



Organizational Development: A Five-Year Strategy for CEPF

October 2025

Development of this strategy has been facilitated by Jany Barraut (Gen-H GmbH) and Pierre Volant (ikivox), in consultation with the CEPF Secretariat, CEPF's technical Working Group and Donor Council, members of CEPF's regional implementation teams, and selected grantees.

Executive summary

The Organizational Development (OD) strategy is fully integrated into CEPF's strategy and mission, by strengthening the capacity of civil society to protect the world's biodiversity hotspots. Building on CEPF's ongoing efforts to support civil society organizations (CSOs), the strategy takes this work a step further to deepen and expand its impact.

The OD strategy balances structure with flexibility, providing a guiding framework that allows for tailored support to CSOs, communities of CSOs, and regional implementation teams (RITs), CEPF's on the ground teams that coordinate investment in each biodiversity hotspot. It offers multiple entry points for OD and ensures that OD efforts are adapted to local context and needs. Developed through a collaborative process, the strategy blends OD expertise with CEPF's collective intelligence to foster meaningful, context-specific solutions.

Effective implementation will be key - ensuring continuity with the development phase by adopting an iterative, learning-driven approach. This includes prototyping and piloting the strategy to refine it based on real-world learnings. Potential cultural and organizational barriers, as well as enablers, have been identified and need to be acted upon to make the OD strategy effective and embed it successfully in the long term within the CEPF program.

By fostering an adaptive, learning-driven approach, this OD strategy ensures that CEPF and its partners reinforce their resilience in the long term and their ability to protect biodiversity for generations to come.

Overview of the CEPF OD approach

fully integrated into CEPF's strategy

What is OD for CEPF?

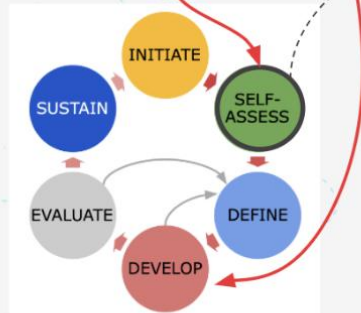
At CEPF, Organizational Development (OD) is a holistic, long-term process that builds resilient CSOs and communities to deepen and expand their biodiversity conservation impact.

How is OD support delivered within CEPF?

Through a guiding framework

OD cycle

CSOs can start the OD cycle at different entry points



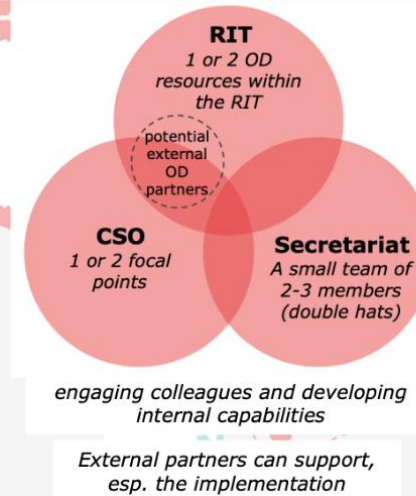
CSOs selected by considering **eligibility criteria** receive a **tailored support**

Facilitated self-assessment during a collaborative workshop



CSOs are in the lead

Who delivers OD support within CEPF?



How will OD be implemented?

Pilots, learning/evolving process, co-pilot teams to make the strategy evolve and mature



Several possibilities to manage **OD grants**



How OD impact is measured?

Evaluation is done through qualitative and quantitative assessment, incl. the option of outcomes harvesting

Ongoing evolution of the OD strategy

The strategy is continuously reviewed, enriched and evolving through the learnings we are gathering

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Strategic context

Organizational Development and CEPF

Organizational Development (OD) is a holistic and continuous long-term process of positive change towards becoming a resilient organization/community.

Organizational Development directly contributes to CEPF's mission by strengthening the capacity of civil society to protect the world's biodiversity hotspots and is therefore fully integrated into CEPF's strategy.

The aim is to ensure the healthy and sustainable development of civil society organizations (CSOs) to enable them to have a long-term impact on biodiversity conservation. We do so by ensuring that all organizational capabilities are aligned with the organization's mission/purpose. The strategy encompasses, and goes beyond, capacity building and biodiversity technical skills.

The positive impact of OD on conservation

Some interesting case studies highlight that CSOs going through an OD process have greater impact and results on conservation.

Honeyguide, a Tanzanian organization that empower local actors to run community-based protected areas, went through a 4-year transformative OD process, leading to increased impact in the field

Across all Honeyguide's sites:

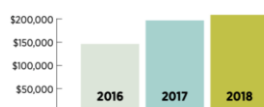
0 ELEPHANTS
killed or poached in the
past 4 years



Fig 2 | Giraffe numbers in Randilen WMA

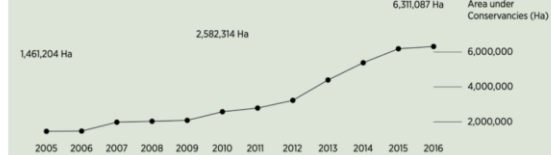


Fig 1 | Randilen WMA Total Revenue



During a 5-year OD process, several community-based conservation organizations in Kenya have been able to grow significantly, increasing their impact on the ground

Growth of Conservancies in Kenya



LION NUMBERS
ARE 14% HIGHER



Source: <https://www.maliasili.org/publications>

Challenges and opportunities faced by CSOs

CSOs face several challenges, such as:

- Shortcomings in governance, succession planning, culture, staff recruitment and retention, skill-building, and career path development.

- Sustainable financing and getting all costs really covered, in some cases accentuated by a context of international financial volatility .
- Operating in a context of political instability, environmental changes, and in general in a shrinking space for civil society in the environment and climate sectors.
- Lack of capacity to meet CEPF's requirements despite their skills.

Some opportunities can be leveraged to improve CSO resilience and impact, such as:

- Be more involved in community building.
- Develop local/national leaders.
- Equip CSOs to become trusted government partners.
- Use OD as a holistic framework to strengthen a CSO's organizational capabilities.
- On a global level, develop exchanges, collaboration and sharing of lessons between RITs.

CEPF's past experience

Several initiatives (past and ongoing) are contributing to the resilience of CSOs and are being implemented at different levels by CEPF. Here is a non-exhaustive list:

- Delivering specific programs (webinars, masterclasses, trainings,...) to support CSOs on dimensions other than conservation, such as communications, legal, finance/fundraising, project management, human resources, operating procedures, etc.
Examples: Indo-Burma, Tropical Andes, Mediterranean (Balkans), Eastern Afromontane, Guinean Forests of West Africa.
- Delivering leadership development programs/journeys for CSO leaders.
Example: Madagascar
- Creating spaces to help grantees see that they can and need to change
Examples: Mediterranean (Cabo Verde, Balkans)
- Funding consultants to help grantees develop their organizational strategy.
Examples: Mountains of Central Asia (Tajikistan, Uzbekistan), Indo-Burma
- Peer-to-peer exchanges among grantees to share lessons learnt and create a learning community (monthly webinars).
Example: Mediterranean Basin
- Supporting the development of communities of CSOs.
Examples: Mediterranean (Cabo Verde, Montenegro), Indo-Burma

It is possible to build on these experiences and develop ways to have a more systematic approach to OD moving forward.

Contextual elements to consider

To be fully integrated into CEPF's strategy and mission, and successfully deployed, the OD strategy must take into account the following contextual elements:

- There is a strong diversity of contexts and needs, between and within each hotspot.
- There is a limited bandwidth: Secretariat and RITs are already at 100%.
- Building trust takes time, especially in donor-partner relationships
- A short-term funding strategy may have gaps, and may focus more on conservation and less on organizational development.
- CEPF's distinctive strength lies in its deep engagement with CSOs, and ability to create tangible impact through local community funding.

Organizational Development trends

Organizational Development is an interdisciplinary field - grounded in organizational and social sciences - that brings together practitioners who work collaboratively with organizations and communities to develop their system-wide capacity for effectiveness and resilience/vitality. In this context, there is a large variety of profiles and skill-sets available.

Organizational Development has gone through three waves of methodology and practice focus, as the field matures and the world context in which we operate continues to evolve:

- **Wave 1/ (first generation OD): Diagnostic Organizational Development**

The most traditional approach – it entails conducting a formal investigation to collect and analyze objective data and then making recommendations to solve problems.

It refers to traditional Organizational Development practice in which a formal investigation was conducted so that objective data was collected and analyzed to make a diagnosis and recommendations for problem-solving.

- **Wave 2 (second generation OD): Action Learning/Learning Organization**

The second generation approach entails working with observable data to identify discrepancies between desired and actual behaviors and outcomes.

The core tenet of second-generation methodologies was to work with observable data to identify discrepancies between desired and actual behaviors and outcomes.

- **Wave 3 (third generation OD): [Dialogic Organizational Development](#) – the most evolved form of OD and the best suited for CEPF**

Wave 3 refers to OD practices and mindset, anchored in an understanding of organizations and human systems as socially constructed; every interaction and conversation is part of creating the change. Dialogic OD is characterized by the change processes of emergence, generativity, and new narratives, which contribute to the desired transformational change outcomes.

It has been developed as a response to the increased complexity of our world and the need to practice in a context where 'planned change' is not always feasible but inquisitive questions, intelligent design methodologies and skilled facilitation can move a group forward as they co-design and collaborate to co-develop meaningful, adaptive and experiential ways to move forward together.

Examples of Dialogic OD methodologies include [Appreciative Inquiry](#), [Art of Hosting methodologies](#), [Liberating Structures](#), [Human Systems Dynamics Methodologies](#), [Systemic Design](#), and all the structured [large-scale collaborative change methodologies](#).

This evolution of OD mirrors the evolution of worldviews about organizations over time, moving from traditional and mechanistic approaches of organizations to today considering organizations as "living systems" or "complex adaptive systems" in constant interactions with their environment.

Key principles for the OD strategy

Considering this strategic context, the OD strategy embodies the following key principles:

- Contributes to CEPF's mission by strengthening the capacity of civil society to protect the world's biodiversity hotspots.
- Builds on the drive coming from within CSOs and communities of CSOs.
- Provides overall guidelines with practical tools, enabling tailored and context-specific approaches based on CSOs needs.
- Envisions OD as a long-term journey going beyond funding cycles
- Builds on the strengths of CEPF and of its partner organizations and puts people at the heart of change.
- Anchors OD support and resources regionally, while promoting sharing of learnings globally within and across hotspots.
- Is an iterative and learning process - including a prototyping and piloting phase.

Scope of the OD strategy

The scope of the OD strategy covers:

- the CSOs and communities of CSOs
- the regional implementation teams (RITs)
- the CEPF Secretariat.

Increasing the resilience of CSOs implies some changes at the RIT level to support these efforts and help them develop their own resilience.

Likewise, the Secretariat needs to evolve and adapt its competencies and some of its ways of working to be able to effectively support implementation of the OD strategy and its institutionalization within CEPF.

OD entry points

The OD strategy will be implemented by providing tailored accompaniment to CSOs and RITs based on their organizational development needs. This support can be activated through various entry points:

- through a strategic/proactive approach by considering the networks/communities that could be developed in/around KBAs, based on the strategic objectives for the hotspot and on the mapping of actors.
- as part of the current call for proposal process for conservation grants (in this case, several options are possible: a) either fully integrated from the beginning of the process, b) as a second step

once the selection of CSOs is completed, or c) at a later stage in the process).

- as part of a dedicated call for proposal process specific to OD, either for individual CSOs or for coalitions/communities of CSOs.
- via a request expressed by a CSO for a need they identified themselves or during a previous assessment (for example via CEPF's Civil Society Tracking Tool (CSTT), mid-term review, or external assessment, etc.).

In the future, other options could be considered, such as the possibility of providing OD tools to interested CSOs, so they can self-evaluate. Such tools could be, for example, located in the "learning hub" page of the CEPF website.

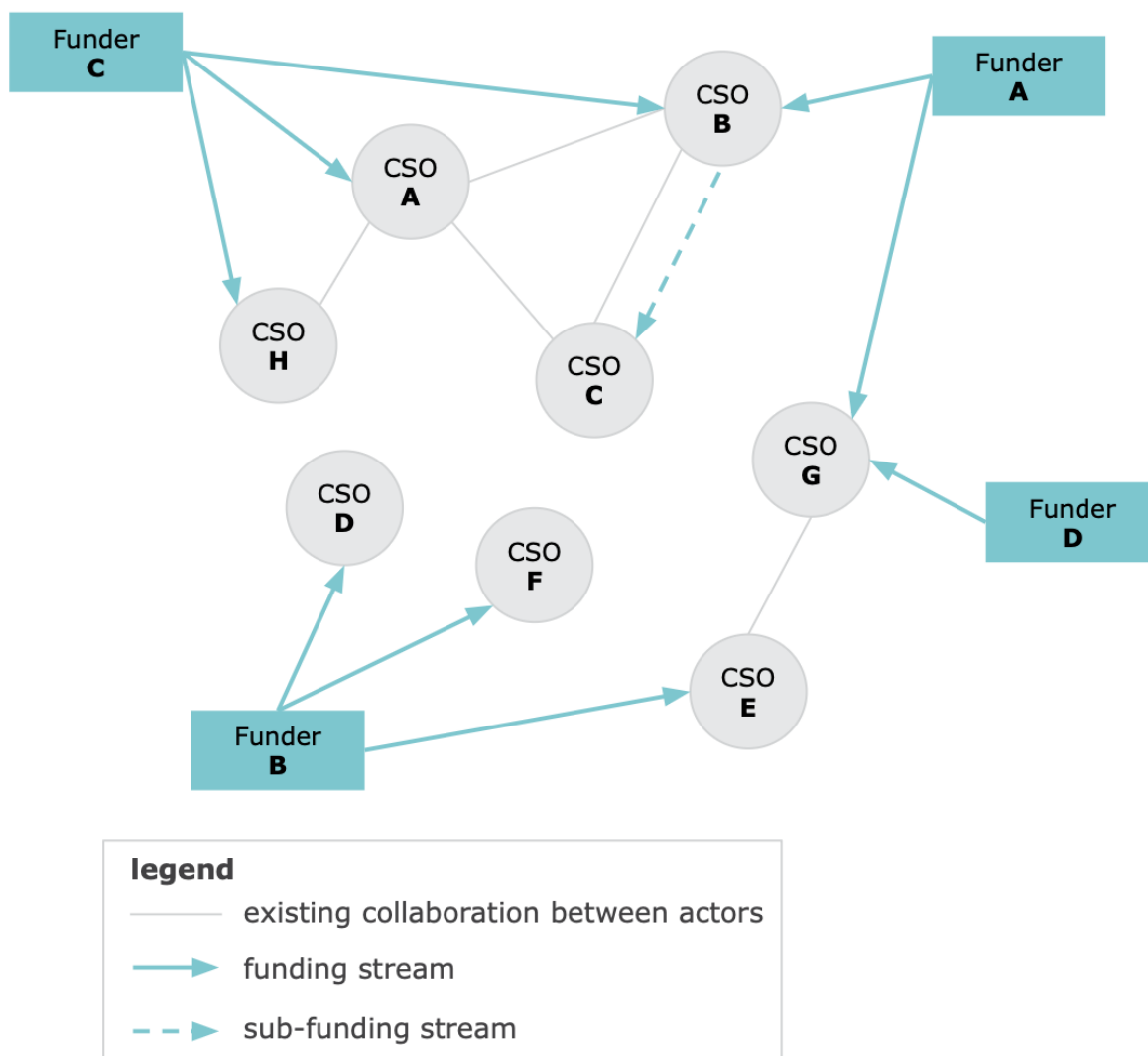
Each RIT will have the possibility to adapt these entry points based on the reality of the hotspot and the opportunities they see. The decision will be made by the Grant Director and the RIT.

Mapping of actors at the hotspot level

This is a proactive approach aimed at complementing the more traditional approach through calls for proposals, helping create a holistic view of the hotspot and identifying as a team where some levers might be. It can be particularly interesting when looking at the development of communities or cohorts of CSOs.

The objective is to develop a shared understanding and a systematic view of the actors (CSOs and funders) active in the field of biodiversity in the geographical sub-areas/ hotspot to be able to make strategic/ informed decisions. In some specific situations, it might be interesting to go beyond the field of pure biodiversity and consider other related development sectors and actors, as they might have an influence on the hotspot conservation targets and objectives.

In terms of timing, this mapping could be done at different stages, especially when scanning the institutional landscape. It can be adapted regularly, based on the needs and the evolution of the area.



More details about this tool are available in the Appendix, including the links to some online tools that can be used to support this process.

Eligibility criteria

The following criteria should be considered to assess whether a CSO (or community of CSOs) is eligible for OD support from CEPF:

- Strategic relevance of CSO's work to CEPF. Is there strong alignment between the CSO's mission and CEPF's conservation targets and objectives in the hotspot?
- CSO's commitment to change.
- Capacity of the CSO to work on OD.
- CSO's leadership support/ buy-in (could be assessed through conversations with the CSO's leadership team).
- Estimated added value of the OD support (efficacy and value of strengthening an organization).

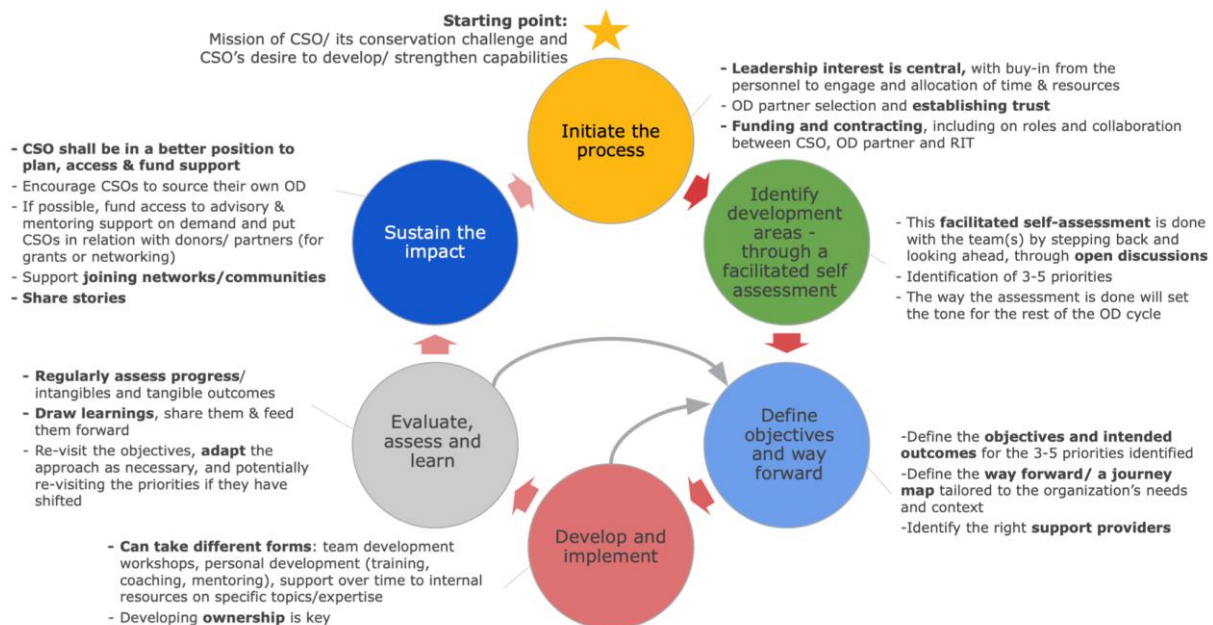
- Estimated budget for the OD intervention in light of the available budget for OD in the RIT (this includes considering if the OD support would be done by the RIT or externally).
- The CSO has not received OD support before, or if it has, the support was used effectively and has led to visible and meaningful changes, and there is still a need to provide additional OD support.
- The CSO does not receive funding for the same OD support from other donors.
- If an assessment was made previously, will the OD support address a root cause and not only the symptoms?
- Reputational risks to anticipate, and/or hazards to mitigate that might be associated with a CSO's negative reputation .

A check-list for eligibility criteria is available in the Appendix.

Within the hotspots, investment decisions among countries and CSOs will be guided by the North Star "where the biggest impact on biodiversity conservation is expected to be the greatest".

About the Organizational Development process

General OD cycle



Depending on the entry point for OD, some of the initial steps of the cycle might be skipped or integrated with other reflections. However, the logic of the cycle remains the same.

Self-assessment phase

Overall principles

The self-assessment is an important step of every OD process. It should be based on the following principles:

- Take a holistic view of the CSO/community of CSOs and its place in the landscape.
- Be part of a collaborative process, based on inquiry and on engaging teams into a self-/meta-reflection.
- Be developmental-focused - enable the identification of organizational capabilities that can be strengthened to support long-term development and resilience.
- Build on a self-assessment tool that is holistic, visual, customizable, easy to use and inviting for self-reflection.

Self-assessment process

The goal is to support a holistic self-assessment of the organization, by looking at the different dimensions that contribute to its long-term development, resilience and sustainability. The objective is to ensure that all organizational capabilities are aligned with the organization's mission and purpose.

It is based on a tool, but what matters most is not the assessment tool itself, but instead the conversations it triggers within the teams. Therefore, it should be part of a collaborative process, engaging several - if not all - of the organization staff, in a spirit of inquiry and meta-reflection.

It is essential to include participants who represent the entire organization. Additionally, involving some Board members in the self-assessment process can be very interesting.

It requires facilitation and collaborative process design skills to manage the group dynamics and to ensure that a safe space is created for open and meaningful conversations.

Having an external facilitator can be beneficial to ensure a neutral approach, allowing participants to focus fully on the content without concern for the process while also fostering a stronger group dynamic. The self-assessment process (and associated) tool can be customized to adapt to each context. It covers the following steps:



More details about the process, including instructions, prompt questions, and templates are available in the Appendix.

Self assessment tool

The assessment tool supports the self-evaluation process. It enables the organization to look in a holistic way at the following dimensions:



When facilitating a self-assessment, it is important to proactively adapt the self-assessment tool to the cultural and organizational context, and to consider/ keep in mind the various questionnaires that the applicants/ grantees may already be required to fill in by CEPF, such as the financial and labor management questionnaires, and the Civil Society Tracking Tool and Gender Tracking Tool.

The self-assessment tool and associated prompt questions can be customized and modified accordingly to adapt to each context. For example, some dimensions can be removed if they are not relevant. However, in that case, it is important to keep the holistic approach.

The appendix contains a self-assessment tool that the RITs can use. Additionally three other tools are included for informational purposes (ODADO by PPI, Organizational mapping Tool by the Ford Foundation, Organizational Resilience Check and Organizational Assessment by Birdlife).

Delivery options

There are a few high-level options for the delivery of the self-assessment phase, depending on who facilitates it:

- For self-assessments facilitated internally (i.e. by a RIT resource): the possibility is there to use the visual, customizable, easy-to-use self-assessment process and tool (available in the Appendix) - to be translated in the language spoken by the teams and adapted culturally before use'
 - We recommend to pilot the assessment tool, then to evaluate the best long-term approach.
- For self-assessments conducted by external OD providers/ partners: allow the possibility to use their own assessment framework, or one they are familiar with, while giving them the option to use the assessment tool developed by CEPF if they wish.
 - What matters most is for them to use a relevant OD framework that is sufficiently holistic and user-friendly to enable the team(s) to reflect on where the organization is at, have open conversations and identify some priorities to work on moving forward. If the OD provider plans to use its own self-assessment tool, it should be validated by the RIT to ensure that this tool is well adapted to CEPF OD strategy principles.

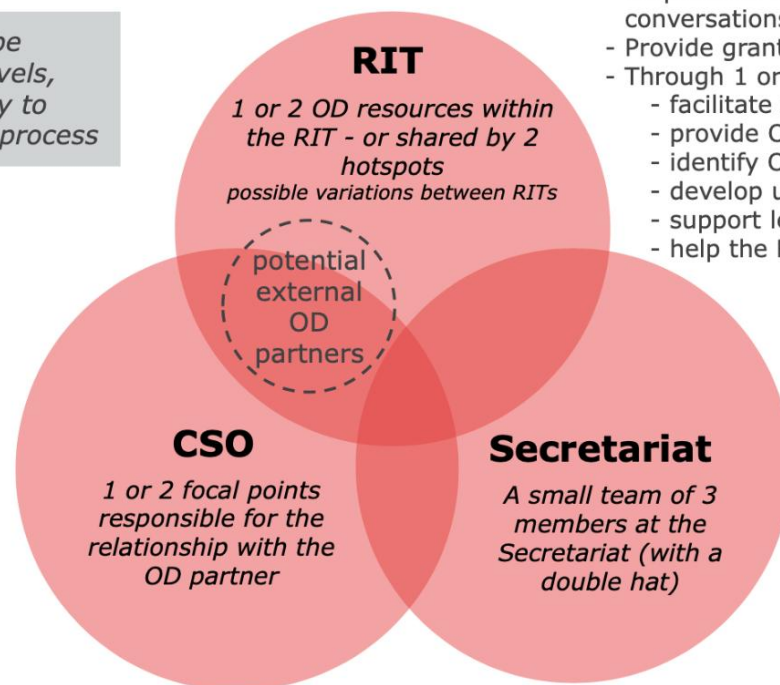
As several organizations within the hotspot go through the self-assessment process there could be some commonalities arising in terms of development needs identified. In some cases these could be addressed through a program developed for a group of CSOs, if this feels relevant and more effective; this could contribute to develop a community of leaders/ of CSOs and lead into potential collaboration between them.

Resources, roles and responsibilities

Overview

Adequate skills will need to be developed at the different levels, both on OD and on the ability to facilitate, or support, an OD process

- Engage in the OD process they have applied for
- Build on the support provided by RIT/ external OD partner/ CEPF's OD toolbox
- Potentially source their own OD provider



- Help define local needs through hotspot mapping and conversations with CSOs
- Provide grants, resources, space (meaning time)
- Through 1 or 2 resources with OD competencies:
 - facilitate self-assessments
 - provide OD expertise
 - identify OD partners
 - develop understanding of OD within RIT team
 - support learnings exchanges within the hotspot
 - help the RIT team identify its own development needs

- Provide financial resources, guidance, space (meaning time) and support to the RITs on OD matters, including for their own organizational development
- Facilitate peer-to-peer exchanges; provide support
- Support the prototypes and the implementation of the strategy
- Manage the Secretariat's own OD process with an external OD provider
- Develop CEPF's ability to facilitate participatory processes
- Connect with OD networks outside of CEPF

External providers can be used in some cases to facilitate the self-assessment, and predominantly to support the implementation. At the same time, a sufficient level of understanding around OD needs to be developed within the Secretariat and the RIT teams to be able to support the process and have the initial conversations with the CSOs.

The possibility of sharing OD resources across two or more hotspots would be dependent on language, culture, geographical proximity, size and funding structure.

Detailed roles & responsibilities, skills and resources

	Roles & responsibilities	Skills	Resources	Steps toward implementation
CSO/ Community of CSOs	-Engage in the OD process they have applied for -Build on the support provided by RIT/ external OD partner/ CEPF's OD toolbox -Source their own OD provider	-Build sufficient capability within the organisation to be able to lead the OD process	-1 or 2 focal points in the CSO responsible for the relationship with the OD partner	When a CSO beneficiaries from OD support, identify the OD focal points in the CSO
RIT	-Help define local needs through the different OD entry points (call for proposals, hotspot mapping, previous assessment, and conversations with CSOs) -Provide grants, resources, space (meaning time) -Through 1 or 2 resources with OD competence; *facilitate self-assessment with some of the CSOs *provide OD expertise to the CSOs *identification of OD partners *develop understanding of OD within RIT team *support learnings exchanges within the hotspot	For 1-2 OD specialist: -OD competence to guide OD processes -Facilitation skills to facilitate the self-assessment workshops -Ability to conduct crucial conversations -Ability to source and manage adequately OD partners <i>Note: Possibility in some exceptional/ particular cases to have an external OD partner assuming this role</i> For the remaining team: -trained to have an understanding of OD - to be able to have initial conversations with CSOs about their needs for development	-1 or 2 OD resources with the RIT - or shared by 2 hotspots <i>Could stay beyond the 5 years of RITs</i> <i>Note: Possibly different structures at RIT level depending on the configurations and competences in OD in the various hotspots</i>	For the RIT ready to deploy the OD strategy: - Recruit 1 or 2 OD specialist in the RIT - Train the RIT team on OD - Organize regular sessions to draw learnings about OD strategy implementation - Create regular learning opportunities for the RIT team through participation to OD activities (for example: self assessment facilitation) - Launch an OD process for the RIT, with an initial self-assessment workshop (if the RIT wishes to engage in an OD process)

	Roles & responsibilities	Skills	Resources	Steps toward implementation
Secretariat	-Provide financial resources, guidance, space (meaning time) and support to the RITs on OD matters ->for their own own organizational development - for national organizations ->to support RITs in providing support to the CSOs/ communities of CSOs engaged in an OD process -Facilitate peer-to-peer exchanges among the OD resources -Support the prototypes and the implementation of the strategy, -Progressively develop CEPF's ability to internally conduct/ facilitate participatory processes (virtually and in person)	3 persons: - OD competence to guide the OD process - Facilitation skills to facilitate the self-assessment workshops (primarily for the RITs) -Ability to conduct crucial conversations -Ability to support RITs on the sourcing and management of OD partners (methodology-wise) <i>Note: A possibility would be to start with 1 - or 2 - persons and then to grow the OD team by leveraging on the upcoming recruitments linked to CEPF's growth</i> Secretariat team trained in OD to support the process/ help source and manage effectively OD partners	-A small team of 3 members at the Secretariat (with a double hat) is responsible for OD/ point of contact for OD	- Create an OD team by recruiting new persons or by reallocating tasks in the Secretariat - Train the Secretariat team on OD and accompany the Grand directors and Grant Managers - Initiate OD process at the Secretariat level - Organize regular sessions to draw learnings about OD strategy implementation

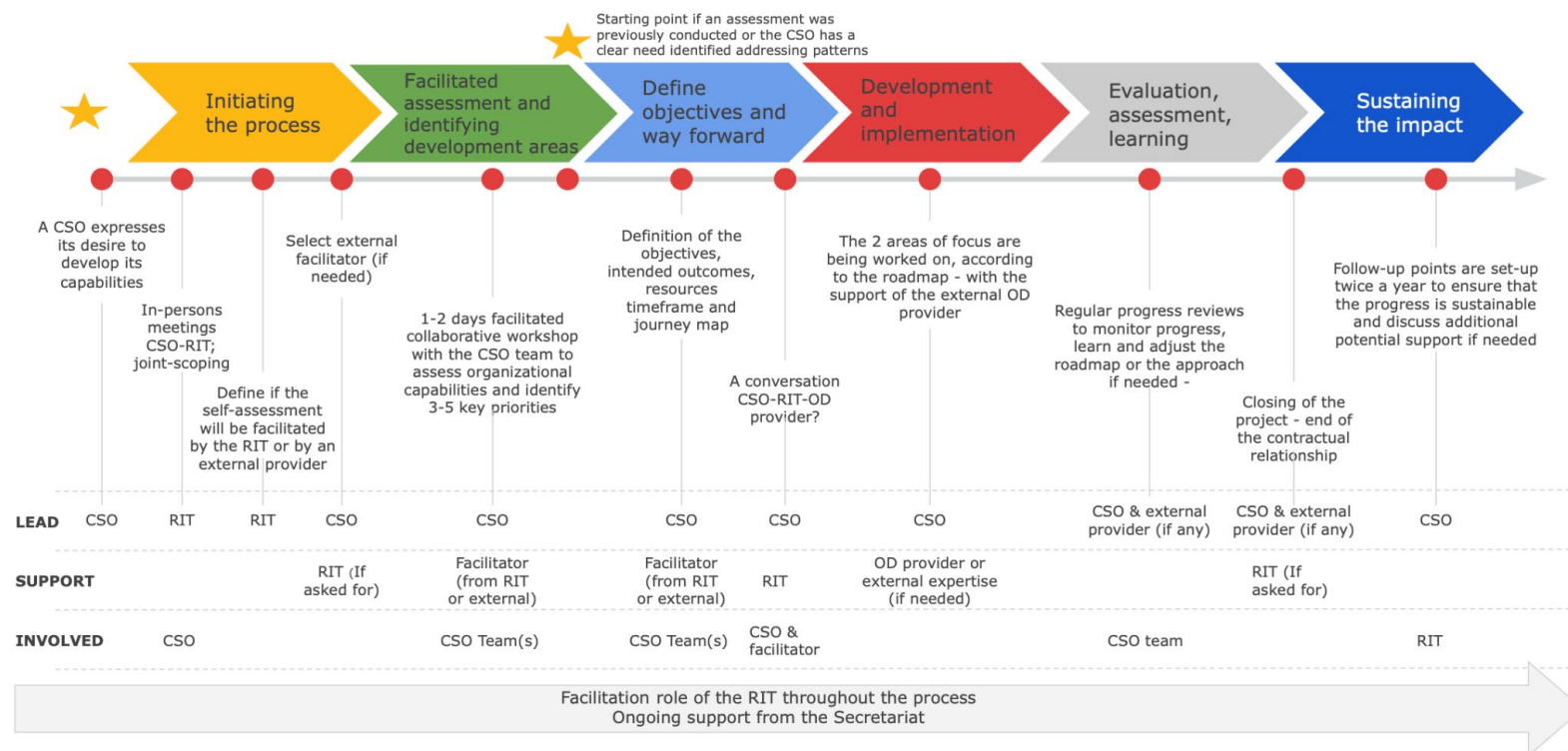
In the first couple of years there could be some champions of OD - they could help the newcomers see the results they achieved. Maybe some champions already exist and some others will be emerging. Peer to peer exchanges take place at multiple levels (CSO level, CSO/RIT, between RITs, between RIT and Secretariat).

In order to ensure successful implementation of the OD strategy, additional staff will be needed at the Secretariat and in selected RITs, based on a needs assessment.

It is anticipated that these staff will have solid experience in OD. For the Secretariat, one FTE is envisioned, and for RITs one-two FTEs. The aim will be to have a small core team within the Secretariat by allocating time and responsibilities between the various persons co-piloting the OD initiative, ensuring sufficient coordination, support and focus in the future. This team will work closely with the RIT staff that are focused on OD.

Responsibilities in the OD process

OD process over time at CSO level with responsibilities



Key points:

- The CSOs are in the lead.
- The RITs have a facilitating role throughout the process. Tripartite conversations could happen as needed, depending on the context.
- The Secretariat provides support (e.g. expertise, resources, coaching) on an ongoing basis to the RIT, and possibly in the future to some CSOs as well.

Scenarios at RIT level for resources and staffing

As outlined in the table below, different scenarios are possible regarding the staffing of the OD specialists at the regional level:

Scenario	Pros	Cons
1 or 2 OD specialists per region funded globally	• could be shared in some cases across two hotspots • continuity across RIT changes through a timeframe for these positions going beyond the RIT's current funding cycles • could be funded by a global OD budget	• potentially less integrated into the RIT and with the core conservation work
1 or 2 OD specialists per region being part of the RIT budget/team	• stronger integration into the RIT, particularly in the case of national organizations • builds RIT's capacity in OD in the long-term	• funding and budgeting constraints might be higher • timeframe limited to RIT funding cycle

A flexible approach might be needed and both scenarios could co-exist, as some of the funders of CEPF have a specific geographic and/or programmatic focus and some others a global one.

Opportunities to explore would be the possibility to have a percentage of the funds allocated to OD (e.g. 10-20%, either at the global level or for specific hotspots/ programs), and to connect in parallel with some foundations focusing more on OD to access this type of funding. Both approaches could be pursued concomitantly.

Accessing additional funds to be able to deliver OD support effectively will be an important part of the equation. Resources at the RIT and Secretariat levels will need to be scaled up or down depending on the funds available.

Sourcing and management of OD providers

Some external OD partners can potentially do some of the assessments - to complement the capacity of the RIT OD specialists - and primarily to support the implementation of the initiatives. In any case, it is important to develop a common basic understanding of OD within the RIT teams.

Working with external OD partners can be interesting in some cases:

- It adds a neutral layer between the RIT and the CSO, allowing for more openness during the OD process.

- It brings additional resources to complement the RIT capacity on OD, in terms of resource availability and/or specific expertise.

When it is relevant to work with an OD provider, it is key to identify potential local/regional process-driven partners with a fit with CEPF's purpose and specific needs identified in the hotspot/sub-area. It is important to go beyond the services advertised for and get a feel for:

- The way the OD practitioners tend to look at organizations (holistically and systems-oriented, or narrowly and in a mechanistic manner).
- Explore how they see their role through the process (as catalysts for change helping develop ownership, or as consultants experts driving the process and providing the answers themselves).
- How they live the values of collaboration in their approach and how this is reflected in their posture (inquiring, developmental-focused and partnering approach, or telling advocating).

There are two main types of intervention for an OD provider within the CEPF context:

- Facilitate some self-assessments, at the beginning of an OD process.
- Support the implementation of some parts of the action plan where specific expertise is needed (after the self-assessment phase) – to address the priorities identified.

These two types of interventions are different and require slightly different approaches to select an OD provider. In both cases, it is important to have conversations with them to assess the fit based on the dimensions described above, and more specifically:

- **if they are going to facilitate some self-assessments:** ability to help teams step back, **facilitate conversations**, and help the teams identify areas that can be leveraged/ developed to build resilience of the organization in the long-term; looking for patterns beyond symptoms.
- **if they are going to support the development and implementation phase of the OD cycle:** ability to accompany on the journey by providing some expertise and at the same time ensuring that the ownership of the changes lies within the organization/ teams. For the implementation, the profile of the external provider will largely depend on the area(s) to be worked on and on the potential level and type of expertise that needs to be brought in. Various skills-set and specific expertise/experience might be required, e.g.:

- More generalist profile and ability to support a change process if helping the CSO develop its strategy or accompanying the evolution of the organization's culture.
- More specialized if the type of support needed is focused on a more specialized topic – e.g. communication on social media, fundraising, leadership development, etc.

In both scenarios:

Posture: partner, facilitator potentially combined with some subject expertise for the implementation phase.

Key skills: partner-centered approach, sensitivity, appreciation of cultural nuances and human dynamics, humility, competence and experience, readiness to engage with the emotional aspects of change.

Favoring:

- facilitative approaches,
- consultative/participatory/ inclusive processes that reinforce the partner organization's ownership,
- taking experiential approaches (e.g. prototypes, etc.),
- taking appreciative/ asset-based approach (not only deficit-based/ gaps analysis approach),
- allowing for gradual and incremental change – rather than assuming that change will happen fast and all at once.

It is important to manage/ partner with the OD provider, in a way that **allows for emergence** and with a light mix of selected intangible and tangible outcomes co-defined together at the start of the project.

Having regular tripartite review sessions between CSO - OD partner - Funder (RIT or Secretariat) will be key to co-pilot the overall OD process. The frequency and format of these tripartite sessions shall be defined depending on the needs and each specific context.

In the Appendix, there is more information about OD providers: landscape, areas of specialization, facilitation vs. consulting postures.

Some key success factors for OD interventions

Having the right combination of:

Motive

- the CSO genuinely owns the process
- the leadership has the desire to develop the organization/ strengthen its capabilities
- sufficient capacity/time and resources are available and allocated to the process

Means

- the OD providers - whether internal or external - are of high quality, strong collaborators and able to develop quickly a trusted relationship with the partner organization

Support

- the RIT/ Secretariat can provide the appropriate support to the CSOs, aligned with its grant making programs for conservation.

In the Appendix, there are more details about what helps develop ownership by the CSOs, what helps ensure quality of OD support, as well as examples of possible OD interventions and some examples of OD providers.

Exit strategy

An important part of the OD cycle is to define - and anticipate - when to stop providing OD support.

A useful dimension to consider is how solid the foundation is, and feels, for the CSO to be able to continue its development journey on its own, building on the dynamic that has been initiated.

This shall be an important topic of the tripartite conversations happening to ensure that the design of the OD intervention, the type of support provided, and the adjustments being made, are all building towards and contributing to the independence from external support.

While extensions of OD support can, and shall be provided when it is needed, conversations need to take place early enough to define how the type of support could evolve and be adapted if necessary. This would be followed by joint agreement on a point at which sufficient internal capabilities will need to have been developed and internal leadership taken.

In this spirit, it is important for the RIT OD resources to start having early enough conversations with the CSO about the next phase - beyond the funding - and how they will organize themselves and cater for their own development once the external support provided by CEPF is over.

OD impact assessment and monitoring

Key principles

- OD cannot be measured and monitored with the same analytical and quantitative approach as conservation, due to its deep, systemic, and often cultural transformative characteristics.
- There is a need for a mix of qualitative and quantitative indicators, and a real opportunity to explore the potential of outcomes-based evidence by looking at outcomes that were not necessarily initially intended, but might have benefited the organization, the community or the wider landscape.
- Success should be CSO-driven and focused, and not CEPF-focused: "As a CSO, what does success look like for us? And how do we evaluate it/know that we are making progress?"
- The measures of 2 or 3 simple indicators could be aggregated to give a global value of the assessed impact for these specific measures, as a complement to the case studies and storytelling that will be gathered.
- A global database for monitoring OD initiatives should be integrated with the current monitoring system and provide both qualitative and quantitative information on projects.

Selected articles on innovative approaches on impact assessment and learning are in the Appendix.

Options for evaluation and monitoring of OD impact

Options	Assumptions behind this option	Pros	Cons	Comment
Quantitative measures with pre-defined targets	-Everything can be measured -Change can be planned; mechanistic view of organizations	Would give confidence and fit the current ways of assessing the impact of conservation projects	-Does not consider the emerging nature of OD processes -Limits measurement to what is known at the start of the intervention -Potentially misses some of the deeper and LT impacts	This is not a realistic option
Qualitative measures defined per project by the CSO/Community of CSOs/RIT	-The organizations going through a change/ OD process are best positioned to assess its impact	-Evaluation driven by the organizations who are leading the change and know best their organization	-More challenging to consolidate globally -Potentially misses some of the deeper and LT impacts	Missed opportunity to demonstrate some of OD's impacts to donors
A combination of -qualitative measures, -outcomes-based evidence: Case Studies - in writing with pictures, possibly short videos -, and storytelling following exchanges/ joint-learning), -complemented by 2-3 indicators that can be globally compiled	-Organizations going through an OD process are best positioned to assess progress themselves -Having some consolidated measures is important -We are open to test outcomes-based evidence as a way to assess real impact beyond what is usually being measured	-Acknowledges the emerging nature of OD and the diversity of OD interventions -Enables to document and demonstrate the impact of conservation projects including OD -Provides 2-3 compiled measures globally & per hotspot	-Will require some testing and probably some adjustments at the beginning -Need for some resources and time to assess the impact of the interventions - <i>which in turn can then be communicated internally and externally</i> -Scientific-based evaluation methodology less data-driven, but used in social sciences.	The best option for CEPF from our perspective
Only outcomes-based evidence	-It would be possible for the CEPF to receive funds - which would all be unrestricted funding - without showing results	-Embodies the principles of trust-based philanthropy	-Evidence of success/ impact happens only once the projects - including th OD interventions - are over	Too far away from CEPF's current donors expectations and CEPF's culture

The most suitable option for the evaluation and monitoring of OD impact at CEPF is a combination of:

- qualitative measures,
- outcomes-based evidence,
- complemented by 2-3 indicators that can be compiled at the global level.

Examples of indicators

It is a real challenge to define truly relevant indicators to assess the impact of OD, not only within the world of biodiversity conservation but across all sectors.

A possibility would be the following:

1. Start with a few questions around the level of satisfaction on the OD support that was received, the progress that was made and the value it created, e.g.:

- How satisfied are you with the OD support you have received?
- How satisfied are you with the progress you have made as an organization during the OD initiative (with a self-evaluation at the start and at the end)?
- To what extent have you been able through the OD intervention to strengthen the ability of your organization to pursue its mission/ to have an impact on biodiversity in the long term?

Invite the CSO to name some concrete achievements, both qualitative and quantitative, that have been possible thanks to the OD initiative - with a story attached to these.

2. Have one or two process-driven indicators:

- Percentage of achievement of the CSO's OD development goals.
- Milestones achievement - invite the CSO to identify concrete elements that have been produced and implemented thanks to the OD support.

This will enable CEPF to compile the data and have an aggregated figure, e.g. "out of the 10 organizations we supported, 80% achieved 75% of their goals".

The OD collaborative working group (set-up to deepen some topics as part of the development process of the strategy) also explored the possibility to use some impact-driven indicators that could be interesting to look at, but did not recommend using them at this stage to try and assess the effectiveness of the OD interventions.

A preliminary list of impact-driven indicators from which the CSOs could choose 2 or 3, possibly with the support of the RIT, is available in the Appendix. After several years of testing it may be useful to revisit them.

Point of caution: avoid the temptation to make promises in terms of OD impact measurements that CEPF will not be able to keep; use alternative ways to show the value/ impact delivered through the OD interventions as part of the conservation grants (including outcomes harvesting and possibly “[progress markers](#)”). Be proactive to manage donor expectations, if needed.

In the medium term there will be a need to look at how to integrate the indicators with the main tool used for the monitoring of biodiversity projects, depending on the assessment and choices that will be made in the coming years regarding the CSTT and the use of potential other tools to meet the evolving needs of CEPF.

Outcome harvesting to define outcome-based evidence

Outcome Harvesting is a very interesting and structured method, which can be used in a participatory manner, and would enable CEPF to evaluate the impact of OD initiatives by looking at the outcomes observed on the ground.

Outcome Harvesting defines “outcome” as a clear change in behavior—actions, activities, relationships, policies or practices — of one or more societal actors.

Demonstrated, verifiable changes in behavior influenced by an intervention are identified as well as how a project, program or initiative plausibly contributed to them.

Unlike other evaluation approaches, Outcome Harvesting does not necessarily measure progress towards predetermined outcomes or objectives. Rather, evidence is gathered on what has been achieved, and working backward the participants define whether, and how, the project or intervention contributed to the change. In this sense, the approach is analogous to sciences such as forensics or archaeology. The focus is on evaluation, less on monitoring.

It is important that this harvesting is done in a similar spirit as the self-assessment, i.e. CSO-led with some facilitation support.

Doing this type of assessment repeatedly/ iteratively within a system increases the depth of the assessment, as the CSOs are getting familiar with the approach and become more used to notice and become conscious of some of the changes or shifts that have been happening.

Examples of organizations who are using this methodology include: IUCN, FAO, Helvetas, Oxford Policy Management, UNESCO, Smartpeace, Shared Resources Joint Solutions program of IUCN Nigeria and WWF Nigeria, World Bank, UNDP, and many others.

An example of a competent organization providing services in Outcome Harvesting is [Voices that Count](#) (more details in the Appendix). They provide training in outcome harvesting to develop internal capabilities in using the methodology. This could be complemented with the progressive development of the soft skills which are necessary to run this kind of assessment effectively (e.g. inquiry-based interviews), accompanying the teams conducting the first outcome harvests internally.

Typically, people trained in this methodology could be the OD resources in the RITs and members of the monitoring and evaluation team at the Secretariat. It would then be possible to build on the experience of people/teams having already done it to mentor/coach others within the hotspot, and potentially in other hotspots as well.

Interestingly, internally within CEPF, Burung Indonesia in the Wallacea hotspot already has some experience with outcome harvesting and has developed processes and skills to run this kind of assessment themselves. It would be useful to build on the learnings they gained over the years.

The recommendation would be for CEPF to use a standardized/ framed methodology for outcome harvesting and test it in one of the hotspots - e.g. in the Mediterranean Basin or Guinean Forests of West Africa - and have it as much as possible internally-run to keep costs down; this could be done under the format of “stock-taking” sessions facilitated by the RIT’s OD resources in an inquiry-based spirit, inviting the CSO/ community of CSOs to reflect on their journey and what has evolved through it. Learn from the experience and then use the same methodology in other hotspots to ensure consistency of reporting globally in the way the outcomes are presented, making the job of the grant directors and of the CEPF monitoring and evaluation team easier.

For mid-term reviews at the hotspot level, the choice could be made to have the assessment done by an external evaluator to help the actors in the system to identify in a neutral way the value they got out of the support they received, enabling through this to take a helicopter view of the outcomes that have been achieved, including potential new ones that were not necessarily expected.

If CEPF is interested in exploring the possibility of using Outcome Harvesting with the support of an external provider for some parts of the impact assessment, a first step would be to scope the type of impact that

CEPF would like to assess, and at which scale. This would enable CEPF to see how these needs could be met from a design perspective and what the financial implications would be, to be able to make an informed decision accordingly.

Database of OD initiatives/projects

At a global level, there should be a database for monitoring OD initiatives integrated with the current monitoring system and providing both qualitative and quantitative information on projects.

It will give an overview at any time of the past and current OD initiatives linked to the organization's account; this could include information such as:

- the type of project/ OD initiative,
- the objectives,
- its duration,
- the type of grant (only for OD or a conservation grant including OD),
- the impact assessed and the main learnings that can be drawn from this OD initiative,
- the link to the qualitative material that was produced (e.g. case study, videos, storytelling, etc.).

It might be helpful to define where the qualitative information and material would be stored, so that it can be easily accessible.

Financial sustainability

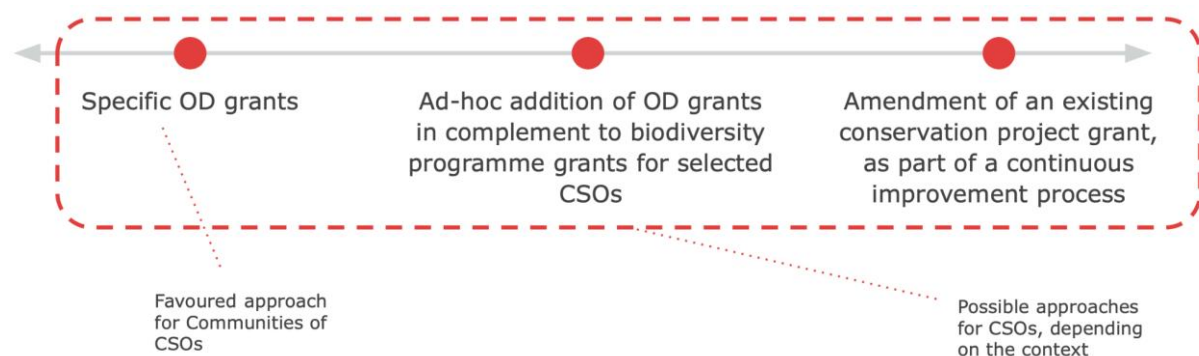
The financial sustainability of the OD strategy implementation is key. It depends on different variables, such as:

- the mix of OD internal and external resources - including the possibility of having some shared resources between RITs and partnerships with some OD providers in each region;
- the number and amount of OD grants - including by focusing on communities of CSOs and/or on individual CSOs;
- the timeframe of OD support, which can potentially go beyond the current funding cycles.

Depending on the available funds, different scenarios could be developed to maximize the impact of OD efforts while ensuring their financial sustainability.

Funding - OD grants management

OD grants can be managed in different ways.



As envisioned in the pilot Mediterranean Basin hotspot, OD support could be:

- **an amendment to an existing conservation project**

Pros: less administrative work, integration of OD into conservation

Cons: OD timeframe is bounded to the conservation project timeframe; the type of OD support should have a direct link with the conservation project

- **a specific OD grant**

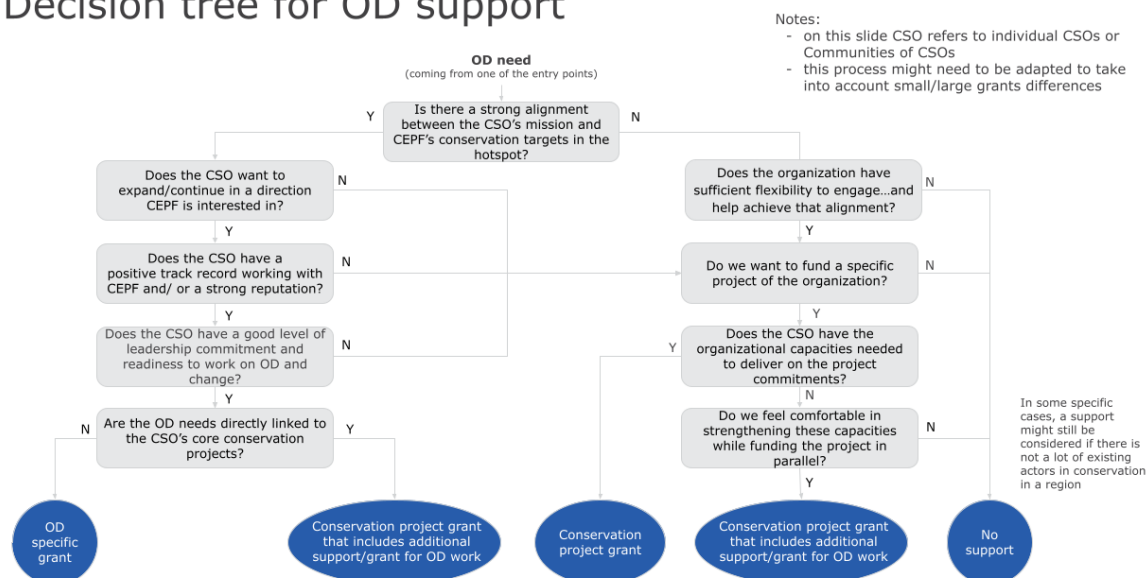
Pros: better follow-up of OD, easier to manage when the funds come from different sources, more freedom regarding time frame and topics of OD support

Cons: more administrative work, less integration of OD with conservation.

Decision tree for OD grant types

A decision tree has been developed to support the decision-making process regarding grants among eligible organizations.

Decision tree for OD support



Investment estimates

Investment items

Below are some estimates of the different items that comprise the cost of the OD strategy:

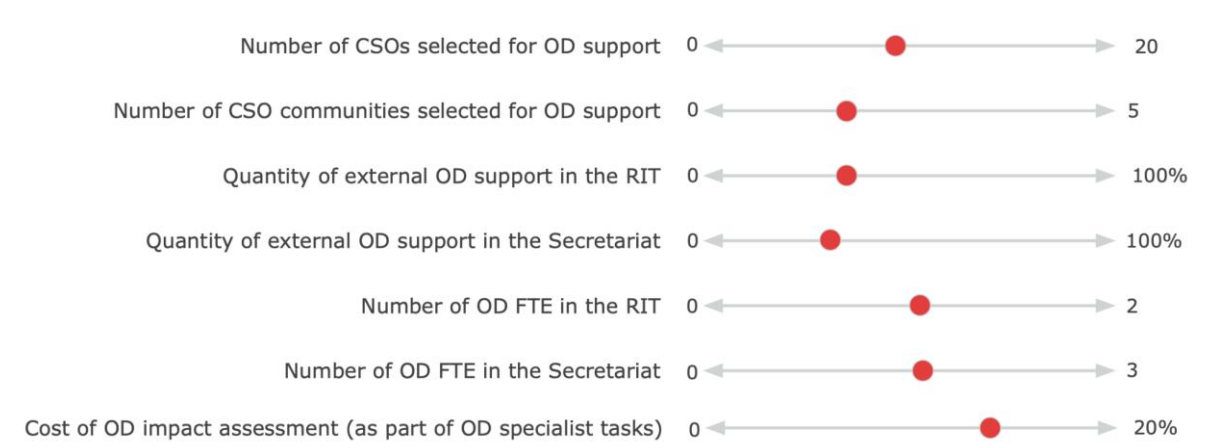
Item	low estimate	high estimate
1 FTE with OD competence in the RIT	TBD	TBD
1 FTE with OD competence in the Secretariat	TBD	TBD
OD intervention from external OD provider - small	\$10,000	\$20,000
OD intervention from external OD provider - medium	\$30,000	\$50,000
OD intervention from external OD provider - large	\$60,000	\$90,000
Travel cost for support visits to grantees and OD impact assessment (per grantee, per year) in the RIT	\$3,000	\$4,000
Travel cost to support the RIT, from the Secretariat (per year, per hotspot)	\$3,000	\$5,000
Impact assessment of OD support (per hotspot, per year) - RIT level	\$7,500	\$15,000
Impact assessment of OD support (globally, per year) - Secretariat level	\$10,000	\$14,000

Notes:

- For the FTE at the Secretariat, a senior OD person, at Director level, was deemed appropriate as it should be someone senior enough to be able to work as an equal to the grant directors and RIT leads, and potentially be in a position to talk with donors.
- For the travel cost, an average of two trips per year to each OD-grantee are foreseen, for the Mediterranean Basin RIT.
- For the impact assessment of OD support, the assumption is that the RIT will carry out this activity at its level for all OD interventions, including those delivered by external providers. This approach ensures strong ownership of learning within the RIT and allows for a standardized process to aggregate data across interventions. The work itself can be assigned to a team member, such as a monitoring, evaluation and learning officer, if available. The estimate is that approximately up to 15% of the RIT OD FTE's time would be dedicated to this task. As the number of OD interventions increases, this proportion translates into a proportional increase in time and cost (i.e., if the RIT OD FTE increases, the cost of impact assessment increases as well). Similarly, at the Secretariat level the estimate is that 10% of the Secretariat OD FTE's time will be dedicated to this task for global OD impact assessment. While these costs will not be separated from the salary budget, they have been included as dedicated lines here for visibility.

Scenario estimate

The financial estimate of the OD strategy depends on several variables, such as:



An Excel sheet has been developed to allow for easy adjustment of the different variables and to visualize their impact on the cost estimates.

The next page presents a financial estimate for rolling out the OD strategy over a five-year period, with a breakdown of costs between the RITs and the Secretariat. For each year, both low and high estimates are provided. The accompanying Excel sheet allows for easy adjustment of variables based on different contexts, making it possible to assess different scenarios.

While this provides a useful baseline, further work will be needed to refine the estimates and align them more closely with actual implementation plans. This tool can support discussions with the RITs and with the donors by helping to quantify the level of support required for the OD strategy implementation based on various scenarios.

Two approaches can be taken and combined:

1. Start by defining the desired OD interventions, then calculate the associated costs.
2. Start with the available budget, then determine what OD activities can realistically be undertaken within that limit.

Cost estimate at the RIT level (**for each RIT** where the OD strategy is deployed)

RIT										
Variables	Year 1		Year 2		Year 3		Year 4		Year 5	
Number of CSOs receiving a new OD support in the RIT	10		10		10		10		10	
Number of CSOs receiving an on-going OD support in the RIT	0		8		18		25		30	
Number of CSO communities receiving a new OD support in the RIT	2		0		2		0		0	
Number of CSO communities receiving an on-going OD support in the RIT	0		2		2		3		3	
Number of OD FTE in the RIT	1		1		1		1		1	
Number of self-assessment done by external OD providers	1		1		1		1		1	
Number of OD interventions done by external OD provider - medium size	6		6		6		6		6	
Number of OD interventions done by external OD provider - large size	2		2		2		2		2	
OD impact assessment activities at the RIT level	0		1		1		1		1	
OD process for the RIT itself	0		1		0		0		0	
Total estimated cost - RIT level	Year 1		Year 2		Year 3		Year 4		Year 5	
	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate
Total estimated cost - RIT level	\$340,000.00	\$540,000.00	\$371,500.00	\$587,000.00	\$401,500.00	\$627,000.00	\$422,500.00	\$655,000.00	\$437,500.00	\$675,000.00
<i>FTE</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>
<i>External OD provider interventions</i>	<i>\$310,000.00</i>	<i>\$500,000.00</i>	<i>\$310,000.00</i>	<i>\$500,000.00</i>	<i>\$310,000.00</i>	<i>\$500,000.00</i>	<i>\$310,000.00</i>	<i>\$500,000.00</i>	<i>\$310,000.00</i>	<i>\$500,000.00</i>
<i>Travel cost</i>	<i>\$30,000.00</i>	<i>\$40,000.00</i>	<i>\$54,000.00</i>	<i>\$72,000.00</i>	<i>\$84,000.00</i>	<i>\$112,000.00</i>	<i>\$105,000.00</i>	<i>\$140,000.00</i>	<i>\$120,000.00</i>	<i>\$160,000.00</i>
<i>OD impact assessment activities</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$7,500.00</i>	<i>\$15,000.00</i>	<i>\$7,500.00</i>	<i>\$15,000.00</i>	<i>\$7,500.00</i>	<i>\$15,000.00</i>	<i>\$7,500.00</i>	<i>\$15,000.00</i>
<i>OD process for the RIT itself</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$60,000.00</i>	<i>\$90,000.00</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$0.00</i>	<i>\$0.00</i>

Cost estimate at the Secretariat level:

SECRETARIAT										
	Year 1		Year 2		Year 3		Year 4		Year 5	
Number of OD FTE in the Secretariat	1		1		1.5		2		2	
Number of hotspots where the OD strategy is deployed	2		2		4		7		9	
Number of OD interventions done by external OD providers - medium	0		1		0		1		0	
Number of OD interventions done by external OD providers - large size	1		0		1		0		1	
OD impact assessment activities at the global level	0		1		1		1		1	
OD process for the Secretariat itself	1		1		0		0		0	

	Year 1		Year 2		Year 3		Year 4		Year 5	
	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate
Total estimated cost - Secretariat level	\$126,000.00	\$190,000.00	\$106,000.00	\$164,000.00	\$87,000.00	\$131,000.00	\$71,000.00	\$113,000.00	\$107,000.00	\$163,000.00
<i>FTE</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>	<i>TBD</i>
<i>External OD provider interventions</i>	\$60,000.00	\$90,000.00	\$30,000.00	\$50,000.00	\$60,000.00	\$90,000.00	\$30,000.00	\$50,000.00	\$60,000.00	\$90,000.00
<i>Travel cost</i>	\$6,000.00	\$10,000.00	\$6,000.00	\$10,000.00	\$12,000.00	\$20,000.00	\$21,000.00	\$35,000.00	\$27,000.00	\$45,000.00
<i>OD impact assessment activities</i>	\$0.00	\$0.00	\$10,000.00	\$14,000.00	\$15,000.00	\$21,000.00	\$20,000.00	\$28,000.00	\$20,000.00	\$28,000.00
<i>OD process for the Secretariat itself</i>	\$60,000.00	\$90,000.00	\$60,000.00	\$90,000.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Total cost estimate – Secretariat cost plus RIT cost x # of hotspots:

	Year 1		Year 2		Year 3		Year 4		Year 5	
	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate	low estimate	high estimate
Total cost - Secretariat and RITs	\$1 006 000,00	\$1 610 000,00	\$1 049 000,00	\$1 678 000,00	\$2 043 000,00	\$3 249 000,00	\$3 578 500,00	\$5 678 000,00	\$4 694 500,00	\$7 418 000,00

These total estimates are based on the assumed number of hotspots where the OD Strategy will be deployed over the coming years - mentioned on line 2 of the Secretariat table.

It is important to note that the number of CSOs, which will benefit from OD support, is likely to be smaller in some hotspots than what is being anticipated by the team in the Mediterranean Basin hotspot; once the ambition in each

of the hotpots has been defined by the respective RIT team together with the grant director/manager, the estimate for CEPF overall can be fine-tuned.

The lines “OD process for the RIT itself” and “OD process for the Secretariat itself” refer to a provision to apply OD for the development of the Secretariat and of the RITs - for those who wish -, in order to improve their own development and ensure that their organizational capabilities are aligned with their mission/ purpose. It includes going through the different steps of the OD cycle themselves. Engaging in this process will also deepen the collective understanding of OD, contributing to the effective implementation of the OD strategy.

An emergency fund dedicated to OD could also be developed (not included yet in the table above) to address emergency situations that can arise during a project.

Implementation

The OD strategy implementation brings with it some cultural challenges and opportunities for renewal within CEPF's ways of thinking and operating. Consequently, it is important to consider the following points for implementation.

Potential barriers and enablers

Potential barriers	Enablers
• Limited OD capacity and resources within RITs, along with bandwidth constraints at all levels. • Quite sophisticated management systems that apply universally, regardless of context or grant size. • A focus on predefined, tangible deliverables and strict time-based success measures to show results, which may not align with OD's organic nature. • At CSOs level, a limited self-awareness of the need to address development challenges, vested interest in maintaining the status quo • Short funding cycles and lack of unrestricted funding, creating potential misalignment with OD's need for long-term engagement. • Reliance on a single donor for OD funding so far, potentially limiting impact • Comfort with well-established ways of assessing needs and managing projects that have made CEPF successful	• Strengthen OD capacity in hotspots by recruiting OD specialists, possibly shared across hotspots; consider OD-focused RITs in some cases. • Allocate time and resources at the Secretariat to support OD prototypes and institutionalize OD within the organization • Simplify processes and systems by removing unnecessary tasks to create space for OD initiatives. • Leverage prototypes and existing initiatives in hotspots and CSOs by building & sharing knowledge and fine-tuning OD approaches • Develop and refine assessment tool by piloting the OD self-assessment tool outside the CSTT system; then evaluate the best long-term approach • Enhance knowledge-sharing and collaboration by exchanging best practices, success stories, and experiences across RITs and with other organizations. • Integrate OD into funding and evaluation by aligning OD efforts with conservation outcomes; making funder criteria transparent, and considering a civic space protection approach.

There should be continuous exploration and discussions to navigate and find the appropriate balance between:

- keeping well-established ways of assessing needs and managing projects that have made CEPF successful and evolving towards potential new ways to initiate, manage, evaluate and monitor a projects' impact;
- focusing on predefined, tangible deliverables and time-based success measures for conservation projects, and testing new ways of assessing impact aligned with OD's organic nature and the fact that organizations are complex adaptive systems.

An important point to consider, and work on, is to ensure long-term timeframes for investment, with as few potential breaks as possible between cycles and mandates.

Implementation roadmap

The implementation will be progressive, starting with two pilot areas to test, learn and refine the strategy.

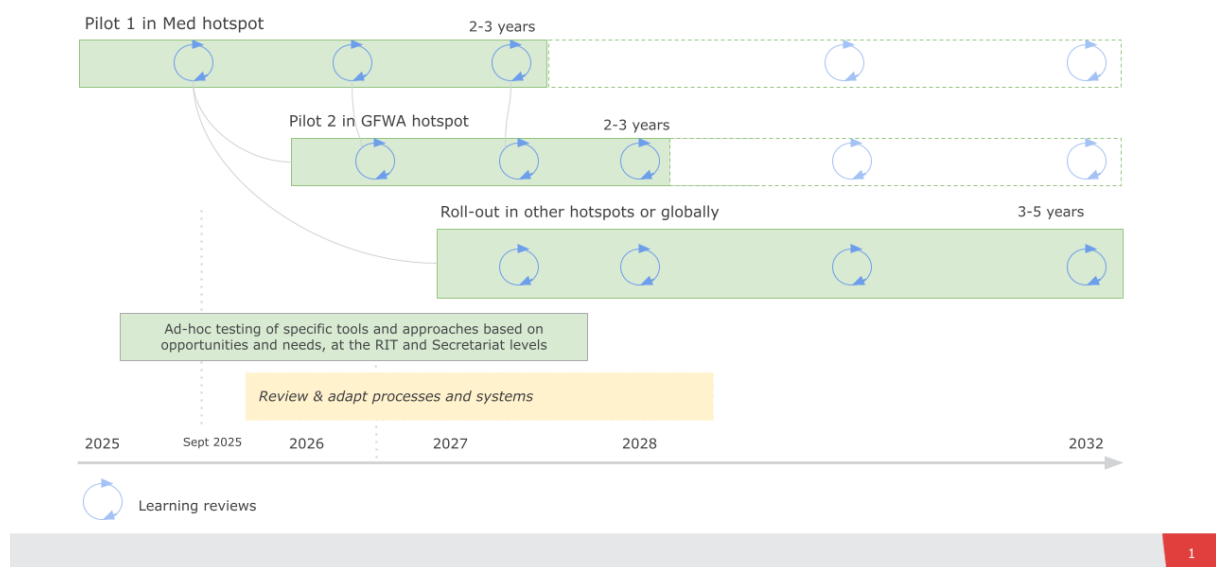
In parallel, efforts will be needed to create the conditions for implementing the OD strategy in other hotspots. This includes:

- A retrofitting approach to integrate OD into existing hotspots where several years of CEPF funding remain (e.g. MADIO).
- Incorporating OD into future ecosystem profiles that will be developed for new hotspots or for the renewal of existing ones.

Conversations with donors will need to take place to assess the different opportunities. As this foundational work progresses, the OD strategy will be progressively rolled out across the different hotspots and OD will be included in the Terms of References for RITs for the next cycles.

Meanwhile, some of the tools or approaches (e.g. mapping of actors, eligibility criteria check-list, etc.) could be tested in any of the hotspots where the RIT team has an appetite for it.

Implementation - Overview



Located below is the detailed roadmap that has been developed during the final review session of the OD Strategy with the Secretariat on April 17, 2025:

Prototypes and pilot preparation

Before starting the pilot phase, the RIT team(s) should define:

- what can be easily initiated (e.g. start with the small grant programs and test it).
- the scope of the OD support the RIT envisions (number of CSOs and of communities/networks) .
- the resources that are anticipated as being needed (human and financial).
- and the type of support they would welcome to be able to roll-out the OD strategy effectively in their hotspot - including on accompanying change (see next part).
- how and when they will assess/ review progress, how the learnings will be shared and fed forward (in the pilot, with the other pilot(s), and within the wider program - in line with the global guidelines provided).

Pilot in the Mediterranean Basin hotspot

The whole RIT team, with the CEPF Grant Director and Grant Manager, gathered in March 2025, to launch the new investment phase (2025-2030). For one week they considered implementation of the OD strategy and defined the following for the first years of the new phase:

➤ **support to individual CSOs**

- After the call for proposals for conservation actions (for small and large grants), the selected grantees will be evaluated by the Mediterranean RIT and the Grant Director to determine which ones are interested in OD support and which ones will receive support. The goal is to have about 25 grantees selected after the call for proposals, with more or less 10 potentially receiving OD support.
- Then, as defined in the ecosystem profile, some grants by invitation will be allocated to these CSOs for OD support:
 - If an OD assessment has already been completed before the contract with CEPF, the CSO can propose specific suggestions for actions that would be supported via the grant;
 - Otherwise, the Mediterranean RIT will support them with the facilitation of a self-assessment and the elaboration of a priority action plan, or go with an external OD provider. If the Mediterranean RIT facilitates the self-assessment, the OD contract will be signed afterwards. If an OD provider is used, the first part of the grant will be used for the self-assessment; then once the plan is defined, an amendment can be done to see what will be in the scope (the grant amount would be between USD 5,000 and 50,000).

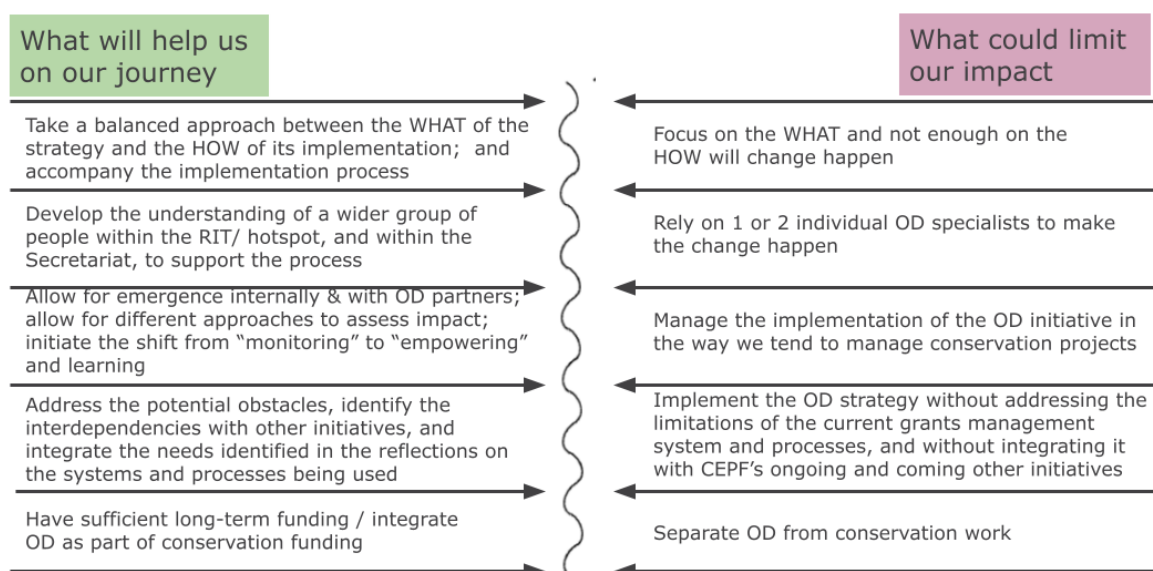
➤ **support to communities of CSOs**

- The creation of a cohort of the group of grantees receiving OD support, and the exchanges between them would be tested.
- A call for proposals for coalitions of CSOs will be launched to see if there are some initiatives at a collective level in the hotspot that could benefit from development support. Then, collective OD support will be activated, based on the results.

Driving and restraining forces

During implementation, it is key to understand the driving and restraining forces at play. This will enable CEPF to make some strategic choices/decisions and take targeted actions.

Meta-reflection sessions at the start and along the journey will help navigate the roll out of the OD strategy more effectively.



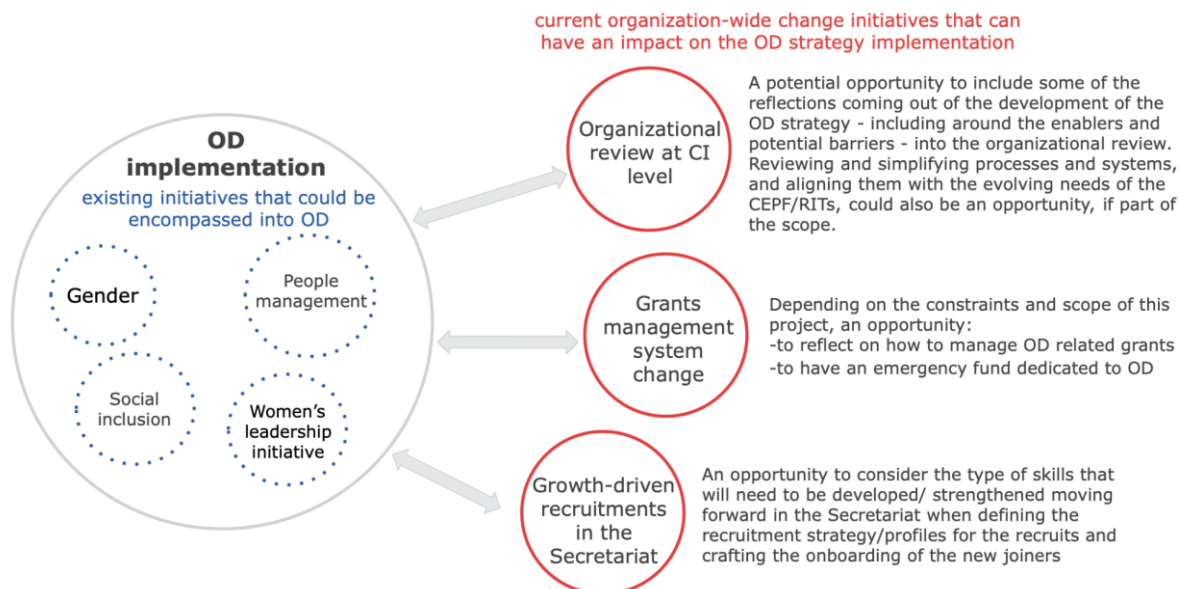
The Key success factors for the implementation that were identified during the session with the Secretariat on April 17 are as follows:

- Build on the momentum that was built through the development phase of the OD strategy.
- Develop the capabilities of the core OD team at the Secretariat; define how it will best support the RITs - itself and via the grant directors and grant managers – build the OD capacity of additional members of the Secretariat team.
- The communication of the Secretariat about OD internally and externally: develop a narrative; articulate the short/medium/long-term goals to develop buy-in; create specific material/ resources for the various target groups (RITs, CSOs, funders).

- Spend the time needed with the partners/RITs/grantees to explain what OD is and what the opportunities are - this includes conducting sensitization sessions and not relying only on formal communication.
- A lot of this needs to happen at the hotspot level, in multiple languages; it is important that the RITs are able to explain these topics and be able to answer questions.
- Identify in each hotspot what the factors of success are; have a well-thought roll out strategy within each region.
- Build long-term partnerships to ensure continuity of support to the CSOs.
- The Secretariat itself should be flexible; and donors as well.
- Be clear on what CEPF is funding and that the grantees are committing to the journey they are applying for.
- Assess to what extent the organizations have increased their ability to have long-term impact on conservation; this would be best done further down the line, e.g. in the third year, and not only during the project itself.

Link to other initiatives

It is critical to view the OD strategy as an integral part of CEPF's overall work and to actively consider its connections with other ongoing initiatives within the organization.



Beside the initiatives identified above, it would be interesting to launch a project across teams at the Secretariat to look at the various existing tools/ questionnaires/ processes and see how they could potentially be

harmonized to remove potential redundancies and improve efficiency in support of the work on biodiversity conservation.

Accompanying change

As seen before, the OD strategy brings potential profound cultural change within CEPF. Therefore, it is crucial to accompany change at the different levels, to ensure that the OD strategy will reach its full potential.

In pilot areas

In the RIT where prototypes of the OD strategy are tested, build:

- an OD team working on the OD implementation.
- a co-pilot team with members from the RIT and the Secretariat (grant director/ manager) to oversee and navigate through the process.

•
Note: a template is proposed in the Appendix that can be used across the RITs and Secretariat to ensure consistency of approaches and harvests. It could be helpful to identify a main point of contact for OD matters within each RIT.

At the global level

At the global level build a small co-pilot team – ideally including representatives from the pilot hotspots:

- Regular (self-) facilitated step-back & feed-forward sessions of co-pilot teams at the RIT and global levels (e.g. every 6 months) to:
 - take a helicopter view,
 - assess progress, resources (human, time, finances),
 - identify potential obstacles and address them,
 - draw learnings and adapt the approach/ navigate through the change.

It will be important to build on existing meetings/ platforms to bring OD in as part of the conversations/ topics being discussed.

At the Secretariat

- Define strategy and plan to develop the competency mix, and the processes, needed to be able to support the RITs in their own development and in their work with the CSOs through providing expertise, strategic guidance, coaching, and making resources and tools available online and in various languages.

- Identify and/or recruit the team members who will be part of the OD team, so that it can be institutionalized. They will have this role as part of their responsibility, and their time will be budgeted accordingly; these should be people interested in taking on this role and who have an understanding of OD and are open to developing their skills in this area.
- Develop the capabilities (*) of the core OD team and define how it will best support the RITs, itself and via the grant directors and grant managers. This shall include as well clarifying the collaboration and roles in terms of OD between the grant directors and grant managers.
- Work as a management team/ Secretariat team through the barriers and enablers for the implementation of the OD strategy; agree on ways of working, experimenting and learning - with regular step-back meetings and learning sessions.
- Onboard the new OD staff - in general and within the specificities of the CEPF's context - keeping in mind that some of the new recruits might (ideally) bring some OD skills and experience with them that they will be able to feed into the organization and process.
- Define the narrative for the RITs, grantees and for the donors and potential new funders, including how CEPF differentiates itself from other players/ organizations.
- Build/ embed OD responsibility in everyone's role. An individual "time envelope/ budget" for OD could be defined and implemented for the members of the Secretariat.

(): Developing the capabilities of the core OD team at the Secretariat; this could include a combination of:*

1. *A personal development journey specifically designed for the core OD team - and potential other members from the Secretariat and from the pilots interested in developing their skills -, including:*
 - *an in-person training workshop run internally aimed at developing some of the core OD and facilitation skills needed to facilitate self-assessment workshops and the bigger participatory process it is part of*
 - *preceded by a learning journey (one-on-one conversations, some background reading and reflection work, a virtual session with the other participants)*
 - *and followed up by a combination of one-on-one support and virtual learning exchanges*
2. *Accompaniment by an external OD coach/ specialist over the first year to support the members of the core OD team ramping up their skills, developing/fine-tuning their posture and developing the confidence to do this on their own moving forward; this could include working together with the external OD coach/ specialist for the preparation of some meetings/workshops, working together on some real situations of OD support in the RITs, and having some regular step-back sessions with the core team and its members to draw learning and feed them forward.*

This could include the creation and the co-hosting of some spaces conducive to peer learning and exchanges within the Secretariat and with the RIT OD points of contact.

Overall, to ensure a smooth transition from the development phase of the OD strategy into the implementation phase, an external light touch accompaniment is recommended. This is also the case for providing support, guidance and coaching to the core OD and co-pilot teams.

Toolbox

To support the implementation of the OD strategy, a comprehensive toolbox shall be developed and be made available online, first for the Secretariat and the RITs, and then potentially open to everyone. It will be available on the Learning page of the CEPF website. This resource would serve as the central reference for all OD-related materials, providing essential documentation and guidance. It should include the following components:

- OD strategy
- eligibility criteria
- decision tree for grant-types
- assessment process and tool, including instructions, prompt questions, and templates (empty one and an example of completed tool)
- tips on how to source and effectively manage OD partners/ external providers, with a list of potential OD external partners
- assessment measures
- templates for harvesting learnings
- success stories - from within CEPF and potentially from outside CEPF as well
- learnings from OD initiatives
- online resources on OD (relevant articles, links, blogs).

A process will need to be defined for maintenance of the online toolbox, including translations.

Way forward

It is crucial to build on the momentum generated through the collaborative development of the OD strategy by initiating the implementation phase as soon as possible in the continuity of the work done over the last 6 months. This is particularly important, as some RITs are starting to pilot and prototype the strategy, and there are ambassadors within CEPF—both in the RITs and the Secretariat—who are eager to integrate its tools and approaches into their work.

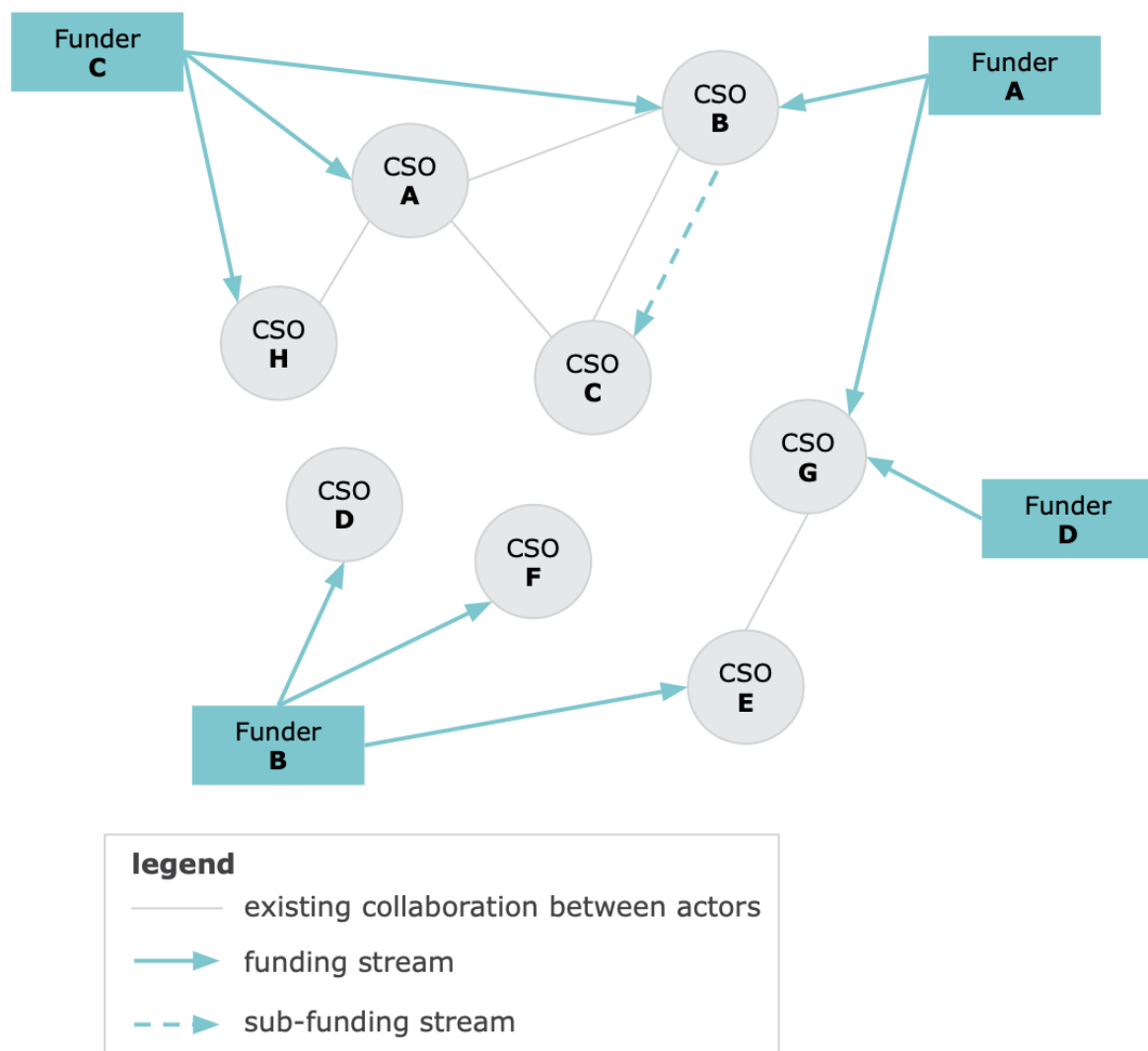
While the full deployment of the OD strategy will evolve organically, it is essential to support this transition phase and to progressively put in place the foundations for the coming years in terms of resources, co-piloting and learning, skills development, processes, funding and ability to navigate through the OD implementation process/journey during the coming months and years.

APPENDIX

Mapping of actors at the hotspot level

This is a proactive approach aimed at complementing the more traditional approach through calls for proposals, helping create a holistic view of the hotspot and identify as a team where some levers might be. The objective is to develop a shared understanding and a systemic view of the actors (CSOs and funders) active in the field of biodiversity and related development sectors in the geographical sub-areas/ hotspot to be able to make strategic/informed decisions.

It could be done at different stages, especially when scanning the ecosystem. It can be adapted regularly, based on the needs and the evolution of the area.



Process: As a RIT, for selected geographical sub-areas of the hotspot:

- Map all the CSOs that are working on biodiversity conservation
- Map the funding streams going to these CSOs, with the funding organizations
- Identify the existing collaborations between CSOs
- Take a helicopter view and analyze the mapping in resonance with the CEPF strategy in the hotspot. For example:
 - are there actors that receive less funding and would benefit from having more?
 - would it make sense to connect with other funders to coordinate efforts and create more collective impact?
 - could we facilitate networks or communities of CSOs by creating links between them?
 - ...
- Develop targeted actions/initiatives to strengthen the communities and/or specific actors

Tools

Actor mapping can be done in a very simple and effective way using flip-chart paper. Small post-its can represent different actors, allowing for easy rearrangement and iteration as the map evolves. Conducting the exercise manually is also a powerful way to engage the team - everyone contributes to building the map together and gains a shared understanding of the ecosystem. Several iterations are often needed as insights deepen.

For a more advanced approach, digital tools can offer greater versatility and on-line collaboration when the teams are in different locations. They make it easier to update, analyze, and share the map across the organization, and some include network analysis features that provide valuable insights into relationships and influence dynamics.

Examples of digital tools include:

- Miro: a collaborative online whiteboard that can be used for basic actor mapping, especially useful for remote teams. (miro.com)
- Kumu: a powerful platform for systems mapping and network visualization, offering intuitive design and advanced analytics. (kumu.io).
- Graph Commons: a platform designed for mapping and analyzing complex networks, ideal for more data-driven actor maps. (graphcommons.com).
- Visone: a network analysis tool developed for academic and research contexts, well-suited for in-depth quantitative analysis and visualization of social networks. (<https://visone.ethz.ch/html/about.html>).

The choice between analog and digital methods depends on the team's context, available resources, and the desired level of analysis.

Eligibility Criteria Checklist

This checklist is indicative and can be adapted to each context. The checklist can be used to determine whether a CSO, or community of CSOs, will be eligible to receive OD support. It should be complemented by good judgement and integrate further considerations that are important in the hotspot. In the checklist below, CSO refers to individual CSOs or networks/communities of CSOs.

Criteria	Evaluation	Comments
Strategic relevance of CSO's work for CEPF: Is there a strong alignment between the CSO's mission and CEPF's conservation targets and objectives in the hotspot?		
CSO's commitment to change		
Capacity of the CSO to work on OD		
CSO's leadership support / buy-in (could be assessed through conversations with the CSO's leadership team)		
Estimated added value of the OD support (efficacy and value of strengthening an organization)		
Estimated budget for the OD intervention in light of the available budget for OD in the RIT (including if the OD support would be done by the RIT or externally)		
The CSO has not received OD support before, or if it has, the support was used effectively and has led to visible and meaningful changes, and there is still a need to provide additional OD support		
The CSO does not receive funding for the same OD support from other donors		
If an assessment was made previously, does the OD support address a root cause and not only symptoms?		
Potential reputational risks to anticipate and mitigate potential hazards associated with a CSO's negative reputation		

Self assessment process and tools

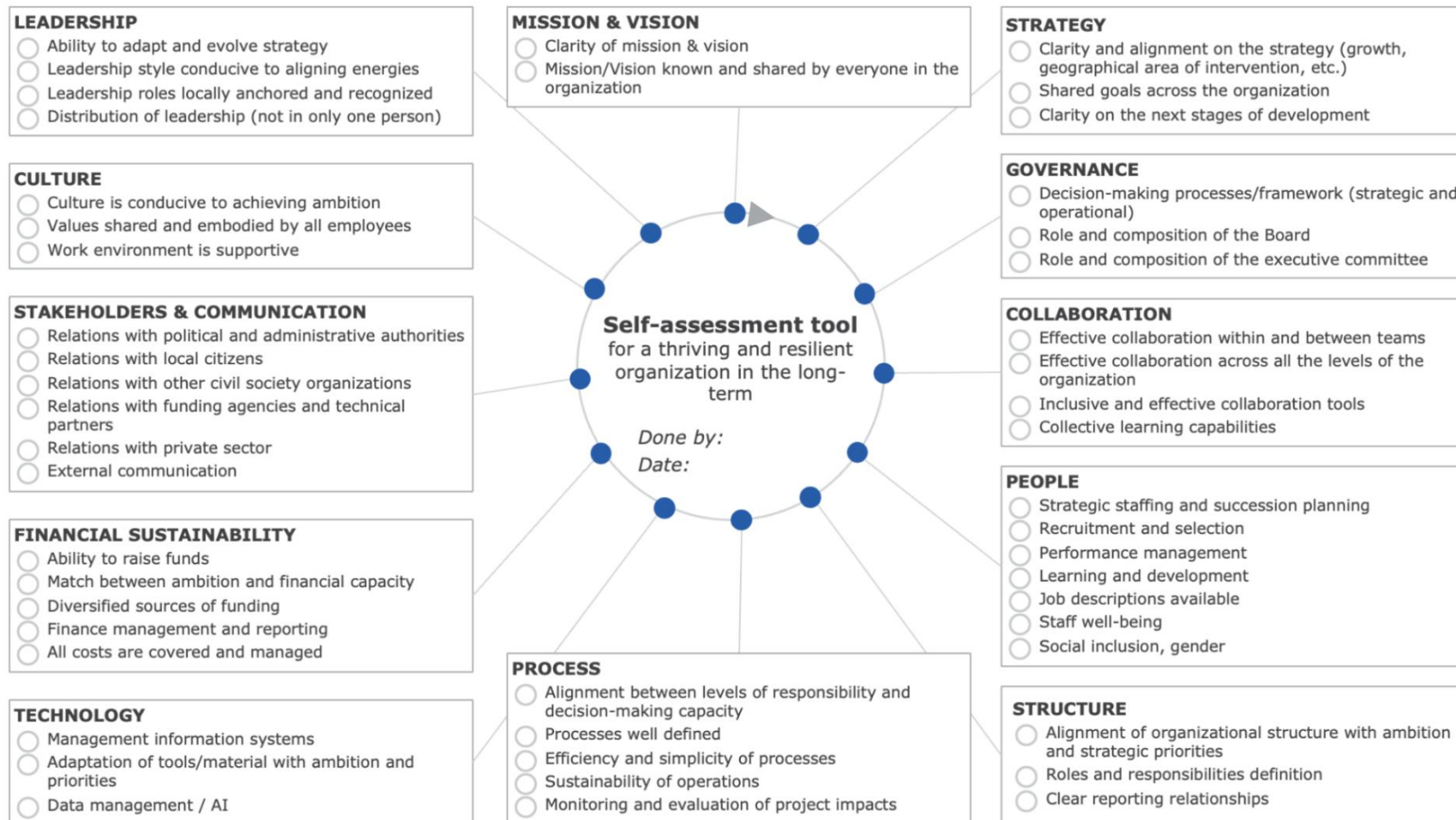
Proposed self-assessment tool

Framework

visual tool

For each dimension, assess the level to achieve our organization's ambition:

☐ sufficient
 ☐ insufficient but not blocking
 ☐ blocking

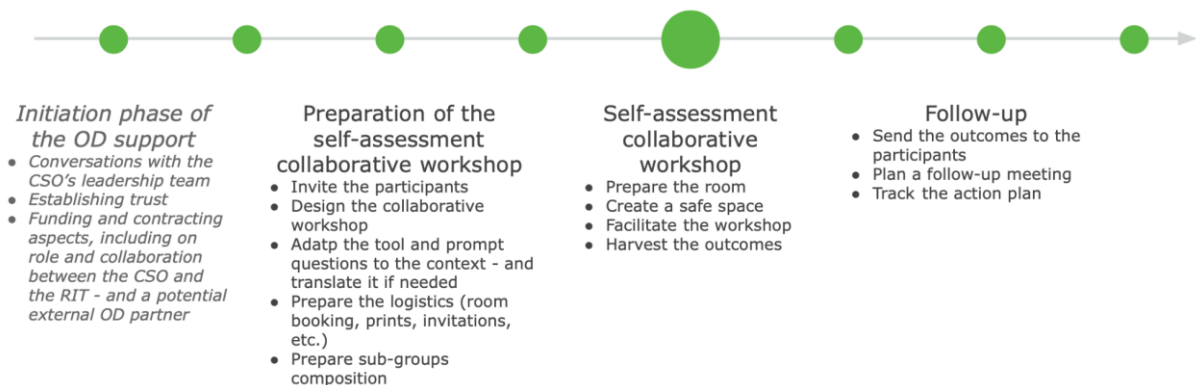


Process

Guidelines to facilitate a self-assessment

Intention and mindset

- The goal is to support a holistic self-assessment of the organization, by looking at the different dimensions that contribute to its long-term development and resilience. The objective is to ensure that all organizational capabilities are aligned with the organization's mission/ purpose.
- What matters most is not the assessment tool in itself, but the conversations it triggers within the teams. Therefore, it should be part of a collaborative process, engaging several - if not all - the organization staff, in a spirit of inquiry and meta-reflection.
- It is essential to include participants who represent the entire organization. Additionally, involving some Board members in the self-assessment process can be very interesting.
- It requires facilitation and collaborative process design skills to manage the group dynamics and to ensure that a safe space is created for open and meaningful conversations.
- The self-assessment tool and the prompt questions can be customized and modified to adapt to each context. For example, some dimensions can be removed if they are not relevant. However, in that case, it is important to keep the holistic approach.
- Having an external facilitator can be beneficial to ensure a neutral approach, allowing participants to focus fully on the content without concern for the process while also fostering a stronger group dynamic



Guidelines to facilitate a self-assessment

Process instructions

- For each element of the **visual tool**, self-assess as a team the current level of the organization in the perspective of achieving its desired ambition, using the following color code:
 - green: the current level in this dimension is sufficient to achieve the organization's ambition
 - orange: the current level in this dimension is insufficient but not blocking to achieve the organization's ambition
 - red: the current level of this dimension is blocking to achieve the organization's ambition
- If needed, **prompt questions** can be used to provide additional context for each dimension and guide the facilitation
- For each dimension, document the **reasoning** that explains the evaluation, writing down the key points that explain the assessment
- Once you have assessed all the dimensions, take a step back and collectively determine the 3-5 **priorities** that the organization should focus on in the following months.

Guidelines to facilitate a self-assessment

Set-up and suggested timing

- Consider splitting your group into smaller groups of two to five participants to conduct the self-assessment in parallel. Once each group is done, compare the results and engage in a conversation to explore similarities and differences. Splitting the group is an interesting option to create safe spaces and limit the influence of hierarchies among the participants.
- We recommend to print the visual tool on a large sheet of paper (poster size) and to use sticky dots of different colors to assess each point. Alternatively, it can be displayed on a screen and completed digitally.
- For the reasoning and priorities, flipcharts can be used to capture the different points

In terms of timing, the whole process could be done in one or two days, depending on the context. Here is a suggested timing for a one-day set-up:

- Welcome, introduction and framing - 30 min
- Inclusion to create a safe space - 30 min
- Self-assessment using the visual tool and documenting the reasoning
 - If one team: 2h30
 - If several teams in parallel: 1h30 for the teamwork, 1h30 for collective sharing and alignment
- Definition of priorities - 2h
- Learnings and check-out - 30 min

Reasoning

Taking a helicopter view, below are the key points that explain the reasoning behind the evaluation of the different points, and the highlights of this self-assessment of the organization for each dimension:

reasoning

key points that explain the evaluation		key points that explain the evaluation	
MISSION & VISION		PROCESS	
STRATEGY		TECHNOLOGY	
GOVERNANCE		FINANCIAL SUSTAINABILITY	
COLLABORATION		STAKEHOLDERS & COMMUNICATION	
PEOPLE		CULTURE	
STRUCTURE		LEADERSHIP	

Action plan

priorities

Priority	Topic	Expected results	Actions	Person in charge	Milestones and deadline
1					
2					
3					
4					
5					

Evaluation of three selected OD self-assessment tools

Against criteria

	Holistic	Invites for team self-reflection	Easy-to-use	Customizable	Visual for use by teams during workshops	Develop mental-focused	Allows to integrate evolutions/ reusable
Visual assessment tool	✓	✓	✓	✓	✓	✓	✓
<u>ODADO</u>	✓	✓	✓	- Not yet (to be made by developers)	-	✓	✓
<u>OMT</u> - Organizational Mapping Tool (by Ford Foundation)	✓	Filled in individually first, only in a 2nd step as teams	✓ (if has previous experience with OMT)	In theory yes, but very time-consuming	-	✓	Re-usable
Organizational Resilience Check	✓	✓	✓	No	?	✓	✓

Pros and cons

	Advantages	Disadvantages
Visual assessment tool	-Specifically designed for workshops/ team conversations -Very easy to customize to each CSO/ context -Can be printed in posters' size for collective work -Tested with a CSO -Enables to quickly identify as a team strengths and opportunities for improvement based on visual assessment, and define priorities	-Does not include prompt questions -> <i>should we add some?</i> -As is designed for workshops, data needs to be typed afterwards
ODADO	-Asks open questions & provides guidance questions -Space to take notes and define level of team satisfaction -Provides a summary at the end with the priorities and a template for action plan -Tool developed for organizations in biodiversity -Available on an app to avoid working on an Excel sheet -A little guide for facilitators was developed by the PPI -ODADO could be tested/used by the CEPF in some pilots	-There could be more questions on governance -Not easy to make changes in the app -> need to go through a developer -It takes a day to go through and do the diagnostic; then needs a half-day for the action plan -Question of potential fit with other cultural environments (was developed for Western/ Central Africa)
OMT - Organizational Mapping Tool (by Ford Foundation)	-Clear statements to guide the evaluation -Space to write comments after each section -Comes with a Facilitators' guide (<i>under Creative commons</i>) -Provides guiding questions in a template to define what needs to be done on each of the priorities identified -There is a specific tool for coalitions, alliances and networks => this could be interesting for assessments with communities of CSOs - <u>more as a source of inspiration rather than as a tool as it would apply only to very mature consortiums</u>	-Includes statements to choose from (pre-defined categories) rather than providing open questions inviting into inquiry => less easy to use in workshops and assumes what good looks like -Some topics might not be relevant depending on the context (e.g. <i>threat or attacks on org.'s work, or some of the questions related to governance</i>) -It would be work-intensive if wanted to customize it to various cultural contexts -Designed first for individual assessments feeding then into a collective assessment and discussion

OD providers

What tends to happen for some OD providers – specialization in one field:

The field of Organizational Development Consulting being a multifaceted one, with professionals bringing diverse perspectives, skills, and approaches to drive organizational change and success, it allows consultants to specialize in areas that align with their expertise, their preferences and the unique needs of their clients, ensuring tailored solutions that maximize impact and effectiveness.

Some OD providers keep a holistic approach, some others tend to specialize in one area or another, which then tends at times to bias/influence the way they look at what is needed in organizations.

Some of the areas of specialization of OD consultants/practitioners can include:

Change Management

Change Management Consultants are experts in guiding and accompanying organizations through transformational initiatives, such as reorganizations, process re-design, culture shifts, etc. They possess strong engagement and project management skills, coupled with a deep understanding of human behavior and organizational dynamics. Their primary focus is to develop and implement strategies that engage hearts and minds of people, foster buy-in, minimize resistance, and ensure a smooth transition during periods of significant change.

These consultants often work closely with leadership teams, providing team development workshops, coaching, sometimes combined with training, to help them effectively communicate, engage and lead their teams through the change process.

Culture and Engagement

Culture and Engagement consultants specialize in cultivating positive and productive work environments that align with an organization's values and purpose. They assess and look at existing cultural norms, employee engagement levels, and workplace dynamics, identifying areas that can be improved and developing strategies to foster a more inclusive, motivated, and high-performing workforce.

People active in this field often employ techniques such as surveys, focus groups, and interviews to gather data and insights. They may also design and facilitate training programs, team development workshops, and engagement and communication initiatives to strengthen organizational culture and employee engagement. Through their work they help develop a positive culture, which is a key driver of employee retention, effectiveness, and overall organizational success.

Leadership Development

Leadership Development consultants focus on enhancing the skills and capabilities of an organization's current and future leaders. They work closely with executives, managers, and high-potential employees, providing coaching, training, and development programs tailored to the specific needs and goals of the organization.

These consultants often have backgrounds in psychology, business, or human resources, and possess a deep understanding of leadership theories, emotional intelligence, and effective communication strategies. They may design and facilitate workshops, assessments, and one-on-one coaching sessions to help leaders develop critical competencies such as strategic thinking, decision-making, conflict resolution, and team management.

Human Resources

They help develop and implement HR strategies and talent management strategies aligned with the organization's ambition. This can include working on topics like competency management, talent development, performance management, succession planning, retention strategies, rewards and recognition, etc.

Diversity, Equity, and Inclusion (DEI)

DEI consultants are dedicated to promoting and fostering inclusive and equitable workplace environments that embrace diversity in all its forms. They work with organizations to assess and address potential biases, barriers, and systemic issues that may hinder diversity, equity, and inclusion efforts.

These consultants often have expertise in areas such as employment law, unconscious bias training, and cultural competency. They may conduct audits, develop policies and procedures, and design training programs to raise awareness, promote inclusive practices, and create a more diverse and equitable workforce. Their services are increasingly in demand as organizations recognize the benefits of a diverse and inclusive workplace, including improved decision-making, innovation, and employee engagement.

Organizational Design

Organizational Design consultants specialize in optimizing an organization's structure, processes, and systems to align with its strategic objectives and ambition. They help look at existing organizational models, identify inefficiencies or misalignments, and develop recommendations for restructuring or redesigning various aspects of the organization.

These consultants often have backgrounds in business administration, industrial engineering, or organizational psychology. They may work on

projects such as streamlining work processes, implementing new technologies, or redesigning reporting structures and decision-making processes. The impact of their work includes effective organizational design which can improve overall operational efficiency and reduce costs.

A few key distinctions: Consultants – Facilitators

The word **facilitate** comes from the Latin which means to 'make easy'; it includes the notion of enabling a group to take control and responsibility for the way they proceed.

Facilitation is the art of building/ accompanying a group's energy on a journey towards some intended outcomes. It's a diverse field/profession and relies on facilitators that have a broad repertoire of facilitation skills and approaches.

Consultants are often hired as subject experts, making it more difficult for them to stay outside the content and develop ownership and internal capabilities. Some consultants have a facilitative approach underpinning their way of working with clients and with organizations; many tend to see themselves however more as experts and are in this capacity less able, and less inclined, to focus on developing the ownership within organizations of what is being developed.

For this reason facilitation skills – with groups – and the ability to take a facilitative approach to embark people within the organization through a change process are key ingredients to look for in any assignments.

Coaching and Facilitation

A coach is very similar in skills and approach to a facilitator. Coaching is also a part of facilitation, particularly when it relates to encouraging an individual to define or achieve goals. Both disciplines are very close in skills, particularly when it comes to group coaching or team coaching - facilitators working more at the team and organizational dynamic levels than at the individual level.

Teaching and Facilitation

Both often happen in parallel. However, a clear distinction between teaching and facilitation is that the role of a teacher or trainer is primarily to transfer information or knowledge to participants. While teachers and trainers also facilitate group processes, the main distinction is that a trainer transfers knowledge, while a facilitator primarily facilitates the group process to help them learn themselves and integrate the learning, without getting involved in the content himself/ herself.

An overview of the various postures in advisory roles is outlined here:

Mentor “You've done it well. Next time, you can add this”	Coach "You do it yourselves. I will be your sounding board and help you draw learnings"	Partner “We will do it together and learn from each other”
Facilitator “You do it yourself; I will attend to the process.”	Teacher/Trainer “Here are some principles you can consider to solve problems of this type.”	Modeller “I will do it; you watch so you can learn from me.”
Reflective observer “You do it; I will watch and mirror back what I see and hear.”	Technical advisor “I will answer your questions as you go along.”	Hands-on expert “I will do it for you; I will tell you what to do.”

Source: Adapted from Champion, Kiel and McLendon, 1985

What helps develop CSO ownership of the process of developing capability?

- **Develop trust by getting to know** the partner organization/ CSO very well, its people, through interactions, check-ins and conversations beyond the specific projects, showing a genuine interest in their organizational big picture.
- **Inquire through open questions** and discussions, helping surface strengths as well as potential gaps and helping partners reflect themselves on their own organization.
- **Ensure that the CSO makes the decision themselves**, to engage into a change process/ OD initiative.
- **Let the CSO partner choose** and contract the OD provider – providing support if asked for, on helping draft the terms of reference, what to look for in an OD provider, while letting the CSO make the final decision for the OD partner they choose.
- **The funding should come through the CSOs’ budget as much as possible**, so that they are in charge of the budget and are invested in the process.

Only in very specific cases should development of capability be a condition of the grant; in this case it would be very useful to have open conversations about the motive and it would be wise to hire a sensitive OD partner mutually acceptable to the grantee and the RIT/Secretariat.

What helps ensure quality OD support to the CSOs/ RITs?

- **Support for joint-scoping** of what is needed and what they should ask of the OD provider. This is not about doing a diagnosis, but spending time with the CSO clarifying expectations, and their needs to help them define the Terms of Reference accordingly. Having the right scoping and skill set identified will help with the selection of the right OD partner.
- **Talking through the selection process together**, sharing experiences/ criteria of what makes a good OD provider/ partner/ what to look for.
- **Build on potentially pre-identified OD providers in the region**, if some are already known - **otherwise a call for proposals could be an option, as well as exploring opportunities through the Non Profit Builder or NGO Connect**; it is good practice to recommend at least 2 or 3 potential partners the CSO can choose from, depending on their perceived best fit.
- **Helping the CSO choose an OD partner** – in the case of an external OD provider; **the final choice needs to be made by the CSO** and it can be time-consuming. In each situation gauges how much support is needed/ can be reasonably provided.
- **Invest in strengthening the supply of local OD providers**, as it can make a difference not only to individual CSOs, but to the sector as a whole. This will contribute to providing support structures in the regions far beyond the intervention in itself.

For the delivery, OD interventions within CEPF's landscape can typically include (these are only examples for the toolbox):

Area	Examples of projects/ interventions
Strategic alignment	-Develop/clarify and align as a team on the strategy for the organization (e.g. growth, areas of intervention, etc.) -Clarify vision and strategic objectives for the organization
Governance	-Define/clarify the governance framework (strategic and operational)/ decision-making processes -Define, or help evolve, the role and composition of the board and of the executive committee (e.g. in the case of a growing organisation or to support the transition from a founder-led organization to a more type of collaborative governance)
Leadership	-Developing the leadership capabilities of the executive committee members/ heads of departments -Preparing future leaders to take responsibilities
Collaboration	-Develop effective collaboration between teams/ between geographical offices/ between the field and head office
People	-Define succession plans to anticipate future departures/retirements and development plans accordingly -Re-evaluate the competency mix needed within the organization following a change of strategy, define strategic staffing needs and learning & development strategy and plans
Structure	-Re-assess the organization's structure and align it with the organization's ambition and strategic priorities -Clarify roles and responsibilities between teams/departments with a focus on interfaces
Processes	-Help clarify and formalize transversal processes with associated responsibilities (e.g. from grant application to project delivery and closure) -Simplify processes to avoid duplications and remove some administrative tasks with limited value-add
Technology	-Defining and implementing a collaboration tool, or system, to support the work and communication between people in the field offices and the head office
Financial sustainability	-Define fundraising strategy, potentially including diversifying sources of funding and adapting internal processes and resources to different requirements -Defining basic financial management system to get a better grip of actual costs
Stakeholders & communication	-Defining communication strategy and plans -Developing a social media communication strategy and approach -Documenting and articulating achievements through case studies and storytelling
Culture	-Helping shift the culture from a paternalistic culture style to a more empowering work environment

Depending on the topics being focussed on, and on each specific context, various modalities of intervention will be best appropriate.

These could include:

- accompanying over time a process with some team development workshops, possibly complemented by some 1:1 conversations or coaching
- team or individual development journeys to support the personal development and capacity building within the organization; this can include taking part in:
 - some in-house trainings - ideally as a part of a journey over time rather than one-off events, as it enables to support the embedding of the new competencies being developed within the daily habits and fabric of the organization
 - taking part in some personal development curriculum (in-person or virtually through facilitated online learning) with representatives from other organizations, which provides safe learning environments, enables learning with representatives from other organizations, creates a sense of community; this is sometimes coupled with the challenge of bringing news approaches and ways of working within the organization if one was alone benefiting from this exposure
 - if similar needs are identified within a hotspot, explore the possibility to address them through a program with several CSOs/ a group of CSOs.

Examples of OD providers

Globally:

-the Non profit builder - <https://nonprofitbuilder.org/>

A large pool of independent facilitators used to partner with NGOs. Partner organizations of the Non-profit builder are the Oak Foundation, Peace Nexus, European Climate Foundation, Laudes Foundation, etc.

Extract from their website:

- Our network of **vett**ed consultants is truly **global** so we can offer experts who understand the context of your grantees and speak their language.
- In our **pay-what-you-consume model**, you only pay when grantees use consultants. And we agree on rates with our consultants which are fair for everybody.
- We offer you a **fully managed capacity building service**: needs assessment calls with your grantees, matching them with consultants, drafting the statements of work, check-ins and quality assurance, contracting and payment of consultants, collecting feedback, financial management and reporting to you as the funder.
- Your grantees will receive **personalized & bespoke** support, starting from our one-on-one needs assessments. We will develop a deep understanding of their aspirations and needs as we accompany them on their journey.

-NGO Connect - <https://www.ngoconnect.net/>

of the Strengthening Civil Society Globallly (SCS Global) Program funded by the US Agency for International Development (USAID) under under a Leader with Associates (LWA) Cooperative Agreement, works across sectors to offer USAID Missions and Operating Units a flexible, worldwide platform for designing and implementing projects that strengthen civil society and independent media organizations to advance DRG objectives and other development goals.

-Facilitators via the Art of Hosting community -

<https://artofhosting.org/> -:

Facilitators teams that organize open Art of Hosting trainings or Art of Participatory Leadership workshops are specialized in collaborative approaches and are usually great hosts/facilitators with access to a large network of independent facilitators and consultants; it is a possibility to contact the facilitators' team in one's region to inquire into the interest of some of their team members into supporting the facilitation of self-assessments and OD/change processes.

-INTRAC:

<https://www.intrac.org/>

-ODS - Greater impact:

<https://odsupport.eu/>

-Mediterranean Basin:

In the Balkans:

Adrijana Strnad: <https://www.adrijanastrnad.com/about-me>

Miljenka Plazonic Bogdan,

Jasina Lukacevic

The 3 are on the page of the “**Centre for Participatory Leadership**”:

<https://cplonline.eu/team/>

The CPL team is driven by need and purpose and is highly competent in designing and delivering learning programmes, facilitation, and coaching, enabling and hosting conversations that matter in real organizational cases.

Spain/ Portugal:

Mira Bangel: <https://es.linkedin.com/in/mirabangel>

Stone Soup Consulting: <https://stone-soup.net>

-Indo-Burma:

India: Co-creative solutions, based in Ahmedabad, Gujarat

<https://co-creativesolutions.com>

<https://www.linkedin.com/company/co-creativesolutions/>

Vietnam:

Center for Management Development – emphasis on training

<https://vncmd.com/en/insights/organizational-development-od/>

-Wallacea:

Indonesia:

Menjadi (Marc Fruitema): marc@menjadi.org

Fellow of the foundation Mulago.

Association Of Indonesian Organization Development Professional –
Mission: “It is a place for leaders and aspiring leaders of organizations who have a strong desire to develop themselves, build marketing

networks, and simultaneously contribute to the creation of value for organizations and business society”.<https://aiodp.org/overview/>

-West Africa:

Organizations	Some highlights
WACSI https://wacsi.org/	-West Africa Civil Society Institute. Former CEPF grantee. <i>Strengthening Civil Society Organizations’ Capacities for Effective Stakeholder Engagement in Biodiversity Conservation.</i> - Current grantee as well -They provided excellent advice on the West Africa context, and how to promote the OD opportunity in the region. -Many lessons learned on how and who to train, thoughts on virtual vs in person training. -They award sub-grants to their partners so that organizations can put into practice what they have learned. -Really knowledgeable about the needs and realities in West Africa
Maliasili https://www.maliasili.org/	-Maliasili exists to support high-potential local organizations to accelerate the benefits they bring to people, ecosystems, and climate change. - Their mission is to accelerate community-based conservation through local organizations. - Current CEPF grantee in Madagascar focusing on a leadership program. <i>Driving Malagasy Leadership and Organizational Growth to Deliver Meaningful Ecosystem-based Adaptation</i> -They strive to be partners for life. Emphasize leadership program. -Do an assessment, develop a strengthening plan, then provide around four years of support which costs about 30-50K USD per year. Focus on conservation organizations. -Launched in 2016 with the Nature Conservancy the African Conservation Leadership Network -Dedicated and capable, with quite sophisticated and comprehensive programs/ learning journeys
Beautiful soul https://www.beautifulsoul.sn/en/home	-A change management consulting firm based in Dakar, Senegal. Has gained extensive experience across various African countries. -Design and deliver tailor-made facilitated change programs for organizations. Employ various interventions, such as meeting facilitation, group and individual coaching, and managerial effectiveness and leadership training -They work across all sectors, focus on behavior change. -Their partners raise their own funds and then approach them. -Have a long term presence of 6 months to 3 years. -They evaluate each intervention. Metrics are key to know what is working. -Cost of intervention varies considerably. -Very tailored

Well-Grounded https://well-grounded.org/	-Aim of helping African CSOs to overcome the barriers they were encountering. Having a key role to play as a complement and a counterweight to government and the private sector, Well Grounded works with CSOs so that they are able to realise their objectives and vision thereby making a positive change to community rights and natural resource governance in their home countries and the wider world. -Current focus is Central Africa. -Have a core team of 19 consultants. -<u>Tailor made process that focuses on the whole organization.</u> Vision and strategy is key. Governance needs to be agile and functional. - CSOs find their own funding and go to them. -Also do training of trainers. -They do one-on-one, workshops, and also have a training platform. -<i>Good focus on facilitation being very key.</i>
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Background reading on impact assessment and learning

- **Rigorous Evaluation versus Trust-Based Learning : Is this a valid dichotomy?**
on the [Center for Effective Philanthropy website](#), written on July 13, 2023 by Brenda Solorzano, CEO of the [Headwaters Foundation](#), which works side-by-side with Western Montanans to improve the health of communities.

Article re-published by [Catalyst 2030](#) and the [Trust-Based Philanthropy Project](#), a funder-to-funder advocacy initiative to make equitable grantmaking and community accountability the standard of practice for effective philanthropy.
- **Flipping the script on MEL; why learning must come first**, written on February 24, 2025, by Marcus Jenal, Strategic Learning and Evaluation lead at the [Botnar Foundation](#).
- **Can we build a trust-based and equitable approach to monitoring, evaluating and learning?**, published on February 19, 2025, on the website of [PHILEA](#) (the Philanthropy European Association), by Sarah Denselow, Principal: Effective Philanthropy and Claire Gordon, Principal: Funder Evaluation and Learning, New Philanthropy Capital
- **Report on monitoring, evaluation and learning with trust and equity** by NPC ([New Philanthropic Capital](#)) - a think tank and consultancy for the impact sector -, which outlines six core

principles for MEL practice which funders are invited to consider.

- **The Strategic Value of Trust-Based Philanthropy**, article written on February 21, 2024, by Stacey Faella, executive director of the Woodcock Foundation & Ryan Roberson, executive director of the Southern Coalition for Social Justice, and published by the Stanford Social Innovation Review

Outcome Harvesting as an effective way to assess the impact of OD interventions

Outcomes harvesting by “Voices that count” - Examples of MEL Case studies

Outcome harvesting for the Marine Plastics and Coastal Communities project | IUCN

Creating an outcome map of the project which was used to fine-tune the Theory of Change of the second phase of the programme.

Outcome Harvesting | Helvetas Western Balkan

Understand the effectiveness of projects and capture the hard-to-measure and unanticipated changes in a complex and dynamic context

Source: Voices that count website - <https://www.voicesthatcount.net/casesthatcount/categories/monitoring-learning-evaluation>



Understanding resilience | FAO OED

Understanding how communities in Zimbabwe and Mozambique perceived FAO's resilience interventions after being hit with tropical cyclones

44 views



Building Resilience in Ethiopia | Oxford Policy Management (OPM)

We conducted an Outcome Harvesting process for learning about achievements and informing future directions

59 views

Outcomes harvesting by “Voices that count” - Methodology

The main features and steps of the Outcome Harvesting process:



1. Design the outcome harvest

The individuals that document outcomes/changes (called harvesters) start by planning the harvesting: Who will be engaged? Where? When? Where to find information? Who to interview?



2. Gather data and draft outcome descriptions

The harvesters collect data and evidence to identify changes, and formulate outcome descriptions, using different data sources and methods.



3. Verify outcome descriptions

To assure quality of outcome descriptions, the harvesters refine the outcome descriptions through checking for consistency, correctness and completeness with his/her peers and others.



4. Substantiate the outcome descriptions

Informants knowledgeable about the outcome but external to/independent of the partner organisation are invited to provide feedback to (a sample of) the outcome descriptions. This will increase credibility and accuracy of the changes.



5. Analyse and interpret the outcome descriptions

The harvesters and colleagues jointly identify and understand patterns, processes and trends of change among (clusters) of outcome descriptions.



6. Support the use of findings

The last step of the Outcome Harvesting approach is focused on the interpretation of the analysis for future practice/decision making in and planning of the programme.

How does Outcome Harvesting work?

In Outcome Harvesting, short descriptions are formulated about the behavioural changes of social actors.

Here are some key questions:

- What is the change?
- How important/significant is this change?
- How did the intervention/project contribute to the change?

The changes (outcomes) are 'harvested' with the project team and/or partners. Subsequently, the information is validated by external people or existing evidence in order to arrive at a valid and plausible account of outcomes and contribution of the program. Outcome Harvesting is based on demonstrable change using different data collection techniques such as workshops, interviews or progress reports.

Outcome Harvesting is a methodology that can be rolled out at any time and in any project or practice.

Source: Voices that count website - <https://www.voicesthatcount.net>

Contacts:

-Nele Claeys: nele@voicesthatcount.net

-Jeff Deprez: steff@voicesthatcount.net

Examples of impact-driven indicators

If at some point it was felt useful to explore the possibility to have some impact-driven indicators, then there could be a series of indicators from which the CSOs could choose two or three, possibly with the support of the RIT.

Here are some examples of impact-driven indicators, being very mindful that these might apply only in certain cases, and that the outcomes of these measures could be influenced by the OD intervention as well as by other unrelated factors:

- Number of alliances/ relations with other CSOs;
number of partnerships/ alliances that have been created or strengthened during the time period
- Improved engagement/ relationships and collaboration with local and national governments - e.g. frequency of joint-projects and initiatives
- Type of funding/ ability to access other types of funds beyond CEPF:
 - Availability of funding and for how long?
 - How many (new) institutional donors are supporting the organization?
 - Relationship building progress with how many potential new donors?
- Talent and staff retention: retention rate
- Well-being of the staff (employee satisfaction survey results)
- Increased (long term) impact on conservation (due to the OD support)
- Contribution to the global goals such as the SDGs and Global Biodiversity Framework targets

At the community of CSO level:

- Development of networks/ communities of CSOs (possibly building on the assessment through the mapping tool):
number of networks/communities of CSOs in place;
number of regular meetings of networks/communities of CSOs per year;
number of CSOs engaged in partnerships with other CSOs

Template for harvesting learnings at RIT/ hotspot level

This template is intended as a support for the co-pilot teams to help navigate through the OD implementation, collectively drawing and harvesting learnings during the co-pilot meetings. It will at the same time help ensure consistency of approaches and harvests across the hotspots/ globally and make the sharing of learning easier and more effective.

Taking an helicopter view:

How are we progressing in the roll-out of the OD strategy in our hotspot?

Which challenges did we face/ are we facing?

...and what did we do to address them?

What helped:

What was less helpful:

Looking ahead:

Which opportunities do we see?

Which potential stumbling blocks/ obstacles are we anticipating?

.....and how will we address/ overcome these?

Ressources (human, time, finances):

Do we need to adapt/ adjust the amount of resources dedicated/planned to the OD initiative(s)? If yes, how?

Which support do we feel we need? (*it could be from the Secretariat, peers, external*)

Learning

What are we learning through the implementation?

Which learnings would we like to share with the wider organization?

Processes and systems

Which observations did we make? *(e.g. redundancy of tools, tensions, etc.) (these can be fed into further process and systems reflections and reviews)*

Which suggestions would we like to make/ offer?

Other comments

Is there anything else that could be helpful to capture, or to look at moving forward?

Template for harvesting learnings - during the yearly step-back meetings/ stock-taking sessions as part of, or following, an OD intervention

This template is intended as a support for an organization going through, or having gone through, an OD process to guide the conversations of the team in identifying its progress, capture its outcomes and learnings and feed them forward into the process.

It will at the same time help ensure consistency of harvesting approaches over time, across the CSOs and RITs, and make the sharing, and consolidation, of outcomes and learning easier and more effective.

Taking an helicopter view:

- How satisfied are we with the OD support we are receiving?
- How satisfied are we with the progress we are making as an organization during the ongoing OD initiative?
- What are some of the early signs showing that we are progressively strengthening the ability of our organization to pursue its mission/ to have an impact on biodiversity in the long term?

What are some of the concrete achievements, both qualitative and quantitative, that are being possible so far thanks to the OD initiative?

- What is the most significant change, or shift, that we feel/ sense is happening?

From a process perspective:

- What is the current percentage of achievement of the OD development goals that have been identified at the start?
- Milestones achievement - What are some of the concrete elements that have been produced so far and implemented thanks to the OD support?

Learning

- What are we learning, or become more aware of, through this process?
- Which learnings could we share with other CSOs?

Looking ahead:

- Which opportunities do we see?
- Which potential stumbling blocks/ obstacles are we anticipating?

.....and how shall we address/ overcome these?

- Ressources (human, time, finances):
Do we need to adapt/ adjust the amount of resources planned ? If yes, how?
- Is there anything we feel we need to adjust - ourselves or in the way we are capitalizing on the support we are receiving?
- Which support do we feel we might need moving forward?
(it could be internally within the organization, from peers, from the RIT, from the Secretariat)

Additional question for final review following an OD intervention:

- How confident are we to be able to sustain what has been developed/ put in place?

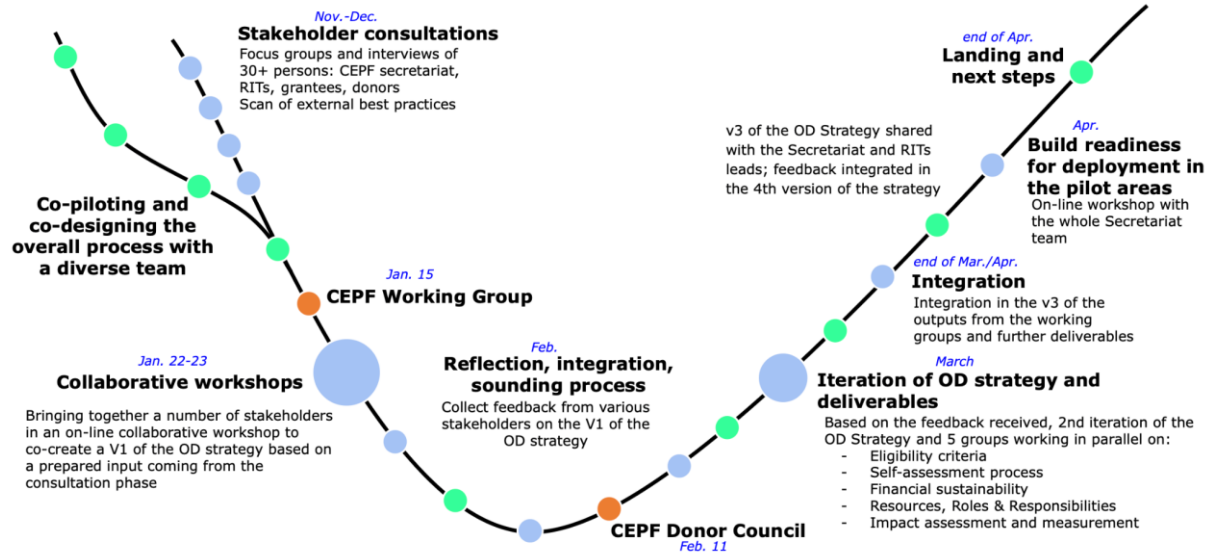
....and what will we do about this?....

Other comments

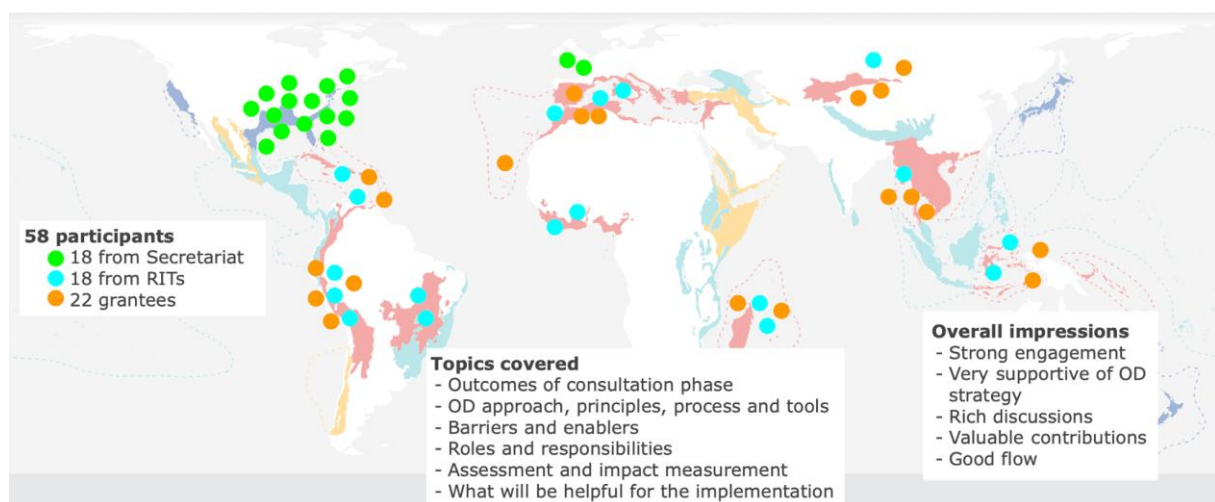
- Is there anything else that could be helpful to capture, or to look at moving forward?

Development phase of the OD Strategy

Process overview



Highlights from the collaborative workshops



Some of the sources that were used

Sources pertaining to the OD process/ approaches	Sources pertaining to the assessment tools
-Hodges model 2020 -OD network (<i>the largest international association of OD practitioners in the world</i>) -Roffey Park Institute -“Funding Organisational Development: View from 5 foundations” - 2020 -“How Funders are Strengthening Nonprofit Capacity: Findings from a Field Scan” - 2022 -Collective Insight -Non-profit builder -Nexus4change -Art of Hosting -Mediterranean Basin and Guinean forests Ecosystem Profiles -Advisers’ Roles-Choosing a Consulting Role: Principles and Dynamics of Matching Role to Situation, by: Douglas P. Champion, David H. Kiel and Jean A. McLendon	-Outputs of the consultation phase -Civil Society Organisational Capacity Tracking Tool (CSTT) -Auto-Diagnostic tools: *ODADO from PPI *Organizational Mapping Tool from Ford Foundation *Organizational Resilience Check and Organizational Assessment from Birdlife -McKinsey 7S Framework -Burke-Litwin Model of Organizational Change -Five-star model from Jay R. Galbraith -Weisbord's Six-Box Model

When looking at best practices:

- Conversations with the Oak foundation, PPI, Voices that Count
- Oak Foundation Capacity Strengthening Playbook