**Resources for Implementing the
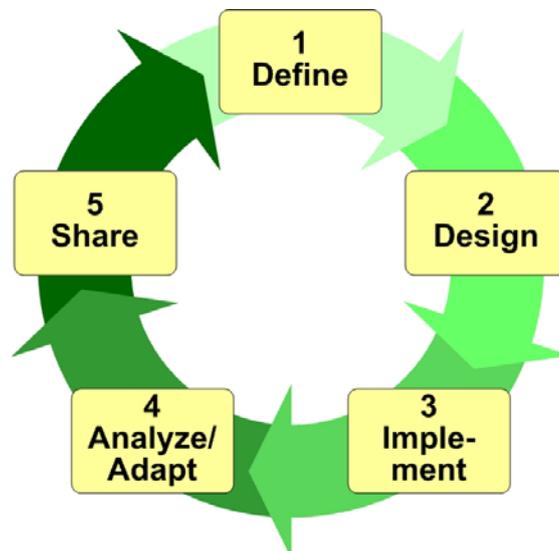WWF Project & Programme Standards**

Step 1.1

Define Project/Programme Team Composition and Operations

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Step 1.1 Define Team Composition and Operations

Contents

This document is intended as a guidance resource to support the implementation of the *WWF Standards of Conservation Project and Programme Management.* Although each step in these *Standards* must be completed, the level of detail depends on the circumstances of individual projects and programmes. Accordingly, each team will have to decide whether and to what level of detail they want to apply the guidance in this document.

This document may change over time; the most recent version can be accessed at: https://intranet.panda.org/documents/folder.cfm?uFolderID=60970. This document is based in part on materials developed by The Nature Conservancy and Foundations of Success.

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Define Project/Programme Team Composition and Operations

What Are Team Composition and Operations?

A project or programme is ultimately designed and implemented by a specific group of individuals who comprise your project/programme team.[1] Over the life of your project, there are many different potential roles that you will need to fill on your team:

- **Initial Project Team** – The specific people who initially conceive of and initiate the project. They may or may not go on to form the core project team.

- **Designated Project Leader/Manager** – Although leadership responsibilities are often shared between team members, normally one individual is appointed as the overall project leader. Specific roles that the leader often plays include managing the performance of other team members, relations with key stakeholders, and the process of going through the project cycle.

- **Core Project Team** – A small group of people (typically 3-8 people) who are ultimately responsible for designing and managing a project.

- **Full Project Team** – The complete group of people involved in designing, implementing, monitoring, and learning from a project. This group can include managers, stakeholders, researchers, and other key implementers. You need to have a wide range of skills on your project team.

- **Project Advisors** – People who are not on the project team, but to whom the team members can turn for honest feedback and counsel and who can champion your cause.

- **Project Stakeholders** – Individuals, groups, or institutions who have a vested interest in the natural resources of the project area and/or who potentially will be affected by project activities and have something to gain or lose if conditions change or stay the same. Just because someone is a stakeholder does not mean that you will want them on your project team. But if they are a key stakeholder, you also cannot ignore them in your analyses of the situation. Cultivation of key stakeholders can be a long process itself that may have to begin well before your process gets underway.

- **Process Facilitator –** A process facilitator is a person who can help the project team through the planning process. A process facilitator is typically part of the initial and/or the core team. A good facilitator understands the key elements of the process, has good facilitation skills, and can keep your team from getting too bogged down in any one part of the process. This person does not need to be a "professional" facilitator, but should be someone who is intimately familiar with applying the planning process to "real-world" conservation problems.

Some of these roles such as the need to appoint a leader and have core project team members, are important for all projects. However, projects and programmes in WWF vary enormously in scale and complexity. Clearly you need to take this into account in deciding who to involve in the team. WWF

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[1] The term Project is used throughout this document as shorthand for Project/ Programme. The guidance applies equally to projects and programmes.

staff will possess some but possibly not all of the required knowledge, skills and experience. You may need to involve "outside" expertise such as consultants or academic institutions. In addition it may be important to involve key partners with whom you may expect to collaborate in future. This can help you to build ownership or buy-in for the project. It is worth bearing in mind that such partners (especially external partners) may have different priority issues in mind, and you may need to take extra time to define and design the project.

In addition to determining who is on your project team, it is also important to determine how the members of the team will work together. Specific team operations that need to be agreed on include what the team is setting out to do, what team members will do, how team members will work together and make decisions, a rough timeline for project activities, who else needs to be informed or involved, and what resources are required to move through the project cycle. It is important to write this down in the form of a **project charter** or **concept form** (click here for a [template for a Concept Form](#)). At this early stage you can only provide a "rough sketch" of the design; you will not have all the information required to fully define the project, but you can at least clarify what you do and don't know.

Why Is Defining Team Composition and Operations Important?

Although conservation focuses on biodiversity, it is fundamentally a human endeavour. To this end, the most important resources for any conservation project are the people who will be involved in designing and implementing it. It is the commitment and skills that these people bring that will ultimately determine if your conservation planning process will result in the development of effective strategies that will truly be implemented and evaluated over time. If you set off with the right people, structures and processes involved in the project, you should be able to move the project forward quickly and efficiently, and you have a good chance of being ultimately successful. Conversely if any of these aspects is lacking, your project is likely to be ineffective and/ or inefficient.

One of the key principles of adaptive management is that the people who will ultimately be responsible for implementing a project must also be involved in designing and monitoring it. If project managers don't intimately understand the assumptions that have gone into a project plan, chances are they will not be able to effectively implement the plan – or to successfully adapt it and change it over time. Another key principle is that having project team members with different skills, knowledge, and experience will generally lead to a more creative and resilient project. Project team members collectively need to have knowledge of the area (both its ecology and human context), ample conservation experience, and an ability to think strategically. A final principle is that although it is important to have continuity, project teams also need to grow and change over time as conditions change, the project matures, and as people's careers evolve.

When to Define Team Composition and Operations

You need to define your initial project team right at the start of the project. This team should then relatively quickly identify the core and/or full project teams. Of course the composition of the project team may change as you move through the management cycle. It is often very helpful to maintain continuity in terms of the project leader and some key team members, but this is not always appropriate. The key is to recognize and make use of existing skills and experience to ensure that the

project moves forward with the best available knowledge. Below some symptoms of effective and ineffective teamwork which may help a project team consider how it is doing and whether any changes are needed are shown. Remember that it can take some time for an effective team to develop, so you may need to be a little patient!

Effective Teams
- Clear objectives
- Good decision making processes
- Clear roles, responsibilities and leadership
- Leadership roles are shared
- Trust, co-operation, support and constructive conflict
- Individual and mutual accountability for performance results

Ineffective Teams
- Falling performance levels
- Low levels of motivation
- Poor communication
- Poor or slow decision-making
- Confusion about responsibilities
- Role and territory conflicts

How to Define Team Composition and Operations

Note that the steps below are described sequentially, but in practice they are interdependent and are often developed in parallel or iteratively.

1. Appoint a Leader and the Initial Team and Sketch Out Project

Bring together the people who are charged with initiating the project. Have the team quickly (in an hour or two max!) sketch out the scope of the project, some likely targets, what the key threats might be, what strategies you might undertake, and most importantly, who the key stakeholders might be. You should also think about your timeline and the resources required and likely to be available.   At a later date, you will flesh out these items in more detail. The key here is to use this rough sketch to give you some idea of what skills and which organizations you might need to involve in various roles on the project team.

2. Select Project Team Members

Based on this initial analysis, think about who would be good to have on your core project team, who might be good as an advisor, and who you should avoid having directly involved in your project. Ideally, you want to have a mix of different knowledge, skills, and experience that include:

- Knowledge of biodiversity and threats to the biodiversity
- Knowledge/ experience of political, social and economic context
- Knowledge/ experience of stakeholders and their concerns
- Skill/ experience in developing strategies
- Experience in implementing strategies
- Experience in communications and fundraising
- Experience in budgeting and risk assessment

You may wish to develop a table as shown in the example below. Or if you want to be extremely formal about your analysis, you could even rank different candidates on different criteria.

3. Define Roles and Team Operations

Once you have identified some of key people involved in the project, draw up rough "terms of reference" for each person that spells out what they are expected to contribute to the team and what they can expect to get in return. For example, will it be a paid position? Will they get credit in any scientific publications? If multiple organizations are involved in the project, it may also be useful to develop a formal memorandum of understanding among the partners.

It is also often helpful to decide how your team will operate. You may already have (or think you have) a good idea of what needs to be done. On this basis you may decide it makes sense to move ahead quickly through the project cycle and into implementation. This approach is sometimes called "fast project management." It does not mean abandoning processes but it does mean working through the project cycle quickly and efficiently. On the other hand you may decide (or need) to work through the each step of the project cycle systematically and in detail. For projects to have lasting impact it is usually necessary to produce a robust strategic plan, especially for projects of any size or complexity. Alternatively you may use a combination of these approaches to achieve a balance between process and action – for example you move forward quickly on some tasks that are very clear whilst developing a robust design/ plan for the wider project. Specific guidance on what is expected from WWF projects in terms of applying the Standards is presented in Annex A of the WWF Standards Overview.

4. Write Down Your Project Concept, and Use It

A Concept Form is intended to capture the essence of the project in a few pages – it is recommended to keep your concept short (3-6 pages only). (Click here for a template for a Concept Form). Of course at this early stage you will only have your initial ideas about the project as opposed to a full strategic plan.[2] Writing the key points down helps ensure that you and the team have a common understanding of the project. The Project Concept can also be used to:

- Communicate the project to stakeholders and gain feedback or buy-in
- Gain formal approval for resources and to proceed with project development (from Budget holders, Senior Management, Board of Trustees)
- Start marketing the project (you may need to repackage the information)

When communicating the project, you have to beware of making definitive commitments about what you plan to achieve, what you plan to do and how much it will cost. Unfortunately there is no easy way round this! As identified above, one of the dimensions of the project leader's role is to manage the expectations of stakeholders. You should aim to be clear whilst at the same time leaving room for adaptation on the basis of new information.

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[2] In terms of WWF Standards requirements, note that for a small project (<100,000 CHF per year) a well-defined Concept Form can also represent your primary planning document (i.e. your Strategic Plan). For a larger project or programme you will need to do more than this (See Annex A of the WWF Standards Overview). The Concept form can also be used to propose a scale down or exit from a project.

Examples

Sample Breakdown of Potential Team Members For a Project

Person	Org	Skills/Knowledge	Roles	Comment *
Core Team				
Ingrid	WWF	Business development	Team leader	Good leader
Jose	WWF	Marine biologist	Assembles information on targets and works with science advisors	Good team player; may be leaving in 6 months
Martha	Green Island (local NGO)	Local politics	Building local consensus	
Raj	National Fisheries Agency	Fishing policy		Useful link to senior agency officials
Advisors				
Hubert	WWF	Process Coach	Process leader	
Mei-Lee	World Bank	Economics	Economic analysis	Good links to donor community
* Warning: Be VERY careful about writing down negative comments about a person.				

Click here for Examples of Concept Notes

References

The Management Centre, London, UK. Project Management Training Manual.

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WWF Standards of Conservation Project and Programme Management

The WWF Standards are a set of best practices to help practitioners deliver conservation results.

Developed in conjunction with major international environmental NGOs and endorsed by the WWF Network, the Standards lend consistency to planning, implementing and monitoring effective conservation projects and programmes worldwide. Email strategies@wwfus.org with any questions or to share outstanding examples.

Project/Programme Cycle - click to enlarge

Overview

❖

WWF Standards of Conservation Project and Programme Management (PDF 624KB)

Detailed Guidance, Tools and Examples

1. Define | Design | Implement | Analyze and Adapt | Share

Step #	Step Name	Outputs	Guidance & Tools	Examples
1.1	Team Composition and Operations	❖ Selection of project team and leadership ❖ Informal or formal team agreement for project	❖ Team Composition and Operations (G) ❖ Stakeholder Analysis (G) ❖ Concept Form (T)	❖ Terai Arc Landscape (team composition) ❖ Congo TRIDOM Landscape (stakeholder analysis) ❖ Ruaha (concept form)

1.2	Scope and Vision	• Brief scope • Vision statement • Map and/or detailed spatial assessment if appropriate	• Scope and Vision (G) • Spatial Assessment for Terrestrial Ecoregions (G) • Spatial Assessment for Freshwater Ecoregions (G)	• Mesoamerican Reef Ecoregion (scope, vision & spatial assessment) • Klamath-Siskiyou Ecoregion (spatial assessment)
1.3	Targets	• Selection of a limited number of biodiversity or thematic targets • A brief explanation of why each target was chosen • Identification of Key Ecological Attributes for each target if appropriate	• Targets (G)	• Bering Sea Ecoregion (targets & Key Ecological Attributes) • Terai Arc Landscape (targets)
1.4	Context and Stakeholders	• Stakeholder analysis • Identification of direct threats affecting each target • A ranking of the direct threats • Analysis of indirect threats and opportunities behind each direct threat	• Stakeholder Analysis (G) • Situation Analysis (G) • Conceptual Models (G) • Threats Ranking (G)	• Bering Sea Ecoregion (situation analysis & conceptual model) • Mesoamerican Reef Ecoregion (situation analysis, conceptual model & relative threats ranking) • Terai Arc Landscape (root cause analysis) • Congo TRIDOM Landscape (stakeholder analysis)

Define | 2. Design | Implement | Analyze and Adapt | Share

Step #	Step Name	Outputs	Guidance & Tools	Examples
2.1	Action Plan: Goals, Objectives and Activities	• Goals for all biodiversity targets • Objectives for threats and opportunities • Activities for all objectives • Results chains or other description of assumptions • Goals, objectives, and activities compiled in your action plan/logframe	• Action Plan (G) • Results Chains (G) • Logical Framework Analysis (G)	• Mesoamerican Reef Ecoregion (results chains & action plan) • Terai Arc Landscape (logframe)
2.2	Monitoring Plan	• Indicators to track progress of each goal, objective, and activity • Brief descriptions of methods to collect data for each indicator • When, where, and by whom each kind of data will be collected • Description of how data will be stored and analyzed	• Monitoring Plan (G)	• Mesoamerican Reef Ecoregion (biological & goal/objective-based activity monitoring) • Terai Arc Landscape (partner activity monitoring)

Define | 2. Design | Implement | Analyze and Adapt | Share

| 2.3 | Operational Plan | • Estimates of capacity needs and gaps required to implement your project

• Estimate and analysis of financial resources required to implement your project

• An assessment of potential risks and specific mitigation strategies

• An exit strategy, if appropriate | • Operational Plan (G)

• Programme Capacity Assessment Template (T)

• Risk Ranking and Mitigation Template (T) | • Bering Sea Ecoregion (capacity assessment)

• Mesoamerican Reef Ecoregion (budget-based financial model)

• Terai Arc Landscape (activity-based financial model)

• Amazon Region Protected Areas (activity-based financial model)

• California Environmental Associates Wakatobi (single PA financial model)

• Congo TRIDOM Landscape (risk assessment)

• South Africa (risk assessment) |

Define | Design | 3. Implement | Analyze and Adapt | Share

Step #	Step Name	Outputs	Guidance & Tools	Examples

3.1	Workplans and Budgets	• Detailed workplan for your project showing tasks, who will do them, and by when • Supporting management and tracking tool, such as a Gantt chart or calendar of project activities • Project budget	• Budgets and Workplans (G) • Workplan Template (T) • Budget Template (T)	• Bering Sea Ecoregion (workplan) • Congo TRIDOM Landscape (workplan)
3.2	Fund Raising and Sustainable Financing	• Potential funding sources identified and if needed, a sustainable funding plan developed • Funding proposals developed and submitted • Financial resources obtained	• Fund-raising (G) • Conservation Finance (G) • WWF Internal Proposal Form (T)	• Contact Development, Government Aid Agency & Sustainable Finance Departments in WWF-I, WWF-US & WWF-UK
3.3	Capacity Building	• Capacity assessments reviewed and completed • Strategies developed and implemented to address capacity shortfalls	• Programme Capacity Assessment Template (T) • Capacity Building (G)	• Bering Sea Ecoregion (capacity assessment)

| 3.4 | Partnerships | • New partners identified and brought into programme as appropriate

• Informal or formal arrangements with partners developed and implemented

• A structure for work management, decision-making, accountability, communication, and monitoring among programme team members | • Partnerships and Partner Management Arrangements (G)

• Partner Governance (G)

• Partner Governance Mechanism Template (T) | • Terai Arc Landscape (partner governance)

• South Africa (partner governance)

• Amur-Heilong (partner governance) |

Define | Design | Implement | 4. Analyze and Adapt | Share

Step #	Step Name	Outputs	Guidance & Tools	Examples
4.1	Manage Incoming Data on an Ongoing Basis	• Development and regular use of systems for collecting and storing data	• Manage Incoming Data (G)	• Contact Science, Finance and Administration & Operations Departments in WWF-I, WWF-US & WWF-UK
4.2	Analyze Project Results and Assumptions	• Regularly scheduled analysis of project results and assumptions • Documentation of analysis and decisions • Regular reports to project team	• Analyze Project Results and Assumptions (G) • Technical Project Report Template (T)	• Contact Science, Finance & Administration, and Operations Departments in WWF-I, WWF-US & WWF-UK

		members and key stakeholders		
4.3	Analyze Operational and Financial Functions/ Performance	• Appropriate scheduled analyses of operational and financial data • Regular financial reports (including financial forecasts)	• Analyze Operational and Financial Functions/ Performance (G) • R3 Financial Report (T)	• Sample R3 Report
4.4	Adapt Your Plans and Budgets	• Revised workplans and budgets	• Adapt Your Plans and Budgets (G)	• Contact Science, Finance and Administration & Operations Departments in WWF-I, WWF-US & WWF-UK

Define | Design | Implement | Analyze and Adapt | 5. Share

Step #	Step Name	Outputs	Guidance & Tools	Examples
5.1	Lessons and Good Practice	• Documented lessons and good practice	• Sharing Lessons (G)	• See *Sharing Lessons* Guidance for short examples
5.2	Formal Communication Strategy and Products	• Identification of key audiences • Development of communications strategy • Development and distribution of communications products	• Communications Strategy (G)	• See *Formal Communication Strategy and Products* Guidance for short examples

5.3	Feedback, Evaluations and Audits	- Feedback - Evaluations and/or audits	- Feedback, Evaluations and Audits (G) - Evaluations Terms of Reference (T) - Audit Tool (T)	- Colombia Social Change Evaluation - Minshan Panda Programme Evaluation
5.4	Performance and Learning Culture	Demonstrated commitment from leaders to learning and innovation	Performance and Learning Culture (G)	See *Performance and Learning Culture* Guidance for short examples

Email strategies@wwfus.org with any questions or to share outstanding examples.

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