Addressing livelihoods issues in conservation: how do we measure success?

Conservation operates in a complex socio-political environment, with the potential to impact either positively or negatively on local livelihoods and poverty reduction. FFI is exploring the linkages between conservation and poverty, aiming to minimise the negative impacts of conservation and, where possible, deliver lasting benefits.

With an increasing emphasis on the social aspects of conservation, it is important to be able to evaluate the social impacts of our work. Not only are we accountable to the intended beneficiaries of our work and to those who fund it, but the lessons learned will also contribute to adaptive project management and organisational learning.

However, it is not easy to demonstrate socio-economic changes. Solid monitoring methods that produce good quality data on outcomes and impacts, rather than just activities and outputs, are essential. This briefing note draws on the experiences of FFI over the last four years; from our own field projects and from working with other organisations on these issues. It outlines some of the challenges of monitoring the progress of livelihoods interventions, and shares some lessons we have learnt.

Why is outcome monitoring challenging?

Tracking socio-economic change is problematic at various levels. Adequate resources – financial, time and human - are rarely allocated for collecting and analysing the data. Monitoring is often considered an add-on activity to satisfy donor or institutional needs, an additional burden to an already over-loaded project team, with no value for project management.

The problem does not just lie with the way monitoring is resourced and perceived, but with the monitoring tools employed. Traditionally, conservation organisations have used quantitative, indicator-based monitoring methods such as household questionnaire surveys which largely focus on economic (rather than social) measures. These tools are replicable across sites, produce data that is amenable to statistical analysis, and demonstrate progress within a conceptual model. They are also less challenging, for conservation biologists trained in natural sciences, than more qualitative social science tools. However, they also have some limitations:

- A baseline is required, against which to measure change.
- Only changes that were expected when designing the indicators are captured.
- The indicators chosen may not be locally applicable or relevant, particularly where a common suite of indicators has been developed by an organisation for use across many projects.
- Quantitative indicators cannot effectively capture critical qualitative or 'intangible' changes.
- They do not always help us understand *why* an intervention is working (or not), or make causal links between a particular change and a project intervention.
- The opinions or perceptions of stakeholders are not effectively captured.

Above: Community members are involved in monitoring activities in Tanzania.

These limitations have led FFI to explore the use of alternative tools that use qualitative, anecdotal and subjective evidence for change, and which promote participation of local stakeholders in planning and monitoring (see Boxes 1 and 2). These methods are a valuable complement to more familiar quantitative methods.

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Box 1: who defines success?

Generally, a conservation team has a predefined notion of what 'success' is for the project, and will develop indicators accordingly. But this may differ from the ideals and needs of local stakeholders. It is well documented that interventions perceived as contrary to local aspirations are more likely to fail.

Taking account of local priorities can go further than an initial stakeholder consultation and social impact assessment, by enabling the intended beneficiaries themselves to identify indicators of success and to monitor progress against these indicators.

When embarking on a small scale ecotourism venture on Ometepe Island, Nicaragua, FFI used an innovative method of project planning called 'Community Definitions of Success' (CDS) to sensitise the project team to local priorities, adjust project emphases to match, and ground local expectations in what were realistic project outcomes.

A series of workshops defined the objectives of the project. These included: enhancing livelihoods through improving human capital (training and knowledge); socio-cultural and political structures (through consolidating internal organisation and identity, and developing networks to link with organisations beyond the community), and infrastructure (trails, lookouts and cabins). For each of these objectives, locally-appropriate indicators were agreed by which to evaluate progress and impacts.

Not only did this process result in the development of effective, appropriate indictors. An important by-product of CDS was the rich exchange of perspectives between the team and community about the nature and activities of the planned intervention, ultimate objectives and realistic results, which generated an understanding of mutual trust and respect that is so important when working collaboratively.

The CDS indicators were subsequently revisited to monitor progress. They were complemented with objective biodiversity indicators to explore in more detail the links between ecotourism activities, livelihoods and biodiversity.

Above right: On Ometepe Island in Lake Nicaragua the community have defined their own indicators of success for the project.

Box 2: a non-indicator-based technique: Most Significant Change

Most Significant Change (MSC) is a methodology that systematically captures stories that demonstrate changes caused by a project, and uses them as an outcome-focused, participatory monitoring and evaluation tool. It was pioneered in a participatory rural development programme in Bangladesh in the 1990s, and has since been used in many contexts worldwide. It is starting to make its way into the conservation sector.

How MSC works[1]

• Project stakeholders, including the intended beneficiaries and project staff at different levels, are asked to record a factual 'story' containing evidence that demonstrates the most significant change that they have observed or experienced as a result of the project. The story can be positive or negative.

• Rather than indicators, MSC uses broad 'domains' within which the project is aiming to effect change, such as 'change in attitude towards conservation', or 'improvement in social capital'.

• Field staff then meet to discuss the stories, and decide which they consider the 'most significant'. They also identify whether feedback is needed, or whether adaptations should be made to project implementation. Stories are verified where necessary.

• The most significant stories are can then be collated for use as evidence of change.

This process is repeated every two months, or quarterly, depending on project context.

MSC and FFI

FFI has piloted the MSC system with several projects, including the Cambodian Elephant Conservation Group (CECG). The CECG aims to reduce the impacts of Human-Elephant Conflict (HEC) amongst poor forest-adjacent farmers, and increase farmers' tolerance to the endangered elephants.

Using simple low-tech methods, the CECG successfully reduced HEC, improved farmers' livelihoods, and reduced resentment towards elephants, which should reduce retribution killings. However, these successes were not captured through the simple quantitative incident reports that were used to monitor HEC.

MSC has produced anecdotes relating to changes in farmers' income (growing crops that are unpalatable to elephants means less HEC, and higher yields), well-being (they no longer need to stay awake in the fields at night to scare-off elephants) and attitudes towards conservation (now that HEC is reduced and CECG have explained the conservation status of elephants, they are more tolerant of them).

MSC is not easy to establish within a project: producing and dealing with narrative data is very different to the quantitative methods that conservation biologists are familiar with. It takes time and effort to adapt the system to the local circumstances. The data collection and regular meetings are time-consuming. There is also scepticism over the high subjectivity of the process.

However, this subjectivity should be seen as an important element of the system, reflecting the views of stakeholders and the project team. The rationale supporting decisions is documented, adding to transparency. Stories can be verified, for instance through triangulation, which supports the rigour of the system. Crucially, MSC is designed to *complement* – not replace – quantitative, indicator-based forms of monitoring.

Moreover, the benefits are many-fold:

• The narrative data captures qualitative, intangible and unexpected changes often missed by conventional methods, such as: building trust and changing attitudes towards conservation; empowering communities to govern their own resources; or improving 'well-being'.

• Stakeholder participation and feedback are integral the system, so strengthening relationships and improving cooperation.

• Projects will amass a bank of evidence for the results of their work. This evidence can be used in reports or proposals, and referred to when replicating the intervention in new target areas. This rich outcome-focused data can also be used in evaluations.

• The subjectivity of the data reflects the perceptions and needs of the stakeholders; an important element in designing the ongoing project.

• Some stories highlight specific issues that require attention, so that MSC has become an adaptive management tool, improving responsiveness and ability to overcome unexpected obstacles.

• Field teams operating in different regions are able to learn from each others' experiences at the meetings.

• The CECG field teams have found that through meeting regularly to discuss the outcomes, reflect on progress, and discuss how the project can adapt to the changes, their capacity and initiative has increased dramatically. They have a better understanding of the overall purpose of the project, and hence are better motivated.

1- This very brief explanation of the system simplifies some important intricacies. Please see **http://www.mande.co.uk/docs/MSCGuide.htm**, or contact the FFI Biodiversity and Human Needs programme.

Above: CECG field team working together, discussing MSC stories.

Lessons and Recommendations

Planning and implementing the monitoring system

• It is essential that interventions – and therefore monitoring systems – are based on a sound understanding of the linkages between conservation and livelihoods issues.

• Monitoring systems must be planned carefully at the outset of the project, and adequately resourced in terms of time, funding and human resources.

• The purpose of the monitoring - and its value for adaptive management and project success – must be understood by those who will be implementing it. Feedback from central office can heighten the sense of purpose and strengthen institutional ties.

• The monitoring effort should reflect the size and scope of the project. Smaller projects may not need as comprehensive effort as larger ones.

• Devise indicators that are locally relevant. Participatory approaches to planning and implementing monitoring are best to achieve this, and help build communication and relationships (see Box 1).

• Create opportunities to learn from other organisations dealing with the same issues, including development organisations.

• Build appropriate skills and expertise within the team, or bring them in.

• Use a variety of complementary monitoring methods to capture different forms of evidence, including:

- Qualitative and quantitative.

- Subjective and Objective; recording perceptions of change is as important as measuring objectively verifiable indicators.

- Methods to measure unexpected as well as expected change.

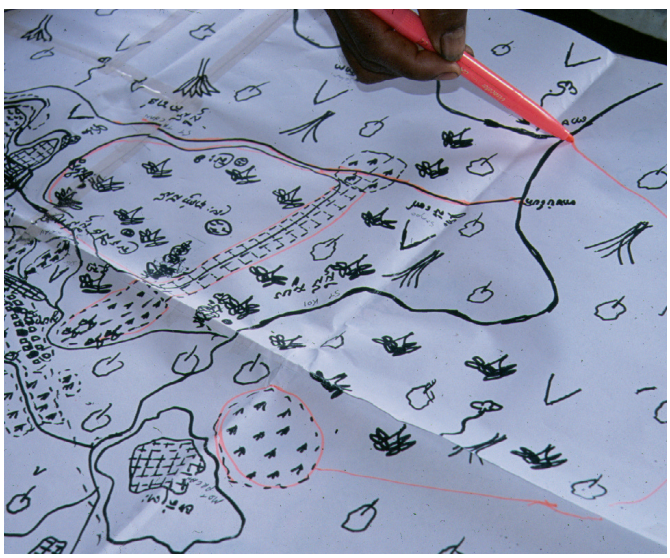
- Means to identify and understand the causes of change.

• Use methods which require the whole team to reflect on project outcomes, as this can build team capacity and enhance analytical skills.

• Learn from challenges as well as from successes, and ensure methods are able to capture challenges and failures.

• It is only worth undertaking monitoring if the data are going to be used. Identify the most useful form of data and focus efforts on collecting good quality information. Make use of secondary data if possible. This will increase cost-effectiveness.

• Whilst monitoring based on participation and qualitative data are important, do not abandon conventional quantitative measures, or lose sight of the original conservation objectives.



Above: Land use mapping in Cambodia can be used to understand community priorities and linkages to conservation.

About FFI

FFI is the world's longest established international conservation body. Active in over 40 countries around the world, FFI develops, implements and manages biodiversity conservation projects in partnership with host country organisations, to protect and conserve species and ecosystems. FFI's guiding principles are to work through local partnerships, to act as a catalyst for change, to make conservation relevant and to base decisions on sound science.

Contact

This is one of a series of leaflets produced by the Biodiversity and Human Needs team at FFI. For more information contact **livelihoods@fauna-flora.org.**

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