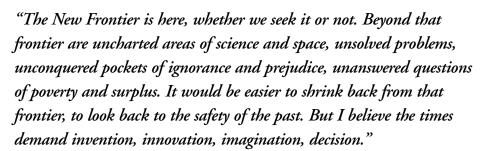


## LOOKING AHEAD



- JOHN F. KENNEDY, 1960, FORMER U.S. PRESIDENT

he evolution of ecoregion conservation represents a new era in conservation planning and action. Gone is an ad hoc, fragmented approach to conservation. In its place has grown a commitment to clear priorities that can be defended by science; a programme of interconnected macro-level and micro-level actions that collectively focus on addressing threats and realizing opportunities; and a new level of partnership and collaboration with government, NGOs, and communities.

Ultimately ecoregion conservation is about generating consensus around targets and strategies that will help conserve biodiversity and promote sustainable use. It is also about building a level of understanding, interaction, and collaboration among stakeholders that will help strengthen the systems and capacities required to implement the strategies of conservation and sustainable use.

The scope and scale of ecoregion conservation can seem daunting—as can the array of processes, tools, and measures associated with its core elements. To not become bogged down in the steps, processes, and tools of ecoregion conservation, an EAP needs to stay focused on the end goal: conservation of the biologically and ecologically important features of an ecoregion.

In pursuit of that goal, an EAP team needs to focus on those strategies and tools that will help create an environment in which conservation priorities are widely accepted and understood, and coalitions for action are operating effectively. They also need to ensure that the activities of key agencies are aligned and mutually supportive and that resources are being leveraged to support conservation activities.

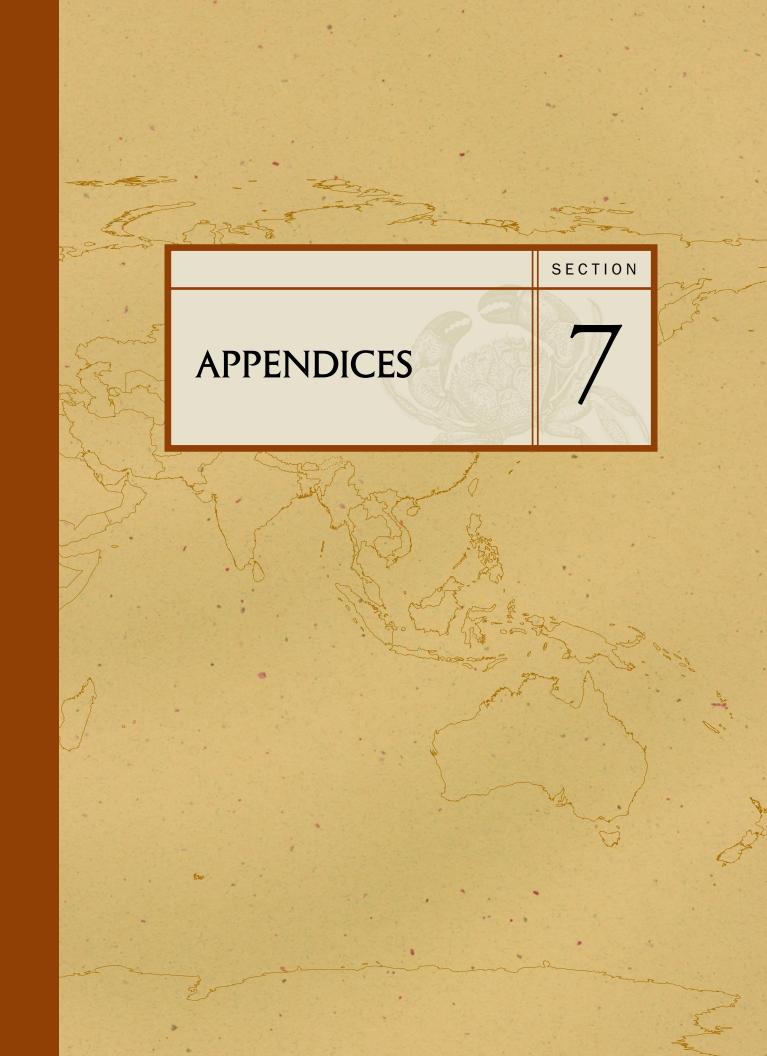
There really is no right or wrong way to implement ecoregion conservation. In some ecoregions, the EAP is the provider of good science, a facilitator of action, and instigator of wider political change. In other ecoregions, the EAP is a campaign team, advocating priorities and targets to those managing large-scale conservation efforts. In yet others, the EAP provides the leadership, vision, and capacity needed to deliver an ambitious and innovative conservation plan. The variations or innovations in any one EAP programme will reflect the conditions in which it is operating.

If large-scale, institutional, or political frameworks for conservation planning and action already exist across an ecoregion, conservation may be best served by an EAP that provides good science, rigorous targets, and broad stakeholder consensus. If no frameworks exist and understanding of conservation issues is limited, a process of education, coalition forming, and capacity building will need to underpin the core elements of ecoregion conservation. How an EAP chooses its route will depend in large part on the nature of the ecoregion, the history of conservation action, and the knowledge and instincts of the EAP's partners and collaborators.

So how does an EAP "pull it all together"—the science, analysis, consultations, targets, and indicators—to successfully implement ecoregion conservation?

- Take to heart the ecoregion conservation guiding principle that advocates flexibility, learning, and adaptive management. Although no two EAPs will operate in the same way, EAP teams can learn from each other's successes and challenges to create unique programmes tailored to most completely address each ecoregion's needs, opportunities, and biodiversity vision.
- Ensure that there are clear, unified messages sent out with respect to the implementation of ecoregion conservation. Succinctly identify and convincingly communicate the costs and benefits associated with implementing ecoregion conservation, particularly in light of other pressing national conservation and development priorities for which funding is already secured.
- Be honest in reviewing the strengths and weaknesses of the EAP initiatives and partnerships. Have the institutional will to frankly assess the capacities that each key stakeholder brings to the process; where there are "weak links" (internal and external), make a commit ment to strengthen those areas or develop relationships with new partners who can provide the necessary capacity.
- Remember that, while a biodiversity vision and conservation target knows no political boundaries, the implementation of action plans often will run up against those boundaries. Work to build bridges between ecoregion conservation efforts and national initiatives. National expressions of intent—in the form of conservation and development plans—will have a strong bearing on the willingness of national decision makers and resource managers to engage in the ecoregion conservation process.
- Ensure that ecoregion conservation planning and action reflect and respect the concerns, priorities, and needs of those most directly involved in or affected by ecoregion conservation activities.
- Make a commitment to clear and frequent communication with stakeholders and recognize the role that trade-offs and pay-offs will play in the sustainability of partnership and collaboration efforts.

Ecoregion conservation is about stretching our ambition beyond what we know to what we hope will be possible. Ideally, the aspirations, targets, and strategies that are at the heart of ecoregion conservation will be embraced by multiple generations. The actions that each generation takes towards achieving those goals will grow out of the communication, learning, and collaboration around the conservation agenda for decades to come. The map that is ecoregion conservation is very much a "living thing."



# WRITING AN ECOREGION CONSERVATION PLAN

APPENDIX

A

Because the strategies, partnerships, and roles that make up an ecoregion conservation plan need to be presented in a way that makes sense to key audiences, there is no single style or format for presentation of a conservation plan. The outline below, adapted from the *Guidelines for Content of an Annamites Conservation Plan* prepared by Amanda Younge and the Greater Annamites team, provides an example of how the objectives, targets, and strategies for an ecoregion can be brought together for a wide range of audiences. EAPs developing a vision and targets for adoption by external processes (e.g., national plans) may only need to pull together a subset of the content items presented below. Others will need to produce a full conservation plan. Irrespective of the local situation, it is worth noting that all content items will probably need to be presented at some point to key audiences.

	CONTENTS AND INPUTS	INPUT AVAILABLE THROUGH ERC PROCESS	
1	<b>Preamble/Foreword.</b> Refer to (1) expressions of commitment by government or other key stakeholders, and (2) coordinating action of multiple stakeholders to underscore the added value of this project.		
2	Executive Summary		
3	We have a treasure here. Describe why the ecoregion is special (biodiversity, ecosystem services, economic value, livelihoods, cultural reasons, and so on); present focal biodiversity and priority areas maps.	Information from biodiversity assessment and vision workshops	
	This is also an area of concern for the government (e.g., priority area for poverty alleviation, development agenda, and so on).	Information from reconnaissance and institutional profiles	
	The government and key stakeholders want to take action to strengthen cooperation between development and environment (and have expressed a commitment to such). An ambitious and coordinated approach will inform and support implementation of existing policies and strategies; it will also help government and other agencies to achieve their goals for conservation and key sectors.	Commitments and interest-generated stakeholder dialogue and vision process	
4	Our treasure is threatened. Summary of threats and key issues. There are also opportunities. A look at the conditions, values, influences, and events that create a positive climate for conservation.	Threat and opportunity assessments	
5	This initiative proposes to assist the government and key stakeholders to maximize opportunities and minimize threats. Together with other key players, we are addressing threats and have set up strong partnerships for implementation. Outline who "we" references, articulate objectives of the ecoregion process, explain what's taken place so far, and describe who's been involved. Highlight successes to date.	EAP process design and action highlights	
		Georgian Concernation Plan	

	CONTENTS AND INPUTS	INPUT AVAILABLE THROUGH ERC PROCESS
6	There are benefits to working at an ecoregional scale. Explain what the benefits are (special features, connections, and so on) and what the relationship is between ecoregion, landscape, and site-level action.	ERC approach and rationale for integration of actions at different scales
	We understand what kind of action is appropriate at what scale. Use the package-of-strategies and actions approach.	Ecoregion study (from vision and target setting)
٠	Outline benefits. Ecoregion objectives, targets, and strategies will provide a means to align, coordinate, and provide synergy between actors, processes, programmes, and existing and proposed projects.	
7	We have a vision. Provide the statement, and describe the goals and objectives.	Goals and objectives from vision and expert workshops
8	We're clear about what we want to achieve. Outline the targets.	Targets from expert and stakeholder workshops
9	We've identified the priority areas. Include a map of priority areas and short descriptions.	Biodiversity assessment and vision information; maps of priority areas and focal biodiversity groups
10	We've analysed the pressures on and threats to biodiversity and ecosystems. We've identified responses to manage those pressures. Outline threats and mitigation responses.	Strategies developed as a result of targeted assessments
	We've identified the key levers and key opportunities for action to catalyse change.	Ideas generated by opportunity assessment
11	We have a plan (which is supported by key players).  Provide an overview or summary of proposed ecoregion conservation strategies and actions.	
12	We have defined phases for action. We have a clear concept of what needs to be done and what's possible in each phase. Time frames and phasing (including laying foundations, catalysing, piloting, innovating, and taking emergency action).	
13	We understand the constraints and limitations, and we have addressed them. Discuss strategic choices and principles, including roles of different players (national, regional, local government, NGOs, and so on), use of donor funding, areas of focus, and participatory approaches.	Identified constraints to solving the problems, and deciding on strategic choices/ responses to those constraints
14	The plan will help address the major pressures on biodiversity. Identify what needs to be done.	Key components of framework and proposed action plan (in draft)
15	We will provide support to action in the priority areas and standards to monitor effectiveness in relation to targets. Include some information here on the priority areas, including what has been done and what still needs to be done. Set out proposed roles of different stakeholders in supporting landscape-level work.	Objectives and outcomes for actions in priority areas—as contributions to ecoregion-level objectives and targets

	CONTENTS AND INPUTS	INPUT AVAILABLE THROUGH ERC PROCESS
16	Action needs to be supported by enabling policy, legislation, appropriate institutions, and improved coordination within governments and between stakeholders. Explain proposals for supporting the creation of an enabling framework.	Strategies for policy review and analysis
17	The capacity is available to coordinate and manage implementation effectively. Show how proposals are aligned with key policies, strategies, and the activities of key stakeholders.	Institutional and capacity assessment
	Who, how, and where. Suggestions for coordination, management, partnerships, communication, and international relations; knowledge management, information sharing, and sustainable financing; monitoring and evaluation; catalysing action on priorities; and so on.	
18	<b>Logframe</b> (objectives, targets, actions, indicators, expected outcomes)	
19	Glossary and Abbreviations	
20	Acknowledgements and Logos	
21	Contact details, ISBN number, copyright conditions, photo credits, and other administrative information	

## GUIDELINES FOR DEVELOPING A **COMMUNICATIONS STRATEGY**

APPENDIX

he steps outlined in these guidelines can be applied to the elaboration of an overall communications strategy or to sub-strategies for the audiences identified in the overall strategy. (These guidelines are designed for use in conjunction with Appendix C, the Communications Strategy Worksheet.) As no single template will work for every ecoregion, the steps should be adapted to fit each situation. EAP teams shouldn't be concerned if they are accustomed to using different terminology or working in a slightly different order. The critical thing is to recognize that communications need to be an integral component of EAP development from the outset and that, in pursuing a communications agenda, there are some key considerations that should be addressed.

## I. Goals (or Strategic Objectives)

What are the overarching communications goals for the year? The goals will vary depending on the EAP's stage of development. Some examples include:

- Making the populations of Asia-Pacific aware of the importance of preserving Global 200 ecoregions
- Helping the governments of Asia-Pacific understand what ecoregion conservation means
- Convincing 75 per cent of local stakeholders that the conservation of priority areas is relevant to their future lifestyle and livelihood needs.

## II. What Are Your Specific Objectives?

Identify and summarize the interim, measurable objectives that will aid in the realization of the EAP's overarching goals. The objectives should be repeated and, if necessary, amplified in the "Events and Activities" section that follows. Summarizing the objectives here helps emphasize their importance and gives others an upfront idea of what the communications plan is meant to accomplish. For example:

- Distribute Global 200 maps to every key government and partner organization office by June 2003 (to contribute to the first overarching goal)
- Achieve the commitment of at least 75 per cent of Asia Pacific governments to support the hosting of ecoregion biodiversity vision workshops by the end of 2003.

#### III. Primary and Secondary Audiences

Who is/are your primary audience(s) for achieving your conservation results?

Identify each primary and secondary audience and, if possible, include salient information on each—for example, what is known about them and what needs to be known in order to communicate effectively; what media best reaches the audience in question; and so on. This section should also specify the actions and/or behavioural changes the EAP seeks to affect in each audience.

#### IV. Previous Research

What research (if any) has been conducted to gather background information on these audiences?

#### V. Messages

What messages resonate best with the audience(s) identified? Summarize the main messages that need to be directed at each of the target audiences identified. This summary will help articulate the overarching communication goals for the EAP.

## VI. Opportunities and Obstacles in Reaching Targets and Conservation Results

What problems need to be addressed for you to achieve your desired result? What opportunities exist to achieve the desired result?

Outline the major strengths and weaknesses of your EAP. On the positive side, this list might include alliances with well-known personalities in the ecoregion or strong media interest in conservation issues. On the negative side, the list might include lack of media interest, lack of funding, other resource constraints, and the reaction of individuals or organizations with opposing views.

## VII. Planned Events and Activities

This is the last and longest section of the strategy. List planned events, publication releases, collaborations, and so on for which you are likely to need communications support. The key target audiences and messages should be repeated and expanded upon here, along with the tools and approaches best suited to reaching those audiences, and the desired outcome of any communications efforts. The specific strategy and tools that will be employed to achieve that outcome (e.g., press conferences, publications, consultations, op-eds, media tours, video news releases, or demonstrations) should also be described briefly. Frame the vital information for each event or activity in the box below so that the essentials can be seen at a glance.

The communications strategy should also describe the communications activity for each target audience in more detail, outlining the objective, key messages, and tools that will be employed to communicate those messages. The events or activities should be listed in chronological order. A timeline or calendar should be included with each strategy to ensure that all of the pertinent information can be easily incorporated into the master ecoregion action plan (and, ideally, that of the lead national organization[s] or programme office[s]). It is also useful to include a "toolbox" section listing the key mechanisms you expect to employ, including fact sheets, publications, PSAs, advertising, outside consultants, satellite media tours, and so on.

#### VIII. Externally Generated Opportunities

Finally, attempt to identify, or at least anticipate, any communications opportunities that may emerge from the actions of others working in the ecoregion, e.g., events such as partner or other agency media events, legislation processes, or expected government announcements that are not controlled by WWF.

# COMMUNICATIONS STRATEGY WORKSHEET

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C

-	Strategic Objectives)
What are your	overarching communications goals for the year?
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2.	
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4.	
II. What Ar	e Your Specific Objectives?
Identify and su your overarchin	mmarize the interim, measurable objectives that will aid in the realization of ag goals.
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III. Primary Identify here th	r and Secondary Audiences ree to six primary target audiences and the changes you want to affect. Be artner conservation NGOs, non-Asia Pacific media, or mining industry leaders).
III. Primary Identify here th specific (e.g., pa	r and Secondary Audiences ree to six primary target audiences and the changes you want to affect. Be
III. Primary Identify here th specific (e.g., pa	v and Secondary Audiences ree to six primary target audiences and the changes you want to affect. Be artner conservation NGOs, non-Asia Pacific media, or mining industry leaders).
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III. Primary Identify here the specific (e.g., particular) 1. 2. 3.	ree to six primary target audiences and the changes you want to affect. Be artner conservation NGOs, non-Asia Pacific media, or mining industry leaders).
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III. Primary Identify here the specific (e.g., particular) 1. 2. 3. 4. Who is/are you that would have leaders, respected.	ree to six primary target audiences and the changes you want to affect. Be artner conservation NGOs, non-Asia Pacific media, or mining industry leaders).  r secondary audience(s) or influencer(s)? List here no more than three audiences the strongest influence on the primary audience (e.g., provincial government

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IV. Previou	s Research
What research and secondary	(if any) has been conducted to gather background information on your primary audiences?
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Provide up to t	three key messages for each target audience.
Provide up to t Target Audienc	three key messages for each target audience.  The One:
Target Audience  1. 2.	chree key messages for each target audience.
Provide up to t Target Audienc  1. 2.	three key messages for each target audience.  The One:
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Provide up to to Target Audience 1. 2. 3. Target Audience 1.	three key messages for each target audience.
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Provide up to to Target Audience 1. 2. 3. Target Audience 1. 2. 3. Target Audience 1. 2. 3.	chree key messages for each target audience.  The One:  The Two:  The Three:

# VI. Opportunities and Obstacles in Reaching Targets and **Conservation Results** List three opportunities. List three priority problems that need to be addressed. VII. Planned Events and Activities What: Where: When: Who: How: Describe each community activity. Target Audience: Objective: Key Message(s): Media Strategy: Tools and Materials:

merge from ther agency	the actions of others working in the ecoregion, e.g., events such as partner of media events, legislation processes, or expected government announcements olled by WWF. Describe those opportunities here.	or

# SAMPLE COMMUNICATIONS STRATEGY: TERMS OF REFERENCE

APPENDIX

D

#### I. Introduction

#### Purpose

The purpose of this document is to articulate a communication plan or strategy to raise awareness of the Southwest Australia Ecoregion Initiative, as well as its accompanying actions and objectives, among a wide range of stakeholders. In general terms, the strategy will:

- 1. Outline communications, education, and outreach activities and strategies to generate awareness of the Southwest Australia ecoregion
- 2. Encourage multi-level (local, regional, state, and national) stakeholder support for ecoregion conservation in Southwest Australia
- **3.** Raise the community profile of the significance of and threats to biodiversity in the Southwest Australia ecoregion
- **4.** Facilitate participation of local, regional, national, and international communities in the development and implementation of an ecoregion conservation plan
- 5. Facilitate the raising of funds for communication and conservation actions
- **6.** Ultimately, contribute to broad-scale, collaborative, and effective ecoregional conservation

It should be stressed from the outset that development and implementation of an effective communications strategy is not the outcome of one meeting, or the sole effort of an appointed communications officer or single other person. Rather, its completion and implementation will require input from a large number of people, including the communications officer, the ecoregion coordinator, associated programme staff, steering committee members, and representatives from the consortium partners.

It is also the view of the steering committee that this strategy should not be considered to be a fixed document once endorsed. Rather the strategy will remain an active document to be updated and modified as the communication needs change during progressive phases of development and implementation of the initiative.

#### Critical Inputs

- 1. The appointment and participation of a communications specialist to oversee the implementation of this strategy and to engage in the required activities, workshops, and events (including the planning workshop, the biodiversity vision workshop, and subsequent collaborative actions)
- 2. The participation by members of the steering committee, and other representatives of the participating agencies and organizations, in the development of communications strategy documents and plans (particularly the identification of key audiences and the shaping of messages)

- **3.** Communications and public outreach training for steering committee members and associated representatives (related to the tools that they need to use to convey messages to their target audiences)
- **4.** The development of targeted communications materials that address intended communications objectives and audiences.

## Terms of Reference: Steering Committee

It is noted that the terms of reference (TOR) of the Southwest Australia ecoregion steering committee include the following relevant elements:

- 1. To participate in the engagement of other stakeholders and seek their input to the work of the steering committee and the Southwest Australia Ecoregion (SAE) initiative
- 2. To communicate outcomes of the SAE initiative to the organization they represent
- 3. To broadly promote the activities and outcomes of the SAE initiative.

#### II. Goals

The broad goals of the SAE communications strategy are to:

- 1. Raise the awareness, among key stakeholders and the wider community, of the importance of preserving the Southwest Australia ecoregion
- **2.** Promote the benefits of adopting an ecoregional approach to broad landscape conservation among the key stakeholders of the Southwest Australia ecoregion
- **3.** Engage the participation of a wider range of stakeholders, and provide a forum for interaction, influence, and collaboration among partnering organizations
- **4.** Articulate the desired future scenarios for the Southwest Australia ecoregion, together with the vision, goals, and objectives that inspire all organizations that can influence the region
- 5. Facilitate the engagement of networks and organizations beyond the partner groups
- **6.** Promote consistency and linkages with other policy processes and initiatives, including regional and local strategies and plans
- 7. Raise the profile while maintaining support for and influencing the conservation of the Southwest Australia ecoregion on local, national, and international levels
- 8. Facilitate the acquisition of funds to develop the communications strategy.

#### III. Awareness Milestones

The broad goals described in Section II are reflected in the following awareness milestones:

- National, state, and regional populations become aware of the importance of conserving the Southwest Australia ecoregion
- 2. Key stakeholders in the Southwest Australia ecoregion can articulate what ecoregion conservation means to them
- **3.** Key technical stakeholders become engaged in the ecoregion conservation process by contributing to its development and implementation

- **4.** A biodiversity vision statement, map of priority areas, and set of ambitious conservation targets are understood and committed to by key stakeholder audiences
- **5.** At least 50 per cent of the Southwest Australia ecoregion's conservation targets are achieved at the ecoregion scale through collaborative action among partners (including citizens, government, and the private sector).

## IV. Specific Objectives

To achieve the broad goals and awareness milestones, effective communication tools and activities will be developed to engage the participation of all key stakeholders—i.e., those who are important in driving the initiative forward or who will be critical to its successful implementation.

The initiative is working to ensure that the Southwest Australia ecoregion's biodiversity vision will be adopted by all of the key stakeholders. This will involve gaining endorsement of and commitment to the ecoregion vision and the development of an ecoregional implementation strategy by key stakeholders, including all the state government agencies and commissions; regional natural resource management (NRM) councils; environmental NGOs and community biodiversity groups; industry groups; development commissions; indigenous group representatives; and the Western Australia Local Government Association.

Among the other specific objectives that the EAP has outlined are:

- 1. To produce and widely distribute a promotional document (approximately ten pages in length) that describes the biological and ecological features of the Southwest Australia ecoregion, along with the rationale and purposes of the Southwest Australia Ecoregion Initiative. The document would highlight the biodiversity values and threats to the ecoregion, the need for an ecoregional approach, how the approach complements existing biodiversity strategies and initiatives that operate at larger and smaller scales, the terms of reference of the Southwest Australia Ecoregion Initiative Steering Group, operational and communication procedures, and the participating organizations.
- 2. To produce a *Directory of Environmental Organizations for the Southwest Australia Ecoregion*, distributed on paper and through the Internet. The directory will list organizations that are working to further biodiversity conservation in the Southwest Australia ecoregion, divided according to whether groups work at international, national, state, regional, or local levels, and whether they are governmental, nongovernmental, associations, or community groups. It will contain details on the organizations' purposes, main activities, contact information, and other pertinent comments.
- **3.** To have the steering committee make presentations as well as engage in discussions and follow-up communications with the key stakeholder organizations.
- **4.** To establish a Southwest Australia ecoregion Web site to facilitate networking, discussions regarding activities, sharing of case studies, and so on.
- 5. To organize and conduct a biodiversity vision workshop involving invited representatives of key stakeholder groups to build on the draft vision statements already developed by the Southwest Australia ecoregion steering committee. The workshop will articulate the vision to such a level that it can serve as a sound basis for establishing geographical priorities

- and principles for conservation and ecological restoration that will inform operations at the regional and local scales.
- **6.** To produce additional documents, maps, and associated promotional materials that articulate the vision for the Southwest Australia ecoregion.
- 7. To organize and conduct a signing event for key stakeholders, at which the vision will be launched using a variety of media techniques, including print and broadcast. Relevant state and federal ministers will introduce the vision, and representatives of all key stakeholder groups will attend the ceremony.

## V. Target Audiences

The staged engagement of (and awareness raising among) primary and secondary stakeholders is essential to the success of this communication strategy and eventual development and implementation of an ecoregion conservation plan.

The stakeholders to be targeted in the communications strategy include:

- 1. Agencies and organizations already involved in biodiversity conservation, particularly individuals who can influence or provide leadership within their institutions
- 2. Organizations that are either very active or have a major interest in activities within the ecoregions, particularly those individuals who are most influential within their organizations
- **3.** Smaller regional and local community groups whose missions are aligned with the EAP's core values.

Those groups may include (but are not limited to): government agencies, nongovernmental organizations, local government authorities, regional or international bodies, local communities, private sector, industry groups, donors, media, academic institutions, and the general public.

The communications officer will need to build a profile of the key stakeholders within the target audiences to include: what is known about them and what else needs to be known in order to communicate with them effectively; what media/methodology best reaches the audience in question; who the point of contact should be; and so on.

#### Primary Audience

The key organizations already involved in the initiative, forming the "consortium," include: the Botanic Gardens and Parks Authority; the Conservation Council; CSIRO Sustainable Ecosystems; Department of Conservation and Land Management; Department of Environment, Water, and Catchment Protection; Department for Planning and Infrastructure; Department of Agriculture; Forest Products Commission; Greening Australia, WA; School of Environmental Science, Murdoch University; State Sustainability Unit; Western Australia Conservation Commission; Western Australian Museum; and WWF-Australia.

Other key stakeholders include: regional NRM groups; Environment Australia; Environmental Defenders Office; Lotteries Commission; Natural Heritage Trust; regional development commissions; Western Australia Local Government Association; Western Australian universities and other relevant research organizations; and industry groups, including agriculture, mining, and so on.

#### Secondary Audience

A very large number of secondary groups and organizations should also be involved. These include: the Australian Bush Heritage Fund; Australian Marine Conservation Society; Australian Wildlife Conservancy; Birds Australia; Malleefowl Preservation Group; National Trust; Western Australia Naturalists Society; Wilderness Society; and the Wildflower Society.

## VI. Key Messages

Among the key messages to be conveyed through this communications strategy are that:

- 1. The Southwest Australia ecoregion is internationally recognized as one of the top 25 biodiversity hotspots of the world.
- 2. The Southwest Australia ecoregion is a mosaic of complex, interrelated, globally significant bioregions.
- 3. The Southwest Australia ecoregion is characterized by an exceptional concentration of endemic species, undergoing an unprecedented loss of habitat.
- 4. The Southwest Australia ecoregion harbours the highest concentration of rare and endangered species on the Australian continent.
- 5. The protection of these natural assets and the ecological integrity of this ecoregion are vital as a basis for sustainable development.
- **6.** The protection of the ecoregion's unique values will require better coordinated strategies between government agencies and nongovernmental organizations to address conservation of both the private and public estate.
- 7. A coordinated approach and an integrated framework for natural resource management will require, among the parties involved, a shared vision of what future landscapes may look like and an agreed-upon approach to implementing that vision.
- 8. A partnership approach to ecoregional natural resource management will consider both the public and private estate and will align with and complement new and existing initiatives.
- 9. To be successful, this approach must embrace a new NRM culture, based on government and NGOs working in partnership to support community-owned initiatives.
- 10. While the regional NRM plans (developed by the regional NRM groups) will be the main conduit for the implementation of natural resource management activities in the ecoregion, it is widely accepted that the development of a "big-picture" strategy, at a Southwest Australia ecoregion level, will add significant, tangible outputs to this process, addressing issues that require cross-regional analysis.
- 11. A consortium of agencies, nongovernmental organizations, research centres, and other groups has come together to develop an ecoregional approach to biodiversity conservation in Southwest Australia, called the Southwest Australia Ecoregion Initiative.
- 12. The Southwest Australia Ecoregion Initiative aims to develop a tangible, long-term biodiversity vision for the Southwest Australia ecoregion, leading to the formulation of a biodiversity conservation strategy that will guide cooperative conservation action in the ecoregion over the next half century.
- 13. The vision and biodiversity conservation strategy should address the triple bottom line (i.e., enabling social and economic decisions to be made within the constraints imposed by the environment).

## VII. Key Communication Tools

Among the key communication tools and strategies that will help promote the key messages are:

- 1. Developing a revised and refreshed image for the ecoregion, including an appealing new name and logo
- Conducting presentations at meetings, consultations, and workshops for a range of audiences, including community members as well as representatives of local, regional, state, and national governments.
- **3.** Developing new media campaigns (including print and electronic) to promote the ecoregional conservation actions
- **4.** Creating a Web site that includes reports; documents; and photographs of ecoregion assets, threats, land uses, and so on
- **5.** Developing videos, displays, and exhibits to highlight the ecoregion's unique features and species
- 6. Revising and distributing publications, including brochures, posters, maps, and reports.

### VIII. Capacity and Resources

The human and other resources required for the successful implementation of this strategy include:

- 1. A project-specific ecoregion communications officer
- 2. One or more media specialists or consultants
- **3.** Steering committee members
- **4.** Consortium partners' communications staff and relevant publications as well as media activities under their management
- 5. Local, regional, state, and national media representatives and agencies.

Ideally, the strategy should be supported by a dedicated communications staff and therefore, if necessary, specific fund-raising should be implemented to achieve this. Some funds, provided by WWF International (through an Ecoregion Partnership Grant, which was allocated in January 2003) and WWF-Australia, are already available to employ communications staff.

Additional costs for staff, materials, and dissemination activities may be funded either by:

- 1. Direct financial and in-kind support by consortium partners and other stakeholders
- 2. Grants (and thus built into budget proposals)
- **3.** Sponsorship.

## IX. Externally Generated Opportunities

There are likely to be a number of significant communications opportunities that may emerge from the actions of other programmes operating within the ecoregion, such as consortium—partner or other agency events, legislation processes, or expected government announcements that are not controlled by the initiative. Examples include the Western Australia State Landcare Conference and the State Sustainability Strategy.

# ECOREGION PROGRAMME LEADER: SAMPLE TERMS OF REFERENCE

APPENDIX

E

## **Example I: EAP Coordinator Terms of Reference**

These terms of reference (TOR) provide guidance for hiring a leader to develop the strategic plan (vision, objectives, and targets) for the conservation of a particular ecoregion. This will most likely be a one-year or two-year contract position.

## Background

Because of the high biodiversity and threats to terrestrial systems, Ecoregion X is the world's hottest biodiversity hotspot. The region houses 1,400 Red Data Book species. Some important habitats have been reduced by 90 per cent, and only 5 per cent of land in the lowlands enjoys any conservation status. Major threats to biodiversity in terrestrial systems include alien plants, urbanization, coastal resort development, unsustainable harvesting of natural products, environmental degradation (e.g., soil erosion), and inappropriate waste management leading to declining scenic quality.

Unsustainable exploitation of marine resources is having a major impact on biodiversity, with very important economic implications (including a collapse of commercial fish stocks).

For both terrestrial and marine ecosystems, a major problem has been the *ad hoc* nature of conservation planning. Another major problem is related to the reduced budget allocation to conservation activities at the local, provincial, and national levels because of social and economic priorities.

#### Project Objectives and Scope

### **OBJECTIVES**

- To develop a long-term strategy to ensure the conservation of the ecoregion and adjoining marine ecosystems
- To prepare a five-year investment programme focused on first priorities within the strategy to be presented to financial agencies—private and public, national and international (including GEF).

The overarching goal will be to promote economic growth with social equity through the conservation and wise use of Ecoregion X's biodiversity while mobilizing resources, such as GEF, to support the incremental costs related to global benefits. More specifically, the plan will focus on:

- The effective and efficient conservation of marine and terrestrial biodiversity and landscapes
- The utilization of biodiversity through the promotion of responsible nature-based tourism and sustainable exploitation of biodiversity
- The development of biocentric planning approaches that minimize biodiversity loss and landscape degradation while maximizing economic growth based on sustainable use of natural resources

■ The creation of employment opportunities, especially within disadvantaged communities.

#### **SCOPE**

The plan and its first five-year investment programme will be limited to Province Y, which encompasses most of Ecoregion X. Regarding GEF financing, the plan will be limited to the "green agenda." However, should the province be able to mobilize additional resources, the plan could become an overall environmental action plan including the "brown agenda," related to industrial and urban environmental management.

The preparation of this plan would be the first of its kind in Country A and, consequently, could be used as a model in other provinces.

#### Phasing and Process

The overall plan and investment programme would be prepared in three phases:

- 1. Taking stock of the current situation and highlighting the main conservation issues related to current physical, institutional, legal, economic, and social conditions
- **2.** Elaborating a long-term strategic vision via the preparation and comparison of various scenarios
- **3.** Preparing the five-year investment programme to deal with conservation priorities.

This three-phased approach will involve consultation with the main stakeholders through workshops, particularly following the completion of each phase.

## Main Building Blocks

The preparation of the long-term strategy and related investment programme will be based on four building blocks:

- Terrestrial biodiversity: Identify an effective and efficient reserve system; identify and
  model dynamic spatial patterns of principal threats to biodiversity; and provide a planning
  framework for the conservation of biodiversity outside of reserves. Work has already been
  initiated and will be pursued and completed.
- **2. Marine biodiversity and coastal zone management:** Identify the priority coastal and marine areas for conservation. A methodology similar to that described in (1) will be used.
- 3. Institutional, legal, and policy frameworks: Assess the current institutional, legal, and policy frameworks of the province regarding the "green agenda," including both the public and private sectors as well the NGO community; highlight the key issues; propose solutions; and implement those solutions within the context of the five-year investment programme.
- **4. Financial, economic, and social analyses:** Assess the current situation regarding the financing of conservation; assess the current benefits and their distribution to the different segments of society through conservation farming, nature-based tourism, and other activities; articulate the key issues; and propose solutions.

The preparation of the four building blocks would have to be well coordinated, as the last two topics overlap with the first two. These building blocks then would have to be fully integrated for the preparation of the long-term strategy and the first five-year investment period.

## Organization and Management

The preparation of the plan and its related investment programme will be supervised by a provincial steering committee chaired by the Minister of Finance and Environment from the provincial government. The committee will meet when key decisions need to be made. The composition of this committee and its terms of reference are being defined.

A full-time coordinator (also called the **ecoregion leader**) will oversee the day-to-day programme operations and will be assisted by a secretariat. These activities will involve individual consultants as well as consulting firms to provide guidance on the implementation activities to support the major building blocks. Overall a technical committee, which will include members covering areas related to biodiversity conservation, institutional management, legal aspects, and socioeconomic aspects, will ensure the technical supervision. This technical committee is being assembled and its terms of reference are being defined.

The financial management, including contracting, will be overseen by WWF in close cooperation with the technical committee and the Department of National Parks.

## Example II: TOR for Ecoregion Leader of Ecoregion AB (a cross-border ecoregion comprised of Country A and Country B)

This TOR is for an ecoregion leader responsible for the development of the ecoregion vision, coordination of the EAP, and implementation of the WWF action plan. The leader is likely to report to a national office, programme office, or steering committee.

## Major Function

This individual will develop a multi-year conservation strategy for ecoregion AB, one of the priority Global 200 areas on which WWF will focus during the next three to five years. The ecoregion leader's major responsibilities for the ecoregion campaign will include: coordinating an assessment of the conservation values of the ecoregion and the surrounding areas in country A and country B; analysing relevant socioeconomic factors that influence the future of the ecoregion; assessing the threats to the ecoregion; and developing a long-term conservation strategy for the ecoregion.

## Major Duties and Responsibilities

- 1. Works with a broad range of key stakeholders in both countries to understand the conservation values of the ecoregion; the threats to its continued ecological integrity and sustainability; and the socioeconomic factors that are influential in defining the future economy and quality of life of its communities. This process will require a great deal of communication with conservation groups, sectoral interests, native communities and their representatives, scientists, and other key stakeholders in both countries. It will be particularly important to build confidence and respect for WWF with these stakeholders and, ultimately, to form a strong coalition of interests who want to protect ecoregion AB.
- **2.** Advocates with government authorities in country A to encourage their involvement in a partnership to develop and fund a long-term strategy for conservation of the ecoregion.
- **3.** Works closely with the national government of country B and key government officials in its regions to develop support for and involvement in long-term conservation of the ecoregion (with a focus on major species populations in the ecoregion).

- **4.** Organizes workshops, conferences, meetings, field trips, and so on in countries A and B, involving experts, government officials, and key stakeholders in initiatives concerning protection of the ecoregion's resources.
- **5.** Coordinates development and implementation of the ecoregion action plan, working closely with WWF target-driven-programme staff.
- **6.** Prepares policy analyses; writes memoranda, reports, articles, and other materials about the ecoregion; and represents WWF at meetings, public events, discussions with government agencies, and other forums.
- 7. Establishes strong, positive relationships with a wide range of key partners involved in the ecoregion, including national, state, and local environmental organizations, native groups and their representatives, other local communities, and scientists and experts.
- **8.** Develops fund-raising strategies and materials to attract individuals, foundations, and corporations willing to support WWF's ecoregion initiative. Works closely with WWF staff in writing proposals, meeting with existing and potential donors, and determining fund-raising priorities for the ecoregion.
- 9. Creates media and communications strategies for the ecoregion programme, working in close consultation with WWF and outside communications experts. Meets with members of the press individually, as well as at media events.
- 10. Prepares and manages annual budgets, working closely with supervisor.
- 11. Travels regularly to countries A and B and throughout the ecoregion.

## Supervisory Responsibility

Supervises project staff and consultants, as necessary.

#### Working Relationships

**Internal:** Interacts frequently with a wide range of WWF staff, including but not limited to target driven programmes and other ecoregion leaders, as well as representatives from the conservation science, fund-raising, education, and communications departments.

**External:** Develops and maintains regular contact with a range of partners and stakeholders involved in the ecoregion; works closely with key government offices, the media, and experts on ecoregion resource issues.

## Minimum Work Requirements

- Knowledge: A master's degree or equivalent experience in natural resources policy, ecology, ecosystem management, or a related field.
- 2. Experience: At least five years of experience in environment/natural resources issues, with specific background and experience in biodiversity and conservation efforts in the ecoregion or in countries A or B strongly preferred. Proven ability to develop fund-raising campaigns and work effectively with funders is highly desirable.
- 3. Skills/Abilities: Must have a good understanding of ecoregion conservation, including how to assess the natural resource values of ecoregions; how to address the socioeconomic factors and resource threats impacting ecoregions; and how to develop and implement conservation action plans. Strong written and verbal communication skills are required. Fluency in languages of both countries A and B is required.

## **Example III: TOR for Single-Country Ecoregion Leader**

This example highlights a TOR for an ecoregion leader who is hired after the biodiversity vision and the ecoregion conservation plan have been completed.

#### Major Function

The principal responsibility of the ecoregion leader for ecoregion YY is the management of an ecoregional action programme (EAP) for WWF. Specifically, the individual will implement and monitor the WWF action plan for ecoregion YY. The person will be based in country YY.

## Primary Responsibilities

- Implement an EAP according to the planning methodology developed by WWF, with the
  participation of local actors in the region including the WWF National Office. Duties will
  include assuming responsibility for the management and oversight of ongoing activities and
  the process whereby an action plan is developed and implemented.
- 2. In coordination with WWF International's communications department and relevant WWF National Organizations and Associates, develop a communications strategy to increase international public attention on the threats, achievements, and opportunities related to conservation of the ecoregion. In addition, support the regional communications officer in the preparation of materials used for fund-raising and environmental education purposes.
- 3. Responsible, in conjunction with relevant WWF Network members, for development and implementation of a fund-raising strategy to support the activities defined in the WWF action plan. Identify funding opportunities and cultivate donors. Coordinate and provide technical oversight for preparation of proposals supporting development of the strategy for the EAP, including reviewing and monitoring the implementation of technical proposals and budgets developed by organizations and consultants contracted by WWF to execute projects.
- **4.** Propose, develop, and implement a monitoring and evaluation system for the EAP.
- 5. Represent WWF on issues related to ecoregion YY before the general public. This includes participation in meetings, seminars, and conferences that are relevant to WWF's work in the ecoregion.
- **6.** Inform all interested members of the WWF Network on relevant developments regarding the conservation of ecoregion YY. Serve as WWF Network point person on any issue related to conservation of the ecoregion.
- Adhere to WWF's administrative requirements regarding the coordination and implementation of the EAP. This includes: (1) preparation of technical and financial reports,
   (2) preparation of budgets, and (3) preparation of contracts and institutional agreements.

#### Supervisory Responsibilities

The ecoregion leader may be responsible for the supervision of consultants and other staff members.

#### Requirements

- 1. **Knowledge:** Undergraduate degree in biology, forestry, international development, natural resources management, conservation biology, environmental studies, environmental education, community development, social sciences, or related field is required. Graduate degree preferred.
- 2. Experience: Seven to ten years of experience in the development and implementation of conservation programmes. Candidates with an undergraduate degree must have at least ten years of field experience in the region in international development, conservation, or natural resources management. Candidates with a graduate degree must have at least seven years of field experience in the region. Preference will be given to candidates with professional experience in XX region and with an understanding of the socioeconomic issues concerning ecoregion YY, or the natural history or biology of the ecoregion.
- 3. Knowledge of WWF organizational policy, structure, and planning processes desirable but not required.
- **4. Skills and Abilities:** This position requires excellent communication skills in English and language B. Administrative and management experience is essential along with diplomatic experience; oral and written communications skills; and fund-raising skills.
- 5. Able to move to country YY and travel frequently within the ecoregion as well as outside of the region.

# MONITORING AND EVALUATION INDICATORS

APPENDIX

F

## Guidelines for Selecting Indicators in a "Pressure-State-Response" Model for EAPs

The following guidelines may help in designing a monitoring and evaluation (M&E) plan for an ecoregion. There are various criteria for selecting indicators, but the following five deserve emphasis:

- 1. **Efficiency:** To the degree possible, indicator data should be easy and cost-effective to obtain, measure, collect, and calculate.
- **2. Relevance:** Indicators should be relevant to what you need to know; do not collect data just because they are easy to obtain.
- **3. Accuracy:** Be sure the information is accurate and from reliable sources; be cautious of sources that have a vested interest in what the data say.
- **4. Sensitivity:** Indicators should be sufficiently sensitive to provide an early detection of positive or negative change over a wide range of values.
- **5. Simplicity:** In addition to often being more cost effective, simple, easy-to-understand indicators are crucial for communicating information to the public and policy makers.

Additional suggestions for how to select criteria for each of the four major areas of monitoring include:

#### 1. Drivers

- Focus on at least one indicator for each key driver and the stress it creates.
- Look for differentiation between changes caused by interventions by WWF and its partners and those caused by other societal responses.

#### 2. Biodiversity State

- Collect data that are relevant, within the context of each ecoregion's biodiversity vision, and that are linked to the four primary goals of biodiversity conservation—representation, viable populations of all species, ecological and evolutionary processes, and large intact habitats.
- Ensure that the data allow you to differentiate between natural changes and humaninduced changes. Make selections based on expected linkage to socioeconomic drivers, i.e., able to evaluate predicted cause-and-effect relationship between drivers and biodiversity.

#### 3. Socioeconomic Values of Biodiversity

- Focus on natural capital as well as the goods and services of biodiversity in the ecoregion.
- Track use values (i.e., consumptive, non-consumptive, functional benefits, option value) and non-use values (i.e., existence value, bequest value).

Track both monetary and non-monetary measures of human well being that depend on biodiversity and ecological processes in the ecoregion (e.g., nutrition and health, maintenance of cultural traditions that depend on native biodiversity, and so on).

#### 4. Societal Response

- Place priority on monitoring interventions by WWF and its partners.
- Track other influential stakeholders (e.g., major government land-use policy players).

## Example: M&E in a Marine Coastal Ecoregion (Gulf of California)

Partners in the Gulf of California ecoregion have designed and are testing a comprehensive M&E system based in the pressure-state-response (PSR) model. The need was explained as follows in a proposal prepared to obtain funding for the M&E programme:

The identification of strategies to protect the biodiversity of the Gulf of California depends in large part on the ability to identify and predict the effects of human activity and to determine how those activities are changing the environmental health and conditions of this important region. This represents a problem in the gulf as our current ability to determine these effects and conditions is relatively weak because of the absence of a systematic, long-term monitoring system operating at the ecoregional scale. Such lack of monitoring has important repercussions for planning because there is currently no base for defining the condition of the gulf that would permit establishing the baseline for a conservation programme, as well as the monitoring of progress and the degree of success of ecoregional planning.

The Gulf of California's M&E programme was created to meet four objectives:

- Quantify and interpret indicators of pressure-state-response to determine a baseline of
  environmental health for the gulf, the pressure of human activities, and the societal
  response to alleviate these pressures.
- **2.** Evaluate the feasibility of using the indicators for long-term monitoring of the gulf's environmental health.
- 3. Identify information gaps and propose data collection efforts.
- **4.** Create cartographic information that allows rapid and easy visualization of the gulf's conditions with the goal of disseminating scientific information relevant to decision making regarding natural resource management in the gulf.

Monitoring the value of biodiversity was not considered in the gulf's M&E programme.

With the goal of keeping down the cost of a long-term M&E programme, the decision was made to focus 70 per cent of the M&E effort on pressure indicators, with particular emphasis on human activities and infrastructure. The rationale was that (1) those are the indicators most needed to make decisions about what actions are important in reducing human pressures, and (2) the cost of obtaining those indicators is relatively small because, in most cases, this monitoring is already being performed by government agencies. The gulf team felt that response indicators are relatively easy to monitor, and about 20 per cent of the effort was allocated to those indicators. State indicators were considered the most difficult because they are complex and costly to obtain, and information often consists of data highly restricted in space and time; thus only 10 per cent of the M&E effort was allocated to these.

The following table illustrates the team's approach to designing a system of indicators for five types of pressure in the gulf: port activity and marine traffic, agriculture, hunting, mining, and fisheries. Not shown here are indicators that were also developed for aquaculture, commerce in flora and fauna, conservation, forestry, cattle ranching, and industry.

## Examples of Indicators Developed to Monitor Human Pressure in the Gulf of California Ecoregion

Use	Stress	Indicators	Variables	Data Needed	Assumptions
Port activity and marine traffic	Change in current caused by port infrastructure	Concentration of infrastructure in the ports	— Distance between docks/ bay length — Dock size/ bay area — Area dredged/ bay area	— Length and area of bay — Size of bay mouth — Number of docks — Area dredged	The potential for change is a function of the port's infrastructure
	Water pollution caused by failures in fuel handling and maintenance	Boat capacity of the principal ports	Length of "atraque"/ length of bay	—Location of the ports —Length of port —Length of boat	—All boats pollute equally, independent of size —Handling of fuel is done in the ports
Agriculture	Introduction of exotic species	Potential area that could be colonized by exotic species introduced by agriculture	—Location of crop fields —Resistance of avenues of colonization	—Location of crop fields —Avenues of dispersal: roads, trains, surface waters	—Crop fields are inhabited by exotic species —Colonization follows island biogeographic theory —Roads and drainage canals facilitate dispersal
	Air pollution	—Potential for smoke caused by crop residue burning —Areas with greatest probability of pollinators being affected by agrochemicals	—Location of crop fields —Capacity of the agricultural system to transport agrochemicals	Location and size of crop fields	—All crop fields are burned —Agrochemicals are used on all crops —The same amount of agrochemicals is used on all crops
Hunting	Population decline of hunted species	Potential area of hunting	Areas of interest for hunting	—Roads —Towns —Sites that are vulnerable because of lack of patrols	—Hunting is carried out wherever there are no patrols —Sites without patrols are all areas without a town or road

Use	Stress	Indicators	Variables	Data Needed	Assumptions
Mining	Water and soil pollution from mining wastes	Dispersal of pollutants by waste waters and transported by rivers and canals	Distance to the source of pollution	Location of source	
Fisheries	Population decline of commercial species	Level of fishing effort in river fisheries	Number of fishing camps per unit of distance Number of fishing boats per camp Distance covered by fishing boats	— Number of fishing camps — Location of fishing camps — Type of boat and size of motor	—All boats travel the same distance —Boat mobility is a function of fuel
	Habitat destruction	Sites susceptible to industrial fisheries	Sites where the fishing fleet is concentrated	Deep areas suitable for fishing	The impact is homogeneous in all areas of 15m to 100m

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## **GLOSSARY**

H

**adaptive learning:** the process of formulating management policies and conservation actions as experiments, recognizing the benefits of allowing the polices and actions to respond to ecosystem changes as well as to changes in people's behaviours.

**biodiversity:** the variety of organisms considered at all levels, including genetic variants belonging to the same species, arrays of different species, and the variety of genera, families, and still higher taxonomic levels. Includes the variety of ecosystems, which comprise both communities of organisms within particular habitats and the physical conditions under which those organisms live. Also called *biotic diversity* or *biological diversity* (Wilson, 1992).

**biodiversity vision:** sets out long-term (i.e., 50-year) goals for conservation of an ecoregion's biodiversity by identifying key sites, populations, and ecological processes.

**biological assessment:** gathers information on the ecoregion's distribution of species and communities of species, and notes the ecological dynamics and processes in given landscapes that sustain species (e.g., watershed flows and fire disturbances).

**biome:** a global classification of natural communities in a particular region that is based on dominant or major vegetation types and climate (Dinerstein et al., 2000).

**conservation targets:** a set of quantifiable and measurable indicators that represent all recognized habitat types; set aggressive population targets for a suite of focal species; and include special elements that are related to unique aspects of an ecoregion's biodiversity (such as rare and threatened plant communities, centres of endemism, and wilderness areas).

**conservation plan:** sets forth a comprehensive strategy for action to conserve and restore the biodiversity of an ecoregion over the span of several decades. Also called *conservation strategy* or *ecoregion action plan.* 

**ecoregion:** a relatively large unit of land or water that contains a distinct assemblage of natural communities sharing a majority of species, dynamics, and environmental conditions (Dinerstein et al., 2000).

ecoregion action plan: see conservation plan.

**ecoregion action programme (EAP):** incorporates all of the steps involved in designing and pursuing a strategy for conserving the biodiversity of a particular ecoregion. The EAP includes setting the biodiversity vision, developing the conservation plan, and articulating and implementing the action plan.

**evaluation:** judges programme activities and results against previously articulated goals and objectives. Usually combined with *monitoring* techniques.

**Global 200:** a science-based global ranking of the Earth's most biologically outstanding terrestrial, freshwater, and marine habitats. The Global 200 rankings help WWF prioritize conservation actions in the world's richest, rarest, and most threatened ecoregions.

**monitoring:** periodic reviewing and oversight of conservation actions. Usually coupled with *evaluation* efforts.

**reconnaissance:** a multidisciplinary rapid assessment that helps frame the development of an ecoregion plan and identify any urgent needs that require immediate action.

**socioeconomic assessment:** identifies the key human-related trends, threats, and opportunities affecting biodiversity conservation in an ecoregion.

**stakeholder:** individual or group with interest in a particular conservation action, programme, or decision.

vision statement: see biodiversity vision.

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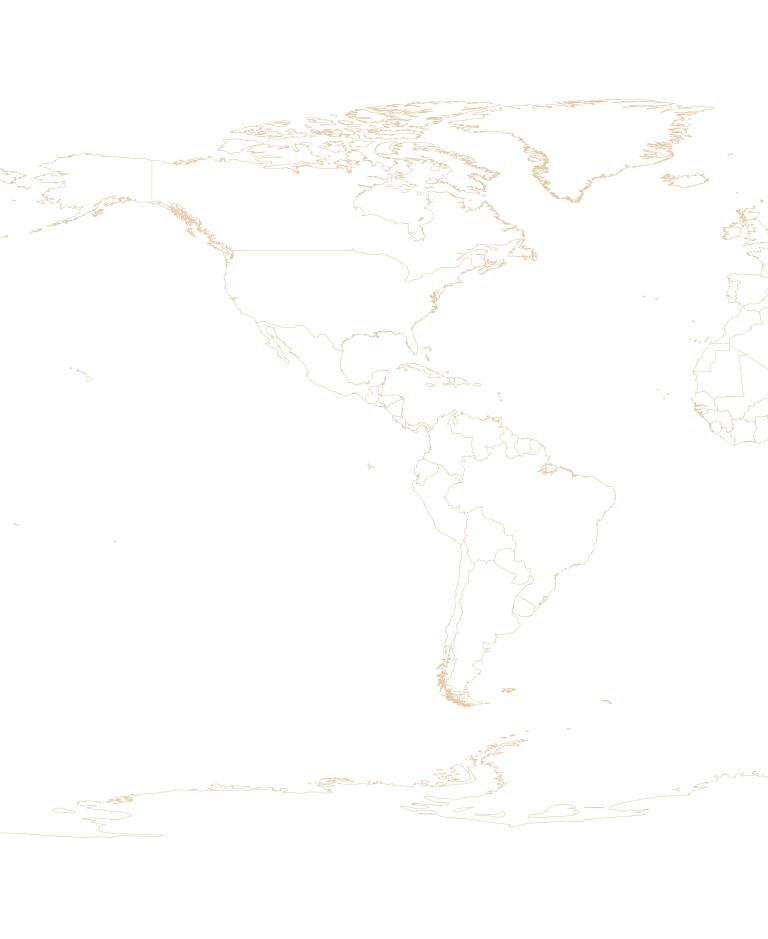
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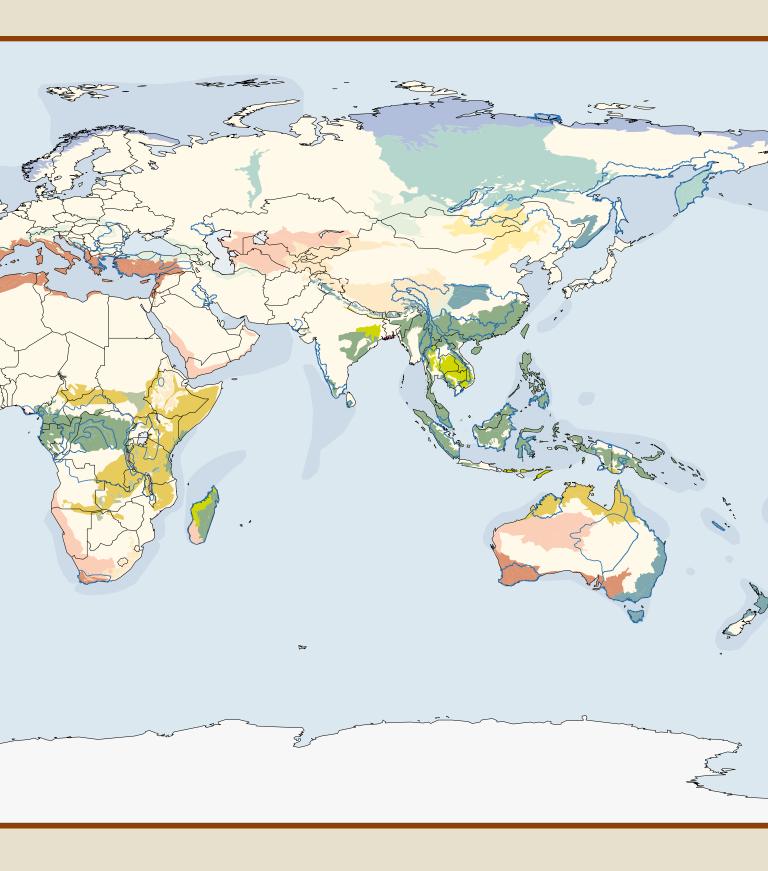
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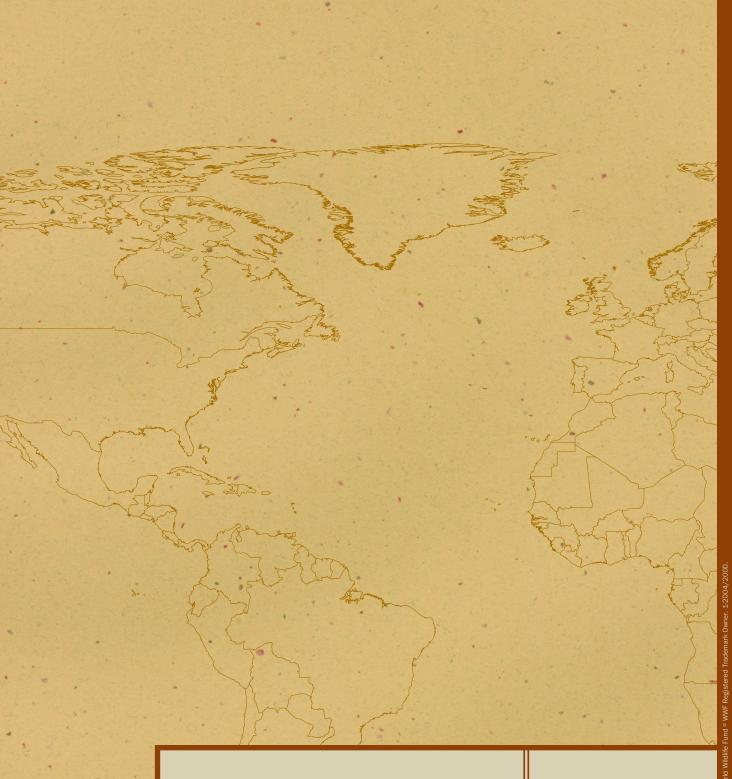
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