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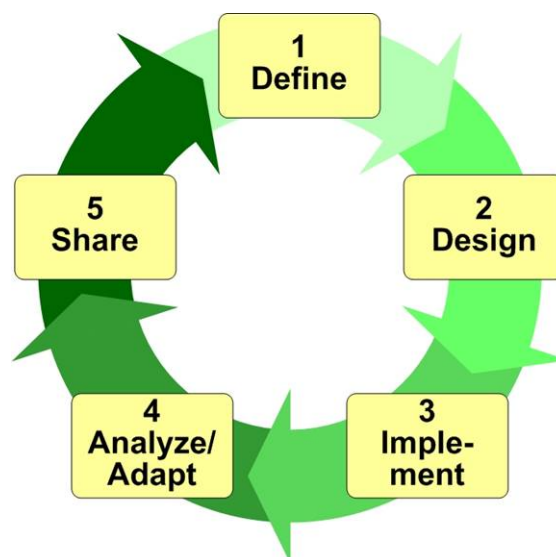
## Resources for Implementing the WWF Project & Programme Standards

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### Step 4.4

## Adapt Your Plans and Budgets

March 2007



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## Step 4.4 Adapt Your Plans and Budgets

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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=60988>

**Written by:** Will Beale, WWF-UK

**Edited by:** Foundations of Success

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

# Adapt your Plans and Budgets

## What Is Adapting Your Plans and Budgets?

“Adapting your plans and budgets” is essentially about using information to adapt and improve your project. It focuses primarily on using what you have learned in the analysis and discussions in Steps 4.2 and 4.3 to modify and optimise your activities.

In practical terms, it means you need to periodically update all the sections of your strategic plan to reflect what you have learned, and make sure your action on the ground is in line with your revised plans. As you make changes, you should also document the reasons behind them so that others will understand what you have learned and why you made these changes.

## Why Is Adapting Your Plans and Budgets Important?

Adapting your plans and budgets to reflect what you have learned ensures that you continuously improve the effectiveness and efficiency of your project. All the planning that you did earlier in the project was not meant to be a one-time event, never to be revisited or used again. Indeed, adaptation should be viewed positively as a strategic response to new information.

Conversely if you do not adapt your plans when new information becomes available, the effectiveness of your project will decrease.

## When to Adapt Your Plans and Budgets

The short answer is “when information tells you that you need to adapt your plan, do so as soon as you can.” In principle this sounds easy and logical, and if you have followed the other steps of the Standards project cycle you should be well placed to adapt your plans effectively.

In practice it can be quite challenging to manage change and at the same time keep the project moving forwards. In particular, if plans are adapted too often in response to events rather than evidence, implementation is likely to suffer and it can even be demotivating for teams.

Therefore as a project team, when adapting your plans you need to consider factors such as:

- Importance/ benefit of the change;
- Size of the change required (extent of activities that need to change);
- Strength of evidence for change;
- Stakeholders and their likely response; and
- Costs of change (time, cash and attention that would otherwise be allocated to implementation).

If you are clear about these factors, you are more likely to adapt your plans successfully and efficiently. In practice, one of the most reliable ways to ensure the necessary adaptation happens is to periodically plan time for analysis, redesign and replanning. There are usually defined points within a project cycle and an annual planning cycle when it is natural to do this (see below). [Click here for the WWF Project Reporting Cycle.](#)

## How to Adapt Your Plans and Budgets

As far as possible, everyone involved needs to support the idea of change and be willing to collaborate in that change process. In any project or organization, resistance to change can come from senior staff, team members, partners or other stakeholders. Being prepared to adapt may involve educating people about the benefits of *informed* change.

Successful adaptation relies primarily on the quality of four main factors:

- Preparing in advance to adapt;
- Clear definition of the change required and why it is required;
- Maintaining strong relationships and communication with partners and stakeholders; and
- Effectively implementing the change.

These four factors are synergistic and mutually supporting. Some basic guidance is provided below on how to manage these factors effectively. Note that to a large extent this is “common sense.” You may do much of this well already, but at the same time you will always be able to improve.

### 1. Prepare to adapt

As explained above, it is important to anticipate the need to adapt your plans and to prepare for this. Partly this means simply “planning time for planning.” As part of your work plan or project calendar, you should schedule time for adaptive management. If you find it useful, you can do this in a separate plan or calendar, but this is not necessary – what is most important is that you plan time for key adaptive management activities such as analyzing data, reporting results, and adapting your plans. That said, it is also important to be receptive to spontaneous, unplanned learning that often arises in the course of a project. You cannot and should not try to schedule this type of adapting, but rather encourage it as the need arises.

Including time for adapting in your project calendar or work plan provides a simple, visual way of ensuring these activities are logically and efficiently sequenced. In addition it can increase understanding and ownership by project team members and partners in terms of their contribution to effective adaptive management (i.e. what needs to happen when and why).

### Activities to Include When Scheduling Adaptive Management

Your timeline for planning for adaptive management should normally cover the next 12-18 months. Depending on whether you are including adaptive management in your project calendar or workplan, you may find it useful to present activities related to or affecting adaptation in a Gantt Chart or calendar format. These might include:

- Planned visits by donors
- Key scheduled meetings with partners/ stakeholders
- Reporting and forecasting (the [WWF Project Reporting Cycle](#) provides an important starting point but this shows deadlines only for the overall project reports).
- Audits, evaluations or peer reviews
- Analysis of data (technical and financial)
- Adapting the strategic plan (redesign)
- Sharing lessons/ examples

## Guidance for Scheduling Adaptive Management

- Focus mainly on the project team and implementing partners, but include also key timings (e.g., report deadlines) for National/ Programme Offices, WWF Network and donors.
- Do not attempt to include implementation activities, but be aware of periods when implementation is likely to be particularly busy.
- Identify the “flow” between related activities (e.g. where a report from a field team feeds up to a Programme Office and where feedback flows back down).
- Ensure that the activities are sequenced logically with sufficient time and human resource allocated. Consider both technical and operational aspects.
- Where necessary, work with partners to simplify the schedule. For example, will external donors accept WWF reports? Are some partners adhering to Network Standards? Would a Programme Implementation Agreement help to simplify the schedule?

Once you have developed an Adaptive Management Schedule you need to use it! Often it can be helpful to have one member of the project team or office focusing on these activities to make sure everyone is delivering their contribution in accordance with the schedule.

## 2. Define what you will change, how you will change it, and why you will change it

Before you actually make changes to plans you need to clearly define what you are changing, how you will change it, and why. You need to consider both technical and operational aspects, and try to be sure that as far as possible you are using reliable information to make your decisions.

The questions in the table below may be helpful in defining change and smoothing the process of change.

Question	Specific sub questions
<b>What are you changing and how will it change?</b>	Action Plan and Monitoring Plan <ul style="list-style-type: none"><li>• Do you need to change any goals or objectives?</li><li>• Are any major activities starting or stopping?</li><li>• Do indicators or monitoring methods need to change?</li></ul>
	Operational Plan <ul style="list-style-type: none"><li>• Overall is the project scaling up, scaling down or staying about the same?</li><li>• Are there any major resource implications (e.g. financial or human)?</li><li>• What are the priority changes (due to importance or urgency)?</li></ul>

Question	Specific sub questions
<b>Why are you changing?</b>	<p>Is the evidence for change based mainly on:</p> <ul style="list-style-type: none"> <li>• Your analysis of results, assumptions and operations (in 4.2 and 4.3)?</li> <li>• Evaluations, audits or other formal reviews?</li> <li>• Opinion or analysis of partners/ stakeholders (e.g. donors)?</li> </ul> <p>Specifically what will be gained by this change?</p> <p>What (if anything) will be lost?</p>
<b>What are the practical implications?</b>	<p>Are there any constraints, such as contractual obligations to fulfill before you can change plans?</p> <p>What is the likely attitude of key partners and stakeholders to change? Are they aware through participation, reports, forecasts and other communications that change is planned?</p> <p>How will you exit from activities that need to stop?</p> <p>Who is responsible for adapting plans and implementing the change? What extra support will be required (if any)?</p> <p>Where will changes be documented? (e.g. project documents and reports)</p>

### 3. Maintain strong relationships and communication with partners and stakeholders

You can adapt your plans more easily if you have positive relationships within your team and with key partners and stakeholders and if you maintain frequent communication with them so that they are aware of how the project is going and are prepared for possible change. Over time people who collaborate and communicate well together come to trust each other; this usually leads to each party giving the other more freedom to take action.

Good relationships and communications are supported by the first two steps described above:

- “Preparing to adapt” can help you and your partners define clear and transparent project processes and communication flows.
- “Defining change” can help you clarify what you need to say to partners and stakeholders, and decide what level of stakeholder participation is needed in adapting plans.

Of course these are not the only factors involved in developing a good working relationship with partners and stakeholders. Other factors such as cultural context and individual personality can be equally important. Without getting too complicated, it can also be helpful to periodically review or “audit” some of your key relationships and consider how they could be improved. For more information on auditing and a simple tool that will help you do that, see [3.4 Partner Management Systems and Agreements](#).

## 4. Implement change

No matter how good a job you do on preparing to adapt, defining change and developing positive relationships, the implementation of change is always a challenge. For example, some people involved in the project will be uncomfortable with change, while other stakeholders may want to see much faster change. You may also have resistance within your organization but outside of your project team.

If people don't understand why you are changing or don't see the need for change, they won't buy into the changes or provide the political and institutional support you need. In all cases, support from your project advisors or champions can be very valuable, or indeed critical.

Whatever the situation, in the end you have to make some decisions, adapt your plans accordingly and then get on with implementation of those revised plans, whilst continuing to pay attention to stakeholders.

## References

Heaney, Deborah (2005). *Developing an Adaptive Management Schedule*.

Nauheimer, Holger (2005). [\*The Change Management Toolbook\*](#)

Relationships Foundation. [\*Relationships Audit Tool\*](#).