

## Criteria for funding from the ex-situ community re prioritized field projects Field Project Prioritization (FPP) Exercise, CBSG

**We invite you to participate in the development of a tool to link conservation practitioners with potential partners in the zoo and aquarium community who are looking to add specific and significant value to *in situ* conservation projects.**

A group of people have done some hard thinking about what is needed as a tool that zoos and aquaria can use to identify and prioritize field conservation projects on the basis of conservation need and opportunity for significant impact. The benefit to conservation practitioners of having a framework of thought and a tool to make investment selection and management reviews is significant. The international zoo and aquarium community, with over 600 million visitors annually and unparalleled expertise in the care of wildlife, has the potential to impact conservation like no other industry – if its efforts are coordinated and sustained. CBSG, in collaboration with WAZA, is working to develop tools that zoos and aquariums can use to identify field conservation projects to which they might contribute. Progress to date has resulted in the first draft of this tool - a set of criteria, against which conservation projects might be evaluated. The ultimate goal is the establishment of integrated, long-term, field conservation programs leading to protection of countless currently threatened species.

***ACTION REQUESTED:*** We are looking to the SSC Specialist Group Chairs to help us to identify the many excellent *in situ* conservation projects to which zoos are not currently contributing and to develop a process for capturing these projects so that projects to which zoos can add value can be identified. Please consider becoming involved in the development of this expanded tool. Linking *in situ* and *ex situ* conservation efforts in this way has the potential to greatly advance our shared goal of conserving of our planet's biodiversity.

### **Background**

During 2004-2005, members of the Conservation Breeding Specialist Group of IUCN embarked on an exercise to establish an approach to making objective decisions about investment priorities concerning field conservation projects. There were two instigating factors. The first was the discussion around and production of the World Zoo and Aquarium Conservation Strategy, 'Building a Future for Wildlife', published by the World association of Zoos and Aquariums in 2005 (1). In this document a clear imperative for zoos to direct their resources towards achieving long term conservation goals, in partnership with complementary organizations, was linked to an explicit definition of conservation being an issue of sustainable populations and habitats. Put simply, zoos' success or otherwise should be assessed in terms of their impact in the wild. The second instigation was a conference held in London in February 2004, 'Zoos in the 21<sup>st</sup> Century, Catalysts for Conservation?' at which Mace *et al* presented a paper entitled 'Measuring conservation success: assessing zoos' contribution' (2). These discussions about role and priority and evaluation in the zoo community were a reflection of a wider debate in conservation and indeed in other areas of collective endeavor and many of the intellectual models and management tool ideas are transferred from business examples. The parallel with investment broking is of some value in that a potential investor wishes to see a return on investment and is prepared to balance risk and likely growth or 'profit' assessments. There are many contending options in assembling a portfolio with many advisors, some with vested interests. Continuing the investment parallel, the potential total investment fund that zoos' can collectively direct is an important sum to bear in mind and makes the necessary influencing and administration worth the effort. If just the North American zoos were to assign 10% of their operating costs to direct support of *in situ* conservation projects the financial impact would exceed that of WWF USA and Conservation International combined (3). Then add in all the other WAZA member zoos!

The aim of the CBSG working group was to refine ideas and imperatives into a tool to make it easy for zoo directors to make consistent and objective selection and review decisions relating to which conservation projects to support. In addition to availability of a comprehensive database and a simple method of securing comparative investment advice, a pre-requisite for any evaluation system is that it is seen to make peoples' jobs easier and much of the discussion has centered on how to achieve a balance of validity and utility. Understanding that the CBSG group were not the only ones addressing selection and evaluation, but were using the specific situation of zoos, it was realized that nevertheless the same principles relate to any practitioners of conservation. The key attributes of the CBSG, FPP prototype tool are that there are a significant number of zoo directors who wish to operate collectively and that there is a functional database with inbuilt design features to enable evaluation to be managed. This is as a result of work by the European Association of Zoos and Aquaria (EAZA) who have developed the software and conducted user trials over the last two years.

The document below expands on the FPP process in its current form and outlines the EAZA database. It is offered to colleagues as a possible tool for selection and evaluation and if such a tool is applied widely and consistently the scale and quality of conservation support from zoos to the field will be very significantly enhanced.

#### References:

- (1) WAZA (2005): Building a Future for Wildlife- The World Zoo and Aquarium Conservation Strategy.
- (2) Cambridge University Press (2007) Zoos in the 21<sup>st</sup> Century Catalysts for Conservation?
- (3) Dr Jeffrey Bonner, St Louis Zoo, *pers comm*.

#### **Zoos and *In Situ* Conservation:**

#### **Next steps for the CBSG/WAZA Field Project Prioritization Initiative**

#### **2007 CBSG Annual Meeting Working Group Report**

The international zoo and aquarium community, with over 600 million visitors annually and unparalleled expertise in the care of wildlife, has the potential to impact conservation like no other industry – if its efforts are coordinated and sustained. The World Zoo and Aquarium Conservation Strategy (WZACS) articulates the ways in which zoos and aquariums can contribute to the conservation of species and their habitats. The Field Project Prioritization (FPP) initiative was envisioned as a way to assist with the realization of this potential. Over the past 2 years CBSG, in collaboration with WAZA, has been working to develop tools that zoos and aquariums can use to identify and prioritize field conservation projects on the basis of conservation need and opportunity for significant impact. The focus of the FPP initiative has been development of a decision tool to assist zoos in choosing among existing projects. Progress to date has resulted in the first draft of this tool - a set of criteria, against which conservation projects might be evaluated (see below). The tool has since been revised into a questionnaire that will help decision makers identify projects of both high conservation potential and institutional suitability. The ultimate goal is the establishment of integrated, long-term, field conservation programs leading to protection of countless currently threatened species.

This initiative has been presented to over 100 people in 6 different meetings but the tool remains far from functional. The objectives of this year's working group were to review our progress to date, and determine next steps, including a time line for realization of a global conservation project database and for road testing the FPP tool.

The EAZA conservation project database was made available on line at the end of August 2007. It was agreed that this will serve as the initial platform upon which the FPP selection criteria will be tested.

However, the goal is the production of a truly global *in situ* conservation projects database. AZA and ARAZPA have conservation project databases in varying degrees of development and our hope is that we can come to consensus around a program that will work for all regions or a set of programs that communicate seamlessly with each other.

The testing phase of the EAZA database development was first within EAZA and included evaluation of the FPP criteria. The database has now been revised and made available to the global zoo and aquarium community for testing and input. Currently, the database can be used to identify potential projects (regarding a specific region, species, habitat, theme etc.) and then the FPP questionnaire can be used to prioritise them against each other, finding the relevant data in the project descriptions. Ultimately, FPP questionnaire will be automated and the functionality built into the database.

Several questions arose during the working group discussion including: Where will the global database reside? How will the FPP tool become computerized? Who might manage it so that all field projects can be entered and evaluated? Does the database capture the specific threats to be addressed by a project? In order to ensure that these questions are answered and that the FPP effort moves forward rapidly the decision was made to form a project team tasked with addressing these and other aspects of the rollout of the global database and project selection tool.

The next step will be to establish a mechanism by which professionals outside the zoo and aquarium community can input into, and access, the database. **This is where the SSC Specialist Group Chairs come in.** The database is designed to capture projects in which zoos are participating. This is an excellent start but there are certainly many excellent *in situ* conservation projects to which zoos are not currently contributing. While there are legitimate concerns regarding database management and quality control, it is clear that, to have maximum conservation impact, there needs to be a process for capturing these projects so that those to which zoos can add specific and significant value can be identified. The group recognized that the SSC's taxonomic Specialist Groups have lists of *in situ* projects in which they are involved or for which they are working to garner support. Therefore, it was agreed that this network will be an ideal source for new projects. As soon as the zoo and aquarium community has ground-truthed the system, we will make a duplicate database available to a select number of SSC Specialist Groups for input and testing. The internal (to the zoo and aquarium community) and external databases will be merged into one as soon as an adequate process for integrating them is in place.

**We now invite SSC Specialist Group chairs to register their interest. If you would like to be involved in the first stages of development of this database, please contact CBSG's Executive Director, Onnie Byers at [onnies@cbgs.org](mailto:onnies@cbgs.org).**

## **Field Project Prioritization Decision Tool - DRAFT**

### **The Principles**

- Maximize conservation impact from invested resources;
- Seek partnerships with organizations whose skills complement the unique skills of the zoo/aquarium;
- Commit for as long as it takes (and no longer);
- Conduct a comprehensive ethical review (human, animal and environmental factors)
- Conduct objective evaluation of all projects to determine measures of success (and failure);
- Report and prioritize success to promote support;
- No need for a zoo to have a species in its collection for support of a field program;

- Conservation programs do not need to have a captive breeding element

## **The Criteria**

### **Conservation**

- Anticipated conservation impact
- Applicability of existing skill sets (of the sorts found in zoos and aquariums)
- Capacity building
- Conservation relevance
- Conservation urgency
- Measurable outcomes
- Relevance of conservation breeding

### **Institutional**

- Cost/benefit analysis
- Infrastructure and methodology
- Ease of entry
- Extent of local support
- Fundability
- Institutional specialty
- Public appeal
- Risk analysis

<b>Field Project Prioritisation</b>						
<b>PRINCIPLES</b>						
Zoos will select Field Projects using the <i>criteria</i> listed below, but only after the following <i>principles</i> have been accepted; if any one of these principles cannot be satisfied, then the institution should consider very carefully whether the project should be undertaken at all.						
1	Maximize conservation impact					
2	Seek partnerships with					
3	Commit for as long as it takes					
4	Conduct a comprehensive					
5	Conduct objective evaluation					
6	Report and prioritise success to					
7	There is no need for a zoo to have a species in its collection for					
8	Conservation programmes do					
<b>CRITERIA</b>						
	Definition	Weighting (DRAFT values)	Score (1,2,3)	Weighted score	High (score = 3)	
Criterion		A	B	C = (A*B)	Medium (score = 2)	Low (score = 1)
<b>CONSERVATION CRITERIA</b>	What is the expected conservation impact of the Project, in terms of things like species persistence, species diversity, habitat restoration, ecosystem integrity?	5		0	The Project has a high potential the enhance: the likely persistence of the target species; species diversity; ecosystem integrity; ecosystem function.	
Anticipated Conservation Impact in detail	What skill sets in conservation action and research does the Project need, and how available are they from the zoo and aquarium community?	4		0	There is clear relationship between the Project and on-going activity in the zoo: for example, in research, small population management, restricted habitat management, population genetics, nutrition, endocrinology, wildlife medicine, etc., and, for example, in conservation action, existing breeding programmes with a reintroduction or translocation component, or a clear need for an assurance population within the zoo and aquarium community.	Project has the potential to enhance two or three of these. Project will enhance one of these.
Applicability of existing skill sets (of the sorts found in zoos and aquariums)	What opportunities does the Project present for training in skills such as husbandry, education, research, protected area management, etc?	3		0	There is a significant potential for training in areas with high priority needs: husbandry and veterinary skills, management of protected areas, education, <i>in situ</i> and <i>ex situ</i> research, population monitoring. Also contributes to staff conservation skills.	There is either a strong conservation interest or a strong research interest but not both. There are no current conservation research or action efforts.

Capacity building	What is the fit between the Project and established threat assessments and priority schemes?	4	0	The Project fits within established criteria of existing global [IUCN, WWF, TNC, CI, and AZE], national or regional priority schemes.	There is less need for training or only in some areas of expertise.	There is no need for capacity building or training.
Conservation relevance	How urgent is it that the Project be done?	5	0	The Project is necessary and clearly urgent.	The Project fits two of three (global/national/regional) schemes.	The Project is of only local importance.
Conservation urgency	Does the Project have a defined set of measurable outcomes?	3	0	The Project has clear measurable outcomes and time frames for meeting programme goals.	The Project is necessary, but less urgent.	The Project is necessary, but not at all urgent.
Measurable outcomes	What is the relevance of conservation breeding to the Project and what is the likelihood of being able to maintain <i>ex-situ</i> populations?	2	0	Project-related species are represented in an SSP or EEP or other regional coordinated breeding programme.	The Project has not yet derived measurable outcomes but there is a high probability those outcomes will emerge.	The Project does not have clearly defined or measurable outcomes for meeting programme goals.
Relevance of conservation breeding		<b>TOTAL SCORE:</b>	<b>0</b>		Project-related species are not represented, but conservation breeding is clearly needed as part of the effort to preserve the species.	Project-related species are unlikely to benefit from conservation breeding.
<b>INSTITUTIONAL CRITERIA</b>						
	What is the outcome of an analysis of costs (time, money, human resources etc) vs conservation benefits?	5	0	A rigorous Project cost-benefit analysis reveals significantly greater benefits than costs.		
Cost/benefit analysis	What is the state of the Project's infrastructure and methodology?	3	0	The project has a long history, proven financial stability, has an <i>in situ</i> infrastructure, has well-trained field staff in residence, and has clear, measurable, empirical goals.	A cost-benefit analysis reveals a neutral outcome.	A cost-benefit analysis reveals significantly higher costs than benefits.
Infrastructure and methodology	Is there an existing collaborative framework in place?	4	0	The Project is located in an area where several other experienced, stable and well-established potential collaborators are already working.	The Project has a relatively short history, modest financial commitment, and no <i>in situ</i> infrastructure or resident staff, but there are experts who are involved and who have specific knowledge of the on-the-ground conditions.	The Project has no history and limited financial resources.
Ease of entry	In the region in which the Project is being conducted, what is the level of support from local people, NGO's and Government?	3	0	There is strong support for the Project from the national, regional, and local government and NGOs <i>and</i> from the people who live in the Project's target area.	The Project is located in an area where some other potential collaborators work, but who may not be experienced or well-established.	The Project is located in an area when there are no established potential collaborators.
Extent of local support	What is the likelihood that the Project will secure funding for its duration?	3	0	The Project can have or can expect a high degree of fundability from several sources and there is a clear constituency of support.	There is strong governmental, NGO or community support.	There is currently no support for the Project.
Fundability	What areas of Institutional focus (for example, education, research) match those needed by the Project?	2	0		The Project has limited appeal in terms of grant funding or government support, private donations, foundations and/or contributions by zoos and aquariums	The Project has no clear source of funds from either the zoo/aquarium community or from the external funding community.
Institutional speciality	What appeal for public support does the Project (species, ecosystem) have?	2	0	Species of primary interest is considered charismatic, is a 'national animal' of country or symbolic animal of a regional association.		
Public appeal	What risks does the Project bring to staff safety, the Institution's financial stability and reputation etc?	3	0	There is little risk to staff or Institution.	Species is not considered charismatic but could be positioned as such.	No charismatic species involved.
Risk analysis		<b>TOTAL SCORE:</b>	<b>0</b>		There is some risk, either to staff safety or to Institutional finances or reputation.	There is significant risk to staff safety and/or Institutional finances or reputation.