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Project Management

Project Overview

Overall Goal: To conserve the full expression of biodiversity in EcosNature ecoregions.

To maximize learning and implementation of Ecoregion Conservation efforts in the EcosNature ecoregions, core project management plays an essential role in coordinating communication and facilitation of learning opportunities across ecoregions. The following outlines the key accomplishments of last year and plans for the upcoming fiscal year FY01.

FY00 accomplishments

- Project management team hired to liaise with AID, facilitate reporting and capture lessons to advance our learning on Ecoregion Conservation in the key ecoregions of the EcosNature Project.
- WWF workshop on Ecoregion Conservation held in November 1999 that brought together staff from across the WWF network to cultivate lessons learned in rolling out ecoregion conservation and identify what current challenges and next steps for action to advance the concept and practice of the approach.
- Multi-media product completed in the form of a distance learning course for the WWF College for Conservation Leadership developed and is now in testing stages with the first participants taking the course in November 2000.
- Information resources either supported or facilitated by the Unit to advance learning are completed and include, for example:
 1. Workbook on “Biological Assessments and Developing Biodiversity Visions” in terrestrial ecoregions is now in press.
 2. Stakeholder Collaboration Resource Manual
 3. Intranet site to share information and alert opportunities for staff within the Network to stay current on ecoregion conservation learning opportunities and resources.
 4. "Wants, Needs & Rights – Economic Instruments and Biodiversity Conservation – A Dialogue”
- Innovative grants helped to support:

1. Testing reconnaissance: Testing of two different methods of carrying out ecoregional reconnaissance in the East Africa Marine and Carpathians ecoregions.
2. Biodiversity vision in Central Africa: Support for workshop to develop a draft biodiversity vision for the Congo Basin Forests that brought together a broad spectrum of stakeholders and served to help build a multi-scale constituency.
3. Global threats: To address linkages from global threats to ecoregional action, pilot efforts began in the Bering Sea to engage villages in community-based toxics monitoring linked to regional databases to inform policy.
4. Economic incentives in ecoregions: A training workshop was held in the Atlantic Forests to explore the various economic incentives and tools that can be used as potential strategies across different scales in ecoregions.

For EAI in the Southwest Amazon Ecoregion:

- The US Government and the Bolivian Government signed the amendment to transfer the EAI funds and management out of FONAMA.
- WWF hired and supervised a lawyer to finalise the by-laws, regulations and act of constitution for the newly established EAI Fund. The documents have been finalised. The lawyer has begun to process the documents through the proper legal channels to legalise the new Foundation.
- WWF hired a short-term consultant, Ruth Norris, to assist in the establishment of the new Foundation. She made recommendations regarding establishment, development and management of the Fund.
- WWF is hired another short-term consultant, Jose Antonio Uzquiano, to work with Ruth and complement her work by writing the procedures and manuals for Foundation administration. This work should be completed by the end of October.
- Recruitment continues for a full-time Technical Advisor to work as counterpart to the General Manager of the Foundation. WWF-US has been recruiting for this position since October of 1999 and has not been able to find someone with the right background.
- In the absence of a full-time Technical Advisor, The Country Representative for Bolivia supervised the development and implementation of the consultancies and travelled frequently to La Paz to work with the EAI Technical Working Group (Ministry of Sustainable Development, EAI staff, USAID and WWF).

Project Activities

The core management team will provide the necessary programmatic, financial and administrative oversight to support site-based implementation and facilitate learning among ECOSNature ecoregions and throughout the broader network. An important function for this team is facilitating opportunities to broaden learning and testing of different methods through various mechanisms such as thematic and/or geographic workshops, ecoregional exchange visits, creative communication media and innovative grants. These mechanisms help to advance the concept of ecoregion conservation within ECOSNature ecoregions and across ecoregions that are global priorities as identified in the original proposal. Just as importantly, the coordination of these activities includes exploring ways to create more exchange and collaboration with the broader conservation community, many of which are rolling out large-scale conservation in different ways around the world. The following reflects our intention of testing out creative ways to fulfill this dual role of supporting WWF programs to achieve our global goals as well as acting as a catalyst for conservation beyond our institutional boundaries.

Total level of Effort: \$864,000 (\$494,000 USAID: 370,000 Global Bureau + \$124,000 Bolivia Mission); \$370,000 WWF Match

Objective I: Mobilize conservation action on an ecoregional scale

Activity 1.1: Maintain EcosNature coordination team

The coming year will provide the opportunity to further track progress, facilitate communication and coordinate reporting for a coherent program designed to test and support this approach in the focal ecoregions of the EcosNature Project. As associates emerge, this coordination team keeps track of existing or potential opportunities for support through other AID missions to help foster greater learning and capturing of experience that can be exchanged across ecoregions.

Anticipated Outputs/Results for Activity 1.1:

- Effective programmatic and financial administration to advance conservation impact in EcosNature ecoregions.

Level of effort for Activity 1.1:

\$180,000 (\$90,000 USAID, \$90,000 WWF Match)

Activity 1.2: Facilitate activities and communication as opportunities for exchange and learning to advance Ecoregion Conservation implementation

Workshops (Level of Effort: \$125,000 (\$75,000 USAID, \$50,000 WWF Match)

1. Facilitate workshop for Ecoregion Conservation for WWF Network. Following the first workshop held in November of 1999, there was resounding demand for more such opportunities to meet with other field staff working to implement Ecoregion Conservation in their own contexts. A second workshop will be held in November 2000 focusing on actions now being defined or carried out. This workshop will provide an expanded opportunity particularly for ECOSNature ecoregion, such as the ecoregion teams of the Atlantic Forests, Southwest Amazon and Sulu Sulawesi Seas. This will be a particularly important learning opportunity structured around peer review and exchange to delve deeper into learning from successes and failures and build skills to deal with the many complex challenges.
2. Convene external workshop entitled "Learning Across Boundaries: Broad-scale Conservation". Held in partnership with the other partners in the Global Conservation Program as well as others testing out broad-scale conservation, this workshop will also be held in November in the Adirondacks. The key objective will be to foster learning of the evolving spectrum of large-scale conservation approaches now emerging, exchange ideas on tools and strategies and promote collaboration across the different organizations.
3. Building on the enthusiasm for the 'Learning Across Boundaries' workshop, there is a clear expressed interest and commitment from other GCP partners to host follow-on workshops. The content and location will be developed collaboratively with support provided to other GCP partners that rotate taking the lead on upcoming workshops, site meetings and trainings for targeted learning across the different organizations and approaches. This will likely include a workshop similar to the Adirondacks bringing together GCP partners and others about overall issues relevant to our work as well as potential for convening on thematic issues such as freshwater broad-scale conservation to be held at a site where GCP partners are working. Bringing these discussions directly to the field will help to maximize learning, build collaboration and add value to the practical challenges being faced.

Communications (Level of Effort: \$80,000; \$40,000 USAID, \$40,000 WWF Match)

4. Develop a driving communications strategy utilizing a wide variety of traditional and new media to create innovative ways for sharing Ecoregion Conservation knowledge and actions within WWF and across global conservation. For example, the proceedings to the NY workshop will include a cd-rom and video disseminated to GCP partners. These and other information resources (particularly those outlined below) will be disseminated to the broader conservation community. Expanding our ability to reach these broader audiences will rely in part on improving the usability of the existing Intranet site and developing an interactive Internet and Intranet site combination for effective external and internal active communication. In addition, we will continue to explore how video can be combined as a creative way to convey information and ideas. Expanding on these media is particularly important for greater exchange with the broader conservation community on the lessons WWF is learning in rolling out Ecoregion Conservation.

5. Produce a publication on broad-scale conservation in Russia. In addition to WWF's Ecoregion Conservation program in the Russian Far East, several other initiatives across Russia have been emerging as important efforts at broader scales. To better understand these approaches, support will be provided to publish comparative case studies in the periodical, "Russian Conservation News". In addition to the regular subscribers (which includes scientists, conservationists and practitioners across the region), this will also be disseminated throughout the WWF Network and more broadly to GCP and other conservation practitioners.

Ecoregional Exchanges (Level of Effort: \$55,000; \$35,000 USAID, \$20,000 WWF Match)

6. Promote ecoregional exchanges. Face to face learning from one ecoregion to another is proving to be one of the most valuable ways to understand first hand how potential strategies and ideas being carried out in one part of the world can help them in their own ecoregion. This includes exchanges within WWF as well as with other partner organizations. For instance, last year expertise from the Sulu-Sulawesi Marine ecoregion attended the Meso-American Caribbean Reef biodiversity vision workshop. This exchange will come full circle in the coming year with ecoregion team members from the Meso-American Caribbean Reef and other coral marine ecoregions attending the biodiversity vision workshop for Sulu-Sulawesi. Sulu-Sulawesi will also benefit in learning from other exchanges such as having the GIS technical team staff from the Gulf of California visit the Meso-American Caribbean Reef to learn how they are developing a region-wide GIS resource center and database for conservation planning. Particularly in ecoregions where other GCP partners are working, support will be provided in the coming year to help foster greater face to face learning across organizations. For example, an exchange may be supported to facilitate collaboration between TNC's Measure of Success staff and the Bering Sea to help identify indicators of success in the marine realm. (also see section on M&E)
7. Participation in the Immersion Program. As a way to foster learning through interaction, research and experience on Ecoregion Conservation, ecoregion staff spend anywhere from 2-6 months in the Washington office conducting their own research as well as participating in ongoing activities with other ecoregion programs and staff. By spending time in the Washington area, this program has worked particularly well as an avenue for strengthening capacity as well as networking and building relationships with other organizations that are relevant to their field sites. For instance, in the coming year a participant from the Russian Far East who is currently working on a network of protected areas ('ECONET') will use part of their time to share information and make important links with other organizations active in the area such as the Wildlife Conservation Society.

Anticipated Outputs/Results for Activity 1.2:

Improved communication mechanisms and opportunities for learning and capacity building across ecoregion initiatives and to the broader conservation community will be accomplished with:

- At least two exchanges within WWF ecoregions and two exchanges across GCP partner sites facilitated.
- Publication and distribution of articles on large-scale conservation approaches in Russia.
- Construction of interactive intra/internet initiated.
- Publication and distribution of proceedings for Adirondacks workshop “Learning Beyond Boundaries: Broad-Scale Conservation”

Level of effort for Activity 1.2:

\$260,000 (\$150,000 USAID, \$110,000 WWF Match)

Activity 1.3: Facilitate Innovative Grants

The purpose of innovation learning grants is to promote creative and rigorous thinking and acting to advance the concept and practice of Ecoregion Conservation. Using the criteria established, several grants are being considered for FY01.

- **Economic Incentives/Financial Sustainability** (Level of Effort: \$35,000; \$15,000 USAID, \$20,000 WWF Match)

Several conservation organizations are exploring strategies and tools for creating economic incentives for conservation at sites as well as sustaining financial support more broadly across ecoregions and other areas. To better build on existing and potential mechanisms, work will be done to explore how these are tested or adapted for ECOSNature and other ecoregions. For instance, held in the Atlantic Forests ecoregion in July 1999, an innovative grant helped to support a training workshop on understanding economic incentives in ecoregions. To explore these issues at a deeper level in the Asia context, support will be provided for the ‘GREEN’ project to further understand what strategies are available within current macroeconomic drivers and economic contexts. This will specifically include ecoregion staff from the Sulu-Sulawesi who are testing a variety of economic incentive mechanisms and seeking to exchange ideas and gather feedback for how these best contribute to achieving overall ecoregion goals. On a broader level in seeking to sustain financing for ecoregional programs, work will be done to liaise with other organizations that are collectively working on identifying or developing strategies. For instance, the EAI in the Bolivia portion of the Southwest Amazon is an example of a conservation fund to glean lessons from. Combined with other experiences within WWF and GCP partners, we will explore more deeply the potential for innovative financing that can meet the demand of ambitious conservation programs.

- **Monitoring and Evaluation** Level of Effort: \$40,000 (\$20,000 USAID, \$20,000 WWF Match)

With biodiversity visions drafted and planned for completion in the coming year, ECOSNature ecoregions as well as over a dozen more across WWF's Network are asking critical questions for how to embed ecoregion plans in a learning framework to monitor progress over time. Various innovative tools are being explored to identify M&E methods within these ecoregions as well as aggregating progress across ecoregions.¹ For instance, significant groundwork has been done to develop M&E in the Gulf of California ecoregion. As this work progresses, this will be a timely learning laboratory for other marine seascapes that are now grappling with how to identify indicators that reflect progress towards biodiversity goals. As a part of developing the M&E for this ecoregion, other partners in the area (such as CI) as well as other ECOSNature ecoregions (i.e. Bering Sea and Sulu Sulawesi) will be included in the process to magnify learning that is applicable to their ecoregions. (also see section on Ecoregion Exchanges)

Other support will also be considered for ecoregions to develop monitoring tools and programs, such as the Southwest Amazon which has made progress in specifically articulating targets. Synthesizing the lessons learned in ECOSNature and other ecoregions, from WWF as well as other organizations efforts will be critical to understanding M&E at this scale.

- **GCP Overlay Map** (Level of Effort: \$20,000; \$15,000 USAID, \$5,000 WWF Match)

One of the enthusiastic recommendations that emerged from the GCP partners is to produce a map that helps us collectively understand our global priorities in the conservation community and where in the world we are working to help identify and promote better and broader collaboration. Several different iterations of this are in discussion (e.g. nested information from broad - hotspot, ecoregional level to landscape to site level), that will be decided on by a collaborative group representing the different organizations. To produce this map, work will be supported that coordinates partner participation and data and after the initial information is gathered, will include a one-day synthesis workshop. This map will be an important contribution to better define global strategies and will be distributed both within the conservation community, other appropriate donors, governments, and academic fora (e.g. 2001 SCB Meeting). This information will also set the stage for further exploration of developing a site where multiple partners are (or could be) working more collaborating by exchanging tools, training, and expertise.

- **Climate change and marine ecoregions** (Level of Effort: \$45,000; \$25,000 USAID, \$20,000 WWF Match)

A potentially devastating threat to marine ecoregions such as the Sulu Sulawesi is the associated effects of climate change. Addressing this requires understanding and acting at scales much broader than the ecoregion. One way this will be explored is through a network of priority coral reef ecoregions of which Sulu Sulawesi is targeted. Particularly as another coral bleaching event is anticipated

¹ Also see section on the GCP overlay map which would provide an excellent opportunity to initiate greater data sharing for global monitoring that can be fed into tools such as the Living Planet Index.

within the next couple years, this work will focus on developing standards for monitoring across ecoregions to better understand vulnerability and adaptation strategies to global climate change. Sulu Sulawesi is playing a critical role in this initiative and will launch these efforts. By linking with other marine climate change monitoring efforts both within WWF and more broadly in the marine conservation community, this is an opportune time for collaboration to better profile the impacts and potential strategies for this critical global threat.

- **Global Trends** (Level of Effort: \$70,000; \$20,000 USAID, \$50,000 WWF Match)

Organizations such as Conservation International are actively looking at how conservation efforts can be better informed by understanding global trends in today's world. Based on previous work on trends in industrial sectors such as shrimp aquaculture, agriculture, mining, oil, gas and timber, support will be provided to look more in-depth at specific global trends in business/industry that directly impact ECOSNature as well as other priority ecoregions. For example, this includes a more in-depth look at agribusiness commodities such as oil palm in the Lower Mekong Forests and Sulu Sulawesi; corn in Southwest Amazon; and sugar cane and cocoa in Atlantic Forests. These analyses will help to better understand shifts in production (where and how), potential best practices to mitigate further 'frontier conversion' with the goal of identifying the key players or dynamics that drive industrial threats such as this as well as better anticipate shifts to help inform response strategies.

Engaging stakeholders Level of Effort: \$90,000 (\$40,000 USAID; \$50,000 WWF Match)

- **Gender issues**

The "Women and Conservation Initiative" at WWF is actively working to integrate gender issues across WWF's conservation programs. Training workshops have been organized in several ecoregions to sensitize both WWF staff and partners and also build appropriate skills to integrate gender within their programs. For instance, in Sulu Sulawesi, support will be provided to continue training-of-trainers work that focuses on reproductive and overall health as an important link to population dynamics as a driver of biodiversity loss. In the Southwest Amazon, support will be provided to conduct a gender assessment and training for two priority areas identified in the Biodiversity Vision in Peru; Tambopata National Reserve and Bahuaja Sonene National Park. A key goal is to explore how gender needs and issues can be linked to environmental education strategies to achieve the biodiversity vision. The insights and lessons learned from these and other exercises will be built on to assist ecoregional planning and implementation processes both within WWF and with the many partners active in ECOSNature ecoregions.

- **Indigenous Peoples**

In several ecoregions, such as the Bering Sea, indigenous peoples are key stakeholders to engage in building a long-term constituency for stewardship of the ecoregion. Last year WWF initiated a community-based toxic monitoring and information program in the Bering Sea to address the impacts of toxics on both biodiversity and local communities. This year, additional support through an innovative grant will help support a collaboration exchange training program with WWF, scientists (from Texas A&M and SUNY-Oswego universities) and community members from 3 Bering Sea villages. Building on the experience of local community monitoring in the Gulf of Mexico, a similar training program will help to teach specific skills in monitoring as well as learn from their experience in community-based monitoring. The process and results of this will be linked to ongoing regional analyses in the Bering Sea and further feed into international policy work by WWF's Global Threats Toxics efforts. This provides a potentially powerful model for engaging with an important - and often underrepresented - group of stakeholders within a multiple-scale framework that catalyzes conservation activities at key junctures across the ecoregion.

Anticipated Outputs/Results for Activity 1.3:

Catalytic funding of innovative opportunities for implementing Ecoregion Conservation in G200 ecoregions and shared learning across the conservation community will result in:

- Training of Sulu Sulawesi and other ecoregion staff on economic tools for ecoregion conservation
- Opportunities identified for collaborating with other GCP partners on mechanisms for exploring long-term financial sustainability.
- One (possibly two) site visits jointly with other GCP partners to train and test out M&E tools.
- Overlay map of global conservation priority areas and active GCP sites/regions.
- Joint proposal with 2 (possibly more) partners to fund addressing global climate change threats in marine ecoregions.
- Potential for joint collaboration on global trends analyses explored (e.g. CI, TNC)
- Analytical guidance papers on specific economic commodities that impact ECOSNature ecoregions published and distributed.
- Lessons learned from ecoregional gender assessments/activities integrated into socioeconomic toolbox and distributed.
- Representatives from three villages in the Bering Sea trained in toxics monitoring.

Level of effort for Activity 1.3:

\$315,000 (135,000 USAID, \$180,000 WWF Match)

Activity 1.4: WWF Bolivia assist in establishment and management of the Enterprise for the Americas (EAI) Foundation

In an effort to achieve high standards of transparency, efficiency and accountability, WWF will provide technical assistance to help the Foundation PUMA become operational. This includes:

1. The establishment and implementation of financial management procedures including financial planning and fundraising.
2. Development and implementation of the EAI Foundation program including long-term strategic planning, project approval, monitoring and evaluation procedures and prioritization methodologies to increase the conservation impact and strategic focus of the Foundation's funding.
3. External communications, outreach and public relations.
4. Development of Board Members and Executives in all aspects of Foundation planning and management.

Anticipated Outputs/Results for Activity 1.4:

- 1) Legalization and establishment of the private foundation – Fundación PUMA
- 2) Operational manuals defining policies and procedures regarding Board management, organizational structure, staff recruitment and personnel management, financial management and project management.
- 3) Communications strategy.
- 4) Board development strategy.
- 5) Financial investment strategy.
- 6) The above policies and procedures and strategies have begun to be implemented in 2001.

Level of effort for the activity:

\$124,000 USAID

List of lead staff involved:

For Project Management:

- Sheila O'Connor, Project Manager
- Sarah Christiansen, Conservation Specialist
- Vanessa Prada, Project Coordinator

For EAI:

- International Technical Advisor
- Local Technical Advisor (Jose Antonio Uzquiano – operational manuals and Jose Luis Tufiño – legalization of the Foundation)
- International EAI Consultant (Financial investment and board development)
- Local EAI Consultant (Communications, financial management and legal advice)

Other Specific Program Details

Travel

For EAI:

The international Technical Advisor and EAI Consultant will be traveling to and from Bolivia from international destinations. They will be posted to La Paz yet will have to travel to and from Santa Cruz to coordinate and debrief with the Conservation Director.

The local Technical Advisor and EAI consultant may come from other parts of Bolivia and may have to travel to La Paz to work. They will also need to travel to Santa Cruz occasionally to coordinate and debrief with the Conservation Director.