

**Critical Ecosystem Partnership Fund  
29<sup>th</sup> Meeting of the CEPF Donor Council  
Arlington, VA  
10 June 2016  
8:00-11 a.m. EST**

**Recommended Action Item:**

The Donor Council is asked to comment on the CEPF Learning Strategy.

**Background**

In 2014, to address the ever-increasing challenge of biodiversity conservation, CEPF embarked on a third phase and adopted a new strategic framework that directs CEPF to grow to a larger scale where it can more widely and effectively impact the biodiversity crisis. A key emphasis of CEPF III will be to scale up learning and outreach efforts and communicate the lessons learned, knowledge gained and information generated by CEPF to a range of audiences. Grantees, RITs and donors are CEPF's most important audiences, however, CEPF also seeks to inform and influence others, such as government agencies and private sector entities.

The CEPF Phase III Strategy includes four components, one of which focuses on communications, monitoring and administrative systems:

*An improved delivery model with more efficient operations, stronger communication products and more effective impact reporting, which facilitates learning, adaptive management and amplification of demonstration models,*

A strategic learning program is integral to this component. A greater emphasis on learning will result in the capture of more lessons learned, and allow for this learning to improve capacity building materials and opportunities and to influence program design and direction. Outreach activities will increase awareness of CEPF and its impact and promote sharing of lessons with our target audiences which will help CEPF's partners to achieve their goals and make more lasting contributions and partnerships for conservation.

CEPF's Learning Strategy was developed during 2015 and entailed research, interviews and a survey distributed to CEPF stakeholders and partners. The survey, which received 135 responses, plays a key role in informing the strategy. More than 50% of respondents have worked with CEPF for three or more years, and were able to provide solid perspective on CEPF's existing learning opportunities, as well as what would increase the scope and effectiveness of the new learning program. CEPF's Learning Strategy will cover a five year period from July 1, 2016 through June 30, 2021. Its primary emphasis is on learning, but it also includes development of tools and resources to facilitate learning, as well as information dissemination and outreach. The strategy will complement CEPF's new Communications Strategy which was approved by the CEPF Donor Council in February 2016.

## The CEPF Learning Strategy

### Introduction

The Critical Ecosystem Partnership Fund (CEPF) is the largest fund in the world focused on conserving the planet's most biologically rich ecosystems. CEPF mobilizes local, regional, and international partners to protect what nature provides for free to their communities. Created in 2000, CEPF is a partnership of seven donors that provides grants to civil society to participate in and influence the conservation of biodiversity. CEPF's grantees range from small farming cooperatives and community associations to private sector partners, and national and international nongovernmental organizations. CEPF's grants are guided by regional investment strategies that are developed with local stakeholders, go directly to civil society groups to build this vital constituency for conservation, help to create working alliances and partnerships among diverse groups, and achieve results through an ever-expanding network of partners working together toward shared goals and a common conservation vision. Most importantly, CEPF's grants target the biodiversity hotspots in developing and transitional countries, areas that are home to millions of people who are impoverished and highly dependent on natural resources.

### Why do we need a strategy?

In 2014, to address the ever-increasing challenge of biodiversity conservation, CEPF embarked on a third phase and adopted a new strategic framework that directs CEPF to grow to a larger scale where it can more widely and effectively impact the biodiversity crisis. A key emphasis of CEPF Phase III will be to scale up learning and outreach efforts and communicate the lessons learned, knowledge gained and information generated by CEPF to a range of audiences. The CEPF Phase III Strategy includes four components, one of which focuses on communications, monitoring and administrative systems:

*An improved delivery model with more efficient operations, stronger communication products and more effective impact reporting, which facilitates learning, adaptive management and amplification of demonstration models,*

A strategic learning program is integral to this component. A greater emphasis on learning will result in the capture of more lessons learned, and allow for this learning to improve capacity building materials and opportunities and to influence program design and direction.

Further, a stronger emphasis on learning will boost CEPF's contribution to Sustainable Development Goal 17, which has an explicit target (17.9) pertaining to capacity building, "Enhance international support for implementing effective and targeted capacity-building in developing countries to support national plans to implement all the sustainable development goals, including through North-South, South-South and triangular cooperation". The learning program will also make contributions to Aichi Target 1 "By 2020, at the latest, people are aware of the values of biodiversity and the steps they can take to conserve and use it sustainably", and Aichi Target 19 "By 2020, knowledge, the science base and technologies relating to biodiversity, its values, functioning, status and trends, and the consequences of its loss, are improved, widely shared and transferred, and applied".

CEPF's Learning Strategy will cover a five year period from July 1, 2016 through June 30, 2021. Its primary emphasis is on learning, but it also includes development of tools and resources to facilitate learning, as well as information dissemination and outreach. The strategy will complement CEPF's new Communications Strategy which was approved by the CEPF Donor Council in February 2016.

### **Who is it for?**

CEPF's Learning Strategy will guide a program that is aimed at increasing learning amongst CEPF's grantees and Regional Implementation Teams (RIT). Grantees are the main focus of the program, but RITs, as CEPF's representatives on the ground, will also benefit. These organizations have many skills, but can learn and improve especially as new challenges and issues arise in the hotspots they are responsible for. The Learning Program will also involve CEPF's other partners, such as donors, government agencies and the private sector; these partners have much to share that will contribute to learning, and equally they can benefit from the lessons and perspectives of grantees and RITs. The CEPF Secretariat will use the key lessons to improve the strategy, program and operations of the Fund.

### **Developing the strategy**

CEPF's Learning Strategy was developed during 2015 and entailed research, interviews and a survey distributed to CEPF stakeholders and partners. The survey, which received 135 responses, plays a key role in informing the strategy. More than 50% of respondents have worked with CEPF for three or more years, and were able to provide solid perspective on CEPF's current learning opportunities, what would increase the scope and effectiveness of the new learning program, and what content would be most useful to include in it.

### **What have we done in the past?**

Over the past 15 years, CEPF has promoted and engaged in a wide range of learning activities that have benefited CEPF's diverse audiences. Learning is broadly defined as the activity or process of gaining knowledge, skill, behavior or value, by studying, practicing, being taught or experiencing something. Examples of what two of the most pertinent CEPF stakeholder groups, grantees and RITs, and the Secretariat, are doing to learn and promote learning include:

*Grantees:* with grant funding, grantees are learning through training opportunities, exchange visits, attending conferences, attending workshops, reading publications, articles, newsletters, using social media and viewing websites and webinars. Grantees are having face-to-face meetings with relevant people, and learning when RITs, donors and CEPF staff visit their projects. Grantees are also exchanging lessons learned from their experiences with other similar grants within their region or in other hotspots.

*RITs:* a key role of the RITs is to provide technical, capacity building and networking support to grantees, at all stages of grant-making. Therefore, RITs hold training workshops to support applicants to write proposals, design projects and apply for funding. They help applicants/grantees to comply with social and environmental safeguards, and prepare required documentation. RITs also help to nurture partnerships between grantees where possible and strategic. Learning is integral to the relationship that the RIT has with their grantees, and extends throughout the project cycle with provision of training and learning opportunities and beyond, to the final assessment workshops that the RIT helps to orchestrate.

*CEPF Secretariat:* CEPF has had two main focal areas for learning. First and most importantly has been support to applicants and grantees to learn about the CEPF funding opportunities, and secondly to

design and implement successful and appropriate projects. Secretariat staff have conducted training workshops and webinars for applicants, produced guidance documents, and have been available to support grantees electronically (via email, Skype, etc.) and when possible in person. New grantee orientation calls are now a regular occurrence every quarter where the Secretariat hosts a webinar for all newly signed grants to explain CEPF processes, procedures, contract language and available support and products from the Secretariat's communications and the grant management team. Midterm and final assessment workshops provide an opportunity for grantees to meet and learn from each other. Field visits to projects, often with donors, RITs or others participating, have contributed to learning. CEPF's week-long introductory RIT training within the first three months of implementation, mentioned above, for each new RIT is an essential and robust learning event for the entire team where all major topics of grant-making and RIT responsibilities are covered in an interactive training format.

CEPF also extends the learning opportunity through the thematic papers, factsheets, annual portfolio overviews, final assessment reports, and other documentation that is available on the CEPF website and publicized on social media. The Lessons Learned page on the CEPF website captures selected lessons from individual grantees.

### **CEPF donors and learning**

All of CEPF's donors have information and materials on their websites that can result in learning by viewers. CI, the European Union, AFD and Government of Japan do not specifically refer to learning, but do have sections devoted to publications, news, project descriptions and innovations, and these are useful for viewers seeking to learn about the program and projects.

Three of CEPF's donors have specific sections or reference to learning on their websites. The MacArthur Foundation has a *What we're learning* page, and state that they are committed to sharing the results of their grant making and the lessons that they learn in their work. They want to evaluate and reflect regularly, study the findings of research and reports, and communicate the results with those in the field and with the public. Evaluations and reports are available on the website.

The World Bank has three programs. The Open Learning Campus includes a series of Talks aimed at exploring nuggets of knowledge through podcasts, videos, webinars, infographics, mobile apps, and games that provide a quick overview of materials targeted to specific interests, an Academy comprising online courses customized to the viewer's needs, and a on online space to connect with experts and peers from around the world. The World Bank also has a Global Development Learning Network which offers direct access to local, regional and international development experts, provides tailored learning programs, knowledge or technical assistance programs, and state of the art facilities for multi-point videoconferencing and internet-based learning. They also have three separate scholarship and fellowship programs: the Joint Japan/World Bank Graduate Scholarship Program (for developing country mid-career professionals); the Japan Indonesia Presidential Scholarship Program (PhD studies for Indonesian nationals); and the Robert S. McNamara Fellowship Program (developing country researchers).

The GEF emphasizes learning in its presentation of M&E policy where it states that knowledge management is considered the process by which organizations generate value and improve performance from their intellectual and knowledge-based assets, and that knowledge sharing enables partners to capitalize on lessons learned by gaining insight and understanding from experience, and by applying this knowledge to generate new knowledge. The website further states that the main purposes of knowledge creation and sharing of M&E information in the GEF are to:

- a. promote a culture of learning through better outreach to the project, program, and country levels by providing easily accessible learning products,
- b. promote the application of lessons learned to improve the performance of GEF activities, and
- c. promote feedback to the development of projects and programs.

Learning is an increasingly important topic and many organizations have, or are developing, programs and opportunities for learning amongst their constituents. We must make every effort possible to improve the way that we work, and learning from each other and from our failures and successes, offers fertile ground for this challenge.

### **Goal and objectives**

The goal of CEPF's Learning Strategy is to use learning to increase our conservation impact. The strategy has five objectives:

1. Ensure that grantees have the necessary knowledge and tools to achieve their conservation targets.
2. Use learning to encourage change (behavior, policy and funding availability) within a range of constituents (government, private sector, civil society) to meet the biodiversity challenge.
3. Increase awareness and engagement of CEPF stakeholders (donors, grantees and partners) in CEPF's learning opportunities.
4. Promote the key role that learning can play in helping biodiversity hotspot stakeholders meet CEPF's "graduation" targets.
5. Use the lessons generated by CEPF stakeholders to improve the Fund's ability to achieve conservation.

### **Outcomes**

The desired outcomes of the Learning Strategy are:

- By the end of FY21, at least 20 grantees, RITs and other stakeholders demonstrate a change in behavior due to a CEPF learning opportunity.
- By the end of FY21, at least 30 learning tools (webinars, videos, guidance documents, etc.) are evaluated as useful and effective.
- By the end of FY21, at least 50 grantees, and all active RITs, demonstrate increased individual capacity.
- By the end of FY21, 100% of technical reports and publications produced by grantees are available in CEPF's online document repository.
- By the end of FY21, at least 10 case studies are undertaken, their lessons shared, and 10 CEPF stakeholders demonstrate improved conservation practice after reflecting on the material.

### **The Learning Strategy**

CEPF will facilitate learning by promoting a supportive learning environment, effective and systematic learning practices and processes, and learning opportunities that allow for reflection and forward thinking. Learning is most effective when learners need to meet a challenge or when the material can be put to immediate use. CEPF stakeholders have full workloads, and learning opportunities must be relevant and appropriate. CEPF recognizes that there are many obstacles to learning, such as lack of time, lack of money, language barriers, and poor timing, and will aim to promote learning opportunities that strive to accommodate these problems. Above all, CEPF will seek to promote quality learning opportunities that will allow for identification of lessons, and time to reflect on how these might be used in the future to improve the way we do conservation.

The Learning Strategy will consist of five components: 1) Experiential learning; 2) Training; 3) Tools and resources; 4) Dissemination and outreach; and 5) Monitoring and evaluation. Each is described below and detailed in an attached logframe.

### **Component 1: Experiential learning**

This component aims to increase learning through experiential learning. Person-to-person, face-to-face, project-to-project, and RIT-to-RIT interactions will be supported. Such active engagement will be done through on-site activities, visits to pilot demonstration projects, learning exchange visits, and midterm and final assessment workshops so CEPF stakeholders will be able to learn directly from experts and fellow conservation practitioners. Exchanges between ecosystem profiling teams will also be encouraged, so that new teams can benefit from experts while they prepare their profile. Opportunities for engagement will also be explored, and will include events, discussion groups, or workshops that bring grantees and RITs together with other stakeholders such as government agencies and private sector entities. For example, mining is an increasing threat in many hotspots, and civil society lacks the skills to engage and negotiate with this sector. Sharing of lessons and experiences between grantees can help grantees to learn how to engage with the private sector. Exchange programs involving government and civil society can also be valuable learning experiences, for example grantees could invite government officers or policy makers to visit their projects to exchange experiences and perspectives.

Through this range of activities, CEPF stakeholders will gain skills and knowledge that they can use in implementing their own projects, and in interacting with new and challenging groups that they may never have worked with before. While standard tools such as guidelines and training manuals have their place, this component seeks to use face-to-face, on-the-ground experience as a means to facilitate sharing of lessons and experiences, to stimulate collaboration and networking.

### **Component 2: Training**

This component includes the formal training opportunities such as RIT trainings, and the RIT training workshops pertaining to application for CEPF funds, project design, project implementation and monitoring. It goes beyond these to address the current capacity building needs of stakeholders by including training in topics such as safeguards, M&E, fundraising, as well as technical themes including eradication of invasive species and climate change. These capacity building topics and technical themes were identified by grantees during the survey, and thus address current priorities and needs. Further, a range of methods will be explored including webinars, videos, toolkits and on-site training sessions.

### **Component 3: Tools and Resources**

This component will address the needs of CEPF stakeholders in terms of producing the tools and resources that they need to comply with CEPF requirements, achieve their conservation objectives, communicate with their constituents and achieve financial sustainability. Covered in this component are resources such as tutorial videos and webinars to help applicants apply for funding, and to help grantees comply with CEPF reporting requirements, understand safeguards, perform monitoring tasks and keep up to date on relevant topics.

### **Component 4: Dissemination and outreach**

This component addresses CEPF's challenge of reaching the range of audiences (governments, private sector, donors) that CEPF will have to address if we are to have a transformational impact. It covers all aspects of information and lesson sharing in online platforms, document libraries, webinars, the CEPF website and newsletter. Activities in this component will encourage grantees, RITs and the Secretariat to

reach out to external audiences in brownbag lunches and forums for and with international audiences, donors and the general public, and international conferences such as the IUCN World Conservation Congress in 2016. Efforts will be made to showcase CEPF’s work by publishing impact reports, and by supporting CEPF grantees to participate in speaking events and other forums. These outreach activities will promote information and lesson sharing with external audiences. While it is important to focus on immediate stakeholders, it is also imperative to go beyond this audience if we seek a transformation in the way that conservation is perceived around the world.

### **Component 5: Monitoring and evaluation**

This component covers monitoring of the learning strategy on multiple levels. Most important is that of uptake of lessons and learning. CEPF will strive to monitor whether successful practices are replicated, whether lessons learned are put to use by grantees, and how lessons arising from workshops and exchanges are recorded and used. Efforts will also focus on collecting and compiling information on lessons and best practices, and creating an environment where these lessons can be reviewed, analyzed and reflected upon. Because CEPF has a focus on civil society, and we employ similar conservation approaches/strategies around the world, but in different operating environments, we have the ability to identify the unique factors that lead to successes and failures of our efforts, as well as to identify common lessons learned and best practices. This exercise will also entail a focus on “failures”, as it is these lessons that will help grantees to do better in the future. This component will include monitoring change in capacity of individuals benefiting from CEPF’s learning opportunities, as well as monitoring of the opportunities themselves, to gauge effectiveness.

## **6. Budget**

The Learning Strategy, covering a five year period, will be implemented by the CEPF Secretariat, the Regional Implementation Teams, and the grantees. Many of the proposed activities are ongoing and currently being implemented by the CEPF Secretariat and the RITs, with existing funds. Exchanges and project to project visits will be incorporated into grantee project budgets. Projects that are designed as demonstration projects will be required to include funds to share lessons, including bringing stakeholders to see the project. RIT budgets already include many activities that are integral to the learning strategy such as conducting training sessions for grantees, and preparing materials to support grantees to do their work. The Secretariat effort on strategy is supported by staff time of the Senior Director of the Monitoring, Evaluation and Outreach Unit (25%), noting that other Secretariat staff from the Communications and Grants teams will be involved as appropriate. As stated earlier, learning is integral to the CEPF program. New funds, for which funds are not yet approved are as follows:

<b>Line in logframe</b>	<b>Activity</b>	<b>Estimated additional funds needed (USD)</b>	<b>Source of funds</b>
4	RIT exchange	200,000	Special projects
35	Showcase grantees at events	15,000	Special projects
39	Grantee attendance at international conferences	55,000	Special projects
		<b>270,000</b>	

### **Annex A: CEPF Learning Strategy Logframe**

ANNEX A. CEPF LEARNING STRATEGY LOGFRAME				
Component/Deliverable	Activities	Target thru FY21	Resources	Estimate of new funds needed
<b>1. Experiential Learning</b>				
CEPF stakeholders participate in exchange activities that allow for face-to-face interaction, and knowledge and lesson sharing.	RIT learning exchange conducted, with participation of past and current RITs.	2 RIT exchanges	Each exchange ~ \$100,000. New funds needed from Special Projects budget line	\$200,000
	Grantee learning exchanges (project to project)	15 project to project visits	Project proposals will include exchanges in their budgets. Exchanges benefiting grantees from multiple hotspots will need a Global grant funds.	
	Grantee/RIT-to-Government exchanges	10 grantee-government exchanges	Project proposals will include exchanges in their budgets.	
	Ecosystem profile team exchanges	4 exchanges between new and old profiling teams	Funded by the Secretariat, from Preparation budget line	
	Private sector engagement opportunities	10 grantee-private sector exchanges	Project proposals will include exchanges in their budgets.	
CEPF stakeholders engage in roundtable dialogs to learn and share information and experiences.	Meetings with government stakeholders	3 dialogs with government	Project proposals will include exchanges in their budgets.	
	Meetings with Private Sector Stakeholders	3 dialogs with private sector	Project proposals will include exchanges in their budgets.	
CEPF stakeholders get on the ground experience by participating in field visits and engaging directly with conservation practitioners.	Project site visits with RITs, Secretariat and donors	15 visits of grantees to other CEPF projects	Project proposals will include exchanges in their budgets.	
	Visits to demonstration projects	25 grantees visit demonstration projects	Project proposals will include visits in their budgets.	
CEPF stakeholders participate in midterm and final assessment workshops for all active hotspots	Each hotspot holds a midterm and a final assessment workshop, to be attended by grantees, partners, donors and other relevant stakeholders	12 assessment workshops	Grant funds	
	Each assessment holds a special session designed to capture and share lessons, possibly organized by theme	12 sessions	Grant funds	
<b>2. Training</b>				
RITs receive comprehensive training on all aspects of the CEPF program at the start of their five year grant	Training program for new RITs	4 new RITs are fully trained in CEPF policies and procedures	Secretariat and RIT funding	
	On-line and webinar trainings provided for relevant topics, including safeguards, M&E, reporting	Number of training opportunities	Grant and Secretariat funding	
	RIT to RIT site/office visits to pair new RITs with experienced offices	5 RIT to RIT exchange visits	Global grants, RIT funds	
	On site training for RIT members for selected topics	5 on site training sessions	Grant and Secretariat funding	
Thematic training opportunities provided to CEPF stakeholders on technical topics such as fundraising, monitoring and evaluation, climate change, invasive species eradication, etc.	Thematic training opportunities developed and offered to CEPF stakeholders (including webinars, external trainings, and professional development options)	5 thematic training opportunities offered	Grant and Secretariat funding	
Training opportunities provided to CEPF applicants and grantees	Training developed to assist grantees to design, implement and monitor their projects	15 training opportunities	Secretariat and RIT funding	
	Workshops or other events organized to support grantees to apply for funds.	10 workshops	RIT funds	
	Quarterly New Grantee Orientation Calls	20 orientation calls	Secretariat funds	
<b>3. Tools and Resources</b>				
CEPF stakeholders have the tools and resources that they need to comply with CEPF requirements and achieve their conservation objectives	Production of documents and guidance materials (hard copy, electronic, multimedia) on technical and administrative topics e.g implementation of safeguards, fundraising, M & E, private sector engagement.	15 items produced	Secretariat funding	
	Development of a RIT intranet/web portal for capacity building + training tools	1 web portal created and maintained	Secretariat funding	
	Production of a series of training videos addressing key topics pertaining to applying for CEPF funds, reporting on CEPF grants, etc.	15 training videos	Secretariat funding	
	CEPF stakeholders take advantage of formal training/exchange programs, e.g. the Conservation Leadership Program or the US International Visitors Program	5 stakeholders participate in formal programs	Grant funds	



CEPF grantees use learning to change their behavior	Learning page set up on CEPF website, including a calendar of events, articles, learning resources, etc.	Learning page set up and maintained	Secretariat funding	
CEPF midterm and final assessment workshops capture lessons and stimulate learning	Create a model/toolkit for the assessment workshops, to include sample agendas, exercises, opinion surveys, report formats, activities and tools.	1 toolkit created, and revised 3 years later	Secretariat funding	
<b>4. Dissemination and outreach</b>				
Information about CEPF's results is available to diverse audiences	CEPF document library	1 Document library set up	Secretariat funding	
	CEPF impact results available for use by stakeholders, in the form of reports, factsheets, website pieces and other mediums	Number of reports or other mediums reporting impact produced	Secretariat funding	
	Links established/maintained with IUCN Red List and other organizations to share CEPF's results	5 partnerships established	Secretariat funding	
CEPF grantees showcase work to CEPF donor constituents	Opportunities to showcase CEPF grantees at forums/events are identified, including those available through CEPF donors	5 events @\$3,000	<b>Special projects budget line- \$15,000</b>	\$15,000
CEPF grantees share their lessons and experiences	Webinars showcasing CEPF grantees, e.g. on international days of importance	5 webinars	Secretariat funding	
	Production of videos highlighting the work of grantees	5 videos	Grant funds	
	CEPF newsletter articles	15 articles	Secretariat funding	
CEPF is known for its work and impact	CEPF (staff, RITs and grantees) participate in international conferences and events	10 events	<b>Special projects budget line- \$55,000 for WCC in 2016</b>	\$55,000
	CEPF staff participate in panel discussions and interviews	10 engagements	Secretariat funding	
	Public & Private Sector speaking events + roundtables	10 events	Secretariat funding	
<b>5. Monitoring and evaluation</b>				
CEPF monitors uptake of lessons	Lessons identified, shared and followed up on with stakeholders	10 lessons learned taken up by stakeholders	Secretariat funding	
CEPF monitors implementation of the learning strategy	Evaluation tools administered to grantees participating in capacity building opportunities to ascertain change	To the extent possible, all participants are evaluated	Secretariat funding	
	Evaluation tools administered to grantees participating in learning opportunities to ascertain their effectiveness	To the extent possible, all learning opportunities are evaluated	Secretariat funding	
CEPF stakeholders identify and analyze lessons	Grantees record lessons in project final reports	All final reports contain lessons learned	Grant funds	
	Grantees share and reflect on lessons learned	10 case studies	Grant funds	
CEPF Secretariat uses stakeholder lessons to improve its work	CEPF collects and compiles information on lessons and best practices	Continuation of the series	Secretariat funding	
	CEPF reflects upon lessons learned and integrates these into portfolio and program development	Ongoing	Secretariat funding	
<b>TOTAL</b>				<b>\$270,000</b>