**Conservation Stewards Program**

**Conservation Agreements**

**Guide for Trainers**

These notes have been developed as a guide to accompany the package of training materials created to introduce audiences to the Conservation Agreement (CA) model and provide instruction on the CA model’s components. This guide will begin with a set of general observations regarding best practice accumulated over several years of training sessions conducted by the Conservation Stewards Program (CSP) team. Then the guide will discuss each of the training modules in turn, to ensure that trainers present a consistent interpretation of the CA model, its steps, and various aspects of its application. The notes assume that the reader is familiar with the Field Guide for Implementers.

1. **Some Best Practices**

*Trainers*

Ideally, training workshops are conducted by at least two people. Training workshops involve intensive days with many details that often require simultaneous attention. Activities in addition to giving the presentations include note taking; ensuring that all participants have supplementary materials; tracking the level of participation; monitoring reactions to see if people are confused or otherwise disengaged; providing a broad set of examples, experiences and perspectives during discussions and question & answer sessions; supporting break-out group exercises; being available for informal exchange during breaks; recording follow-up needs; noting which parts of the workshop are working well and which are not; solving unforeseen logistical problems as they arise; and more. Therefore having more than one person on the training team contributes enormously to a smooth event.

When possible, having at least one man and one woman on a training team is highly desirable. In addition to projecting recognition of the importance of gender, this offers the ability to relate different perspectives and experiences. Most importantly, in some settings male or female participants are more comfortable approaching trainers of their own gender with questions or informal discussions, so having a gender balanced training team encourages greater engagement and participation.

*Preparation*

The most critical part of preparation is for trainers to ensure that they are intimately familiar with the training presentations and supporting materials. Effective PowerPoint presentations minimize the amount of text on the screen, so the trainer must know the intended content and message of each slide, and must be able to present them without relying on reading from the screen. This can happen only through practice. The investment of time in such practice yields an enormous pay off, as you will then be talking to people and have people listening to you, instead of you reading out slides and people staring at slides.

Moreover, thorough knowledge of the presentation content reduces your reliance on the slides; in the event of a power outage or computer breakdown, a well-prepared trainer will be able to nevertheless deliver the information and conduct the training. Of course, technical problems of this kind hopefully remain a rarity. As part of preparation before the workshop, the trainer should test the presentation on the machine and projector that will be used; this may mean getting to the venue early to have enough time for a run-through. Check that visibility, colors, animations, means of advancing slides, etc. are functioning as expected.

*Presenting*

As noted, trainers should be well-prepared, intimately familiar with presentation content, and have practiced the presentations many times. This guide will not replicate the many available sources of guidance for effective presentation and public speaking. The one tip on presenting in general is to compose and memorize the first few opening sentences of your presentation. After speaking the opening lines from memory, the rest of your preparation will carry you through with ease. This lets you get off to a smooth start, and will make the audience comfortable and positively engaged as they see your confidence.

**PowerPoint tips and tricks**

* 1. Turn off screen saver on your computer (and skype, and email notifications, and anything else that can suddenly pop up)
  2. With the file open, F5 starts the presentation from the beginning
  3. With the file open, Shift-F5 starts the presentation from the slide you are on
  4. To skip the step of opening presentation from editing mode, make a copy of the file and change the file extension to .pps; double-click on the file to go straight into presentation. Esc gets you out.
  5. While in presentation:
     + B blacks out the screen; any button gets you back to the presentation
     + W whites out the screen; any button gets you back to the presentation
     + Never cover the projector with a sheet of paper again!

Often, your presentation will result in an engaged audience with many questions and observations. You must not let the training get side-tracked or thrown excessively off schedule by questions, but you also need to identify opportunities to stop for a few simple clarification questions or you will risk losing your audience; be ready to restate the same thing in a different way. Make clear to the participants that questions are welcome and you will try to address simple questions as you go, but that more elaborate questions will be addressed during scheduled Q&A sessions. At various points you will also be able to thank someone for their question and say that it will be addressed later in the presentation. Importantly, someone on the training team should note all questions, to ensure that they are all addressed at some point during the workshop and to inform efforts to refine presentations and the model in the future.

Given that the group of workshop participants may include a range of language abilities, background familiarity with the issues, and other differences, it is essential to speak slowly and clearly. Check with the audience that everyone can properly hear you and see the screen. At the first break in the workshop, trainers should consult each other to check if language, speed, volume, etc. are working well. Someone on the training team who is not presenting needs to monitor the audience for confusion, and for when there may be a need for an unscheduled break, for example if many people are losing focus.

*After Presenting*

After each session, conduct a debrief between training team members to record what went well, what did not, what questions or other follow-up needs arose, and what needs to be done before the next session. After the training workshop as a whole, arrange a workshop evaluation by participants, typically using a prepared questionnaire. A well-designed questionnaire can allow you to both invite feedback from participants and assess the degree to which they absorbed key material and messages from the workshop.

*General Steps*

1. Agree on agenda/plan with local partners, if any
2. Logistics – checklist
   1. Invitations and RSVPs to/from participants
   2. Participant accommodations (if applicable)
   3. Meeting venue (meeting room, table/chair arrangement, podium/lectern, etc.)
   4. Audio-visual equipment (microphone, projector, screen, etc.)
   5. Workshop materials (flip charts, markers, notepads, memory sticks, etc.)
   6. Transportation to/from venue (if different locale from accommodations)
   7. Meals
   8. Refreshments during workshop breaks
3. Organize preparatory and presentation materials in appropriate language, to extent possible; select examples that are most relevant (while ensuring that flexibility/range of applications of CA approach is also conveyed)
4. Send materials to participants for review before the training days: Agenda, Field Guide for Implementers, examples of feasibility assessments, Theory of Change guidance and examples, monitoring Protocols, effective communications materials, etc.
5. Prepare workshop evaluation questionnaire
6. Practice presentations (many times!)
7. Test presentations at the workshop venue
8. Conduct workshop
9. Distribute evaluation questionnaire for completion during dedicated part of schedule
10. After workshop, provide additional guidance materials, templates, etc., and list of other resources/guidance, including materials developed by CI/CSP and external materials (e.g. on monitoring, community engagement, designing REDD+ projects, possible funding sources, etc.)
11. **Training Modules**

The package of training materials consists of seven presentations, accompanying materials (handouts, guides and examples) and exercises. The organization of these materials is as follows:

*Presentations*

The PowerPoint presentations, after an initial introduction to the overall thinking behind and structure of the model, tackle the several steps of applying the model in sequence. They include explanations and examples. The seven presentations are:

* Introduction to Conservation Agreements
* Module 1: Feasibility Assessment
* Module 2: Engagement
* Module 3: Negotiation and Design
* Module 4: Implementation
* Module 5: Monitoring
* Module 6: Sustainability

The Field Guide for Implementers is mandatory reading for workshop participants; trainers must be sure to distribute the Field Guide well in advance of the training workshop, and strongly encourage participants to review it before the event. In addition, Annex 1 provides a listing of the sets of other Supplementary Materials that have been prepared to accompany each presentation. Of course, for particular workshops the trainer teams should feel free to provide additional supplementary materials as relevant to the specific site, project type, geography or audience.

*Core Themes*

Several core themes run through all of the presentations. Trainers should develop the habit of re-emphasizing these themes during presentations, when answering questions, when guiding group exercises or facilitating discussions, and during informal interactions. These themes are what make the CA approach distinct and effective, and are central to coherence and consistency among CSP’s many efforts around the world. These themes include:

* The key idea of CAs is that behavior change depends on incentives.
* Incentives only work if benefits are conditional on performance.
* Verifying performance requires monitoring.
* For benefits to work as incentives, penalties must be applied if performance is lacking.
* Community participation in CAs is voluntary, based on FPIC principles.
* Since community participation in CAs is voluntary, getting incentives right is essential.
* CAs are not right for every situation, that is why we do a thorough feasibility assessment.
* Figuring out the benefit package is a combination of pragmatic analysis (opportunity cost) and negotiation.
* Long-term CAs require long-term funding and management solutions; this is a challenge, but every long-term conservation effort faces the same challenge.
* CAs are very different from Integrated Conservation and Development Projects (ICDPs); the CA model does not assume that the resource base itself can produce enough benefits to motivate sustainable choices.

The presentations and Supplementary Materials seek to convey these themes that are central to the thinking behind the CA model, the model itself, and best practices for its application. Trainers should take every opportunity to reinforce these themes. Often, when audiences are confused or even skeptical about the approach, returning to these themes can help structure useful, constructive responses.

The tables below provide remarks for the slides in the seven PowerPoint presentations. The section that follows these tables discusses the exercises that Trainers can use to engage participants on focus on specific concepts and methods.

*Annotations for PowerPoint Presentations*

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| --- | --- | --- |
| **Session: Introduction to Conservation Agreements** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Introduction to Conservation Agreements | Session title |
| 2 | Biodiversity, Ecosystems and People | Overlap between hotspots and population density: key point here is that biodiversity and ecosystem services are in the hands of local people, so we need an effective approach to working with local people. |
| 3 | Map of Colombian Amazon | One such place is the lower Caquetá / Apaporis basin in southeastern Colombia, near the border with Brazil, where CI-Colombia is implementing CAs with local settlers and indigenous communities |
| 4 | Threats to Biodiversity | Title |
| 5 | Threat images | Illustrate threats in Colombian Amazon: the main threat to biodiversity CI-Colombia seeks to address using CAs is overharvesting of key fish species, Pirarucú and Arowana |
| 6 | Local Priorities | Title |
| 7 | Priority images | Illustrate priorities in Colombian Amazon: main priorities of the communities are livelihoods and rights & capacity to manage their lands and resources |
| 8 | CSP’s Solution: Conservation Agreements | Definition of the model: CSP has developed a model for working with local communities we call Conservation Agreements. Emphasize that this is about incentives, an exchange of benefits for conservation performance; the terms of the exchange are determined through negotiation; the deal is meaningful only if performance is verified. |
| 9 | Socioeconomic and Biodiversity Results | Title |
| 10 | Images of socioeconomic and biodiversity results | Illustrate monitoring results – what the model just described has achieved in the Colombian Amazon. Biodiversity results include larger populations of key fish species, greater number of many other species of fish such as the giant river otter, and effective community protection of almost 200,000 hectares of forest; socioeconomic results include improved management capacity, greater fish availability for consumption and sale, and contributions to household income from patrolling stipends |
| 11 | Introducing Conservation Agreements | Key points of rationale for the model: emphasize that conservation imposes a burden/cost on local people, so it is only just/fair/equitable to provide benefits/compensation – in addition to be necessary for effectiveness. |
| 12 | Conservation Agreement Model | Graphic of the CA model: actions are designed in response to threat to biodiversity (or ecosystem services); these actions impose a cost (we call this opportunity cost, more on this later in the workshop); the benefits have to be greater than the cost for conservation to be an attractive choice to local people. |
| 13 | The Agreements | Title |
| 14 | Biodiversity | Biodiversity targets for Colombian Amazon CAs |
| 15 | Stakeholders | Key stakeholders in Colombian Amazon CAs |
| 16 | Conservation Agreement | Commitments and benefits in Colombian Amazon CAs |
| 17 | Conservation Agreement | Indirect benefits of Colombian Amazon CAs – note that there are benefits that the implementer/investor commit to providing as described in the previous slide, but the relationship in general also leads to various different kinds of benefits and advantages for communities. |
| 18 | Monitoring | Note three types of monitoring for the CA model |
| 19 | Monitoring Biodiversity Impact | Colombian Amazon example – growing densities of Pirarucú in 4 lakes |
| 20 | Monitoring Socioeconomic Impact | Colombian Amazon example – one thing to track in socioeconomic monitoring is the composition of household income. |
| 21 | Long-term Sustainability | Colombian Amazon example – for long-term CAs, need to identify solutions to who will manage them in the long-term (take care of the implementer role – a government agency? A local NGO? A community organization? …) and how the costs will be covered (government budgets, trust funds, community enterprises, …) |
| 22 | Questions? | Pause for Q&A |
| 23 | CSP Initial Portfolio | Map of CSP’s first generation of project sites – demonstration sites in 7 countries, mostly in Latin America |
| 24 | CSP Accelerating Adoption | Map showing new sites since then – some new CSP investments, but also use of the model by other CI programs, and other NGOs, in countries all over the world |
| 25 | Impact at Scale | Map showing countries where large CA program initiatives are in progress  Guatemala – now throughout the MBR  Colombia – national program combining public, private and non-profit sectors exists: Programa Conservación para el Desarrollo  Ecuador – national government program exists: Programa Socio Bosque  Peru – from pilots to CAs with nearly 1,000 households in the Alto Mayo Protected Forest  Bolivia – national government program emerging: COMSERBO  Guyana – national government program under development: Sustainable Development Framework Agreements  Liberia – national government program under development  South Africa – national government program exists  China (Sichuan Province) – progressively higher level government adoption (district, protected area, county, prefecture …) |
| 26 | Applications of the Approach | Show many different uses of CAs |
| 27 | The Rest of the Workshop | Note the steps in applying the CA approach |
| 28 | Project Cycle toward Sustainability | Graphic of steps in applying the CA approach: note that we typically begin with a series of short-term agreements, while we figure out solutions for a long-term agreement. This also allows opportunities to refine the agreement, build trust, develop relationships, find more partners and, crucially, figure out long-term financing and CA management solutions |
| 29 | 4 Keys to Conservation Agreements | Re-emphasize critical components of a CA: conservation actions, benefits, monitoring, penalties: if there is anything people remember from the session, it should be this! |
| 30 | Questions? | End session by opening to Q&A |
| 31 | Extra image |  |

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| **Session: Feasibility Analysis** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Feasibility Analysis | Session title |
| 2 | Project Cycle toward Sustainability | Reminder of steps in application of the CA model, show that this session is about the first step |
| 3 | 4 Keys to Conservation Agreements | Reiterate the 4 key parts of a CA, the most important take away message from the previous session; when looking at a potential site, the first thought exercise is to come up with initial idea of what these components might be – at least for actions and benefit package – to help frame feasibility analysis |
| 4 | Initial Idea for CA | Thinking in terms of targets, threats/drivers, actions, and stewards helps frame first ideas for the CA; these first ideas help frame the feasibility analysis. |
| 5 | Feasibility Analysis | The purpose is to build the arguments to answer three essential questions, noting that CAs are not always the right tool, or the most cost-effective tool, for a particular situation. |
| 6 | Feasibility Considerations | 9 categories of questions/information to look at when doing the feasibility analysis, ranging from basic physical features of the site to first rough ideas about long-term financial and management sustainability needed for exit strategy for the implementer |
| 7 | Feasibility Considerations | Deal-breakers: there are a number of things that could make a CA impossible at a given site. If costs are extremely high, strategies based on policy/enforcement/regulations may be more appropriate; if the government has committed to huge infrastructure projects such as hydrodams or super highways, it might not make sense to invest in a CA; if there are many other NGOs providing many benefits for free, CA benefit packages might not be an effective incentive; some property rights situations are too unclear or conflicting, so you don’t know who to compensate for behavior change in a way that leads to conservation; some sites are simply too difficult to raise funding for based on the CA model; in addition, if the value of biodiversity or ecosystem services at the site is low, investing in a CA is probably not a good idea … |
| 8 | Feasibility Considerations | Critical challenge: managing expectations. You need to gather information about the community (and other stakeholders) to determine whether an incentive-based deal can be structured to achieve conservation outcomes, identify potential livelihood investments, etc.; however, since you have not yet determined that you will actually do a CA in this place, you have to be very careful not to fuel expectations. Relying on published documentation and local partners can help, but sometimes you can’t avoid doing primary information collection. You need a careful communication strategy that is fair and honest. |
| 9 | Benefit Package | As we indicated in the first session, benefit package has to offset the burden/cost of conservation. This is the sum of the cost of conservation actions (patrolling, monitoring, reforesting, etc.) and opportunity cost of foregone resource use – income lost by not logging, or not converting an area to agriculture, or not hunting/fishing. |
| 10 | Conservation Agreement Model | Technically, the opportunity cost is what the community has to give up in order to achieve the conservation outcomes; thinking about it that way helps figure out how substantial the benefit package must be to secure community interest in conservation |
| 11 | Opportunity Cost of Conservation | Technically, the opportunity cost of conservation related to foregone resource use is the income lost by not doing something (like logging or hunting), MINUS the enhanced conservation values from not doing it (like better watershed services resulting from not logging). |
| 12 | Example: Guyana | For example, in Guyana not logging in the Upper Essequibo Conservation Concession meant foregoing $50,000 in logging revenues |
| 13 | Only Timber? | Not logging in Guyana meant improved water quality, protecting habitat for biodiversity, and avoiding carbon emissions; technically, these values should be subtracted from the $50,000 of lost logging revenues, so the true opportunity cost is less than $50,000 |
| 14 | Challenges | There are several difficulties in figuring out technically accurate opportunity cost. Overcoming these difficulties could take a lot of time and a lot of money for expert consultants. |
| 15 | Being Practical | So, in many cases the opportunity cost analysis is best served by looking at the simple-to-quantify elements, rather than doing complex/expensive analyses that probably won’t be very convincing to communities (or other stakeholders such as government) anyway. The savings in time and expense are worth the loss of accuracy, noting also that the ultimate benefit package is the result of negotiations. In negotiations, you can point out the additional benefits of conservation that were omitted in the opportunity cost assessment. |
| 16 | Opportunity Cost: Cambodia | Value of foregone rice production from areas protected from shifting cultivation |
| 17 | Opportunity Cost: Cambodia | Value of foregone hunting of protected species |
| 18 | Feasibility Analysis: Output | Key result of this step is a decision on whether or not to move to the next step |
| 19 | Feasibility Assessment | A useful thing for the report is a table that clearly spells out favorable/unfavorable factors, organized by the considerations described earlier; Field Guide has more specific questions; some of these are on the handout. |
| 20 | Feasibility Analysis: Theory of Change | If the analysis does justify moving to the next step, it is time to develop an initial Theory of Change, to describe the logic of the intervention, or the logic of how the proposed rough idea for the CA will lead to the desired conservation outcome |
| 21 | Theory of Change | More specifically, the ToC has to present the rationale for what kind of behavior change the CA will produce, how it will do so, and how that behavior change will deliver the conservation outcomes. This logic/rationale is structured as the relationships between Actions and Drivers, Drivers and Threats, and Threats and Outcomes |
| 22 | Theory of Change | For the Actions, Drivers, Threats and Outcomes there are several components that need to be described for the Theory of Change – for each, you have elements (type of action or change), targets (how much/what kind), indicators (what do you measure to show if you are making progress on targets), and data collection (how do you measure the indicators) |
| 23 | Theory of Change: La Ventosa and Nuevo Belén (Guatemala) | Title slide for example |
| 24 | Theory of Change | Example – **very small print for screen, so important to make sure that handout is available to participants**. |
| 25 | Final Thoughts | 1. Opportunity cost is important, because it addresses a fundamental driver of decision-making which is the relative costs and benefits of particular resource use decisions. The whole point of the CA model is to shift those costs and benefits to make conservation more attractive. 2. The feasibility assessment is a snapshot in time (often with some historical perspective). But things change over time, sometimes rapidly and dramatically, such as new plans for a mine or a road, or a new national REDD+ program – therefore it is important to revisit key factors (threats, funding opportunities, and others) regularly to keep your information on feasibility considerations up to date. 3. When things change, your Theory of Change may become obsolete and require adaptation. This is another important reason to keep up to date on key feasibility considerations. |
| 26 | Thank you | Closing slide, opens Q&A session. |

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| **Session: Engagement** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Engagement | Session title |
| 2 | Conservation Agreement Model | Repeat basic definition of the CA model, to reinforce big picture concept |
| 3 | Project Cycle toward Sustainability | Reminder of steps in application of the CA model, show that this session is about the second step. Purpose: ensure that community (and other key stakeholders) understand the approach, as well as motivations for the project, and seek community consent/agreement to proceed to next steps. |
| 4 | Rights Based Approach | Key principles of RBA (at least CI’s version, but something like this will be common to most organizations that embrace RBA). Given that CAs are all about working with communities, these principles are especially important. |
| 5 | RBA Policies | CI has developed policy documents addressing several important topics with respect to rights of specific groups, and other specific issues, relevant for RBA. Working with the SPP team, CSP has incorporated these principles and best practices into the model. |
| 6 | Engagement | FPIC – this slide is essential for the CA approach. Free, Prior and Informed Consent – FPIC – is central to the model as it is about voluntary participation on the part of communities, based on a complete understanding of what the deal is … the agreement cannot go forward unless you have determined and documented that everyone in the community understands it, and a critical number of people agree on it. Critical number does not need to mean everyone, but a simple majority (just over 50%) is probably not adequate either. Often the implementer must work with the community to identify the acceptable minimum number of community members in support of the CA. |
| 7 | Gender | Engagement (and later design and every other step and activity in the CA) must take into account gender differences. Since men and women have different roles in resource use, in community governance, in managing household finances, and more, the different needs, priorities, perspectives, and ways of participating in a CA need to be examined and incorporated. In some projects, this means deliberately empowering women by assigning specific roles, or by insisting on ways for them to participate in consultations and decision-making. It can be challenging to strike the right balance between advancing women’s status and respect local norms and traditions; see the case studies provided in Supplementary Materials and CI’s guidance on gender within RBA for reflections on overcoming this challenge. |
| 8 | Stakeholder Process | Two key points to emphasize with respect to stakeholder process are that the community cannot be viewed or treated as a single, homogenous entity but is composed of multiple groups with different perspectives, needs and priorities (men/women, young/old, farmers/hunters/traders, etc.), and community resource management does not take place in a vacuum – many other relevant parties need to be considered in the CA strategy (private landowners, many government agencies, other NGOs working in the area, companies operating nearby, etc.). Some relationships will be critical, requiring specific plans and strategies to maintain or strengthen the relationship. Each actor and each relationship is complex, and the implementer will continually learn more about them, requiring frequent updating of stakeholder analyses. See Stakeholder Mapping handout. |
| 9 | Engagement Process | The basic steps of the engagement process are fairly intuitive. A few points: keeping the engagement team stable makes it easier to develop a positive relationship with stakeholders; engagement requires planning and preparation, you can’t just show up at a meeting and say “ok, what shall we talk about?”. You need an agenda, meeting objective, handouts, talking points, initial thoughts on follow-up steps, etc. (see Engagement handout). The critical thing to achieve during the engagement process is that everyone shares an understanding of how the project is going to evolve; you have to make sure that people don’t mean different things when they say “CA”! |
| 10 | Engagement Process | Outputs: The desired outcome is that, based on shared understanding, everyone decides together whether or not to go ahead to the next steps – this is one key way in which the CA approach embodies FPIC. |
| 11 | Stakeholder Analysis | As mentioned before, stakeholder analysis is essential to making sure that you are engaging all the actors that need to be evolved, and engaging them in the right ways with respect to how they relate to the project and each other. Here are some categories of stakeholders that may be relevant to your CA project. ***(The reason this slide is here, rather than after Slide 8, is that it sets up for the stakeholder mapping exercise)***. |
| 12 | Thank you | Closing slide, opens Q&A session. |

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| **Session: Design & Negotiation** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Design & Negotiation | Session title |
| 2 | Project Cycle toward Sustainability | Reminder of steps in application of the CA model, show that this session is about the third step |
| 3 | Conservation Agreement Model | Repeat basic definition of the CA model, to reinforce that negotiation is key |
| 4 | 4 Keys to Conservation Agreements | Negotiation, discussion, consultation – lots and lots of communication and exchange! – is relevant to all aspects of the project, but these 4 keys are the central items to be negotiated, the core features of the CA. |
| 5 | Negotiation Process | As with engagement, negotiation requires thorough preparation. When defining the schedule, it is critical to allow sufficient time for internal discussions within community; they cannot feel rushed or pressured, as this would violate our FPIC principles. For your negotiating position, you need to define the minimum conservation actions needed to make the CA worthwhile, and have a sense of the opportunity cost of those actions to frame discussions about the benefit package. Also, remember that the CA will evolve over time, so you don’t necessarily have to get (or give) everything in the first round of the CA. It is also important to identify deal breakers, and make clear to the community (and other stakeholders) that you will walk away from a bad deal. You want to be fair, but also need to use your hard-raised conservation funds wisely; if the community demands too much, there are other communities at other sites that will offer a better deal; pointing this out during negotiations can sometimes be effective. |
| 6 | Defining Conservation Actions | The commitments of the community have to be realistic, things they can do (potentially with technical support and capacity building), but at minimum they have to contribute meaningfully (and in a measurable way) to conservation goals. An implication is that in a CA, the incentive often is for doing an action, regardless of whether that action produces the desired outcome; this is fair because that is what the community can more directly control. However, it is also fair to make clear that if, after some period time, the CA is not producing conservation results despite good performance on actions, the CA will need to be changed or terminated to justify continued conservation investment. |
| 7 | Example Agreement: Cambodia | A useful observation here is that for many CAs, it will be helpful to have a land use plan of some kind. Clearly defined land uses and management practices, explicitly mapped, offers a transparent foundation for conservation commitments. However, it also means that you will need to ensure community-wide awareness of the plan, and, usually, that there is some physical demarcation in the field identifying what may and may not be done where. |
| 8 | Example Agreement: Colombia | The Colombia CA offers a great example of restrictions on how people can use resources, in this case through restrictions on fishing practices. This means that compliance monitoring has to specifically pay attention to fishing practices, and that the implementer has to invest in awareness raising throughout the community on permitted/prohibited practices, harvest timing, fishing zones, etc. |
| 9 | Defining Agreement Benefits | Obviously, in many places this will be the most interesting part of the negotiating process for the community. Therefore it is important to start with the commitments first, to make clear why you are doing the project to begin with, to emphasize that benefits are in return for conservation actions, and to emphasize the point that the size/number/nature of benefits is linked to the extent/nature of conservation actions. |
| 10 | Defining Agreement Benefits | **CRITICAL**: Since the point is for benefits to serve as an incentive that is linked to conservation performance, it is essential that (a large part) of the benefit package consists of things that can be increased/decreased (or turned off or on) depending on compliance with conservation commitments. |
| 11 | Defining Agreement Benefits | What can go into a benefit package? There are many, many different possibilities; CSP’s portfolio has tons of different examples ranging from simple (handing out small farm tools or school books) to complex (arranging legal recognition of land rights or working with the navy and police to enforce marine fishery zones). Some benefits are linked to resource management/protection, directly contributing to conservation objectives. Others are totally separate from conservation objectives. Some are benefits for individuals, while others are for the community as a whole. The negotiating process needs to consider these differences to identify what will make a fair, affordable, and effective incentive package. |
| 12 | Example Agreement: Cambodia | Some benefits require elaborate systems. Patrolling wages require ways to verify that people did the patrols, reported accurately, etc. In Cambodia, the water buffalo benefit required designing a process to identify who received the animals and in what order, what happened if those people later violated the CA, what happened to offspring of animals … all this after implementer and community representatives went to regional markets together to select the animals to purchase. |
| 13 | Example Agreement: Colombia | Again, many CAs result in indirect benefits in addition to what is agreed on in the formal benefit package. This is not linked to opportunity cost, but can be significant and attractive to communities. Therefore it can be useful to point out such benefits during the negotiation process. |
| 14 | Defining Penalties | Incentives only work if there is a consequence of non-compliance. Defining penalties has to be part of the negotiation process to ensure that the penalty framework is seen as just and transparent by the community. Also, it is important to have penalties that are scaled to the number/frequency of violations, allowing the opportunity to correct behavior, return to compliance, and restore the full benefit package. It is also important that there are consequences for the implementer if they fail to uphold their end of the deal, as in the case of long delays in benefit delivery. |
| 15 | Defining Penalties: Colombia | The Colombia CAs have a well-defined penalty framework relating to individual patrollers, the community as a whole, and the implementer. It also combines internal penalties (things the community does with respect to its own members) and external penalties (things the implementer does with respect to the community). This slide shows internal penalties. Many CAs include internal community penalties as part of the overall framework, often building on traditional/customary ways of enforcing community norms and rules. |
| 16 | Defining Penalties: Colombia | This slide shows external penalties in the Colombia CA. |
| 17 | Pictures of CA Signing | Successful negotiating processes conclude with the signing of a CA. Often, this will happen in a ceremony with accompanying festivities, to signal CA importance and serve as a dissemination/awareness event. Including government officials (mayor, district head, provincial governor … what is appropriate depends on the place) in the signing ceremony, potentially as witness signatories on the actual CA document, can reinforce the importance of the CA in people’s eyes. A key question is who will sign the CA for the community – the community leader, members of a natural resource committee, representatives from each household … what is appropriate/feasible will depend on the site. |
| 18 | Thank you | Closing slide, opens Q&A session. |

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| **Session: Implementation** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Implementation | Session title |
| 2 | Project Cycle toward Sustainability | Reminder of steps in application of the CA model, show that this session is about the implementation component of the 4th step. |
| 3 | Implementation | This session is relatively short, as most people are familiar with what implementation looks like in the field, and implementation of CAs are so different for each site depending on conservation objectives and the specific elements that emerged from negotiations. Stakeholder engagement is ongoing, paying attention to RBA including FPIC and gender – RBA is not a step, but a set of principles that apply to every part of the relationship with communities and project process. Many CAs involve capacity building, for activities such as community patrolling and monitoring, and for broader resource management and governance. The implementer usually provides technical support, especially during early periods before capacity building has progressed, for specific activities like patrolling and also facilitates governance processes. The key implementer responsibility is to ensure delivery of benefits, as this will be their main commitment in the CA itself. |
| 4 | Planning is Key | The relationship with the community is crucial, so to maintain their respect and confidence the implementer must perform reliably and professionally – this requires careful planning and continuous communication. Planning relates to meetings and ongoing engagement, to technical execution of activities, to delivery of benefits, to monitoring and reporting … every aspect of the project. |
| 5 | Adapting is Key | No matter how well you plan, reality will present surprises. Therefore while it is essential to have thorough plans in place, you have to be ready to adapt to change and adjust plans – to new threats, to economic changes that affect livelihoods, to changes in leadership in the community, to interruptions in funding, to … any of a million things that can change (not always, but unfortunately often, in negative ways). When plans change, it is critical to communicate with the community to explain and agree on changes. |
| 6 | Bad Implementer Habits | This slide has some bad practices that must be avoided if you want an effective CA. Perhaps a big picture observation is that we have to avoid some of the characteristics sometimes associated with NGO culture! While action is more motivating for implementers than monitoring, incentive-based approaches cannot work without reliable monitoring. Implementers working in the field may prioritize maintaining good relationships over discipline in adhering to CA terms, but penalties have to be applied or the incentives will be weakened. Often people working hard in NGOs have many demands and pressures and are handling several different initiatives, but the CA is a negotiated deal and you cannot let things slip due to the distraction of other projects and activities; a community will not respect the implementer or the CA if they feel they are not taken seriously. |
| 7 | Good Implementer Habits | The items in this slide add up to two overarching themes – the implementer must be professional, even business-like, in living up to the terms of the deal in the CA, and they must treat the community, as a whole but also as individuals, with respect and consideration. |
| 8 | Thank you | Closing slide, opens Q&A session. |

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| **Session: Monitoring** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Implementation | Session title |
| 2 | Conservation Agreement Model | Repeat basic definition of the CA model, to reinforce that verification of conservation performance is key, which requires monitoring. |
| 3 | Project Cycle toward Sustainability | Reminder of steps in application of the CA model, show that this session is about the monitoring component of the 4th step. |
| 4 | Functions of Monitoring | Monitoring has many purposes, some related to the working of the CA itself, some to justify the investment and support further fundraising, some will help with policy engagement, etc. |
| 5 | Areas of Monitoring | Reemphasize the three types of monitoring in the CA model. |
| 6 | Monitoring Framework | Note that the Theory of Change developed earlier was important, because it provides the basis for the monitoring framework. Also, engagement, negotiation, and design efforts will have produced key inputs for the monitoring framework as well, for example negotiating conservation actions and how they will be verified. Monitoring requires a baseline, to identify changes and progress toward desired biological, social, and behavioral outcomes. Using objective 3rd party monitors is ideal, often requiring partnerships, possibly with a university or research center. |
| 7 | Monitoring Framework | A key point here is that involving the community in monitoring offers several advantages, and contributes to engagement/ownership of the community in the overall CA. |
| 8 | Monitoring Framework: Communicating Results | Implementer should prepare a well-organized system for collecting, analyzing, reporting, and communication monitoring results. It is important to prepare information in forms that are easy for communities to understand - oral presentation, calendar/poster, photo exhibit, etc. If external researchers are involved in monitoring, ensure that their TOR includes the obligation to prepare such materials and/or present to community. |
| 9 | Biodiversity Monitoring | Biodiversity monitoring address the threats and outcomes defined in the Theory of Change. This will tell whether the CA is achieving the desired conservation outcomes. |
| 10 | Theory of Change: Example from La Ventosa and Nuevo Belén (Guatemala) | This example shows well-defined, easy to understand biodiversity indicators; need to refer to handout, as the screen may be difficult for participants to read. |
| 11 | Map | This is a map of the Lizhiba community area in China’s Sichuan Province. The colored circles show where signs of Panda activity were observed each year; the dots show how Panda activity is spreading wider and wider, including down the valleys toward the villages, as increased protection efforts under the CA improve habitat and reduce disturbances. |
| 12 | Socioeconomic Monitoring | Overall, the main question for socioeconomic monitoring is whether people are better off under the CA. But this is also an important opportunity to check awareness of and satisfaction with the CA among people throughout the community. Therefore socioeconomic monitoring includes asking people about their knowledge of commitments, benefits and penalties under the CA. In some CAs, there is an incentive for the leadership or a natural resource committee to ensure wide community awareness; socioeconomic monitoring then determines whether that incentive is to be maintained or reduced (e.g. the committee gets $100 for its management expenses if at least 75% of surveyed community members correctly describe the basic CA). |
| 13 | Socioeconomic Monitoring | In addition to awareness of CA, an essential role of socioeconomic monitoring is to see if the CA is making people measurably better off (e.g. income, access to electricity, clean water), and if they perceive conditions as improving (such as threats, quality of governance, etc.). Importantly, monitoring should check whether people believe that any improvements are linked to the CA. |
| 14 | Socioeconomic Result | Given that there are so many different possible components of benefit packages in a CA, the things to measure and results to report vary widely. In Cambodia, one benefit was providing salary supplements for teachers; the implementer showed that this led to a significant increase in school attendance. |
| 15 | Socioeconomic Result | In Guatemala’s Maya Biosphere Reserve, a CA with the community of Uaxactún sought to improve the capacity and functioning of the community forest management body. Success in this regard was shown by steady decrease in the level of debt of the body, and eventually surpluses that contribute to community income. |
| 16 | Renegotiation | Remember, in all likelihood you will renew the agreement several times for the short term, before sealing a long term deal. This requires renegotiation. Renegotiation must be linked socioeconomic and biodiversity monitoring to refine conservation actions as well as benefits. However, some socioeconomic trends take longer to manifest, so they may not be worth checking annually (also because of cost); this needs to be thought about with respect to renegotiation. Also, careful planning is needed to ensure a smooth process with respect to ending one round of the CA and starting the next, with respect to timing of monitoring efforts, analysis of results, communicating results to stakeholders, and renegotiating the CA. You want to avoid long gaps between CA rounds. Finally, you should consider a strategy of starting with a simple CA, and using annual renegotiations to increase the strictness/magnitude or scope of commitments over time (which may require increasing incentives too, of course) |
| 17 | Thank you | Closing slide, opens Q&A session. |

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| **Session: Sustainability** | | |
| **Slide** | **Title/Content** | **Point/Purpose** |
| 1 | Sustainability | Session title |
| 2 | Project Cycle toward Sustainability | Reminder of steps in application of the CA model, show that this session is about the monitoring component of the 5th step. A big picture question, related to the Theory of Change, is: what is the long-term strategy for the overall intervention? If it is a long-term CA, then you need to think about long-term sustainability with respect to financing and management. |
| 3 | Long-term Conservation Agreement | ***Note: “Long-term” means mid- or long-term throughout; the point is thinking beyond year to year renewal of CAs.***  Questions for intervention strategy: what is the exit strategy for the implementer? What does sustainability look like (captured in Theory of Change)? How does this relate to replication/amplification?  If the plan is for a long-term CA, strategy should be integrated into wider long-term context – benefit package should be integrated into wider development vision; management plan needs to address long-term issues (especially about who will be responsible for what); the monitoring framework should address longer term questions about development, resilience, and sustainability; and financing strategy needs to take a long-term perspective. |
| 4 | Feasibility Considerations | At the beginning of the CA model project cycle, with feasibility analysis, you should already have looked ahead to the long-term. |
| 5 | Feasibility Considerations | Recall that the feasibility analysis included initial thinking about financing options. To enter into a long-term CA, this needs to be fully developed. Also, the long-term vision hinges on capacity – what will be needed to enable Stewards (and implementers and other partners) to take on management responsibility in the long term? |
| 6 | Long-term Management | You need to consider who will be responsible for organizing and verifying conservation actions in the long term, organizing provision of benefits in the long term, and monitoring compliance and socioeconomic and biological impacts in the long term. The vision for long-term management should consider both management of the CA itself, and management of natural resources/conservation in general. |
| 7 | Long-term Financing | Long-term financing must cover the costs of conservation activities, benefits and monitoring. See the handout for a guide to developing a long-term financing plan. |
| 8 | Secure Financing Vision | Long-term financing solutions will vary greatly by site. In some sites, a community-based organization may be built to have the capacity for ongoing fundraising or enterprise management that sustains conservation activities. At others, financing will depend on external sources such as government programs, or national conservation trust funds. Sometimes the need for long-term financing is raised as a challenge for CAs; although it can be challenging, it is worth noting that this challenge is one faced by most conservation efforts. |
| 9 | Long-term Resilience | Solutions for long-term management and financing are crucial. At the same time, one can invest in other factors to reinforce long-term resilience of the CA. These include ensuring that employment and income are linked to conservation, investing in community awareness of direct as well as indirect benefits of the CA (including the benefits of having a healthier/more biodiverse resource base), improved planning and decision-making through institutional strengthening at the community level, seeking opportunities to enhance the legal protection status of key conservation areas, and communication campaigns that build pride in the conservation accomplishments (videos, prizes, news coverage, government recognition, etc.). |
| 10 | Thank you | Closing slide, opens Q&A session. |

*Exercises*

The conservation agreement training package includes a set of exercises for use doing the workshop sessions. The prepared exercises relate to the following themes (titles in parentheses indicate the session to which each exercise relates):

* Feasibility Assessment (Feasibility Assessment)
* Theory of Change (Feasibility Assessment)
* Stakeholder Identification and Mapping (Engagement)
* Engagement (Engagement)
* Conservation Agreement Structure (Design and Negotiation)
* Presenting the Conservation Agreement (Design and Negotiation)
* From Theory of Change to Monitoring (Monitoring)

The exercise slides are provided separately from the session presentations to allow the trainers to turn to the exercises at a time that they feel works best for their particular workshop. Some workshops may not use all the exercises; in some cases, trainers may construct other exercises.

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| **Feasibility Assessment** | *Apply feasibility assessment framework to potential site*  The exercise is for participants to break into small groups (usually 3 to 4 groups) to discuss a subset of feasibility considerations for a potential site. In most workshops, participants will have in mind a potential site where they might try to use the conservation agreement approach. When this is not the case, the trainers need to provide some basic information on a potential site. Often each group will discuss a different site, but this is not strictly necessary for the purposes of the exercise.  In the interest of time, the groups will not address each feasibility assessment criterion, but only the five items listed in the table on the exercise slide, which includes sample questions to help get discussions started. For characteristics of stewards, groups should summarize key features of the community with whom they hope to do a conservation agreement – how many people, main livelihoods, relationship to natural resources, etc. After the small group discussions, someone from the group presents the main points from the discussions to the full workshop group.  Before the discussion, remind participants that each small group should select a note-taker and a presenter, and, if desired, a discussion leader/facilitator.  During discussions, trainers should circulate among the small groups to answer questions, remind people of timing, intervene if discussions are side-tracked, etc.  Materials needed  flipcharts and markers to record discussions  feasibility assessment handout |

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| **Theory of Change** | *Develop basic elements of Theory of Change for potential site*  The Feasibility Analysis should lead to an initial Theory of Change (ToC). The  For the exercise, the participants return to the small groups they formed for the previous exercise to draft an initial ToC based on the feasibility considerations they noted earlier.  In the interest of time, this exercise session will not go into targets, indicators, or data collection, but, as indicated on the slide, participants are asked to focus on the basic elements – working from right to left, begin by defining the outcomes to be achieved, the threats that must be reduced to achieve that outcome, the drivers that must be addressed to reduce the threat, and the proposed actions for addressing the drivers.  Here again the trainer can emphasize that when first constructing the ToC, one typically works backwards from outcomes to actions, but when documenting or explaining the logic of the intervention, one typically starts with actions and describes how they are expected to lead to the desired outcomes.  As with the previous small group session, remind participants before the discussions that each small group should select a note-taker and a presenter, and, if desired, a discussion leader/facilitator (they may be the same as the previous sessions, though switching roles is better for participation and engagement of all participants).  During discussions, trainers should circulate among the small groups to answer questions, remind people of timing, intervene if discussions are side-tracked, etc.  Materials needed  flipcharts and markers to record discussions  Theory of Change Handout |

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| **Stakeholder Identification and Mapping** | *Identify stakeholders relevant to your Conservation Agreement project*  Normally stakeholder identification will have started during the Feasibility Analysis. For the exercise, the participants return to the small groups they formed for the previous exercises to develop stakeholder tables and maps for presentation to the larger group.  In the interest of time, this exercise session will not go into all the columns of the stakeholder table, but, as indicated on the slide, participants are asked to focus on a subset of the information elements. The groups should brainstorm a list of stakeholders and note some of their key characteristics in a table. Then they should try to convert the table to a stakeholder map as shown in the handout.  As with the previous small group session, remind participants before the discussions that each small group should select a note-taker and a presenter, and, if desired, a discussion leader/facilitator (they may be the same as the previous sessions, though switching roles is better for participation and engagement of all participants).  During discussions, trainers should circulate among the small groups to answer questions, remind people of timing, intervene if discussions are side-tracked, etc.  Materials needed  flipcharts and markers to record discussions  Stakeholder Map Handout |

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| **Engagement** | *Explain the Conservation Agreement approach to the community*  This exercise will test the degree to which participants have absorbed the key contents of the sessions so far, and their ability to articulate key aspects of the model.  Designate a team of 3 participants to act as the implementer, and 6 participants to act as community members.  Give the two groups time (5 minutes or so) to prepare for the initial engagement meeting. Make sure that the implementer prepares a simple agenda for the meeting, and assigns roles and responsibilities for the engagement session. For the community members, instruct them to be ready to challenge the implementers, demanding explanations and justifications.  Have the two groups meet for a 10 minute session, with the rest of the workshop participants as an audience.  After the simulated engagement meeting, have the full group of participants discuss what went well and what did not, ideas for best practices, etc.  Materials needed  Engagement & Design Handout |

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| **CA Structure** | *Develop draft Conservation Agreement for potential site*  For the exercise, based on earlier work on the Theory of Change, small groups will draft an initial design for a Conservation Agreement.  For now, as indicated in the slide, the exercise will skip the monitoring component and focus on commitments (conservation actions), the benefit package provided in return for those commitments, and the penalties that will be applied in case of non-compliance.  As with the previous small group session, remind participants before the discussions that each small group should select a note-taker and a presenter, and, if desired, a discussion leader/facilitator (they may be the same as the previous sessions, though switching roles is better for participation and engagement of all participants).  During discussions, trainers should circulate among the small groups to answer questions, remind people of timing, intervene if discussions are side-tracked, etc.  Materials needed  flipcharts and markers to record discussions  CA Structure Handout |

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| **Presenting the CA** | *Present proposed Conservation Agreement to the community*  As in the Engagement exercise, this exercise will test the degree to which participants have absorbed the key contents of the sessions so far, and their ability to articulate key aspects of the model.  Select one of the potential sites for which feasibility analysis, ToC and CA design exercise were done. Designate a team of 3 participants to act as the implementer, and 6 participants to act as community members; make sure these are different people than the performers in the Engagement exercise.  Give the two groups time (5 minutes or so) to prepare for the CA proposal and design meeting. Make sure that the implementer prepares a simple agenda for the meeting, and assigns roles and responsibilities for the engagement session. For the community members, instruct them to be ready to challenge the implementers, demanding explanations and justifications, and offering alternatives or making demands.  Have the two groups meet for a 10 minute session, with the rest of the workshop participants as an audience.  After the simulated engagement meeting, have the full group of participants discuss what went well and what did not, ideas for best practices, etc.  Materials needed  CA Structure Handout |

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| **From ToC to Monitoring** | *Develop monitoring framework based on Theory of Change*  For the exercise, based on earlier work on the Theory of Change, small groups will first consider whether actions proposed for the initial ToC have changed during engagement, negotiation and design processes. Then, they will define monitoring metrics (indicators) and formulate a monitoring plan (data collection) based on the threats and outcomes defined earlier.  The table in the slide shows what information needs to be completed. The first line (elements) will be a refined version of the actions developed earlier. Then each small group should describe the indicators and data collection methods; if time allows, they can tackle the targets line.  As with the previous small group session, remind participants before the discussions that each small group should select a note-taker and a presenter, and, if desired, a discussion leader/facilitator (they may be the same as the previous sessions, though switching roles is better for participation and engagement of all participants).  During discussions, trainers should circulate among the small groups to answer questions, remind people of timing, intervene if discussions are side-tracked, etc.  Materials needed  flipcharts and markers to record discussions |

Finally, for the Sustainability session, the trainers should consider initiating the Q&A session as a group discussion about sustainable financing and management solutions. At this point the participants may be too fatigued for a formal exercise, but typically will still be ready to engage in a free form discussion session.

*Agenda Planning*

Although most Conservation Agreement training workshops generally will have the same structure, final agendas and schedules may differ as a function of practical matters (i.e. travel schedules), local business culture (i.e. length of working day) or other factors. Therefore the trainers, often working with local collaborators, will need to tailor agendas and schedules to specific situations. To help in planning, the table below provides some rules of thumb for typical length of various workshop components, to which must be added breaks for refreshments and meals, and perhaps additional discussion sessions.

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| **Rules of Thumb for Length of Workshop Components** | |
| **Sessions** | |
| Opening: Introductions, Training Plan, Ground Rules, etc. | ~30 minutes |
| Introduction to the Conservation Agreement Approach | ~30 minutes (& 10 minutes Q&A) |
| Feasibility Analysis (& Theory of Change) | ~30 minutes (& 10 minutes Q&A) |
| Engagement | 15-20 minutes |
| Design and Negotiation | 15-20 minutes |
| Implementation | 10 minutes |
| Socio-economic Monitoring | 30 minutes |
| Financial and Management Sustainability | 15-20 minutes |
| Wrap up discussion, next steps and closing  (including workshop evaluation form) | 30 minutes  (10 minutes) |
| *Note: Unless explicitly mentioned, approximate times for Sessions include time for Q&A/discussion* | |
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| **Exercises** | |
| Feasibility Assessment | 40 minutes small groups  + 20 minutes reporting |
| Theory of Change | 40 minutes small groups  + 20 minutes reporting |
| Stakeholder Identification and Mapping | 30 minutes small groups  + 20 minutes reporting |
| Engagement | 35 minutes (10 minutes prep, 10 minutes exercise, 15 minutes discussion) |
| Conservation Agreement Structure | 30 minutes small groups  + 30 minutes reporting |
| Presenting the Conservation Agreement | 30 minutes (5 minutes prep, 10 minutes exercise, 15 minutes discussion) |
| From Theory of Change to Monitoring | 40 minutes small groups  + 20 minutes reporting |

**Annex 1: CSP Conservation Agreement Training Toolkit Supplementary Materials**

Below is a listing of Supplementary Materials compiled and made available online by CSP as of June 2016. As the CSP team documents additional best practices and develops further guidance and communications materials, they will be added to this set.

**Mandatory Reading: Field Guide for Implementers**

1. **Introduction to CAs**
   1. Milne, S. and E. Niesten, 2009. “Direct Payments for Biodiversity Conservation in Developing Countries: Practical Insights for Design and Implementation.” *Oryx* 43: 530-541.
   2. Niesten, E. and H. Gjertsen. 2010. *Economic Incentives in Marine Conservation*. Conservation International: Washington, DC. Available at: <http://ian.umces.edu/pdfs/ian_report_298.pdf>
   3. Niesten, E., P. Zurita and S. Banks. 2010. “Conservation Agreements as a Tool to Generate Direct Incentives for Biodiversity Conservation.” *Biodiversity* 11:5-8.
   4. <http://blog.conservation.org/2013/07/5-years-later-peruvian-farmers-reveal-new-attitudes-toward-forest-protection/>
   5. <http://blog.conservation.org/2014/02/despite-challenges-progress-toward-fisheries-recovery-in-the-colombian-amazon/>
   6. <http://blog.conservation.org/2015/02/what-ive-learned-about-protecting-indonesian-forests-from-rural-china/>
   7. <http://blog.conservation.org/2012/03/tonka-beans-the-scent-of-sustainability/>
   8. <http://blog.conservation.org/2013/09/community-based-conservation-spreading-fast-in-china/>
   9. <http://blog.conservation.org/2015/02/environmental-peacebuilding-conservation-agreements-reduce-people-park-conflict-in-liberia/>
   10. China CSP video
2. **Feasibility Analysis**
   1. Handout: Feasibility Analysis topics
   2. Handout: Opportunity Cost elements
   3. Example Feasibility Analysis (Steinkopf, South Africa)
   4. Guide: Theory of Change
   5. Handout: Example Theory of Change
3. **Engagement**
   1. CI RBA policies (Gender, FPIC)
   2. Gender case studies (Uaxactún, Alto Mayo)
   3. FPIC case studies (China, Colombia, South Africa)
   4. Policy Statement on RBA Research Ethics
   5. Handout: Engagement & Design
4. **Negotiation, Design and Renegotiation**
   1. Example CAs (China, Colombia, Guatemala, Peru, South Africa)
   2. Handout: Guidance for Negotiating Benefit Packages
5. **Implementation**
   1. Mora, M. 2015. “Conservation agreements and equitable incentives distribution: reflections on the experience of the Conservation Stewards Program in Latin America” Unpublished manuscript. Conservation Stewards Program, Conservation International.
   2. Mora, M. *et al*. 2010. “Social development and freshwater fisheries conservation: lessons learned from monitoring conservation agreements in the Colombian Amazon.” Unpublished manuscript. Conservation Stewards Program, Conservation International.
6. **Monitoring**
   1. Guide: CSP Monitoring
   2. CSP Monitoring Form
   3. Colombia Biological Monitoring Report (Spanish)
   4. Colombia Socio-economic Monitoring Report (Spanish)
   5. Peru Alto Mayo Monitoring Protocol and Report (Spanish)
7. **Sustainability**
   1. CA Financing Plan Outline
   2. CA Management Sustainability Plan Guideline
   3. Sustainability plan examples (China, Colombia, Guatemala, Peru, South Africa)