



BCI Open Standards for The Practice of Conservation - Training and Pilot Programs

Feb 2018

The **Open Standards for the Practice of Conservation** is a broadly accepted conservation planning process that helps teams be systematic about planning, implementing, and monitoring their conservation initiatives so they can learn what works, what does not work, and why — and ultimately adapt and improve their efforts. (<http://cmp-openstandards.org/>)

Bat Conservation International (BCI) is dedicated to the enduring protection of the world's 1300+ species of bats and their habitats. BCI works worldwide to respond rapidly and effectively to bat conservation crises and prevent the extinction of threatened bats. BCI implements its own direct conservation projects and programs, provides funding and support to other organizations' projects and programs, and serves as a clearinghouse for best practices in bat conservation.

Foundations of Success (FOS) is a non-profit organization that specializes in working with members of the conservation community to do strategic planning, adaptive management, monitoring and evaluation, and learning. FOS has helped to develop both the *Open Standards* and *Miradi Software* and is working with many organizations to apply these tools to their work.

1. Introduction

BCI staff and National Board are interested in delivering new levels of conservation impact. This includes investing in projects on the ground that save bats and building replicable, scalable models of conservation delivery. BCI wants clarity on areas of real potential for growth and a tactical plan for how to get there that leverages its new organizational structure and staffing.

To this end, BCI contracted with FOS to run a pilot test of the *Open Standards* and *Miradi Software* in the context of BCI’s work. Specific aims of this pilot included:

1. Give BCI program staff training on the *Open Standards* and a one-year subscription to the Miradi Conservation Planning Desktop and Online suite of project management tools,
2. Develop examples of how BCI work could be facilitated by using the *Open Standards*, and
3. Evaluate whether this approach makes sense for BCI going forward and if so, what would be needed to roll this approach out in the organization.

This report provides a summary of results to date. A final report will be prepared at the conclusion of the contract.

2. What We Did

The key philosophy behind this pilot involves providing key BCI staff with training in the *Open Standards* and *Miradi Software* in the context of actual BCI projects and programs.

2.1 Selection of Team

We selected key BCI staff to participate in this pilot based on both their role within the organization as well as their interests and aptitudes. We created cross-organizational working teams on specific pilot projects. Specific staff are shown in Table 1 with team leads indicated with an asterisk.

Table 1. Summary of BCI Pilot Projects & Teams

Example	Team	Comments
Wind	Cris Hein*, Kevin Pierson, Mylea Bayless, Rebecca Patterson	Threat example Program example
Pollinating bats in the Southwestern US & Mexico	Jon Flanders*, Winifred Frick, Kevin Pierson, Mylea Bayless, Dan Taylor	Place-based example Project example
Cavernicolous Bats	Jason Corbett*, Jon Flanders, Kevin Pierson, Winifred Frick, Mylea Bayless	Target-based example Organizational template

2.2 Selection of Pilot Projects

We selected projects that would both represent the full gamut of BCI work and yet also provide a good training environment:

- **Threat-Based Project (Wind Energy)** -- This represents a thematic set of work addressing a key threat.
- **Place-Based Project (Pollinating Bats in Southwestern US and Mexico)** -- This project was selected to represent typical place-based projects that require a mix of strategies to deal with a set of prioritized threats to bats and their habitat.
- **Global Program Template (Cavernicolous Bats)** -- This project was selected to represent a more generic program template that could be used to more quickly develop standardized place-based projects around the world.

2.3 Training / Pilot Work

The training / pilot work was designed to balance both learning about the OS and doing “real” work. Given that BCI staff are not based in one office, we structured this training as a virtual exercise over the course of several months. We organized weekly web-based training sessions. At each session, one step of the Open Standards process was introduced (e.g., selecting conservation targets, rating threats, developing theories of change for conservation strategies). FOS staff provided an introduction to the concepts involved in the step and then gave the three project teams a “homework assignment” that involved applying these concepts to BCI’s work. At the next week’s session, teams then presented and discussed the results of their homework assignment, before going on to the next step.

Evaluation of the course is provided in the Annex of this document.

3. What We Learned

Rapid Transition from Training to Actual Work -- Participants found the approach and tool set to be helpful in conservation planning as evidenced by ongoing adoption following the training. As one example, following the end of the formal training, the Wind Energy Team has continued to meet regularly and uses the tools to do its planning work. In addition, participants went on to apply the methods to new and existing projects in development. As of today, BCI now has 10 active Miradi files in Miradi Share representing all major conservation strategies across the organization.

Use of OS Improves Shared Understanding of Conservation Situation -- Project team members realized that saving a specific bat species involves more than managing the specific population or roost, but instead needs to consider the wider system in which the bats are living. (See Figure 1.)

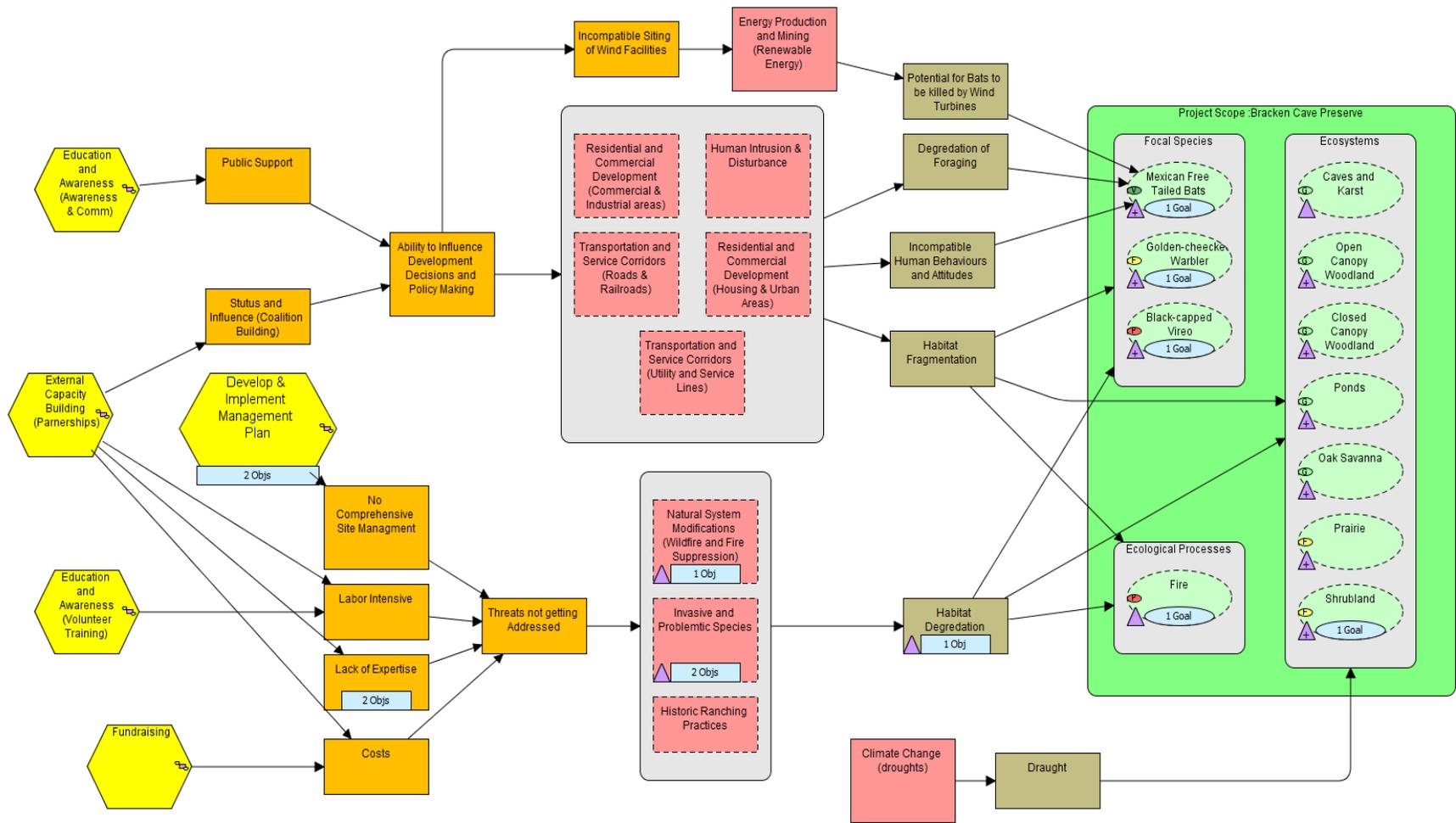


Figure X. Example of Situation Analysis: Bracken Cave Preserve Conceptual Model

OS Materials Readily Inform Funding Proposals - Project team members developed results chains with phased timelines and objectives that became the basis for funding proposals for international species conservation work. It's rare that a project can be completed by a single funder. The results chains show the necessary steps required to get to a desired conservation result. An initial or intermediate action that needs funding may not appear as urgent or high-profile as later actions, but without the funding for all the steps, the work can't progress and succeed. Also, some of BCI's major funders are open standards proponents, including Disney Conservation Fund and USFWS International Programs.

Building Staff Morale with Cross-Organizational Teams - There was tremendous value in bringing staff from different program areas within the organization together to work and share knowledge in small focal teams. BCI's program staff largely work remotely in various parts of the country and our programs have traditionally been 'siloes' with little interaction across programmatic areas. Sharing knowledge and expertise across the programmatic structure was a huge lift to organizational culture by improving communication, demonstrating respect for staff expertise, and identifying new opportunities for staff collaboration within the organization.

Incorporating Accountability & Rigor - The Open Standards creates a framework for measuring the impact of our conservation work. Both conceptual diagrams and results chains developed in the Open Standards can indicate where there are knowledge gaps and needs for science as they directly relate to conservation targets and action. It demonstrates the relationship between science and conservation and provides metrics for evaluating progress, which lends accountability and rigor to the work we do.

4. Recommendations / Next Steps

4.1 Recommendations

- **BCI Should Adopt *Open Standards for Conservation Work*** - BCI should continue to adopt the *Open Standards / Miradi* as a key set of tools for managing our conservation work. This means using the *Open Standards* to design, manage, monitor and learn from BCI's conservation projects and programs.
 - **UPDATE** - We began incorporating species target and threat data into Miradi to facilitate a prioritization analysis for global bat conservation to help inform where and how we should work globally. The approach was presented to BCI's Science Advisory Committee on February 13, 2018.
- **Provide Training & Coaching to Key Staff** -- To achieve this end, BCI needs to help key staff develop appropriate fluency in the *Open Standards*. Not everyone has to know every step and detail, but they do need to be comfortable with key parts. For example, the development team might need to know how to easily access a results chain and project funding model.
- **Incorporate *Open Standards* into Business Processes** -- One of the key lessons from other organizations is that uptake and adoption of a method like the *Open Standards* is greatly enhanced if

the approach is integrated into the organization's routine business practices. Relevant practices can include:

- **Organization / Program Strategic Prioritization** -- This business process involves developing an organization-wide or program strategic plan and then prioritizing activities within them. The *Open Standards* can be used to develop the framework for this strategic plan as well as specific activities that would be undertaken in the context of this plan.
- **Project Initiation / Management** -- This business process involves identifying, planning and managing basic work opportunities. This process lines out how the project is conceived, how it is approved, and then how it is managed going forward. The *Open Standards* can be used to plan and manage specific projects. It can also provide a set of tools to enable managers to track project performance and make course corrections as needed.
- **Fundraising / Reporting** -- This business process involves developing budgets for projects and programs, raising funds to support this work, and then reporting to the funders about the work. *Open Standards* can be used to develop the basics for results-oriented proposals as well as track performance against goals and objectives that can form the core of donor reports.

Once program staff develop the basic conceptual framework for a project, then can either sit down with or give this framework to development staff as a way of developing specific funding proposals tailored to the interests of specific donors. If both fundraisers and relevant decision makers have basic fluency in reading and understanding *Open Standards* outputs, this can dramatically speed up the process of sharing and discussing the ideas.

- **Cross-Project Coordination and Learning** -- This business process involves sharing information between projects and programs, both within the organization and with external partners. The *Open Standards* can be used to capture standard information about conservation projects and partners that can then be shared with other practitioners, thus improving both coordination and learning.
- **Join the Conservation Measures Partnership** -- BCI should consider joining the Conservation Measures Partnership which is a community of practice of leading conservation organizations and funders who are interested in improving conservation work.

4.2 Next Steps to Go Forward

Based on the above, recommendations, we propose the following objectives and activities for Phase 2 of this work:

- **Develop First Iterations of Conservation Plans for All BCI Projects** -- By end of FY 18, all BCI projects have an active Miradi file on Miradi Share that is used to manage the project. Each project has at least a first iteration of Conceptual Models, Results Chains with Objectives and Indicators, and a basic Work Plan.
 - Create cross-organizational teams for each project
 - Provide training and support to teams to develop plans

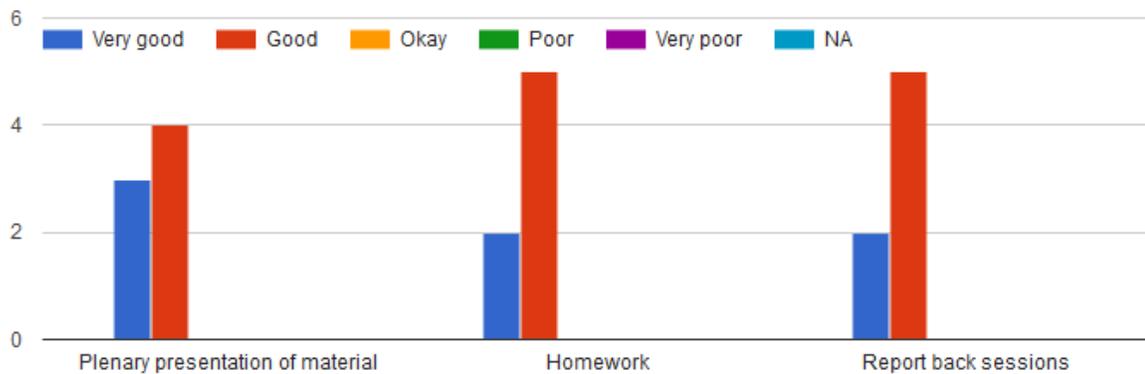
- Develop peer review / feedback process
- **Identify and Develop *Open Standards* Coaches** -- By end of FY 18, BCI has identified and begun initial training for at least 3 individuals who can serve as coaches to support *Open Standards* work in the organization.
 - Identify coaches and have them work with experience coaches
 - Potentially enroll coaches in coach training courses
- **Review & Adapt Key Business Processes** -- By end of FY 18, BCI has reviewed and adapted key business processes.
 - Identify key processes
 - Develop *swim lane* diagrams. (A swim lane is a visual element used in process flow diagrams, or flowcharts, that visually distinguishes job sharing and responsibilities.)
 - Review and modify processes with key stakeholders
- **Develop IT Systems to Support *Open Standards* Work** -- By end of FY 18, BCI has developed an initial plan for deploying Information Technology systems to support *Open Standards* work.
 - Develop BCI organizational requirements and options
 - Develop and pilot systems as appropriate

Annex

The following shows the results of a confidential post training evaluation survey of BCI staff participants. The results can also be accessed at the following link: [Evaluation Results](#)

(https://docs.google.com/spreadsheets/d/16Nn_Px4IDtAPVITM2GOchC3KpTi9jOBfy-1zuRwcoHI/edit#gid=2037666376)

What is your opinion of the general utility of each session component?



Comments on the above

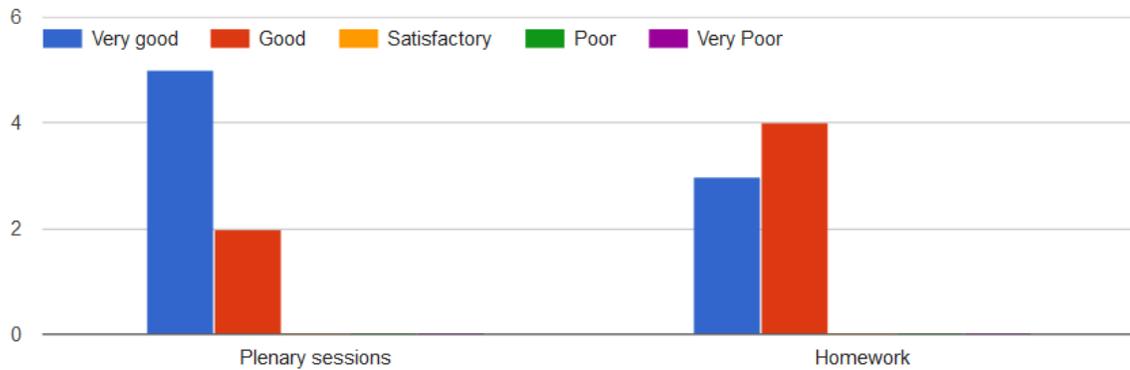
3 responses

Overall, I enjoyed the sessions, my only criticism (and its minor) is I felt the plenary presentations were rushed, particularly when report back sessions went long. I'm glad the presentations were provided. Its been very helpful to have them handy when going through the homework. The homework was useful to motivate us to work on our project each week.

I really like the format where we learn something, apply it, and the beginning of the next session is report back before we launch into the next lesson

The information was presented in a very digestible and reinforced manner.

How would you rate the quality of the course instruction/training?



What did you like most about the course instruction/training?

7 responses

Nick and Adrienne are very knowledgeable and helpful.

I like the small group help. I like the candid feedback. i love that we did our "lessons" on our own work.

Bringing together the expertise around a common conservation issue. We are very silo'd.

Staff was really great about walking us through the process, this was a different way of looking at programs/projects for a lot of us & overall it was a very useful exercise.

The interaction of co-workers that I normally do not work with for the purposes of accomplishing a common work assignment.

The logical progression, Nick's familiarity, and instruction

the mix of conceptual and practical instruction and integration of doing real work as part of the training course

What could be improved about the course instruction/training?

7 responses

I felt some of the material towards the end would have been useful to have earlier in the course. Example- navigating through Miradi

it might be nice to offer a 3 and/or 6 month out - post class lesson. Assuming that we continue to work in this platform, knowing we've got a 2 hour slot to have with you all would be a nice addition. Also it might allow you to get feedback on how much or little we've really incorporated this into our organizational work ... that my offer a more realistic measure that is not biased by our current excitement.

the course was excellent - it really provided a structure and common language for us to use across our team when planning our conservation work. I think we will be more efficient, effective and transparent at both accomplishing our goals and funding our programs.

More time/budget for a face to face meeting at the beginning and end of the training.

I can't think of anything - very helpful!

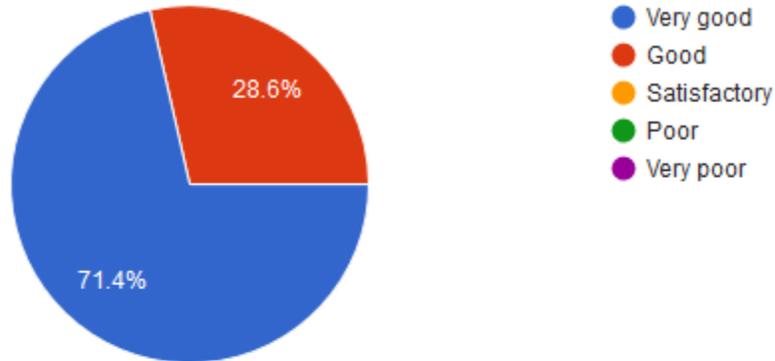
Relating the information presented more directly to the work that we will be using this software for. It would be nice to become more familiar with how to customize this software during the training to achieve solutions to gaps we are currently facing in our organization, most prominently the interpersonal communication between staff members and programs.

Maybe some more detailed homework assignments/instruction, but perhaps that's on our side

The pace was a bit tough to maintain given other work priorities/obligations, but I'm not entirely sure what the solution to that is. The remote nature of all of BCI's staff limited the ability to do an in person training component which I think would have been very beneficial at the outset to have focused days all together.

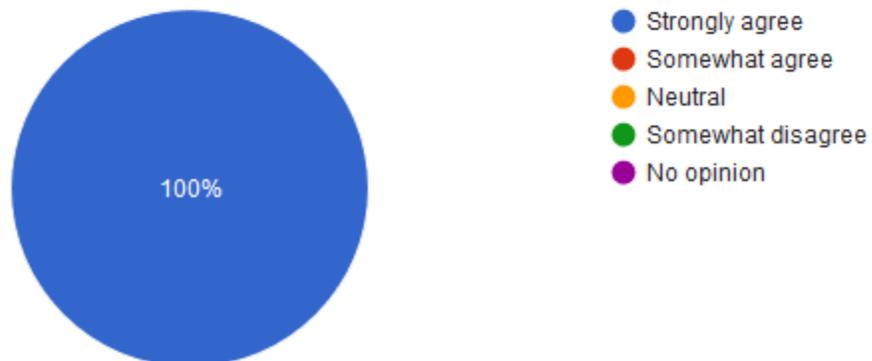
In general, what is your impression of this course?

7 responses



BCI should offer this type of course again in the future

7 responses



Why or why not offer it again?

5 responses

BCI has gone through a couple iterations of this type of process. This one made the most sense and its used by other similar organizations. It felt less like a Dilbert cartoon than other training. It will help us organize our programs/projects and relay to others our approach to resolve complex issues.

not right away, but at some point i'd like a primer to keep us fresh, and an opportunity occasionally to get new staff up to speed. Plus like anything , you learn better the next time around. :)

This course allowed us the opportunity to work with folks within the organization that we do not normally work with. These collaborations can lead to a higher level and more stable product that BCI can offer to its members and partners.

I think follow-up would be good. As they say with learning a language, unless you practice, use it, you will forget it.

(1) Helps staff to focus on conceptual issues and big picture fixes to how and why we do work; rather than just doing the grind of what work is in front of us. (2) The pace of the course was fast enough that we could benefit from an iterative process of refining and reviewing progress and thinking about next steps after we've worked with the OS for a while.

If you agree, folks in what position would benefit from this course?

7 responses

I think this course has wide applicablity from top to bottom.

conservation/science staff

Front line conservation project leaders.

Operations & Development Depts.

Everyone in BCI. The exposure to this course should be tailored to the needs of abilities of individual programs or groups.

Certainly natural resource management program or project directors.

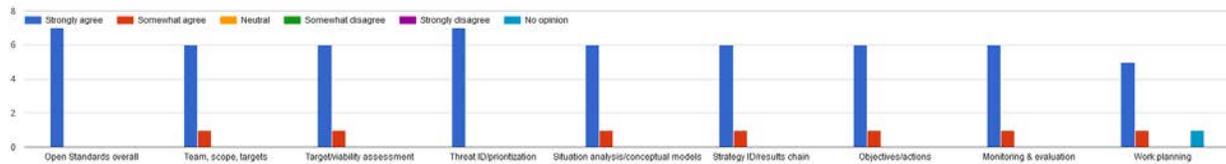
Program staff is still the target focus. Perhaps having some of our development staff responsible for fundraising also sit in on parts.

Do you have any thoughts about the online format or ways that remote collaboration could have been improved?

5 responses

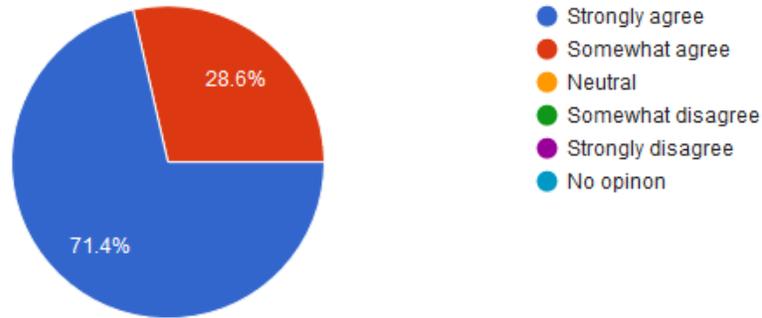
- I liked the format.
- all good. webinars were easy to use, tools were well thought out
- The weekly format is somewhat limiting for folks within BCI that do not have a standard Monday thru Friday work schedule. It would be neat if this course could be utilized in a way that fits individual schedules.
- Again, this perhaps should come from the client side, but at least with smaller groups, some type of insurance that all participants will (be required to) take the lead on a pilot/training project.
- As stated earlier, tying this into a staff retreat could have been worthwhile so we were all together and working in the same room with the same focus for a couple of days. Otherwise, I think we made the most of the remote situation.

BCI could benefit from using some or all of the Open Standards



BCI could benefit from using Miradi & MiradiShare

7 responses



Comments on the above:

2 responses

I think Miradi is a very good tool as long as the development is always guided by practical application, making sure it doesn't get too influenced by "planning for planning's sake", i.e. the emphasis on making something that works computer/system-wise more so than it's necessary or practical.

I'd love an option in Miradi to be able to rank/score the uncertainty in the evaluation of threats and viability, so that ultimately you can track when a rating is based on a 'best guess' and when something is based on evidence.

Do you have any final comments you would like to share with us?

3 responses

I am extremely glad that BCI partnered with you for this course. see my earlier comments.

Nope, overall I thought it was a very well-taught and useful training, and I look forward to continuing to use it for our conservation planning purposes.

Just that I'd really like to thank Nick for the course and insights. I learned a lot and I wish my schedule had allowed me to participate more regularly. I'm disappointed that I missed the last sessions. I feel this course was successful in transforming the way we talk about projects and programs and our work at BCI. I look forward to those changes becoming codified and leveraged to benefit our conservation impact.