the same factor more than once.**

Key Ingredients or Catalysts to SPM adoption

#1 (most important)	<input style="width: 100%;" type="text"/>
#2	<input style="width: 100%;" type="text"/>
#3	<input style="width: 100%;" type="text"/>

Comments on ranking



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**30. Do you have evidence that SPM leads to improvements in conservation effectiveness or efficiency?**

- Strong evidence       Moderate evidence       Weak or anecdotal evidence       No evidence

General comments on evidence

**31. Please give illustrative examples of *specific programs or projects* that have provided evidence or anecdotal support of SPM leading to improved conservation effectiveness or efficiency. Where possible, specify the evidence (e.g., a change in strategy based on a reduction in threat status).**

## What obstacles have impeded adoption of SPM in your organization?

The goal of Section 4 is to understand the obstacles that impede SPM in your organization.

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## 32. In your experience, how important are the following factors in impeding adoption of SPM in your organization?

	Very important (extreme obstacle)	Somewhat important (major barrier)	Minimally important (minor hurdle)	Not important (not an issue)
Lack of money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of staff dedicated to SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of good examples of SPM helping to achieve conservation goals	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception that SPM is too complex	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception that SPM is too simplistic	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception that SPM (or related terms: adaptive management, monitoring & evaluation) has become a meaningless buzzword	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Perception that SPM is unnecessary to doing effective conservation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reporting guidelines of major donors discourage or inhibit SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of donor pressure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of board pressure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of peer pressure	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of training	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of quality trainers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of database exchange to share practices and learning	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of support from upper management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of demand from upper management	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of support and/or interest from project managers	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of good software tools to implement SPM	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of an overall culture of accountability to our bottom line (biodiversity conservation)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lack of incentives to change the status quo (i.e., SPM not a part of business practice to date and no incentive to change)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other (please specify)

## 33. Additional comments on obstacles:

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**34. In rank order and using the list above, what are the top 3 most important obstacles to SPM adoption within your organization? Please do not list the same factor more than once.**

	Obstacles
#1 (most important)	<input type="text"/>
#2	<input type="text"/>
#3	<input type="text"/>


Comments on ranking

**35. Please give illustrative examples of *specific programs or projects* that highlight the obstacles faced by your organization to broadly adopt SPM.**

**36. Please describe the outlook for SPM in your organization. Where possible, give anecdotes or evidence that provide insight on:**

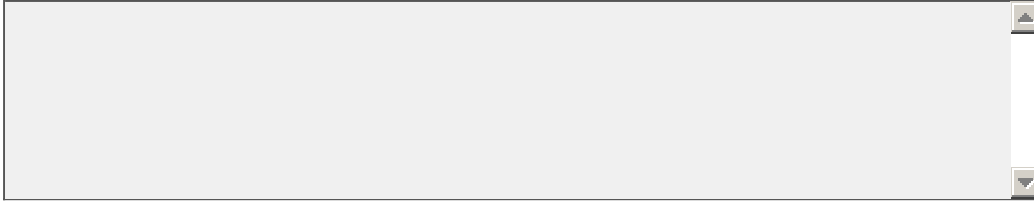
- the future direction of SPM in your organization, and
- critical future steps if SPM is to be adopted more widely within your organization

## Thanks!

You're done! Please remember that Matt Muir is available for assistance in survey completion, general questions, complaints that the survey is too long, etc. He can be reached at [muirmatthewj@gmail.com](mailto:muirmatthewj@gmail.com), 530-902-6476, [skype: matthewjmuir](skype:matthewjmuir)  , and is located in Washington, DC.

**37. Do you have any specific ideas for the Summit that you would like to offer to the organizers? Do you have any specific concerns that you would like to share?**

**38. Additional comments:**

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