

CMP Working Group

Operationalising¹ the Open Standards

Refer also - [Meeting Notes document](#)

Overview/Statement of Need

We all share the task of managing information associated with planning, implementing, and tracking conservation projects. Independent of what systems we use (if any), decisions are being made regarding what actions & monitoring to implement, who is leading the work, who else is helping, when the work be done, and how much it's going to cost. We all face the need of assessing, in some way, whether we are doing what we said we would do and whether the intended results are being achieved.

Even though most conservation organizations use standardized systems for tracking financial information, the actual conservation work we do is typically captured using ad hoc systems – most often in spreadsheets, documents, or presentation software. The systems we use to operationalize our plans are typically not efficient – it takes a lot of time and effort and often involves copying and pasting information across multiple applications.

We hypothesize that if we pool some of our intellectual and financial resources together then we can create a flexible solution that substantially improves the efficiency of our current systems so we spend much less time managing and reporting on information. That we can end up with touch-once solutions where information can be easily entered and updated, where the most up-to-date information is always accessible to all team members, and reports tailored for different audiences can be created with minimal effort. A particular emphasis is on delivering concise project reporting to management, as a way of encouraging demand for results-based management and further use of the Open Standards as a means to this end.

This working group was initiated at the 2017 CMP Retreat, and refined at the 2019 CMP Retreat, with a particular focus on identifying the shared priority needs for systems improvements.

¹ “Operationalising” generally refers to the routine function of putting processes and standard practices into use, and exploiting all of their key features. “Institutionalisation” generally means “the building of infrastructure and culture that supports practices so that they are the ongoing way of doing business. The result is the deployment and implementation of processes that are effective, usable, and consistently applied across the organization. Institutionalisation implies that the process is ingrained in the way the work is performed and there is commitment and consistency to performing the process.”

Scope

The working group's scope aims to cater for the full range of organisational sizes, noting aspects that need more / less attention for organisations at different sizes.

Objectives

- Identify the systems features we need to capture, manage and share conservation project information, and to integrate this information with other core business processes.
- Identify the current solutions addressing these features, define the key gaps, then look for ways to improve and integrate existing systems, and build new components, in order to fill the gaps.
- Develop guidance and case-studies in the use of these improved systems.
- Identify the organisational enablers that can be leveraged, and barriers to be overcome, in order to operationalise OS
- Share relevant knowledge, tools and resources; provide a professional network; and generally improve skills amongst the CMP membership in this area.
- Use a "systems" view to show the benefits of OS - extend the common explanations of OS benefits (which focus on better design of conservation efforts / effectiveness) to demonstrate the broader benefits offered through use of systems and data (greater efficiency, improved information flows to support data-driven decision-making, improved workflows across the organisation).

Working Group Activities

The actions identified to date have been grouped into 4 strategies -

1. Support the "integrators" to operationalize projects (integrators = working group members)
2. Build the technology to support our vision
3. Link into the broader organisation
4. Build management demand for better information

Priority is given to the activities that help us in our day-jobs and that can usefully be discussed in group meetings.

Strategy - Support the "integrators" to operationalize projects

Activity	Description	Would this help your day-job?
Share experiences with each other	Organise demonstrations at our working-group webinars to share what our organisations have done / are doing in this area, to learn from each other and to tap into the collective wisdom of the group to help with particular challenges being faced	CK, DS, AS
ID needs from our orgs	Identify key needs perceived by folks in the working group, prioritise and set up activities to meet them. Aim to share experiences and avoid pitfalls	CL
Share info about resources needed	Share information about the resources needed to operationalize conservation project information - such as FTE's, roles, implementation timelines and plans; - Info on FTEs / roles compiled January 2018	CL, AS
Build capacity in business-process modelling	Share references to key resources on business process modelling; maybe hold an introductory webinar to outline the concept and for folks to talk about the key things they have learnt in this area. Then decide what (if any) further support the group needs and/or can provide to each other	DS
Build capacity in business process integration	Use working group meetings to share experiences on integrating conservation project information with other processes. Arrange conversations / presentations from people who have already been on this path, to help others map out a direction for their own work	CK, DS, AS
Case studies to demonstrate benefits	Eg use the Business Process Model as a base and demonstrate the linkages in use and the benefits that flow	CK, DS, AS
Identify the guidance required	Identify the broad types of guidance needed for operationalising the OS ; prioritise the key needs; locate existing guidance, and identify gaps to be filled, Short-term - how to make best use of existing tools to operationalize conservation project information. Longer-term - enhance guides to include new technologies and build on experiences. Some guidance documents were developed as part of a Fulbright project (available in this toolkit) and these need peer review; other types of required guidance also need to be identified. Systems improvements to Miradi and Miradi Share were also identified (available here), including mapping of the OS data types not yet supported by systems (available here); these need to be reviewed and prioritised.	DS
Identify the Organisational enabling conditions and context	For example - - what roles and responsibilities are required to make Operationalisation happen? - How can we leverage the role of external champions to help internal people get support at a senior level; - How to influence decision-making audiences on the <i>benefits</i> of results-based management (as opposed to communicating just the specific <i>features</i> of OS); - How to link results to performance evaluation of roles	DS

	- What additional processes need to be identified to support OS projects? (such as processes for longer-term funding; processes for exiting;	
Develop a “picture” of the pieces of the framework / architecture that need to be addressed	help people see the whole picture,. E.g. look at Organisation self-assessments; CMP's original Theory of Change for adoption; Conservation Capability Maturity Model; Conservation Business Model (the arrows relate to Will's enabling conditions)	DS, AS
Develop the "How To" Guides	- Agree the architecture - ensure we have the right pieces, and connections - Agree priorities and assign responsibilities for initial drafts - For priority gaps, identify relevant experts to be consulted / involved - Agree the process for review / acceptance / “publication” of guidance once it is produced	AS
Decide on best way to deliver guidance	Options are documents attached to OS website, videos, wiki, worked examples etc	
“Simple Easy OS”	Collaborate with the next-steps on this CMP activity - might help develop guidance related to organisations of different sizes; (see Will re next steps on this)	DS, AS, CL
Take the question-based approach	Identify the key questions of decision-makers at different levels, and at different stages of a project's lifecycle; then identify the information required to answer them. Would help in designing reports for managers	CK, DS, AS
Program-level coaching	Talk to CCNet about creating additional resources to help coaches support teams moving beyond the perspective of individual projects to cover the program-level / org-levels. Includes things such as multi-project reporting and the information management / classification schemes needed to support this	

Strategy - Build the technology to support our vision

Activity	Description	Would this help your day-job?
Identify / share systems that are out there	Includes how to map to these systems - fields approach those tool makers... Develop examples for exchanging data with common systems	CK, DS, AS, CL

Convene our IT folks	Convene IT staff in our orgs, to identify needs / review OS systems / ultimately support implementation of systems to capture and share conservation project information	DS, AS, CL
Figure out how to build Miradi / MS into IT Ecosystems	Data standards; how M/MS fit into data exchanges with other business flows (eg budget info into finance systems)	DS, AS, CL
Collaborate to build systems together	Work together to build shared systems, rather than each org spending money on reinventing wheels. Enhance existing systems and fill gaps; build new systems where required.	DS, AS, CL
Learn from other shared-system efforts in other fields	Review other shared-system efforts and identify key learnings so we can map a clear path and avoid the pitfalls. Ask the group for examples. e.g. Shared Measurement Systems covered in SSIR articles;	DS, AS
Collaborate to raise funds to support systems development	Pooled funding will get systems improved / developed faster than if each org tries to do their own thing. Collaborate to raise - and to use - the funds	DS, AS, CL
Create data standards to allow flow of info	Data standards are required to allow flow of information between key systems; e.g. data flows to Financial Management processes, Fundraising processes, people-management processes (need to identify the flows required, whether they are one-way or two-way, etc). Standards also required for info to flow amongst systems supporting conservation processes - eg spatial systems, field data collection, monitoring databases, reporting processes.	DS, AS, CL
Dashboards for different audiences	How to make this happen; what tools are available; include spatial information; examples of reports that will generate interest in building the systems	CK; DS, AS

Strategy - Link with the broader organisation

Activity	Description	Would this help your day-job?
Facilitate meetings between orgs	Get friendly folks to convene - beyond the conservation folks in orgs, to include IT, accounting / finance, fundraising	CL,
Map key interactions between conservation and	Use the Business Process Model - probably start with one business process and identify the information that currently flows, or should flow, from conservation projects. Look at how it currently flows, and how that flow could be streamlined, Use this to communicate the potential	CL,

other org processes	benefits from streamlining the flow, and help build the case for support. Then work through the other processes	
Per audience	What do we need to be able to support this function; stand in their shoes to see what they need from conservation info in order to do their role	
Org roles & functions	For full RBM, what roles and responsibilities are required within an org	Done - refer folder for notes & resources

Strategy - Build management demand for better information

Activity	Description	Would this help your day-job?
Articulate the vision / benefits - making the case	Needs to be concise and powerful. - internal voices - external companies, partners etc Show how what OS delivers can and does address their needs - Articulate the key benefits - Evidence from projects applying OS (vs those that don't?)	AS
Work with rating agencies & others to build pressure	Senior management give attention to the organisations areas of greatest risk - look at risk environment and identify where risk can be reduced / better managed if conservation project information is systematised. Key example is Ratings Agencies and their desire for seeing reporting of measurable results. Other example are groups raising expectations of organisational performance (eg the "Performance Imperative" group).	DS
Demonstrate applied value	Demonstrate applied value of systematised conservation project information, by building reports that meet needs of managers at various levels. Use examples from other orgs if that's helpful initially.	DS, AS
How do we get in front of the management audiences?	CMP and CCNet need; how do we leverage our existing connections; how can we personalise the delivery of our message	DS, AS

Final Products

Note from group: Avoid “creeping complexity” and mass of guidance; think of audiences and tailor guidance to key groups; point people towards the guidance that solves particular situations

- Guidance materials to support operationalisation of OS
- Guidance on systems supporting Implementation, adaptation and full-cycle projects
- Guidance on integrating conservation project information with other organisational systems (eg finance systems, organisational dashboards)

Working Group members

- Victor Ramos - Conservation International (copy Annette Olsen on info)
- Charles Latrémouille - Nature Conservancy Canada
- Erica Cochrane - International Crane Foundation
- Dave Kramer - EcoLogic
- David Williams - AWF
- Will Beale - WWF UK
- Nico Zeltner & Florin Feraru - WWF Intl
- Brad Northrup - CCNet
- Nathan Herschler - IFAW
- JG Collomb - WCN
- Christina Kakoyannis - NFWF
- Catherine Payne - Durrell
- Patrick Crist & Lesley Honey - NatureServe
- Lilian Pintea and Marc Fourier - Jane Goodall Institute
- Dan Salzer - TNC
- Nick Salafsky - FOS
- Caroline Stem - FOS
- Marcia Brown - FOS
- Annette Stewart - Bush Heritage