



*for a living planet*



---

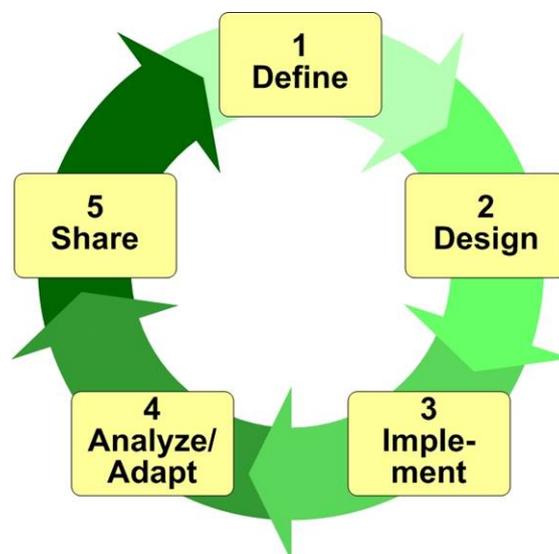
## Resources for Implementing the WWF Project & Programme Standards

---

### Step 1.2

## Define Project Scope & Vision

May 2006



---

## Step 1.2 Define Project Scope & Vision

---

### Contents

<b>What Are the Scope and Vision of a Project? .....</b>	<b>1</b>
<b>Why Is Defining a Scope and Vision Important? .....</b>	<b>1</b>
<b>When to Define Project Scope and Vision.....</b>	<b>2</b>
<b>How to Define Project Scope and Vision .....</b>	<b>2</b>
1. Discuss with your team the basic scope of your project .....	2
2. Outline your project area on the best available map .....	2
3. Develop and refine a vision statement for your project .....	3
<b>Examples .....</b>	<b>5</b>
<b>References.....</b>	<b>6</b>

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=60971>.

**Written by:** John Morrison, WWF-US

**Edited by:** Foundations of Success

Please address any comments to Sheila O'Connor ([soconnor@wwfint.org](mailto:soconnor@wwfint.org)).

# Define Project Scope & Vision

## What Are the Scope and Vision of a Project?

A project's scope defines the broad parameters of the project, be it an ecoregional programme, an effort to conserve a priority area, an initiative to combat a particular threat, or actions to protect a species. Efforts to conserve or effectively manage ecoregions, priority areas, or protected areas typically have a geographic scope or project area. Efforts to address threats, enabling conditions, or species have a thematic scope.

A project's vision is the desired state or ultimate condition that the project is working to achieve. It is typically expressed in a vision statement (not to be confused with a biodiversity vision, which is a much more involved process – see box below) which is a clear and brief summary of what the project team members and their partners would like to achieve. For most biodiversity conservation projects, the vision will describe the desired state of the biodiversity of the project area, although it will often reference stakeholder interests as well.

### **Box 1. Biodiversity Vision**

Many people in the WWF Network use the term “biodiversity vision” or “biological assessment” to describe a map of ecoregional priority areas (and attendant documents) that forms the foundation for long-range dialogue, planning, and action among a range of stakeholders in an ecoregion. These maps typically focus on the key biological elements (habitats, species, and ecological processes) that are most important for sustaining and restoring biodiversity. The biodiversity vision is thus very specific expression of the general scope of an ecoregional programme.

## Why Is Defining a Scope and Vision Important?

A project's scope and vision define the broad parameters of the project and provide the foundation for all subsequent steps in project or programme cycle. A clear scope sets the rough boundaries for what the project will attempt to do. For example, in a project with a geographic scope that encompasses a specific protected area, while some actions may be directed outside of the project area, the project scope makes it clear what the team is focusing on and where the final outcomes will be measured.

Likewise, defining a vision enables the core project team members to discuss and agree on what the broad purpose of their project will be. Although this should be a relatively easy task in many conservation projects, it becomes particularly important in multi-stakeholder efforts in which the different partners may have radically different ideas of what they would like to accomplish. If some of the stakeholders are interested in conservation and others are primarily interested in using natural resources to promote rapid economic development, then at the very least, you need to negotiate how you will work together. Without clear boundaries, there may be considerable confusion among staff and stakeholders as to where the project ends, and there is a risk of being drawn into an ever-widening circle of interventions. A well crafted vision statement grabs and directs the project team's attention, sets their agenda, and energizes their work. This statement becomes the common starting point for discussion about more specific activities and outcomes.

## When to Define Project Scope and Vision

As outlined in the *WWF Standards of Project and Programme Management*, projects should develop their scope and vision during Step 1.2 of the initial planning work for their project. Note, however, that you may have to revise your geographic scope as you define your targets in the next step. The project should periodically revisit the scope and vision to make sure that they are still valid.

## How to Define Project Scope and Vision

Defining your project's scope involves agreeing as a team on the basic parameters of your project. Specific steps include:

### 1. Discuss with your team the basic scope of your project

Most project teams will come together with at least a broad idea of what they are supposed to focus on – for example conservation of biodiversity in a national park or in an existing biogeographic unit such as a Global 200 Ecoregion or priority landscape. Likewise, in a thematic project your scope should be fairly evident. If there is any doubt, then discuss the options with the members of your project team and see if you have at least a general consensus. If you can't arrive at some basic consensus, then you need to seriously reconsider whether you should split into multiple projects.

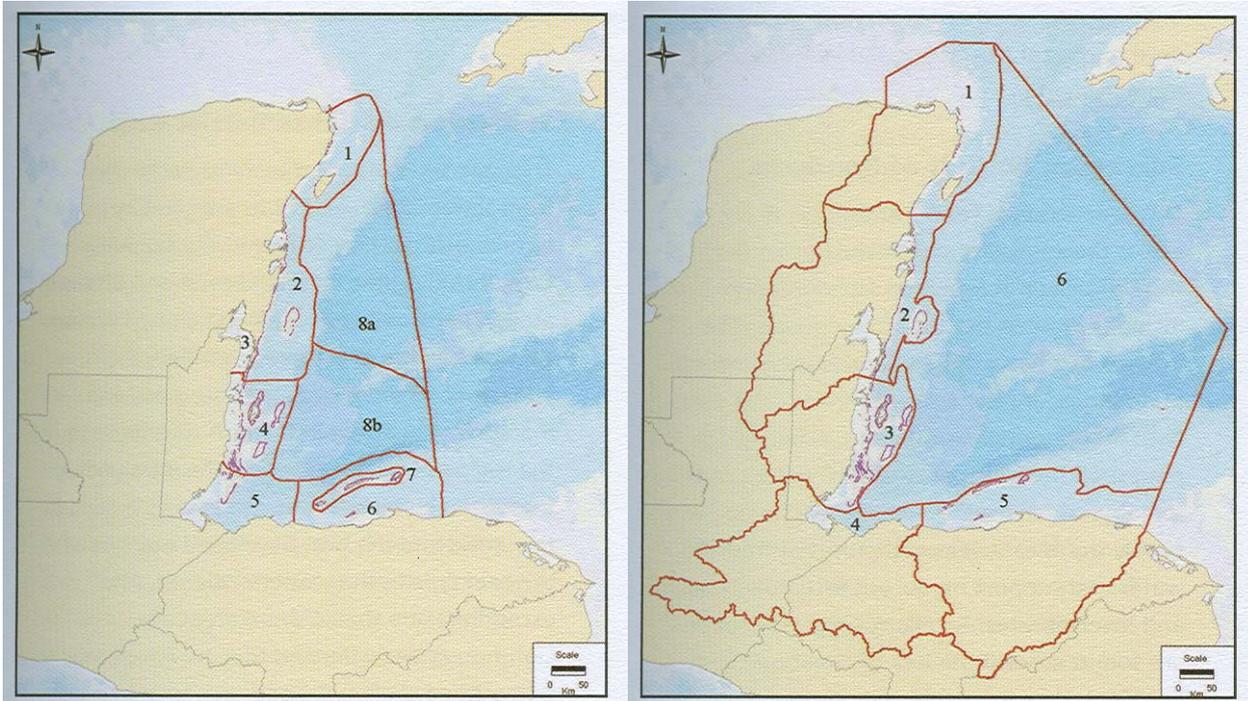
### 2. Outline your project area on the best available map

Most place-based conservation projects will typically focus on biodiversity in a defined project area. In these cases, you should describe this area on a GIS program, a base map, or even a rough hand-drawn sketch. In many cases, you will have to take the initial biogeographic unit boundaries that you are handed (which were often developed by people working at a global scale), review the ecological and practical considerations for that unit, and then refine the boundaries to meet your specific needs and current local conditions. Ecological considerations include the ecological basis for the original delineation and the larger ecological context. For example, does the ecoregion represent a unique biome among a group in a different biome? Or because of the similarity among a number of units does it make more sense to work on them together? The capacity of your organization and your partners is also important when considering how large or small a unit to work on. For example, do the proposed boundaries make sense to the regional stakeholders and fit their image of the "site" should look like?

As shown in Box 2, it is not always obvious where the team should draw the project boundaries – but the choice that the project team makes will have profound consequences for the ongoing structure and functioning of the project – indeed you define your project by the project area you select, rather than vice versa. Note that in many cases, project actions may take place outside of the defined project area – for example political action in a national capital designed to affect a protected area in a remote province. In a few cases, a conservation project may not focus on biodiversity in a specific area, but instead will have a project scope that focuses on a population of wide-ranging animals, such as migratory birds. Even here, however, it is usually possible to tie the animals to specific locations on a map where they have critical breeding or feeding sites.

## Box 2. Defining Your Project Area

The Mesoamerican Caribbean Reef marine ecoregion initiative initially defined its project area to focus on the marine habitats shown in the map on the left. Over time, however, they realized that if they really wanted to conserve the marine habitats, they had to worry about the adjacent terrestrial areas as shown on the right. This “reef to ridge” project area had broad implications for their overall project. There is no one right choice, but each choice would mean a very different focus for the project.



## 3. Develop and refine a vision statement for your project

As described above, a vision is general summary of the desired state or ultimate condition of the project area or scope that a project is working to achieve. If all the members of your project team agree that the project is focused on biodiversity conservation, drafting a vision should be relatively easy. Depending on the size and makeup of your project team, the team as a whole or a subcommittee should craft a draft statement and then make sure it meets the following criteria:

- *Relatively General* – Broadly defined to encompass all project activities
- *Visionary* – Inspirational in outlining the desired change in the state of the targets toward which the project is working
- *Brief* – Simple and succinct so that that all project participants can remember it

If, however, there are members of your project team (including partners) who believe that the ultimate vision of the project should involve not be biodiversity conservation, but instead other aims such as “improving human welfare” or “conserving open space” then crafting a vision statement becomes a much more difficult exercise, especially if realizing different visions ultimately require taking different (and potentially conflicting) strategies. As an extreme example, consider a project in which some team members want to conserve a forest for its biodiversity values and others want to “sustainably” log it for its economic values. The project team here will either have to figure out how to reconcile these two visions or split their work into two separate projects.

In this case, you may have to go through a much more formal process of developing a vision statement that includes:

- Soliciting unique submissions from the entire group on paper;
- Organizing the submissions by subcommittee;
- Crafting a draft proposal based on the submissions, attempting to include elements of the major ideas in the submissions;
- Vetting the draft with the larger group;
- Redrafting the vision statement by the subcommittee;
- Final approval by the group.

Finally, there is no reason that a vision statement cannot be accompanied by a map, picture, or pictures. It is important to remember that vision statements, just like biological visions, may evolve as new information becomes available, stakeholders change, or aspirations change. Both biological visions (see Box 1 above) and vision statements should be viewed as living documents that can change iteratively as planning an implementation proceed.

### **Box 3. Developing the Project Area for an EAP**

For an ecoregional action programme (EAP), determining scope entails deciding which ecoregion to work on, which is not as straightforward as it sounds. The 50+ ecoregional action programmes are generally based on one or more Global 200 ecoregions. Terrestrial Global 200 ecoregions often contain a number of constituent ecoregions, and these smaller units may sometimes be more realistic units to work on. Freshwater and marine Global 200 ecoregions are generally divided for the purposes of determining the scope of an EAP. A number of WWF efforts have even been directed at conserving conglomerations of multiple Global 200 Ecoregions (e.g., Congo Basin, Forests of the Lower Mekong).

Within an ecoregion, priority areas are usually identified which represent key landscapes that contain (or should contain) important endemic, keystone, or characteristic biodiversity in the ecoregion. These priority landscapes are intended to become projects in and of themselves, and their geographic scope needs to be delineated. When these units have been produced in an expert workshop environment, the boundaries may only be notional, and will require a fair amount of work before their appropriate extent becomes clear. Eventually, the boundaries of the conservation landscape will be based on the needs of the elements of biodiversity that led to the identification of the priority area in the first place (including ecological processes). Because, it may take a while to identify these needs and the specific parcels of land that will contribute to these needs, it is probably best to propose tentative boundaries and continue to think broadly across the area.

Delineation of the boundaries of freshwater systems begins with an accurate map of water catchments, overlaid with freshwater surface features (e.g., rivers, lakes, springs, wetlands). Overlays of terrestrial features may also be of assistance in this process. Natural freshwater dispersal barriers such as waterfalls and steep salinity gradients may also help delineation.

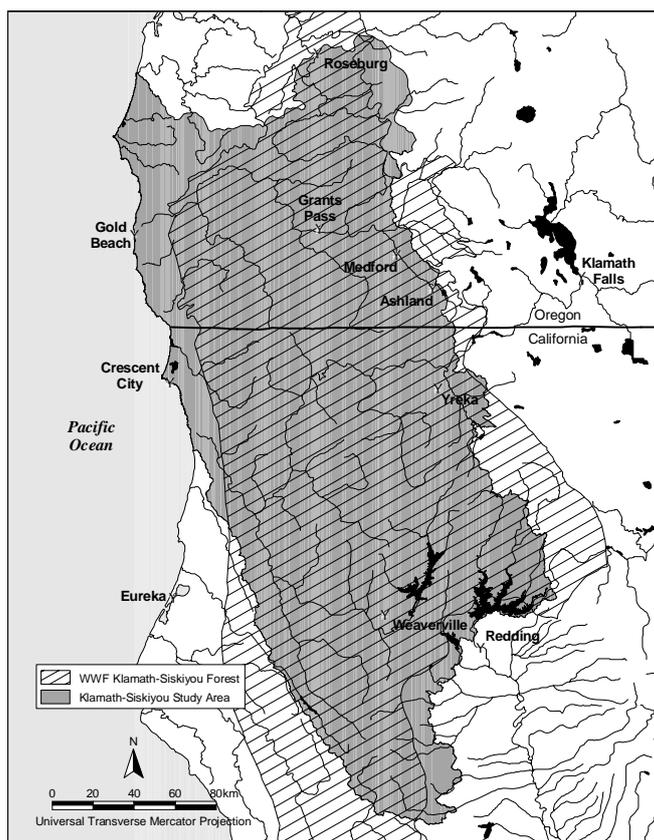
No matter what boundary is finally identified for the conservation project, it is critical to document the refinement process, and to convert the new boundaries in geographic information systems (GIS) files. This GIS linework should be distributed to appropriate repositories (regional programs, conservation science program), and perhaps even served on the program website. One should also expect that the analysis of threats will eventually lead the team to look outside of those boundaries.

## Examples

The image below illustrates the final Klamath-Siskiyou ecoregional boundary (“study area”) and the original WWF Global 200 boundary. Most ecoregions make subtle or not so subtle modifications to the boundaries of their units, usually based on the input of experts that they have consulted.

Generally, additional adjacent habitats are pulled into the planning unit. When watersheds are more closely examined, this also often results in an extension of boundaries.

### The Klamath-Siskiyou Ecoregional Boundary



Examples of inspirational vision statements, developed in workshop settings such as described above, include the following:

#### **Bering Sea**

“Our vision of the Bering Sea is to ensure that species assemblages and abundances, community structure and ecological phenomena are maintained or restored within their natural ranges of variation. Within this long-term vision, the cultural diversity of indigenous peoples is a vital part of Bering Sea biodiversity. People locally and globally recognize the unique value of the Bering Sea and committed to conserving it. This also requires working together to minimize or eliminate the impacts of alien species and ensure there are no further human caused global or local extinctions.”

### **Chihuahuan Desert**

“A biodiversity conservation strategy for the Chihuahuan Desert ecoregion must seek to conserve the full range of distinct natural communities and ecological and evolutionary phenomena, maintain viable populations of species, sustain important ecological processes and services that maintain biodiversity, and protect blocks of natural habitat large enough to be responsive to short- and long-term change. The strategy will continue to be developed through a participatory process of identifying priority sites, conservation activities, natural resource uses, and threats.”

### **Yangtze Basin**

“A region where a living river links the Tibetan Plateau and the Pacific; where people thrive in harmony with nature, pandas play in the forests, children swim with dolphins and fish in the clear water, pheasants dance among the rhododendrons, and the cranes sing at sunrise. A region where natural cycles sustain a rich and ancient culture.”

The extent to which biological and social values dominate or share space in the vision statement should be a reflection of the goals of the program, and will have implications for what activities are prioritized.

## **References**

- Abell, R., M. Thieme, E. Dinerstein, and D. Olson. (2002) A sourcebook for conducting biological assessments and developing biodiversity visions for ecoregion conservation. Volume II: Freshwater ecoregions. World Wildlife Fund, Conservation Science Program, World Wildlife Fund, Washington, D.C., USA. Pages 19-21.  
<http://www.worldwildlife.org/science/pubs/FWsourcebook2002.pdf> (PDF, 6.78M)
- Dinerstein, E., G. Powell, D. Olson, E. Wikramanayake, R. Abell, C. Loucks, E. Underwood, T. Allnutt, W. Wettengel, T. Ricketts, H. Strand, S. O'Connor, and N. Burgess. (2000) A workbook for conducting biological assessments and developing biodiversity visions for ecoregion-based conservation. Conservation Science Program, World Wildlife Fund, Washington, D.C., USA. Page 35.  
<http://www.worldwildlife.org/science/pubs/terrecoregionswkbk.pdf> (PDF, 13.2M)
- Loucks, C., J. Springer, S. Palminteri, and J. Morrison. (2003) From the Vision to the Ground: A Guide to implementing ecoregion conservation in priority areas. World Wildlife Fund, Washington, D.C., USA. Page 9-10.
- WWF-International. (2004) Ecoregion Action Programmes - A Guide for Practitioners. WWF-International, Gland, Switzerland. Pages 1-12.  
<http://assets.panda.org/downloads/guidebookpart1.pdf>  
<http://assets.panda.org/downloads/guidebookpart2.pdf>  
<http://assets.panda.org/downloads/guidebookpart3.pdf>