



# Designing and implementing impact based conservation projects



A Master Class organized by the Tropical Biology Association for future CEPF grantees  
in the Eastern Afromontane Biodiversity Hotspot

13 – 17<sup>h</sup> November 2017  
Dar es Salaam, Tanzania

*Funded by Critical Ecosystem Partnership Fund*

**CRITICAL** ECOSYSTEM  
PARTNERSHIP FUND

## Executive Summary

The Master Class helped Civil Society Organizations (CSOs) in the Eastern Afromontane Biodiversity Hotspot improve seven priority conservation projects for funding by the Critical Ecosystem Partnership Fund (CEPF). The ultimate aim was to ensure that, in their next funding round, CEPF awarded grants to projects that are both ‘well-thought through’ and have a greater chance of delivering real and measurable conservation impacts on the ground. Related, was the need to ensure that the CSOs’ understood, and properly aligned their projects to CEPF’s monitoring and reporting requirements from the onset.

The 13 conservation managers in attendance (46% of who were female) included one technical, and one finance person from each of the participating CSOs except for one CSO that did not send a finance person. This mix of participants was necessary for cross-sharing of ideas between technical and financial teams right from the project design phase, something that is often overlooked yet so critical to the success of projects. It was also important in helping institutionalize the preparation of CEPF by engaging key persons who will be responsible in managing the winning projects, afterwards. The participants represented seven CSOs working in Kenya, Uganda, Tanzania and Rwanda.

The 5-day Master class had two broad themes. First, **capacity building** that provided participants with the fundamental skills and background knowledge in project design and implementation. Second, **proposal revision and submission** that ensured projects we uploaded into the CEPF’s Conservation Grant System. six out of the seven projects were finalized and submitted by end of the Master Class, while the seventh was submitted a day after.

At 4.2 overall score (on a scale of 1 = “very poor” to 5 = “Excellent”), the Master Class was highly rated by the participants.



## Why the Master Class?

*"This training has helped me a lot in understanding how CEPF works. How budgets should be linked to activities with every specific item clearly being stated. It has also helped me understand how the finance and project [technical] team should work together to design & implement impact-based projects!"*

Cecilia Mueni, Finance Officer, Nature Kenya.

Conservation managers often face problems when implementing their projects because of weaknesses in project design. For example, projects often lack appropriate indicators, or project plans do not incorporate the important aspect of monitoring. A related problem occurs where projects are prepared and submitted with limited inputs of the finance team. This makes it hard for finance managers to understand how resources were allocated, and to manage project finances effectively. These weaknesses are difficult to fix once the project is being implemented after it has been funded.

The Tropical Biology Association (TBA) recognizes that rectifying project design flaws can significantly enhance project delivery resulting in better projects. This understanding underpins the delivery of this Master Class, coupled with the shared need to ensure CEPF's limited resources are allocated to projects that deliver real conservation impacts on the ground.

## Partnership with a purpose

*"Once I get back to my organization I will write a short report on lessons learnt to share with colleagues and we shall implement some of the key lessons like including a clause for functional responsibility for program staff."*

Scovia Kabusingye, WCS, Uganda.

In a truly collaborative initiative the TBA and CEPF Regional Implementation Team (RIT) organized the Master Class on '*Designing and Implementing Impact-based Conservation Projects*' from 13<sup>th</sup> to 17<sup>th</sup> November 2017, in Dar es Salaam, Tanzania'.

This Master Class was particularly unique as it combined proposal review working sessions with value-addition training on project design and monitoring as well as on CEPF's project management tools, procedures, and requirements. The approach allowed the participants to apply what they learnt in real time as they continually revised proposals they had earlier forwarded to CEPF. It also afforded the participants the rare opportunity to interact with their future funder – the CEPF – and engage constructively to ensure their final proposals met standards set out by CEPF. It was also perhaps the first time for both the technical and financial teams, both at CSO level and hotspot level, to work together on projects they are commit to implementing in hotspot.

## Capacity built

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*"I have finally learnt about project design and how to make use of the right activities to achieve the desired impact."*

*Thierry Aimable,  
Rwanda*

The Master Class followed an “active learning” approach based on interactive talks and practical exercises as well as peer-to-peer learning. We designed mixed classes attended by both technical and the finance teams as well as parallel classes that separately articulated specific issues relevant to either of the team.

The participants learned new skills and gained experience in:

### Designing projects and planning outcomes

The managers learnt how to test the assumptions and logic of their project plans, and set realistic indicators to track progress towards achieving their desired project objectives. They also learnt how to map impacts starting from their desired impacts and linking them to specific project activities in an ‘end-to-start approach’.

### Budgeting and financial management

This was a parallel session for the finance team with some of the presentations also attended by the technical persons. The class covered key issues in preparing budgets and especially linking resources to project activities. Participants also learnt about CEPF financial standards and requirements aimed at ensuring proper management of project funds, afterwards. Aspects covered included CEPF’s procurement procedures, allowable costs and reviewing budgets, CEPF contracting process and how to handle third-party funding, and financial reporting on CEPF grants.

### Stakeholders, Gender, and Governance

All attended this class where they learnt how to integrate and engage with diverse stakeholders at various stages in project planning and implementation. They also learnt about gender issues in conservation and how important gender concerns should be addressed when preparing projects. Governance was explained through a practical exercise and role play.

### Communications

The participants were trained about story telling as well as how they can use stories to publicise their work. They applied this skill by writing a newspaper article in an exercise designed around the expected impacts at the end of their proposed project.

## **CEPF tools and procedures explained**

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Presence of CEPF and the CEPF RIT staff provided a good opportunity to explain key tools and procedures in preparing and managing CEPF grants. The participants were introduced to the following tools and procedures that are both critical and essential to CEPF.

### **Key tools in monitoring CEPF projects**

**CEPF Indicators** - approved set of parameters that the CEPF uses to measure the impacts of their investments and to monitor the implementation of CEPF's Strategic Framework.

**Gender Tracking Tool (GTT)** - a self-assessment tool that organizations can use to understand if and to what extent they have integrated gender considerations in their programs and operations.

**Civil Society Tracking Tool (CSTT)** - a score-based tool that organisations can apply to assess their capacity. The tool asks 20 questions across five thematic areas: human resources, financial resources, management systems, strategic planning, and delivery.

**Management Effectiveness Tracking Tool (METT)** - a tool that CEPF uses to collect information on the management effectiveness of protected areas as a result of CEPF investment.

**Stakeholder Engagement Plan** - a CEPF tool aimed at assisting project managers to engage effectively with stakeholders. It requires managers to identify the specific project activities that enhance stakeholder engagement.

### **CEPF procedures and requirements**

**Procurement procedures** - a structured procedure for consulting the market for the purchase of goods and services.

**Safeguards** – set out policies that CEPF uses to appraise projects on their environmental and social ramifications. This is aimed at preventing and mitigating any harm to people, at ensuring environmental and social concerns are incorporated as part of project cycle management.

**Ethics and fraud** – standards that apply to all persons and entities which receive, are responsible for the deposit or transfer of, or take or influence decisions regarding the use of CEPF grants.

By the end of the Master Class, each manager ensured they aligned their project to these tools, procedures, and requirements. The relevant items were then completed in the CEPF's Conservation Grant system.

## Feedback

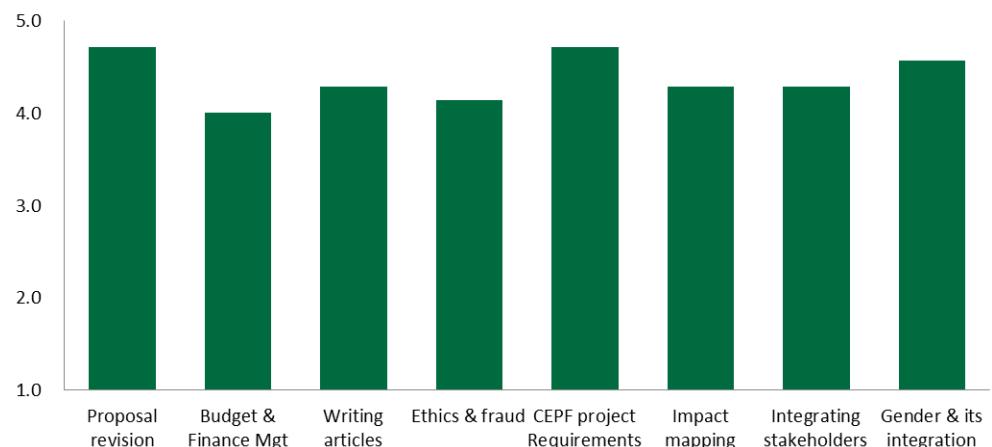
*"The knowledge I have gained in this master class will help me work better on the theory of change; think through the proposed activities, assumptions & key stakeholders and safeguards."*

*Simon Nampindo,  
Uganda*

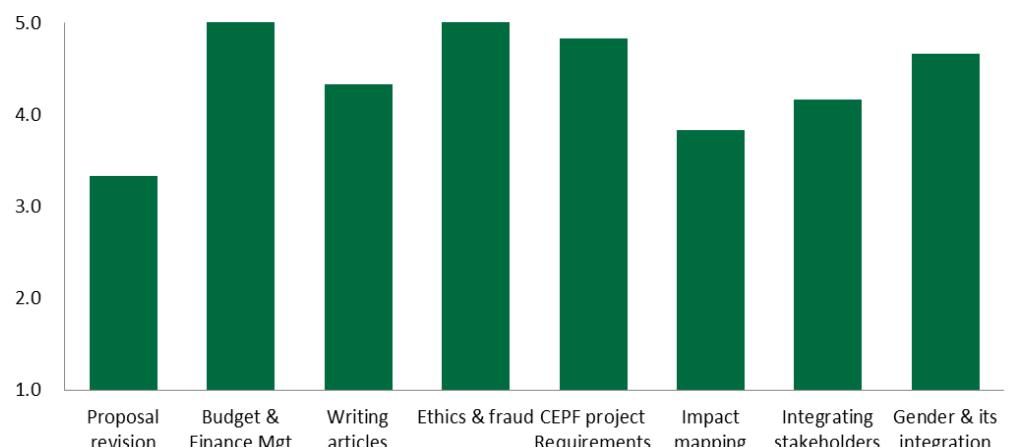
### Level of Knowledge

At the end of the master class, the participants rated their level of knowledge on the topics that were covered in the master class as presented in the graph below. Using a scale of 1 ("very poor") to 5 ("Excellent").

Level of Knowledge for Project Managers



Level of Knowledge for Finance Managers



**4.4** Overall rating of the course by the participants.

## Who we trained

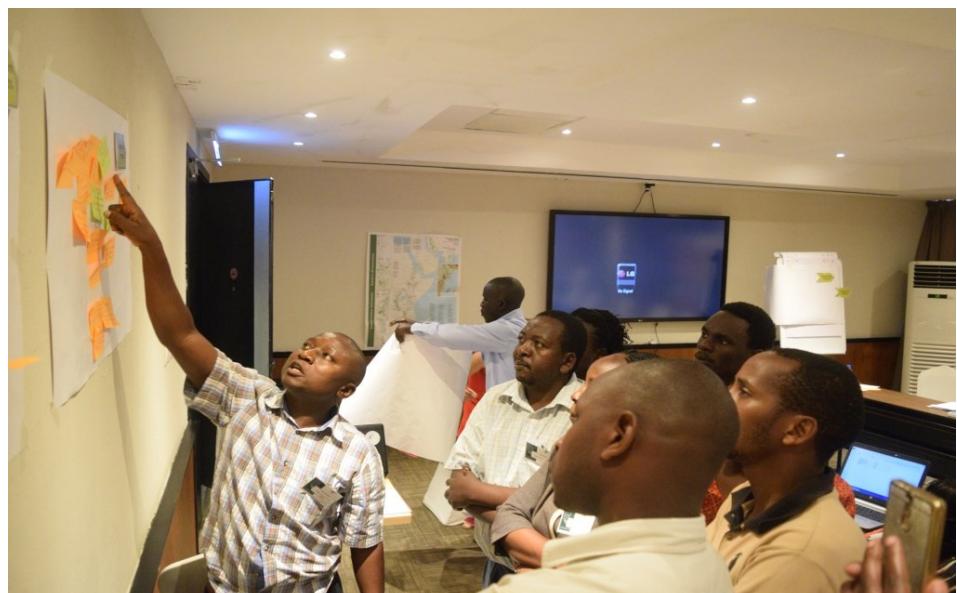
*"With the knowledge I have gained in this training I will share with my colleagues and also use the skills gained to improve my project implementation."*

*Thierry Aimable,  
Rwanda.*

The 13 participants (46% of whom were female) came from seven civil society organizations in the Eastern Afromontane Biodiversity hotspot:

Country	Civil Society Organization	Name (*Finance)	Gender
Kenya	Kijabe Environment Volunteers	Julius Kimani	M
		Zipporah Mugure*	F
	Nature Kenya	Paul Gacheru	M
		Cecilia Mueni*	F
Kenya	Wetlands International	Titus Wamae	M
		Judith Otindo*	F
Rwanda	Forest of Hope	Thierry Aimable	M
Tanzania	Tanzania Forest Conservation Group	Bettie Luwuge	F
		Christina Ntambi*	F
Uganda	Chimpanzee Trust	Kasozi Nebat Athuhura	M
		Otim Samuel*	M
		Simon Nampindo	M
	Wildlife Conservation Society	Scovia Kobusingye*	F

Six out of the seven technical persons (86%) in attendance were male, while five out of the six finance persons (83%) in attendance were female. Both the technical and finance persons from the Tanzania Forest Conservation Group were female, while only male participants came from the Chimpanzee Trust.



## The trainers

The Master Class was designed and coordinated by the Tropical Biology Association, in collaboration with the Eastern Afromontane Regional Implementation Team at the BirdLife Africa Partnership Secretariat in Nairobi, Kenya. The RIT also has offices in Kigali, Rwanda.

### Course trainers, resource team and their institution of origin

Tropical Biology Association Kenya & UK	Dr. Rosie Trevelyan (RT) Mr. Paul Mugo (PM) Ms. Ann Nyambura (AN)
BirdLife International Africa	Ms. Maaike Manten (MM) Mr. Jean Paul Ntungane (JP) Ms. Dalphine Adre (DA) Ms. Priscila Borba (PB) Mr. Khamis Mucumbitsi (KM) Mr. Jude Fuhnwi (JF)
Critical Ecosystem Partnership Fund	Mr. Dan Rothberg

See appendix 1 for the training programme for the Master Class.

## Looking ahead

*“Networking and peer to peer learning. Other participants built my capacity too.”*

*Nebat Kasozi, Uganda.*

Feedback received from both the Finance and the Project Managers indicated that they all thought it was extremely important for both groups to be present for the Master Class since it helped them understand the project and each other's role better.

Therefore, looking ahead it would be essential for TBA and CEPF (including the RIT) initiate plans for the next Master Class early, and engage actively throughout the planning phase to ensure even more seamless integration of finance and Project management training.

The training also created strong links between the participants as demonstrated in their continued interaction through a WhatsApp group created by the TBA.

## Funding

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The Master Class was funded by Critical Ecosystem Partnership Fund, under the project '*Systematic Evaluation of CEPF and Capacity Development of CEPF Grantees*', which is being implemented by TBA.

CEPF is a joint initiative of l'Agence Française de Développement, Conservation International, the European Union, the Global Environment Facility, the Government of Japan, the MacArthur Foundation and the World Bank. A fundamental goal is to ensure civil society is engaged in biodiversity conservation.



## About us

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The Tropical Biology Association helps safeguard natural resources in Africa and other tropical regions by delivering innovative training and support to the people responsible for conserving nature.

We run practical, tailor-made courses in Africa and south-east Asia. By sharing expert knowledge across different cultures, we help ensure that the conservation community has the essential skills and capacity to manage resources sustainably.

To make sure our training has maximum impact, we provide on-going support for our trainees. This ensures they apply their new skills afterwards and become active members of a dynamic international network.

Our growing network of over 1900 alumni spans over 70 countries (including 1000 from 29 countries in Africa) and is creating a potent international force for conserving precious habitats and threatened species.

## Contact us

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## Appendix 1: Training programme (see trainers list for abbreviations)

### Monday 13th November 2017:

Setting the scene		
8:00	<b>Registration:</b> First opportunity for networking and interacting	ALL
8:30	<b>Brief:</b> Welcome and introductions	PM
9:15	<b>Brief:</b> Who is who (CEPF/RIT); CEPF's expectations	DR/MM
9:35	<b>Speed talks:</b> Participant presentations	PM
10:15	<i>Tea/coffee break</i>	
10:30	<b>Brief:</b> About the Master Class	RT
Designing projects and planning outcomes		
10:45	<b>Talk:</b> Designing projects & planning outcomes	RT
11:15	<b>Exercise:</b> Impact mapping	PM
12:30	<i>Lunch break</i>	
13:30	Exercise: Impact mapping	RT
15:00	<b>Talk:</b> CEPF indicators	DR
15:30	<b>Talk:</b> Feedback session on Impact mapping	RT
16:00	<i>Tea/coffee break</i>	
16:30	<b>Working session:</b> Review of project logic & indicators	ALL

### Tuesday 14th November 2017

Budgeting and financial management		
8:30	<b>Brief:</b> Expectation for joint sessions and parallel meetings	DA
9:00	<b>Working session:</b> Budget and allowable costs	PB
10:00	<i>Tea/coffee break</i>	
10:30	<b>Brief:</b> Contract walk through	PB
11:00	<b>Talk &amp; exercise:</b> Procurement overview	DA
12:00	<b>Talk &amp; exercise:</b> Supporting documents: overview	DA
12:30	<i>Lunch break</i>	
13:30	<b>Working session:</b> Work in Conservation Grants	DA/MM
	<b>Talk:</b> Third-party funding	PB
14:00	<b>Talk &amp; Exercise:</b> Reporting in conservation grants	DA/PB
15:30	<i>Tea/coffee break</i>	
16:00	<b>Brief:</b> Review of day 2	DA
16:10	<b>Working session:</b> One-on-one; Conservation Grants updates	ALL

## Wednesday 15th November 2017:

Stakeholders, Gender, Governance & Ethics		
8:30	<b>Talk:</b> Community diversity	PM
9:15	<b>Talk:</b> Gender in conservation	RT
9:45	<b>Talk:</b> Gender - CEPF Expectations, tracking tool	MM
	<b>Finance team exercise:</b> Reconciliations	DA/PB
10:00	<b>Exercise:</b> Completion of Gender Tracking tools	MM
10:30	<i>Tea/coffee break</i>	
11:00	<b>Role play:</b> Governance	AN
12:15	<b>Talk:</b> CEPF Safeguards	JP
12:30	<i>Lunch break</i>	
13:30	<b>Brief:</b> Stakeholder engagement plan	DR
13:45	<b>Working session:</b> Completion of CEPF Stakeholder engagement plan	MM
14:30	<b>Talk:</b> Ethics and Fraud	DR/PB
15:30	<i>Tea/coffee break</i>	
16:00	<b>Brief:</b> Other CEPF Monitoring tools and requirements	DR/MM
16:15	<b>Working session:</b> Completion of Stakeholder engagement plans, Gender Tracking Tools, CSTT, METT, Safeguards	DR, MM, JP

## Thursday 16th November 2017:

Communications and reporting		
8:30	<b>Talk &amp; Exercise:</b> Story telling - how to write a story about your project, for publication (website)	JF
10:30	<i>Tea/coffee break</i>	
11:00	<b>Exercise:</b> writing publicity articles	JF
11:30	<b>Working session:</b> Work in Conservation Grants	ALL
12:30	<i>Lunch break</i>	
13:30	<b>Working session:</b> Work in Conservation Grants	ALL
15:30	<i>Tea/coffee break</i>	
16:00	<b>Working session:</b> Work in Conservation Grants	ALL

## Friday 17th November 2017:

Finalising proposals & wrap up		
8:30	<b>Working session:</b> One-on-one sessions; Grants updates	ALL
12:30	<i>Lunch break</i>	
13:30	<b>Working session:</b> One-on-one sessions; Grants updates and submission as they finish	ALL
15:30	<i>Tea/ Coffee break, &amp; course assessment</i>	
16:00	<b>Working session:</b> One-on-one sessions; Grants updates and submission as they finish	ALL
16:30	<b>Closing session</b>	AN