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A Checklist for Implementing New Local Conservation Projects

Introduction

This checklist is an evolving document that was initially produced as a result of a scientific publication in the Journal of [insert name once accepted], aimed at guiding conservation managers and scientists to make more considered, collaborative contributions to implementing conservation. It is intended to assist the establishment of new conservation projects at single sites (i.e. "local"), based on the shared experiences of conservation practitioners, scientists, landowners and conservation funders. The checklist gives an overview of the important considerations for ensuring that conservation decisions benefit both wildlife and people and hence improve the chances of success in conserving or restoring local nature. However, each case is unique, with no one single correct approach, nor one single correct outcome, so projects will need to decide whether the order of steps and content presented here are appropriate. More explanation (including definitions of terms) can be found in the scientific publication, available at [insert online location once published].

We would be very interested to hear feedback on this checklist and how it has been used. Has it been useful? Any suggested changes? Contact: admin@reforestafrica.com.

Step 1. Consultation

Seeking advice from other individuals and organisations with interest in the site to be conserved (i.e. stakeholders) will help to modify and improve the success of both immediate and longer-term conservation responses. Without a well-connected network of collaborators, it is hard to build the crucial working relationships required to succeed.

- ☐ Have all stakeholders been identified and contacted (especially: local inhabitants; landowners; ecologists; social scientists; regional and national government; non-governmental organisations)?
- ☐ Is there good understanding of stakeholder opinions regarding the expected environmental future of the site?
- ☐ Is the site considered more or less important for action than other similar sites known to the stakeholders?
- ☐ Is the project team aware of any difficulties that each stakeholder is currently facing in the area?
- ☐ Is the land title/status known, and do the stakeholders report any other awareness of claims to the land, or intentions for local infrastructure, or indigenous / commercial use?
- ☐ Collectively, do any of the local difficulties, needs and land intentions suggest that there are any major opportunity costs?
- ☐ Have all relevant scientific / government reports and publications been reviewed? Are there any with which each stakeholder was unaware?
- ☐ Has a lawyer been consulted regarding all information gathered?
- ☐ Which stakeholder is best-placed to work with all stakeholders (good relationship, trust, etc.) and hence lead the conservation project?
- ☐ Which stakeholders would be best-placed to formally participate in the project team?

Step 2. Seed Funding

Funding is crucial for conservation and the involvement of funding bodies can help ensure international standards in quality and ethics. In particular, both governmental and non-governmental organisations (NGOs) in developing regions tend to have extremely limited resources without external support.

- ☐ Have all funding options been considered based on the expertise and contacts of the project team? (e.g. funders interested in the region, charities, governments, corporations, conservation zoos)
- ☐ Has the lead partner (and/or best-connected team member) made a personal approach to the funding body / bodies?
- ☐ Is the project team aware of the amount of funding available?
- ☐ Based on the above, has the project team determined the most realistic funding target: (a) feasibility study, (b) pilot project, or (c) full conservation?
- ☐ Does the project proposal appeal explicitly to the goals, guidelines and terminology of the chosen funding body?
- ☐ Does the project proposal include measurable objectives, Key Performance Indicators (KPIs), Return-on-Investment, and a clear workplan with deliverables and means to measure progress?
- ☐ If rejected, does the project team now have better understanding regarding how a revised application can better (a) sell the project, and/or (b) satisfy the requirements of the same [or alternative] funding body?

Step 3. Publicity

Generating publicity is important for building support by attracting and informing partners and funding bodies. Positive publicity is vital for most funding bodies and can even leverage conservation action. However, it can be time-consuming and may even take time away from focus on direct conservation work, so it needs careful management. Done correctly, publicity can be very rewarding.

- ☐ Have the funders and other project partners been approached to ask how they should be referred to in all external communications regarding the project?
- ☐ Is the project team aware of its target audience(s) for publicity?
- ☐ Is the project team aware of the best medium to reach its target audience(s)?
- ☐ Does the project have a presence on the most appropriate form of social media for its target audience(s)?
- ☐ Does the project have a website, including an overview, news, relevant reports, links to social media, inspiring photographs and contact details?
- ☐ Does a member of the team have responsibility to generate publicity at an agreed frequency per publicity type (e.g. social media, website news, press releases, newsletters, etc.)?

Step 4. Feasibility Study

A feasibility study is an investigation into the conservation value, threats and opportunities at a proposed conservation site. This helps to determine the feasibility of conservation, most often comprising assessments of biological and socio-economic attributes, legal status and threats.

- ☐ Have ecologists, social scientists and lawyers been consulted to determine the best approach for the feasibility study?
- ☐ Is the project team aware of the best methods for assessing the biological and socio-economic attributes of a conservation site?
- ☐ Is the project team aware of which ecosystems are present, their importance, their health, and how their size, importance and health compares to similar sites nearby?
- ☐ Which threatened, restricted range and charismatic species are present and are populations declining? (especially among groups likely important for management or funders)
- ☐ Have all stakeholders from step 1 been formally consulted under the feasibility study, revisiting the same questions?
- ☐ Are stakeholders aware of the current rules, legal status and boundaries?
- ☐ Is anyone currently using the land, or intending to use it? For what purpose?
- ☐ What natural resources are currently obtained by local communities and where? E.g. through bio-cultural mapping,
- ☐ Do the stakeholders perceive any ecosystem service benefits from the intended conservation area and are they sufficient for their needs?
- ☐ Are there any current/potential revenue streams arising directly from the intended conservation area?
- ☐ Do the stakeholders know which species are present and their importance for conservation?
- ☐ Have local human wellbeing and opportunity costs been fully assessed?
- ☐ Has a legal assessment determined the protected status and ownership of the land, and which stakeholders are permitted to use it and for what purposes?
- ☐ Has a formal “threat assessment” been completed, giving reasonable understanding of the relative influence of direct and indirect current and future threats to the species/ecosystem?

Step 5. Strategic Planning

Effective reporting is vital for funding bodies to decide upon support for longer-term conservation. Reporting should directly address the agreed KPIs of the feasibility study, with clear results and rationale for a proposed strategic conservation plan. Strategic conservation planning may take many forms, but essentially needs to consider all threats to the project and how to act upon them.

- ☐ Has a core team been formed with all skills necessary to evaluate all of the identified direct and indirect threats?
- ☐ Has the core team produced a conceptual model to demonstrate the major threats and most appropriate strategies to combat them (in terms of cost and threat reduction)?
- ☐ Have appropriate indicators been identified for monitoring progress towards reducing major threats and improving the major biological and socio-economic elements of the project?
- ☐ Is there a SMART (specific, measurable, achievable, relevant and time-bound) strategic plan for action?

Step 6. Full Funding

Based on all of the information acquired during previous steps, the project team can now collate the information to make a case to funders for a conservation project to begin in earnest, i.e. to implement the strategic plan from step 5. In addition to the basic fundraising principles under step 2, the conservation team needs to demonstrate how the proposed plan will address the major threats to generate sufficient revenue, infrastructure and capacity to sustain both species diversity and human wellbeing.

- ☐ Have all considerations for approaching donors been considered from step 2?
- ☐ Is there a strong case for sustainable conservation in the proposed timeframe?
- ☐ Is the proposed budget, return-on-investment and exit strategy explained clearly?
- ☐ Is there written evidence from all stakeholders, showing their support and involvement?
- ☐ Overall, will the project be positive for both wildlife and people?

Step 7. Pilot Project

Conservation can often benefit from an initial period of experimental management with a flexible, adaptive management approach, developing and refining methods, and building working relations between stakeholders. This flexibility needs to be maintained throughout, but is particularly important in the early stages, which are the most at risk from misunderstanding and distrust. However, pilot projects can also be controversial because they can raise false expectations, particularly where funding for subsequent full implementation is uncertain.

- ☐ Is there sufficient, written commitment from the project team and funding body to ensure that the project will not just cease after the initial pilot project has been completed, e.g. a Memorandum of Understanding?
- ☐ Will the pilot project raise awareness both locally and externally using the principles under step 3?
- ☐ Will the pilot project build local capacity?
- ☐ Will the pilot project develop a provisional management plan with input from all stakeholders?
- ☐ Will the pilot project monitor progress using indicators selected in step 5?
- ☐ Has the pilot project obtained sufficient information to finalise the strategic plan, or is more pilot work needed?

Step 8. Conservation

At last! The commencement of formal conservation will likely be an extremely uplifting moment, especially if the stakeholders have spent years watching the site slowly succumb to the threats. However, the initial stages of conservation might also be quite slow-going in order to ensure that vital documents are in place to ensure that the work has legal backing. This final checklist focusses on this administration rather than the conservation activities themselves, because the direct conservation work will be entirely dependent on the nature of the project and hence cannot be generalised.

- ☐ Is a strong project management process in place to monitor cash flow and milestone adherence alongside a risk mitigation matrix?
- ☐ Has a neutral, tactful, realistic, communicative and accessible individual been assigned the task of updating partners regarding progress and managing their expectations?
- ☐ Are lawyers involved to help all legal aspects of the administration to progress without undue delay?
- ☐ Has a written, time-bound step plan been agreed by all project partners, including the funding body?
- ☐ Is there a written agreement between the lead partner and the donor, regarding project financing, reporting, publicity and any restrictions/covenants on the release of funds?
- ☐ Is there a written management agreement between members of the project team and other relevant stakeholders, especially local residents, Government and landowners?
- ☐ Is there a beneficiary feedback mechanism, through which stakeholders can give anonymous feedback?
- ☐ Are financial agreements in place for all land acquisition and expert consultancies?
- ☐ Has the relevant Government authority produced an official notification authorising the lead partner to conduct the planned work within the area of focus?
- ☐ Has there been formal Government public consultation regarding the proposed work?
- ☐ Has any necessary transfer of land tenure, title deeds or protected area status been completed according to national law?
- ☐ Does the plan for development of the governing management document include opportunities for genuine input from all stakeholders?
- ☐ Will the conservation project continue to monitor progress using indicators from step 5?
- ☐ Is there a plan for continued management and financial sustainability into the future, beyond the initial project period?