

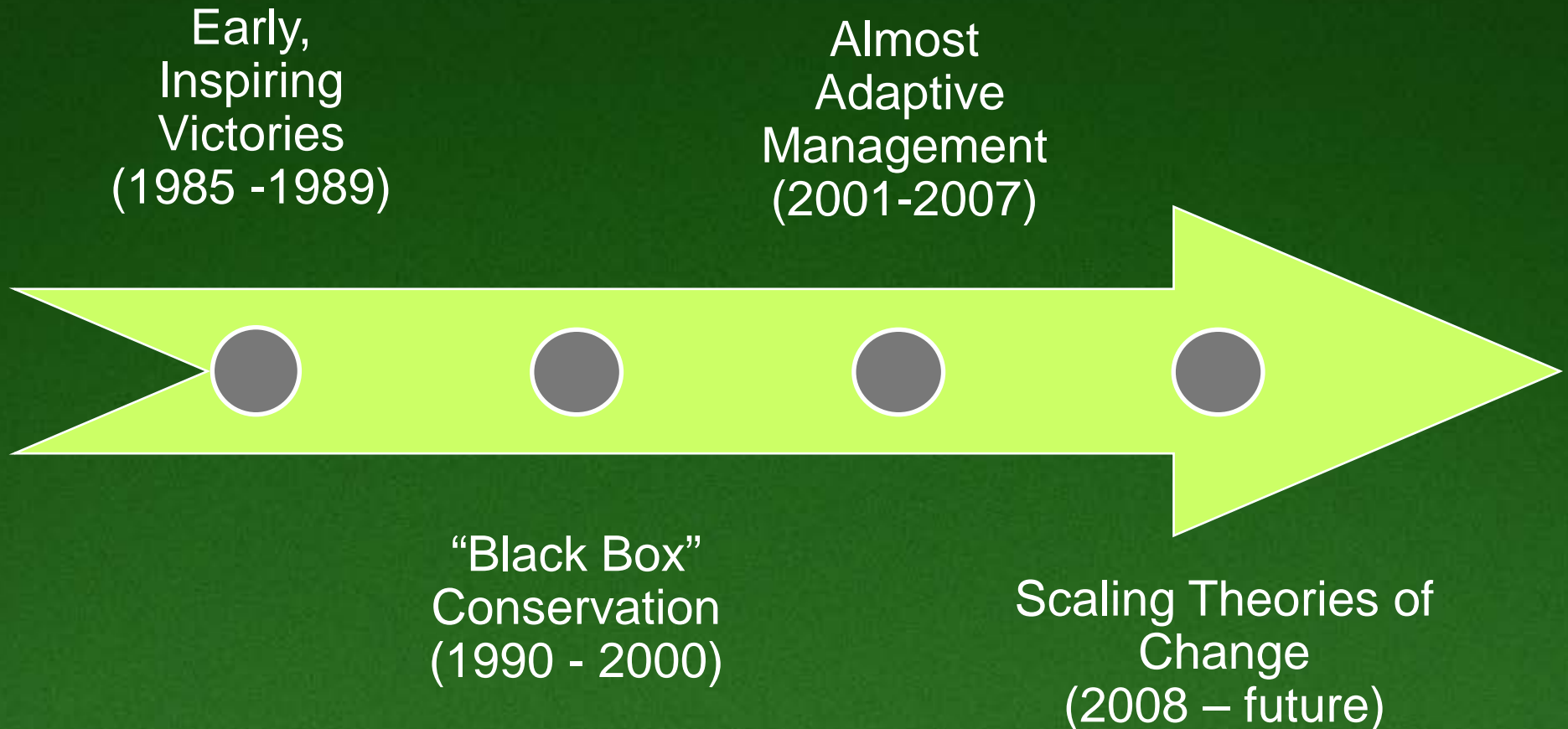


If You Love Your Program, Change Your Organization

Brett Jenks, President & CEO

RARE
inspiring conservation

Rare's Program Evolution over Time



Change at Rare Since 2000

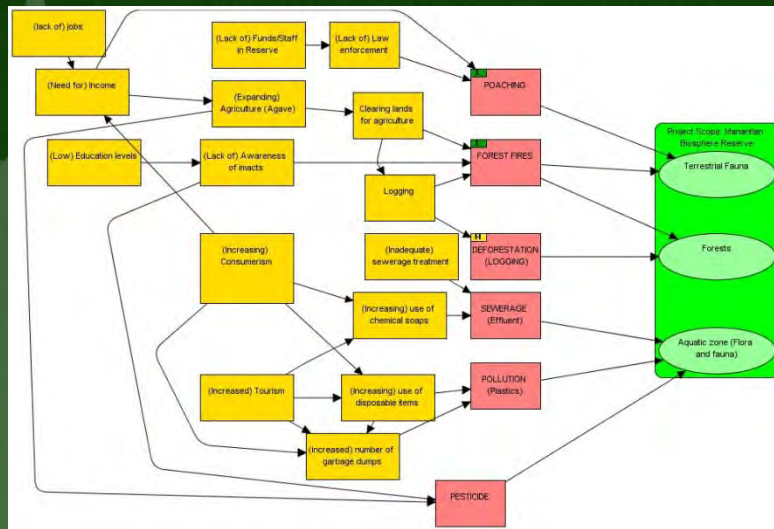
Staff	7 to 47
Board	30 to 16
Budget	\$850k to \$8M
Net Assets	\$400k to \$17M
Programs	Contracted from 4 to 1
Reach sites/year	Expanded from 5 to 45
Theory Change	“Black Box” to Theory of
Measures	KAP to K,A,IC,BR,BC,TR,CR
Monitoring	Almost Nothing to Almost Everything





Paul Butler helped save the St. Lucian Parrot by inspiring national pride





Salvador Garcia
instilled Mexican
pride to reduce
forest fires

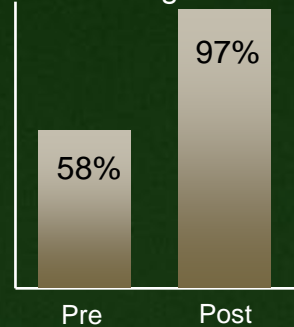
Forest Fires

Bomb Fishing

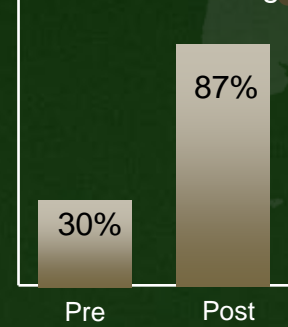


Ni Putu Sarilani Wirawan helped create the 1M acre Togeian Islands

% know negative impacts of overfishing



% fishermen open to using alternative fishing practices

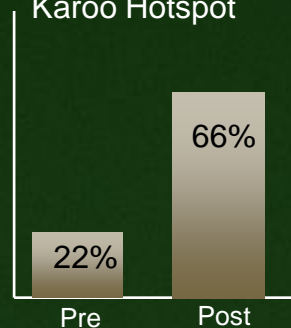


Overgrazing

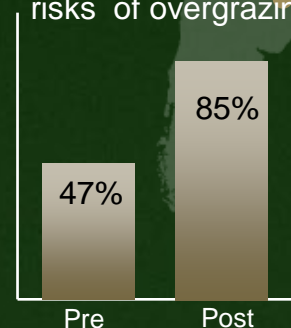


Morne Farmer helped create a new watershed reserve in South Africa

% know of the Succulent Karoo Hotspot



% farmers who recognize risks of overgrazing



Rare Pride Campaigns Versus Public Health Benchmarks (as of 2005)

	Rare Campaigns	Public Health Campaigns
Knowledge	17 pp	13 pp
Attitude	6 pp	3.5 pp
Practice	5 pp	12-14 pp

K + A +



Campaign Theory of Change (2008)

Knowledge

What knowledge is needed to increase shift attitudes?

Interpersonal Communications

What conversations are needed to encourage adoption of new behaviors?

Behavior Change

What behavior for which group must change in order to reduce this threat?

Conservation Target

What are we trying to conserve?

K + A + IC + BR → BC → TR

CR

Attitude

What attitudes are needed to induce new conversations?

Barrier Removal

What are the barriers to the adoption of these new behaviors? Social? Political? Economic? Technological? How can we remove them?

Threat Reduction

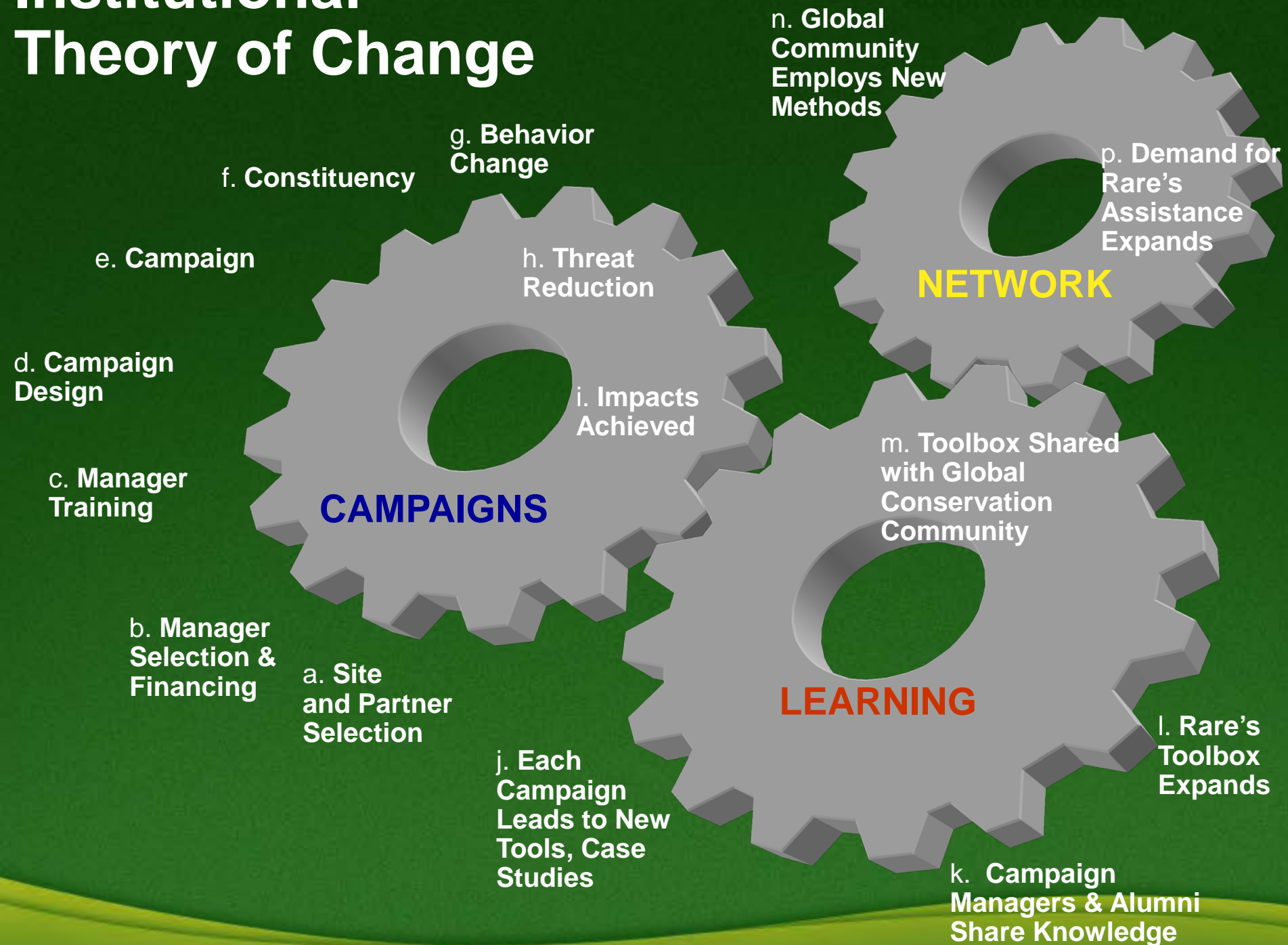
What are the main threats to biodiversity? Which can we reduce?

Goal by 2011: Launch 287 Campaigns

	2007	2008	2009	2010	2011
New Universities	-	1	1	1	1
New Regional Staff	3	12	9	6	3
New Campaigns	22	43	62	78	82



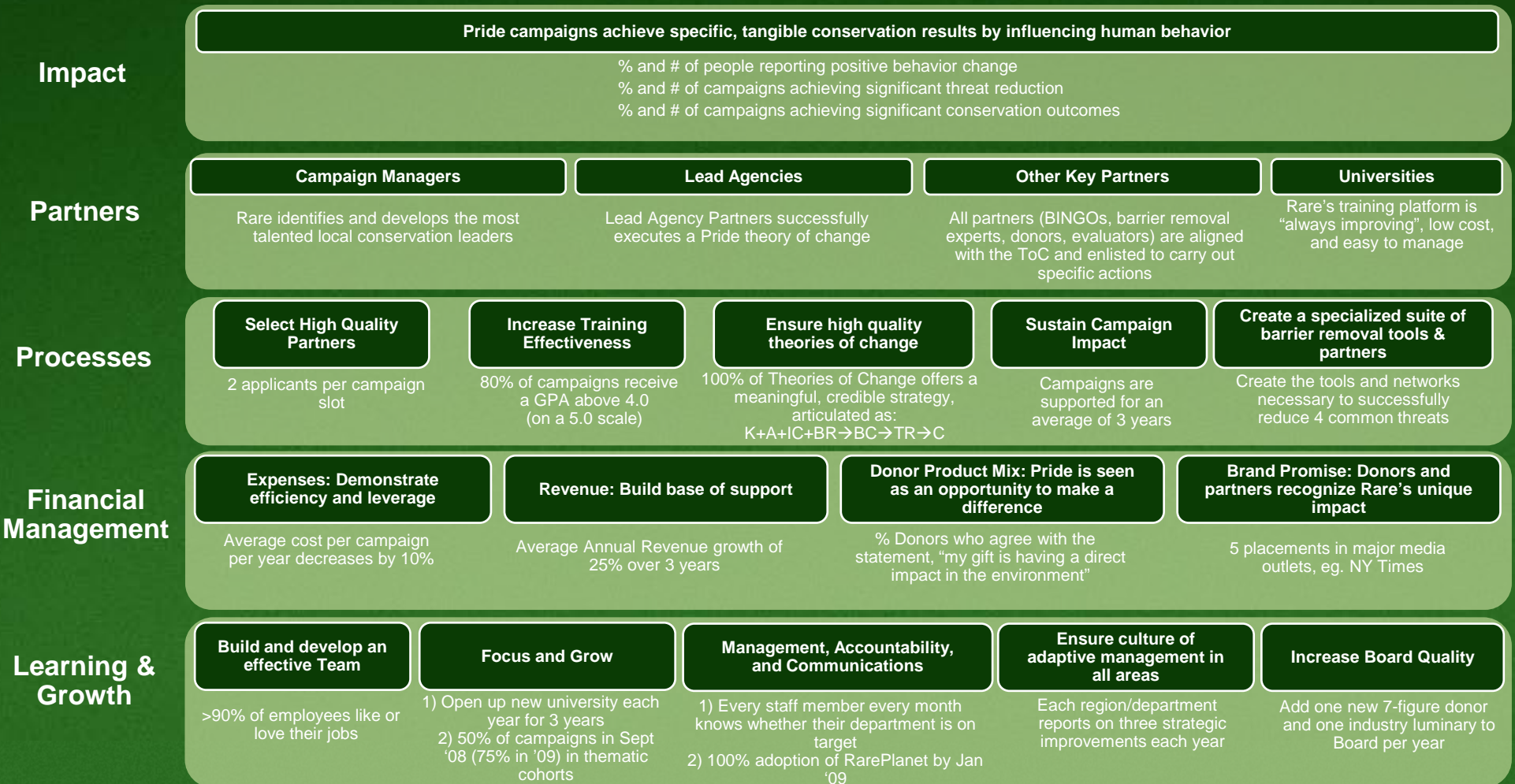
Institutional Theory of Change



Rare's Strategy Map 2008-2009

Vision *Ensure that one day all people living in the world's most threatened natural areas will have the motivation and tools they need to conserve the earth's natural resources.*

Approach Train local conservationists to employ a systematic method (Pride campaigns) that induces human behavior change, enabling reduction of threats to nature.



Top Priorities for 2008-09

Theory of Change

100% of Theories of Change offer a meaningful, credible strategy, articulated as:
 $K+A+IC+BR \rightarrow BC \rightarrow TR \rightarrow C$

Vision

Approach

Impact

Partner

Processes

al areas will have the motivation and tools they need

gns) that induces human behavior change, enabling

ults by influencing human behavior

r change
 threat reduction
 conservation outcomes

Other Key Partners

All partners (BINGOs, barrier removal experts, donors, evaluators) are aligned with the ToC and enlisted to carry out specific actions

Universities

Rare's training platform is "always improving", low cost, and easy to manage

Sustain Campaign Impact

Campaigns are supported for an average of 3 years

Create a specialized suite of barrier removal tools & partners

Create the tools and networks necessary to successfully reduce 4 common threats

Financial Management

Expenses: Demonstrate efficiency and leverage

Average cost per campaign per year decreases by 10%

Revenue: Build base of support

Average Annual Revenue growth of 25% over 3 years

Donor Product Mix: Pride is seen as an opportunity to make a difference

% Donors who agree with the statement, "my gift is having a direct impact in the environment"

Brand Promise: Donors and partners recognize Rare's unique impact

5 placements in major media outlets, eg. NY Times

Learning & Growth

Build and develop an effective Team

>90% of employees like or love their jobs

Focus and Grow

- 1) Open up new university each year for 3 years
- 2) 50% of campaigns in Sept '08 (75% in '09) in thematic cohorts

Management, Accountability, and Communications

- 1) Every staff member every month knows whether their department is on target
- 2) 100% adoption of RarePlanet by Jan '09

Ensure culture of adaptive management in all areas

Each region/department reports on three strategic improvements each year

Increase Board Quality

Add one new 7-figure donor and one industry luminary to Board per year

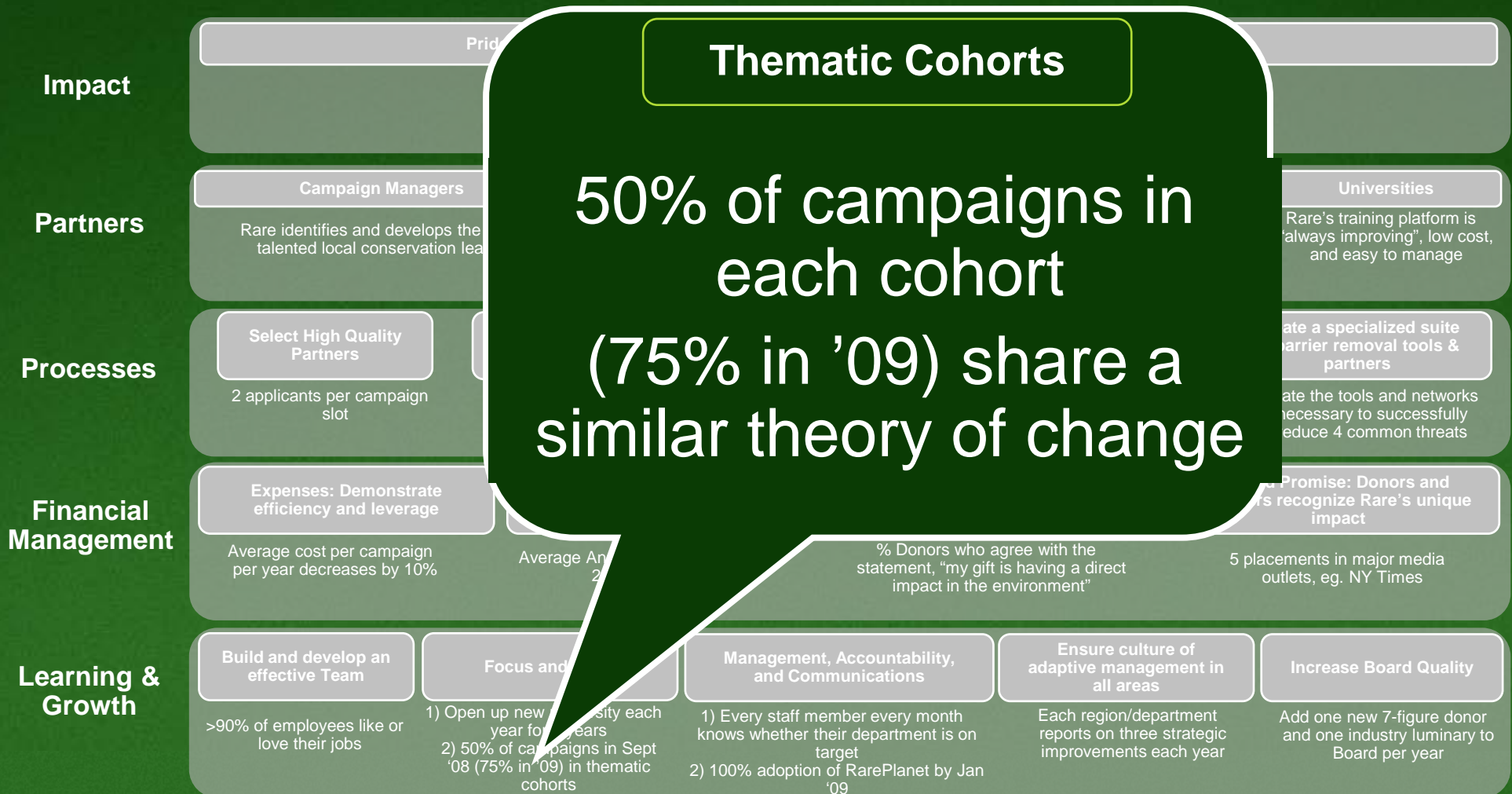
Top Priorities for 2008-09

Vision

Ensure that one day all people living in the world's most threatened natural areas will have the motivation and tools they need to conserve the earth's natural resources.

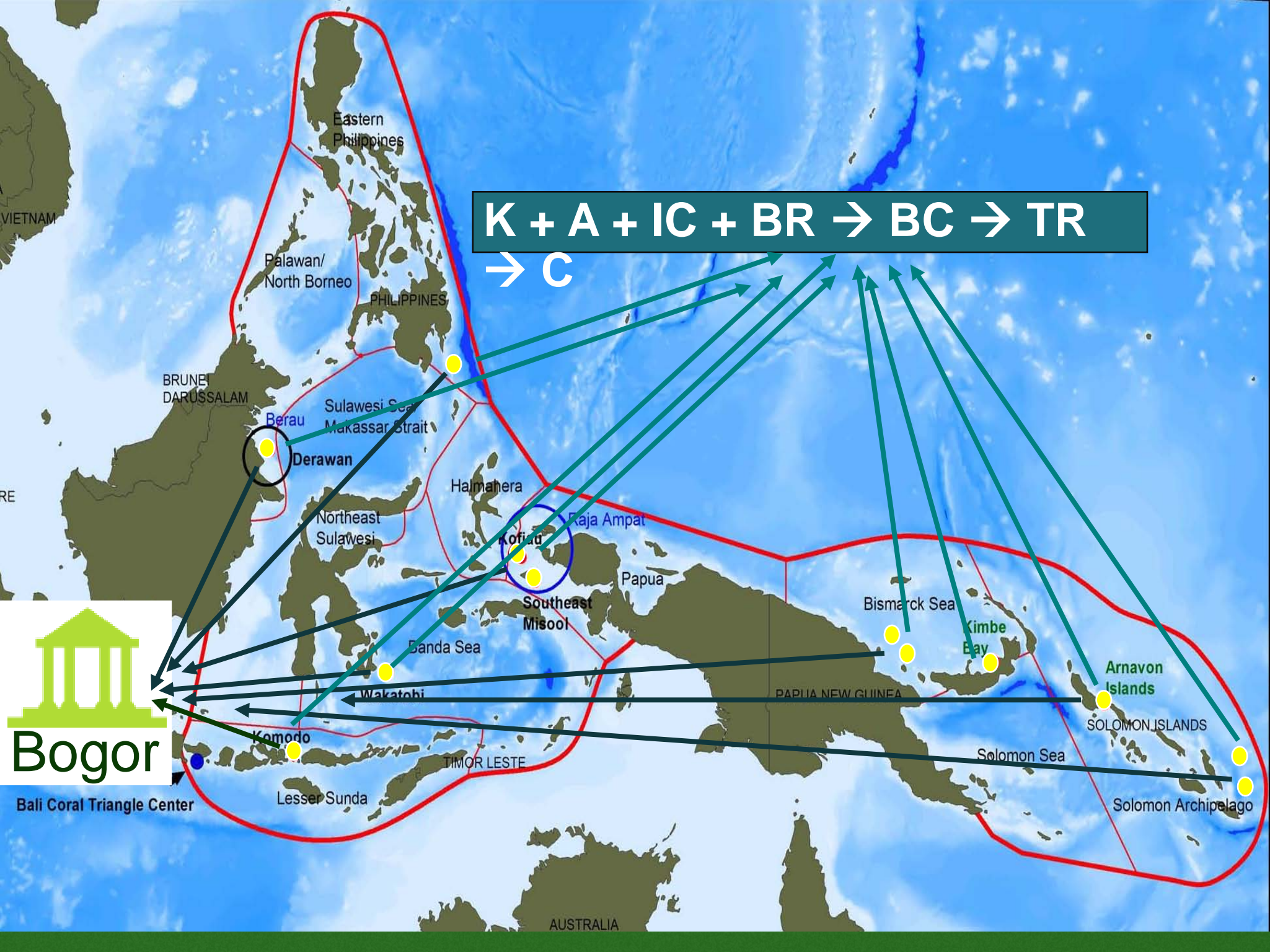
Approach

Train local conservationists to employ a systematic method (Pride campaigns) that induces human behavior change, enabling reduction of threats to nature.





K + A + IC + BR → BC → TR
→ C



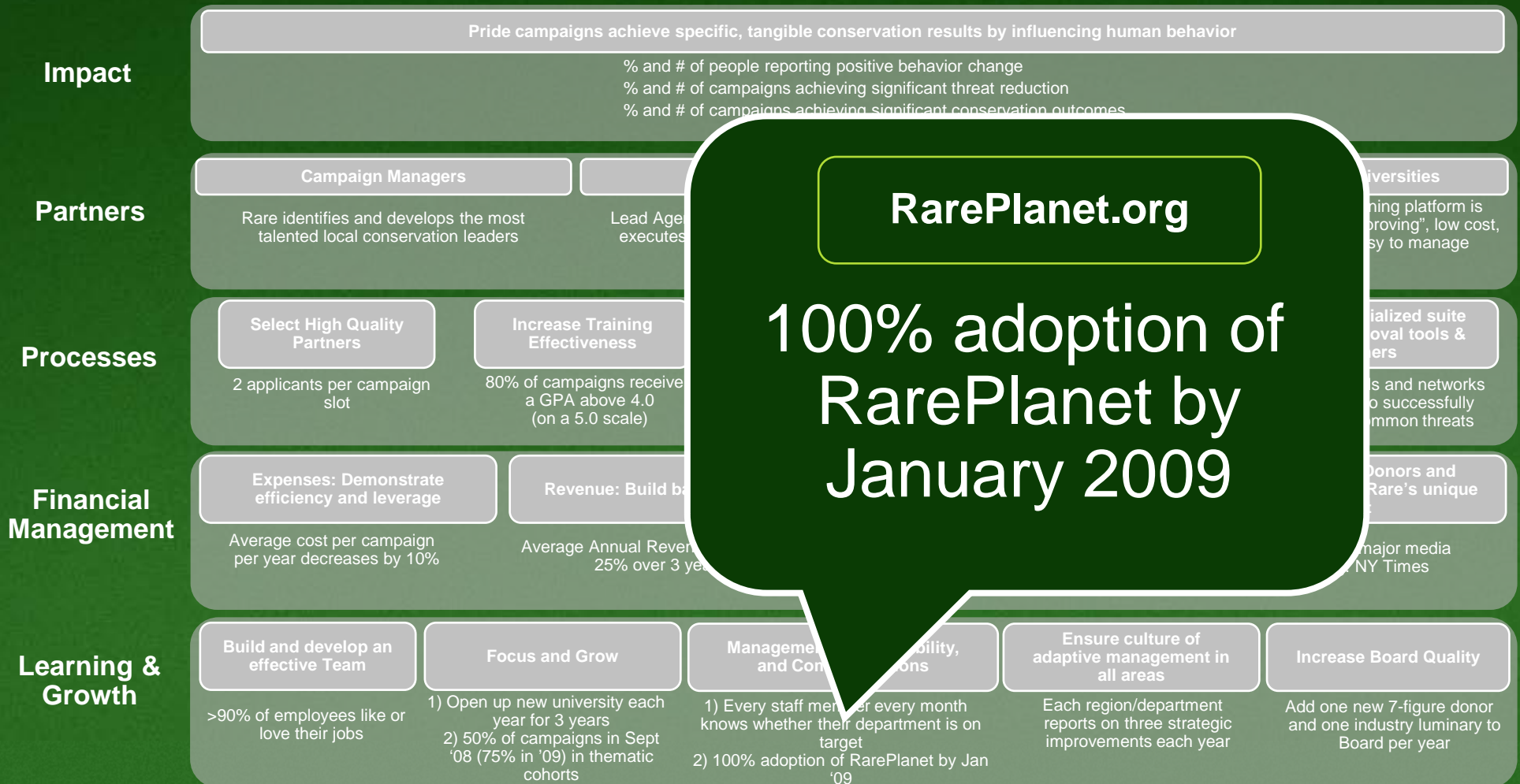
Top Priorities for 2008-09

Vision

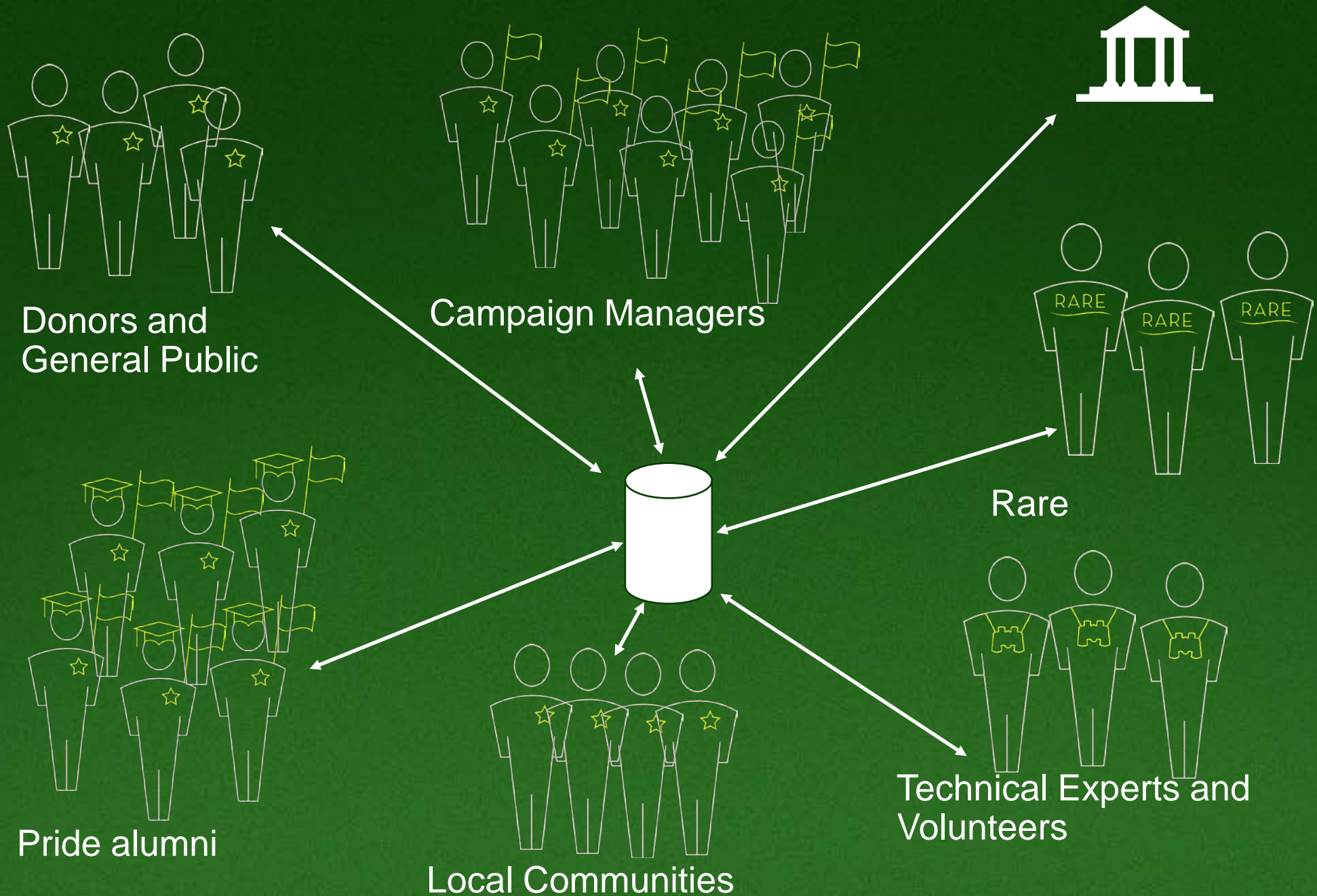
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Approach

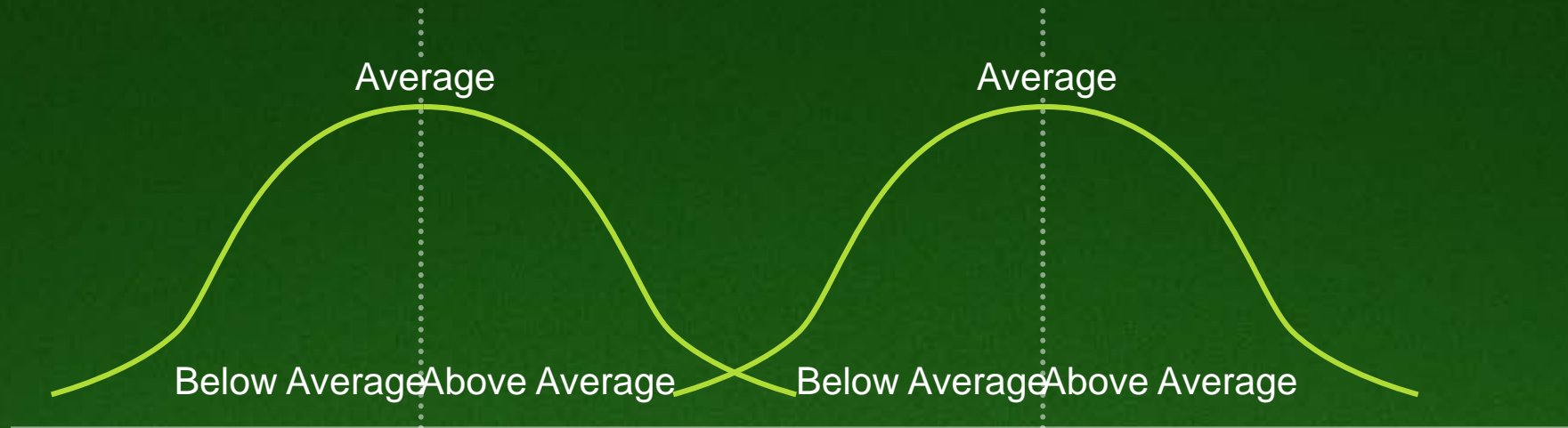
Train local conservationists to employ a systematic method (Pride campaigns) that induces human behavior change, enabling reduction of threats to nature.



Rare's Social Network



Continuous Improvement of Program Operations



Monitoring Recruiting Pipeline – example from Latin America

Recruiting Pipeline	Target	Actual to date
Prospects	36+	35
Pre-apps (leads)	36	33
Invitation (pre-qualified)	30	27
Application (qualified)	24	24
Interviews (considered)	18	5
Accepted	12	
Deferred		6

Assessing Proposed Theory of Change

DRAFT THEORY OF CHANGE SCORECARD

DRAFT ToC DETAIL

Campaign Site Serena Island
Lead Agency Partner Andrea Forestry Department
Campaign Manager Jacob Parker
Pride Cohort Kent 00
Conservation Result (CR) Increase Andrea Quail Dove to 250 by 2010
Threat Reduction (TR) Invasive Rats
Behavior Change (BC) Stop fisherman reintroducing rats to Serena in boats
Barrier Removal (BR) Traps and eradication supplied by REI

REVIEWER DETAIL

Name
Date of Review

DRAFT ToC SCORE

Sum of Conservation Impact, Feasibility & Measurement Scores

Green	51-68
Yellow	34-50
Red	6-33

Additional comments

DRAFT ToC SUMMARY

To eliminate the principal threat posed to the endemic and endangered Andrea Quail Dove, invasive rodents must be eradicated from Serena Island and their reinvasion prevented. Fishermen will be informed of the threats posed by rodents and the benefits of eradication. They will be given snap traps and trained in their use; then asked to trap rats on their boats. There will be 100% compliance in adopting rodent monitoring and trapping strategies prior to their using the island. The Serena Pride Campaign will be deemed successful if rodents are eradicated from the island, re-invasion has not taken place and if the population of endemic Andrea Quail Doves rebound from 100 birds in 2007 to 250 by 2010.

Rare will evaluate the Draft ToC in three categories: Conservation Impact, Feasibility, Measurement

In each category, score each line item as follows (1) strongly disagree (2) disagree (3) agree (4) strongly agree. Please provide data to back up your score.

Use the notes made in the "Review Section" of the Draft ToC to help you.

CONSERVATION IMPACT

Score each line item using the 1-4 point scale described above. If you are doing this in Excel, the points will automatically sum to give you a "Total Conservation Impact Score".
If completing the scorecard in hard copy, sum the points to get a "Total Conservation Impact Score".

Items in red are necessary criteria. They must receive a score of a 3 or 4

A conservation result has been identified with a specific and measurable conservation target

The intended conservation result is meaningful in a global / comparative context

The target habit or species is of significant biodiversity importance

A priority threat to the conservation target has been identified and quantified

The Theory of Change articulates a clear and logical link from behavior change to conservation results

The quantitative targets for behavior change and threat reduction will achieve the target conservation result

This Draft Theory of Change is worth a \$150,000 investment.

Score	Data to Support Score

TOTAL CONSERVATION IMPACT SCORE

Green 21 - 28
Yellow 12 - 20
Red 0 - 11

FEASIBILITY

Score each line item using the 1-4 point scale described above. If you are doing this in Excel, the points will automatically sum to give you a "Total Feasibility Score".
If completing the scorecard in hard copy, sum the points to get a "Total Feasibility Score".

Items in red are necessary criteria. They must receive a score of a 3 or 4

The threat can be reduced through community engagement

The target audience will likely shift behaviors to reduce the specified threats

Effective and relevant barrier removal partners and tools have been identified and are engaged

This campaign is a well-integrated part of the lead agency's strategy

The barrier removal method has been proven effective in this situation

There is proof of concept for the draft ToC at other sites, in case studies, or in analogue situations

Score	Data to Support Score

TOTAL FEASIBILITY SCORE

Green 15 - 20
Yellow 10 - 14
Red 0 - 9

MEASUREMENT

Score each line item using the 1-4 point scale described above. If you are doing this in Excel, the points will automatically sum to give you a "Total Measurement Score".
If completing the scorecard in hard copy, sum the points to get a "Total Measurement Score".

Items in red are necessary criteria. They must receive a score of a 3 or 4

Baseline data is available for at least the threat

Baseline data is available for other variables

A monitoring and evaluation partner(s) have been identified and secured

If no monitoring and evaluation partner has been identified, there is a plan to collect and measure data

Score	Data to Support Score

TOTAL MEASUREMENT SCORE

Green 12 - 16
Yellow 8 - 11
Red 0 - 7

CONSERVATION IMPACT

Score each line item using the 1-4 point scale described above. If you are doing this in Excel, the points will be calculated automatically. If completing the scorecard in hard copy, sum the points to get a "Total Conservation Impact Score".

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TOTAL CONSERVATION IMPACT

Monitoring Fundraising Progress



Dashboard Segment Targets Dashboard

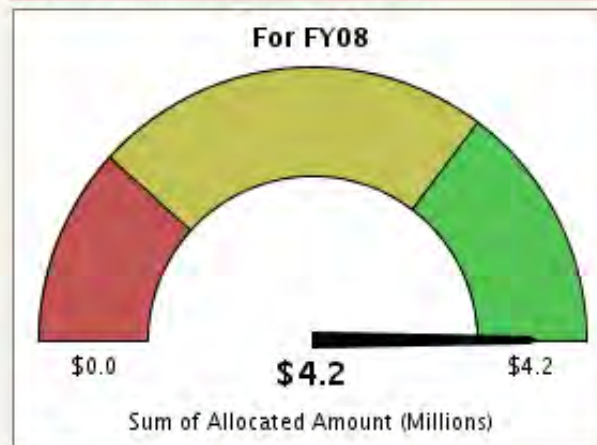
[Go To Dashboard List](#)

View Dashboard

Clone

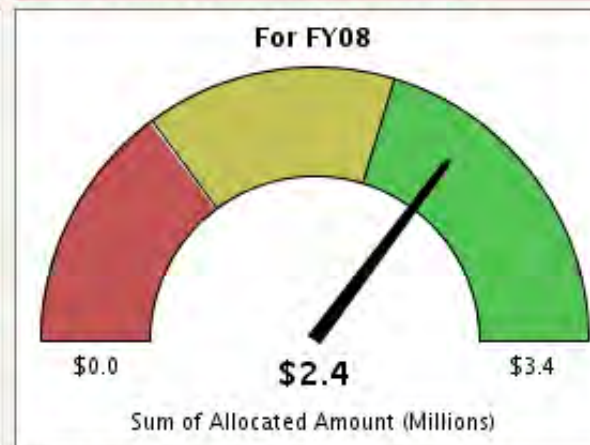
Refresh

Trustee Allocations vs. Target



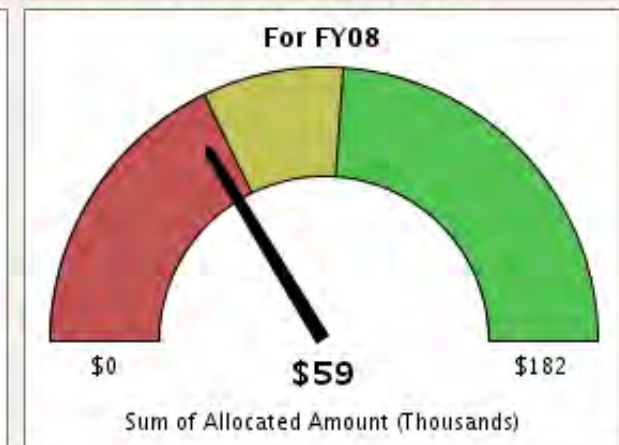
Trustee Target for 2008 - \$4,095,000

Major Donor Allocation vs. Target



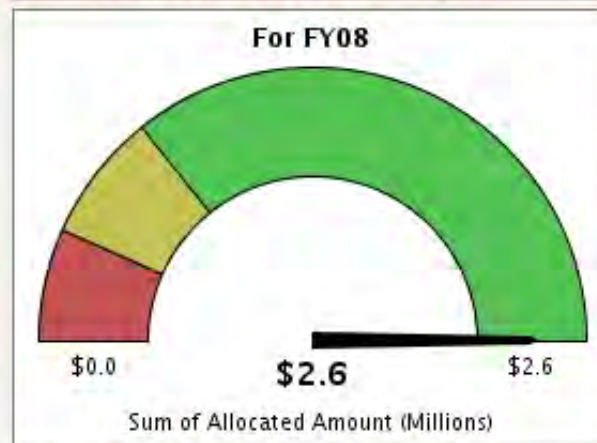
Major Donor Target for 2008 - \$3,367,000

Individual Allocations vs. Target



Individual Target for 2008 - \$182,000

Foundation Allocations vs. Target



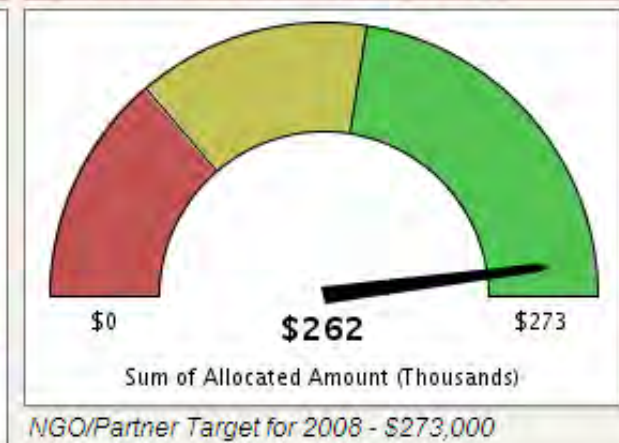
Foundation Target for 2008 - \$1,001,000

Corporation Allocation vs. Target



Corporation Target for 2008 - \$45,500

NGO/Partner Allocations vs. Target



NGO/Partner Target for 2008 - \$273,000

Government Allocations vs. Target

Monitoring Program Quality

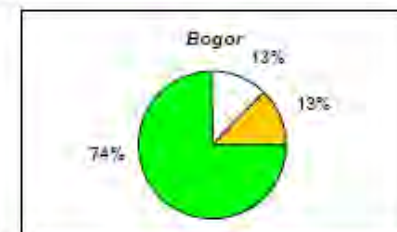
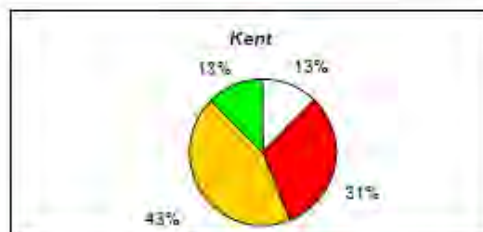
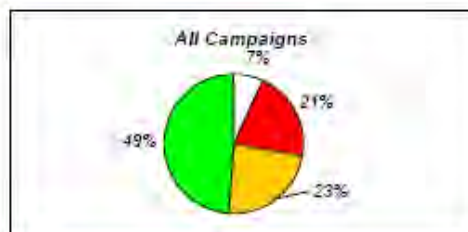
RARE MONTHLY FLASH REPORT: Pride Campaign Status - Summary View

As of: May 16

Year: 2008

KEY			
●	- on track	●	- significant problems
●	- trending	○	- information not available

SUMMARY CHARTS



TOP 5 SUCCESSES (in order of importance)

Campaign Detail						Timeline		Comments	
#	Campaign Site	Country	Cohort	Threat	Charismatic Species	Months Since Start	Phase	Status	Notes/Next Steps
1	Ajos de Bavisque	Mexico	Guad 4	(6.3.3) Pollution, Water pollution, Commercial/Industrial	Black bear	23	Campaign Implementation	●	Enthusiastic partner, on schedule for successful completion
2	Lagunas de Montebello	Mexico	Guad 4	(6.3.1) Pollution, Water Pollution, Agriculture	Pale-billed Woodpecker	23	Campaign Implementation	●	Receiving active support of the local government and Local partner
3	Raja Ampat District, Papua	Indonesia	Kent 7	(1.3.2) Habitat Loss/Degradation (human induced), Fisheries	Spinner Dolphin	21	Campaign Implementation	●	Beginning to develop a strong follow-up strategy for the site
4	Vizcaino Biosphere Reserve (Reserva de la Biosfera El Vizcaino)	Mexico	Guad 4	(1.3.6) Habitat Loss / Degradation, Extraction, Ground water extraction	Gray whale	23	Campaign Implementation	●	Campaign manager invited to Japan by JICA to share experience in social marketing
5	Wamba Division, Samburu District, Rift Valley Province	Kenya	Kent 7	(1.1.4) Habitat loss/Degradation (human induced), Crops Agro-industry farming (1.7) Habitat Loss/Degradation (human induced), Fires	Greater Kudu	21	Campaign Implementation	●	Strong Local partner and very good campaign manager

TOP 5 CONCERNS (in order of importance)

Campaign Detail						Timeline		Comments	
#	Campaign Site	Country	Cohort	Threat	Charismatic Species	Months Since Start	Phase	Status	Notes/Next Steps
1	Amoró-Carrasco Conservation Unit, Santa Cruz and Cochabamba	Bolivia	Guad 3	(6.3.3) Pollution, Water pollution, Commercial/Industrial	Guan	32	Campaign Implementation	●	No Local partner support
2	Panama Bay (Bahía de Panamá)	Panama	Guad 5	(1.4.2) Habitat loss/Degradation (human induced), Infrastructure development, Human settlement	Yellow warbler	21	Campaign Implementation	●	Campaign Manager left the organization before finalizing the campaign
3	Three-River Source National Nature Reserve, Qinghai Province	China	Kent 8	TBD	TBD	12	Campaign Planning	●	Campaign Manager has left the organization
4	Río Plátano Biosphere Reserve (Reserva de la Biosfera Río Plátano)	Honduras	Guad 5	1.3.3.2. Habitat Loss / Degradation, Extraction, Wood, Selective logging	Great green macaw	21	Campaign Implementation	●	Campaign Manager is recovering from leukemia. Local partner is looking for ways to fund her salary
5	Monts de Cristal National Park	Gabon	Kent 7	(3.1.1) Harvesting (hunting/gathering) - Food, Subsistence use/local (3.1.2) Sub-national/national trade)	Giant Pangolin	21	Campaign Implementation	●	Not on track to reach campaign goals of impacting bushmeat hunting

What Has Driven This Change?

1. ADAPTIVE management- program evaluation drove continuous improvement
2. ADOPTIVE management – racing against phantom competitors, benchmarking, shameless borrowing

Arguments for Adaptive Management

1987	Pre- and Post- KAP survey
1996	Retrospective of first 10 Campaigns
2005	360-degree org evaluation
2006	Retrospective of first 26 Campaigns
2006	Meta-analysis of 250 variables, all Campaigns
2006	Study of Web-based Club

Arguments for “Adoptive” Management

- Adaptive Management (Foundations of Success)
- Threat reduction Assessment (FOS)
- Concept Models (FOS)
- Social Marketing (Andreasen, Kotler, etc.)
- Theory of Change (Aspen Institute)
- Participatory Planning (Jane Stallman, Institute of Cultural Affairs)
- Five Forces (Porter)
- Core Competencies
- Buyer Process (Monitor Consulting)
- Benefit Ladders (Monitor Consulting)
- Customer Purchase Scenario (Elaine Romanelli, G'town Business School)
- Balanced Scorecards (Bob Kaplan)
- Strategy Maps (Bob Kaplan)
- Recruiting – 3:1 for every spot (Teach for America)

CONCLUSION:

If your organization is not continuously improving, it's hard to imagine that your programs are...