

# Defining and planning the impact of BirdLife Netherlands

## Conservation Case Study



Photo: Jelle de Jong



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## Abstract

Vogelbescherming Nederland (the Society for the Protection of Birds, Netherlands, or VBN for short) is a part of BirdLife International, a worldwide partnership of organisations conserving wild bird species and the habitats on which they depend. VBN was founded in 1899, and currently has 151,000 members and 90 staff.

In 2019, the VBN team used the *Conservation Standards* for its new five-year strategic plan. It was a complex journey supported by three internal Conservation Coaches and Ilke Tilders (CCNet Europe). The team took a phased approach, first retrofitting the previous plan into programme level theories of change and evaluating the impact up to 2018. Based on the findings, the team set the scope, targets, and threats, created situation models, and developed theories of change for the new strategic plan. During special sessions, the coaches gave feedback on the new theories of change.

Through the planning process, the team discovered that collective effort pays off. The *Conservation Standards* worked even though team members had different levels of understanding of the components. In addition to sharpening focus, facilitating discussion, and aligning understanding, the process helped programme teams take ownership of their theories of change and realize the value of actively using them. VBN sees the *Conservation Standards* and new strategic plan as a valuable investment in the organization's success and the future for birds!

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**Location:** Netherlands, the Dutch Caribbean and along the East Atlantic Flyway



Figure 1: Part of the VBN Team working on the development of the new Strategic plan

## Setting the Scene

Once every five years BirdLife Netherlands sets up a big participatory process for our strategic plan covering the organization's goals, results and strategies for the 5 years to come. This is a process which demands intensive participation from our membership council, supervisory board, management team and all staff members. Because of our internal drive to improve our conservation methods to stop the enormous loss of biodiversity and the growing external demand, partially donor and certification institution driven, to measure conservation impact, new planning and M&E tools had to be used to guide our strategic planning process.

For the purpose of setting up our strategic plan 2020-2025 we used the Conservation Standards. As we were not familiar with the method, a training workshop was organized. Approximately 20 staff members including the entire management team and the head of the supervisory board joined to set up theories of change (TOCs) for three of our major programs. Everyone was very excited as the process revealed the connections between our individual work efforts. Having TOCs made it much easier to explain to others how we plan to achieve an impact and to open it up for discussion. With this workshop the initial enthusiasm and the understanding of the use and benefits of Conservation Standards was created.

The former strategic plans consisted of long lists of goals and results with different levels of abstraction and it was often unclear how our actions would result in saving (bird) populations. The Conservation Standards addressed our wish to be able to define the impact we wanted to make and work more strategically towards realizing our goals. It also met the requests of our donors to show our impact.

The management team decided to make TOCs the basis for our next strategic plan. A Conservation Standards committee was formed to guide the organization in this process. Part of this committee was our board member Ilke Tilders, also CCNet Europe coach, 2 members of the management team, a coordinator and other members adding capacities depending on the steps that had to be taken.

## Step by step approach

To take all the steps below, a lot of effort went into planning the whole process and keep everybody on board. We had a schedule where everybody could see what steps we were going to take and when. We spent approximately two years to go through this process. This allowed us to take enough time for each step while our teams continued doing their regular conservation work.

### 1. Retrofitting Program level Theories of change and Staff Capacity Building:

We built capacity in our organization by retrofitting our former strategic plan into program level TOCs. We did this with the teams that work on these programs, which is about 60% of the staff. Because of this approach people could focus on learning while using the method in the programs they are familiar with. To avoid confusion, they were not asked to think about future strategies at this stage. While doing this, it became clear that people did not always share common understanding, they had different interpretations of the results that activities were supposed to bring and there were giant leaps of faith.

We performed this step with staff and management team only. We presented to our council and supervisory board how the method works and why we were using it.

### 2. Evaluating and assessing our impact up to 2018:

With the retrofitted TOCs, the teams were instructed to do an assessment of their impact according to the methods of the Conservation Standards. This proved to be quite difficult as it already became clear during the retrofit that our goals and objectives were not very SMART, and that little monitoring had been undertaken. Therefore, evaluating them involved a lot of guessing. However, the process did make clear what a great method CSs is for assessing one's impact provided objectives and indicators are were defined.

The evaluation we did was more structured than we were used to do before, and it was done with input from the whole organization. In future we would try to improve it further.

We also realized how personally involved we are with our work and how hard it can be to have others ask critical questions. This is something we will do more often: look at our work objectively instead of having to defend it.

### 3. Setting scope, targets, goals and threats:

As we have built capacity and had our evaluation results, it was time to set up the new strategic plan. Defining the scope was easy, as our geographic work area includes Netherlands, the Dutch Caribbean and along the East Atlantic Flyway. We did however already have trouble with defining our targets. How should we divide it all? Should we use habitats or species or both? We went back and forth a couple of times and then decided we would have 8 targets/programs resembling a certain type of territory. For example, we have urban areas and saltwater areas and the targets were respectively the groups of garden birds and water bird species.

Selecting the prioritized threats for each of these targets was also a big exercise. What made it complicated was that the science team responsible for this work, at first did not agree with the approach of the Conservation Standards. They had trouble deciding on threats when so many factors remained unknown. We have also formulated additional research questions on those threats that could potentially be very harmful, but we did not have the data to rank them. It took some debating to agree to use the best knowledge available, ensuring that our approach is still sufficiently science based.

This step was undertaken by our scientific team with the heads of the programs and all the results were shared with our membership council who are very knowledgeable and gave a lot of additional input.

### 4. Building the conceptual model and ranking strategies:

Instead of just updating the retrofitted TOCs we decided to do a new situation analysis. We asked the program teams to brainstorm and come up with as many strategies as possible and finally rank them on impact, risk, financial limits/opportunities, organizational fit, added value and resources. Although ranking the strategies was a useful tool, we still had some trouble selecting the most important ones as all of them seemed to be relevant and often only effective when combined.

The management team, supervisory board and the membership council could give their input on the prioritized threats, conceptual models and strategy ranking. That did help in broadening the staff's perspective. As we were on a relatively tight schedule, most groups did not find the time to check these conceptual models with partners outside the organization.

### 5. Developing the TOCs:

Once we had the conceptual models, groups were assigned to set up their TOCs. Some used their TOCs from the retrofit, others started an entirely new one. During this process we organized sessions where a group of conservation coaches gave feedback on the TOCs and another one where the teams were invited for a strategic session with the management team. A third session was organized where all staff was invited to come and ask as many questions as possible. And at last we had half a day with our council and board to get their input and thus further improve the TOCs.

Again, there was very little interaction outside of our walls. Hopefully with everybody having learned about CSs, the next time around we can make this improvement. Currently, colleagues are starting to use the method of creating a TOC as a useful tool in the collaboration with other NGOs.

During this period three people from the organization took the CCNet Coach Training which was very valuable for our further work on the organization's strategic plan.



#### 6. Finishing the Strategic Plan:

With all the TOCs finalized, we put together the strategic plan, adding elements on business operations etc. Was then our work finished? Well no, we realized early in the process that the conservation standards had great potential and that it would be very valuable to continue with the other steps of the methodology. It was decided that as an organization we were going to implement the full adaptive management cycle.

#### 7. Going full cycle (in a pilot):

The previous steps were done for all VBN programs simultaneously. It was a big collective effort. The next steps will be done in a pilot with one of the programs and with conservation coach guidance. In the pilot certain standards will be developed that other programs can also use, like a format for a monitoring plan, a logbook, a management cycle, etc.

### **Results and Lessons Learned:**

Applying the CSs requires a whole new way of thinking that does not immediately come easy for all. This natural resistance to a change was a major challenge requiring sometimes big effort to walk the people through. Sometimes it was hard to see where we were going because people are so deeply involved in the process. For people who were not actively part of the process, it was and still is hard to see the real use of what we are doing. A crucial condition for a successful work was that our management team gave this process full priority and was very actively involved in motivating their staff. Sometimes the quality of the TOCs was a bit compromised by the deadlines but in our pilot program of going full cycle, we will have the opportunity to further improve the TOCs. In fact, having a not-so-great TOC is a great motivator for the staff to take part in the next steps.

#### Results:

Apart from an impact focused 5-year strategic plan for the entire organization we have the following results:

- A clear picture of the impact that we want to make and the changes in society that we believe are necessary to achieve this;
- Support throughout the organization for our goals and the Conservation Standards.
- More focus in our goals, threats and strategies;
- A useful tool to elevate our discussions at a strategic level;
- Teams ownership for their Theory of Change;
- A better collaboration between the different areas of expertise – biology, communication and advocacy;
- Measuring our impact - the bird research component in our programs goes hand in hand with the communication, lobbying and advocacy which aim to eventually influence the behavior of the public, politicians, policy makers, farmers etc. Before using the CSs it was difficult to see and claim the impact we are making on the stakeholders. The TOCs help us specify the changes in society we think can take place and how these relate to our actions.

#### Lessons learned:

- The program level on which we applied the CSs is a very high abstract level. It might be necessary to do more detailed TOCs for certain strategies of the program.
- Having external expert guidance (a conservation coach) is essential. We had this covered for the overall process but not for each team individually. A lot of the work had to be done independently without a conservation coach facilitation. Setting up TOCs and conceptual models was quite challenging for some. Having experienced coaches guiding the organization and teams, would have been a lot easier and could build more capacity within the organization;

- The process required a lot of time and effort from all staff as well as from our Committee on CSs that guided the organization through the whole process.
- Not everyone would go along with the method. More time and effort, also beforehand, need to be invested in explaining and clarifying the CSs to people from a scientific background for whom CSs often looks like cumbersome and tedious management approach. It should be acknowledged that less experienced staff also needs more guidance to lead them through the process.
- Management team understanding and involvement has been vital to ensure priority, sufficient space and motivation among people for a quality process. We could not have done this without their constant support and commitment;
- Working with a group of over 50 people with a new process takes time and endurance. Keeping the team inspired, motivated and focused on the final “destination” is key and should be an essential element of the process. Most of the people in the organization often need reminders of why we are going through it.
- Not all the staff have to understand the Conservation Standards. We have categorized the staff depending on the necessary level of knowledge and understanding they need.
- Making the process a collective effort pays off!

