
ENVIRON 601K

Building an NGO Toolkit: From Design to Monitoring



2nd Semester (Block 2) 2018

Dates / course meeting time: 300 minutes of contact time per week for 7 weeks

Academic credit: 1 course

Course format: Each class will include lecture, discussion, group work, and presentations

Instructor's Information

Elizabeth Losos

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Dr. Elizabeth Losos is a tropical forest ecologist with extensive expertise in tropical ecology, conservation biology, natural resource policy, and administration. Prior to joining the Nicholas Institute, Losos served for 12 years as the President and CEO of the Organization for Tropical Studies (OTS), a non-profit organization with the mission of providing leadership in education, research, and the responsible use of natural resources in the tropics. During her tenure, OTS provided experiential learning courses – including those based on the Open Standards curriculum – for undergraduates, graduate students, natural resource managers, and environmental policy makers in Costa Rica, South Africa, China, and throughout Latin America. Before working at OTS, Losos was the Executive Director of the Smithsonian Institution's Center for Tropical Forest Science and a post-doctoral fellow at The Wilderness Society. Losos holds a PhD in biology and a master's degree in public administration, both from Princeton University.

What is this course about?

Non-governmental organizations (NGOs) that address conservation issues in China face large, complex, and urgent problems. To be successful, these NGOs must be equipped with the skills to be efficient, effective, and transparent when planning, implementing, and monitoring their conservation initiatives. In this hands-on course, students will become familiar with decision-support tools that allow organizations to systematically address strategic planning, project design, project budgeting, implementation, monitoring, evaluation, communication, and donor transparency. The students will apply these tools to real-world conservation problems.

The primary tools used in this course will be drawn from "Open Standards for the Practice of Conservation," an internationally-recognized set of strategies and tools for results-based management for planning, implementing, and monitoring. Adaptive management provides a method for making more informed decisions about what actions are the best for a conservation project to pursue, measuring and testing the effectiveness of strategies used, and learning and adapting to improve strategies. The students will become familiar with all the steps of Open Standards tools and the Miradi software using case studies of marine and terrestrial conservation projects throughout the globe. Working in groups, students will also work on a real-world local issue, partnering with a local conservation NGO to address an issue of real concern to that NGO. Working with the NGO representatives and the instructor, students will work in teams to develop a draft Conservation Plan that includes a work plan, monitoring plan, and budget.

What background knowledge do I need before taking this course?

No prerequisites are required.

What will I learn in this course?

The goal of the course is to provide students with training and experience in a systematic and adaptive process for planning conservation projects. Specifically, course participants will learn to:

- Discuss and analyze adaptive management as a tool for effective conservation planning and management
- Differentiate and evaluate different conservation management approaches
- Identify and define basic steps and activities of “Open Standards for the Practice of Conservation” (OS)
- Apply OS conceptualization, planning actions, and monitoring to real-world conservation challenges
- Identify where to find additional information on conservation adaptive management planning
- Apply Miradi Adaptive Management Software for Conservation Projects

How will I know if I have met the objectives of this course?

This hands-on course allows students to become familiar with the sequential steps of conservation planning and then apply them to a real-world conservation problem. Students will learn new planning tools in each class and discuss them in terms of case studies (from readings and videos). They will then apply these tools to the conservation problem that they are working on with their partner NGO. The mastery of the skills will be measured through: class participation in discussion sections, team participation, group presentations for each step of the planning process, and the oral and written Conservation Plan prepared for the partner NGO.

How can I prepare for the class sessions to be successful?

Videos and readings from the training manual and related materials will provide background on the theory and practice. Additionally, readings of different case studies will be assigned for each class and will serve as the basis for group discussions.

Laptops or notebooks are useful for the group work.

What required texts, materials, and equipment will I need?

The primary text reference – which can be downloaded for free – is:
Foundations for Success. 2009. *Conceptualizing and Planning Conservation Projects and Programs. A Training Manual*. Foundations of Success, Bethesda, Maryland. <http://www.fosonline.org/resources/all/training-download>
<http://www.fosonline.org/resources/all/training-download>

Other readings and videos will be available on line or through the library.

Students will need to purchase a student subscription to the Miradi Adaptive Management Software for Conservation Projects, which is available for \$30.

(<https://www.miradi.org/pricing/>)
(<https://www.miradi.org/pricing/>)

How will my grade be determined?

Case-study exercises (individual) and group assignments
4 assignments 30%

Client-based proposal (team project)
Written first draft 10%

Written final proposal	30%
Class presentation	10%
Class attendance and participation	20%

A+ = 97 - 100
 A = 93 - 96
 A- = 90 - 92
 B+ = 87 - 89
 B = 83 - 86
 B- = 80 - 82
 C+ = 77 - 79
 C = 73 - 76
 C- = 70 - 72
 D+ = 67 - 69
 D = 63 - 66
 D- = 60 - 62
 F = below 60%

What are the course policies?

ACADEMIC INTEGRITY:

Each student is bound by the academic honesty standard of the Duke Kunshan University. Its Community Standard states: “Duke Kunshan University is a community composed of individuals of diverse cultures and backgrounds. We are dedicated to scholarship, leadership, and service and to the principles of honesty, fairness, respect, and accountability. Members of this community commit to reflecting upon and upholding these principles in all academic and non-academic endeavors, and to protecting and promoting a culture of integrity and trust.”

All group presentations must be submitted electronically by 9 pm on the day before their class presentation. If the Conservation Plan (draft or final version) is late, 5% of grade will be subtracted for each day.

All presentation slides will be made available to the class electronically. Cell phones and laptops are only allowed during the group working sessions.

Because this course is hands-on, class attendance and group participation is critical. If you cannot attend class, you must speak with the instructor to get an excused absence.

[I will need to work out policies concerning working with partner NGOs, including potentially signing confidentiality statements.]

What campus resources can help me during this course?

[DKU administrators: Insert link to a pdf or website url for the full list of resources, that includes the writing center, language labs, tutors, and any other relevant campus learning resources.]

What is the expected course schedule?

Readings listed below.

Date	Class topic/unit name	Pre-class work for students	Planned in-class activities	Assignments due
March 13	Introduction to Conservation Planning and Miradi software	Download Miradi software and training manual	Computer exercises: Miradi	
March 15	Conceptualize Project	Readings: Foundations for Success – pp 1-30	Lecture Group discussion: case studies Group work: define the project team, scope, vision and conservation targets.	
March 20	Conceptualize Project	Readings: Foundations for Success – pp 32-64 Prepare group presentation	Group presentations: project conceptualization Lecture Group work: assess and rank direct threats to conservation targets.	Group presentation
March 22	Conceptualize Project	Readings and video (case study): Vegetation Management of Sagebrush -Steep, USA	Lecture Group discussion: case studies Group work: situation analysis and conceptual modeling.	
March 27	Planning Actions and Monitoring	Readings: Foundations for Success – pp 66-83 Prepare group presentation	Group presentations: project conceptualization Lecture Group work: identify and prioritize strategies.	Group presentation
March 29	Planning Actions and Monitoring	Readings: Foundations for Success – pp 84-93	Lecture Group work: define assumptions and outcomes in results chains.	
April 3	Planning Actions and Monitoring	Readings: Foundations for Success – pp 94-104 Readings (case study): Adaptive Management of Chimpanzee Habitats, Tanzania Prepare group presentation	Group presentations: planning actions Lecture Group discussion: case studies Group work: develop activities and measurable objectives to evaluate strategy effectiveness.	Group presentation
April 10	Planning Actions and Monitoring	Readings: Foundations for Success – pp 105-116 Schwartz Prepare group presentation	Group presentations: monitoring Lecture Group work: Set quantitative goals for biodiversity targets and develop monitoring plan.	Group presentation
April 12	Implement Actions and Monitoring	Readings: Conservation Measures Partnerships – pp 29-31 Ferraro and Pattanayak Readings (case study): Marine conservation and adaptive management, Asia Pacific Region	Lecture Group discussion: case studies Group work: Prepare a work plan and budget.	Draft Written Conservation Plan due April 12
April 17	Analyze, Use, Adapt	Readings: Conservation Measures Partnerships – pp 32-34 Lamoreux	Lecture Group work: Analyze and use monitoring data to adapt.	
April 19	Capture and Share Learning	Readings: Conservation Measures Partnerships – pp 35-37 Salafsky Readings (case study): Palm oil management, Asia Pacific	Lecture Group discussion: case studies Group work: Recommendations and examples from evidence-based conservation in practice.	
April 24	Class Presentations	Prepare presentation		Final group presentation of

				Conservation Plan
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Assignments due	<p>Four group powerpoint presentations (March 20, 27, April 3, 10)</p> <p>First draft written Conservation Plan (April 12)</p> <p>Final Conservation Plan presentation (April 24)</p> <p>Final written Conservation Plan (April 27)</p>
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Readings

Conservation Open Standards

The Conservation Measures Partnership. 2013. *Open Standards for the Practice of Conservation*. Version 3.0. April 2013. <http://cmp-openstandards.org/download-os/http://cmp-openstandards.org/download-os/>

Ferraro, P.J. and S.K. Pattanayak. 2006. Money for Nothing? A Call for Empirical Evaluation of Biodiversity Conservation Investments. *PLoS Biology*. 4:0482-0488.

Foundations for Success. 2009. *Conceptualizing and Planning Conservation Projects and Programs. A Training Manual*. Foundations of Success, Bethesda, Maryland.
<http://www.fosonline.org/resources/all/training-downloadhttp://www.fosonline.org/resources/all/training-download>

Lamoreux, J., et. al. 2014. Overcoming the funder's dilemma. *Biological Conservation*. 175:74-81.
<http://www.sciencedirect.com/science/article/pii/S0006320714001682?via%3Dihubhttp://www.sciencedirect.com/science/article/pii/S0006320714001682?via%3Dihub>

Salafsky, N. 2011. Integrating development with conservation: a means to a conservation end or a mean end to conservation? *Biological Conservation*. 144:973-978.
<http://www.sciencedirect.com/science/article/pii/S0006320710002697>

Schwartz, M., et. al. 2014. Perspectives on the Open Standards for the Practice of Conservation. *Biological Conservation*. 155:169-177.
<http://www.sciencedirect.com/science/article/pii/S0006320712002832http://www.sciencedirect.com/science/article/pii/S0006320712002832>

NOTE: when I taught at DKU I did two simulation case studies. It will be difficult to require readings OTHER than the case study for a class period. It is too much for the students to digest.

Case studies

Vegetation Management of Sagebrush -Steep, USA

Chambers, J.C., et al. 2017. Science framework for conservation and restoration of the sagebrush biome: Part 1. Science basis and applications. Gen. Tech. Rep. RMRS-GTR-360. Fort Collins, CO: U.S Department of Agriculture, Forest Service, Rocky Mountain Research Station. 213 p.
https://www.conservationtraining.org/pluginfile.php/97960/mod_resource/content/12/topic1/PDFs/keyLit9.pdfhttps://www.conservationtraining.org/pluginfile.php/97960/mod_resource/content/12/topic1/PDFs/keyLit9.pdf

Successful Vegetation Management Practices in the Sagebrush-Steppe

<https://www.conservationtraining.org/course/view.php?id=263><https://www.conservationtraining.org/course/view.php?id=263> Topics 1, 2, and 5.

Adaptive Management of Chimpanzee Habitats in the Greater Gombe Ecosystem, Tanzania

Pintea, L., Mtiti, E., Mavanza, M., Abdallah, F., Kashula, A., Mjungu, D., Collins, A., and S. Kamenya. *20 Years and Counting: Adaptive Management of Chimpanzee Habitats in the Greater Gombe Ecosystem, Tanzania*. The Jane Goodall Institute.

<https://docs.google.com/document/d/1WXt0tSDKfElbraoG4jcAL7hVx0MDEap2Lfdtu50a3FM/edit?usp=sharing><https://docs.google.com/document/d/1WXt0tSDKfElbraoG4jcAL7hVx0MDEap2Lfdtu50a3FM/edit?usp=sharing>

TANAPA, TAWIRI, WD-MNRT, USFWS, USAID, CBSG, FOS, FZS, JGI, TNC & WCS. 2015. *Gombe-Mahale Ecosystem Conservation Actin Planning*. v2.0.

<https://drive.google.com/file/d/0B166ZPGrNnAUanIb2lxUHVzTVE/view><https://drive.google.com/file/d/0B166ZPGrNnAUanIb2lxUHVzTVE/view>

USAID, Jane Goodall Institute, and The Nature Conservancy. 2009. *Conservation Action Plan for the Greater Gombe Ecosystem, Tanzania 2009-2039*. Version 1.

<https://drive.google.com/file/d/0B166ZPGrNnAUbFhuVFFxWkFQsXM/view><https://drive.google.com/file/d/0B166ZPGrNnAUbFhuVFFxWkFQsXM/view>

Marine Conservation and Adaptive Management, Asia Pacific Region

Measuring Success of Marine Conservation in the Asia Pacific Region: Coral Triangle and Micronesia Challenge <https://www.conservationgateway.org/Files/Pages/ccnet-case-study-measurin.aspx><https://www.conservationgateway.org/Files/Pages/ccnet-case-study-measurin.aspx>

Hughs, T.P., et al. 2007. Adaptive management of the Great Barrier Reef and the Grand Canyon World Heritage Areas. *Ambio*. 36:586-592.

Leslie, H.M. and K.L. McLeod. 2007. Confronting the challenges of implementing marine ecosystem-based management. *Frontiers in Ecology and the Environment*. 5(10): 540–548.

Palm Oil Management, Asia Pacific Region

WWF-Australia Palm Oil Campaign. 2010. <https://www.conservationgateway.org/Files/Pages/ccnet-case-study-wwf-aust.aspx><https://www.conservationgateway.org/Files/Pages/ccnet-case-study-wwf-aust.aspx>

Greenpeace. 2017. *Dirty Bankers: How HSBC is Financing Forest Destruction for Palm Oil*. <http://www.greenpeace.org/international/Dirty-Bankers/> .

Paoli, G.D., et al. 2010. CRS, Oil Palm and the RSPO: Translating boardroom philosophy into conservation action on the ground. *Tropical Conservation Science*. 3:438-446. <http://journals.sagepub.com/doi/pdf/10.1177/194008291000300408>