



# conservation education

## STRATEGY PLANNING TOOLKIT

To help organisations and projects to plan, design or refine their own conservation education strategies.





## acknowledgements

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# conservation education strategy: why?



## Background

This toolkit helps organisations and projects to design or refine their own conservation education strategies – that is, to plan for conservation education. The resource has been produced by the C.A.P.E. Conservation Education Programme (CEEP), which is convened by the Rhodes University Environmental Education and Sustainability Unit. In 2005-2006 the Unit conducted a strategy audit of conservation partners in the Cape Floristic Region (CFR), which informed this toolkit. Partners throughout the CFR then used the toolkit in a series of workshops run by the CEEP, during May – June 2006. This work helped to refine the toolkit, which now includes stories of how various partners have used the resource.

## But Why Strategy?

C.A.P.E. (Cape Action for People and the Environment) is a partnership initiative towards institutional strengthening, coordination and networking in the interest of biodiversity conservation in the CFR. The CEEP aims to strengthen local action and learning for sustainable living. One of its activities is to provide organisations and projects with support for strategy development. But why spend time and resources on strategy?

One could argue that developing strategies is not the best use of time and resources in the under-staffed, resource-stressed context of our conservation agencies. Compared to being in the field with learners, sitting around a table talking about goals and objectives is not very action-oriented. In fact, it can be counter-productive: a glossy strategy document will create the impression that an organisation has a good handle on its conservation education activities, even if there are serious problems with implementation, which might then remain unattended.

However, a number of problems we currently observe can be addressed by better planning. Examples may include the following:

- Educational activities which are of such narrow scope and trivial nature that they must fall short of organisations' broader conservation goals; agencies lobbying government to 'get environment into the curriculum' with little knowledge of the actual policy; materials being produced with no thought of how they would be distributed and used.
- Conservation education being handled by committed but inexperienced volunteers, students or junior staff, who tend to do what they know, and are seldom in a position to innovate or drive activities strategically.
- Conservation education staff struggling to explain what exactly it is that they do or should do; at times lacking adequate management support and with vague or unrealistic job descriptions and performance criteria.
- Across the field, a poor grasp of 'people-processes' which do not fit scientific paradigms, 'log-frames' and quantitative criteria.

For these and other reasons many conservation education activities appear to be *ad hoc*, unfocussed or mis-directed. At the same time:

- Environmental agencies strongly endorse the importance of educational processes in achieving biodiversity conservation goals.
- Several agencies allocate significant resources to conservation education in the CFR.

Many of the problems we experience could be addressed through more careful planning that is *guided by educational thinking and evaluation*. Strategic planning could help us to:

- Decide how best to use available resources, for the highest educational impact (focus, scope, staff development and management, coordination).
- Mobilise the necessary resources (funds, partners, staff, resource materials).
- Work out action plans to guide and monitor staff and partner activities.
- Be more effective in engaging communities in biodiversity conservation in the CFR.

## **Strategic planning has limitations**

Strategic planning which originated outside educational contexts (in business, the military, or development intervention planning), while providing a reassuring logic, may detract from the *educational thinking* which needs to inform conservation education programmes. In this Toolkit, we have introduced *an educational framework* for strategic planning.

Strategic thinking should not replace the creative spark, enthusiasm and responsive use of opportunities that make educational processes engaging and exciting. However, a strategy has an important role in ensuring that such energies are not squandered, but used wisely and effectively towards achieving an agency's biodiversity conservation goals.



# how the toolkit has been used so far



## Process and Composition

The C.A.P.E. Conservation Education Strategy Toolkit currently consists of:

- A workbook, which includes -
  - Two sets of introductory notes
  - Ten task sheets with questions to work through

- Three loose inserts -
  - CCEP Brochure
  - Strategic Planning Table
  - Policy Reference.

This version of the resource was developed during May – July 2006. A first draft was drawn up and then used during five strategic planning workshops in the CFR (Port Elizabeth, George, Hermanus, Cape Town, and Algeria in the Cederberg). These two-day workshops were attended by a total of 109 participants from 57 organisations and units. Working with these partners helped the CCEP to further develop the toolkit.

## Stories

This is how some organisations used the workshop process and the toolkit components:

### **Strengthening Fledgling Educational Activities – SEF, Cape Town**

Many organisations used the workshops to consider how they can strengthen their existing educational activities. One such group was the team from Strategic Environmental Focus, an environmental consultancy firm. They have been conducting some training for developers of construction projects, after having completed Environmental Impact Assessments for these clients. As they worked through the



tasks, the SEF team noted that their existing educational activities were limited, involving mainly low-level and seasonal workers, and using a limited range of educational methods which might not be entirely suitable for these learners, who were often not literate or fluent in English. Using Task Sheet 6 and discussions with workshop facilitators they thought of a broader range of methods and materials they could use. They also thought of ways in which to broaden the audiences for their educational activities, e.g. by strengthening the educational impact of their existing newsletter to clients, around new legislation and requirements.

### **Aligning Educational Objectives With Mission Statement – Greater Cederberg Biodiversity Corridor (GCBC), Porterville**

Working through Task Sheet 5 (on mandates and missions) the GCBC's Adrie Koch and colleagues worked carefully through their vision and mission and educational objectives, which had been drawn up before she was appointed. They included:

The Mission: “Learning and working together, all the people of the Greater Cederberg Biodiversity Corridor live sustainably with, and benefit from, their natural resources now and in the future... through appropriate conservation and management of the region’s unique biodiversity.”

The most directly educational objective was “To encourage scientific and educational activities which will contribute to the long term well-being of fauna and flora populations of the Greater Cederberg Corridor and to the development of public support for the environmental protection of the Greater Cederberg Corridor.

They noticed a discrepancy: The mission promoted a participatory approach (conservationists and the people of the Cederberg “learning and working together”) which also integrated conservation with broader land management and social benefits (“living landscapes”). The educational objective did not share this orientation. Instead, it spoke of educational activities which would “contribute to the development of public support” (implying that the public learn from conservationists, then support what conservationists are doing – not ‘learning and working together’). It also spoke of the “well-being of fauna and flora populations” – rather than people’s well-being being

dependent on the conservation of biodiversity and sustainable management of natural resources, as suggested in the mission. After some workshop discussion, Adrie started to re-work their educational objective to more closely reflect the Corridor's mission statement.

#### **Addressing the Evaluation Gap – Gaia, Hermanus**

Gaia is a small educational initiative which struggles for resources. Working through Tasks 1 and 2 highlighted an issue which the staff had identified earlier – the need for evaluation. They noted that they needed evaluation strategies that would help them give feedback to staff and sponsors as to whether their educational activities had been worthwhile. They felt that statistics alone were very limited. Through the workshop they sought advice on and clarified how else one could evaluate educational work.

#### **Re-Thinking Existing Strategy in the Light of New Policies – LandCare, Cederberg**

Working through Task Sheet 4 (on policy and other guidelines) Johan Meij, Landcare official from Mooresburg, reviewed the *Minutes of a JuniorCare Discussion Document Meeting held on 9-10 Feb 2006*. This document states one of the “long-term objectives (strategies)” of Junior Landcare as “To integrate the LandCare philosophy into school curriculum”. Johan and colleagues then reviewed the National Curriculum Statements. They concluded that as far as the FET curriculum (Grades 10-12) was concerned, the Landcare philosophy was already reflected in the curriculum. The GET curriculum (Grades 1-9) was more open-ended, but did present many opportunities to “bring out the flavour” of Landcare which was already there; as Johan expressed it, “we just have to add the salt”.

This policy review means that Junior Landcare can now re-think their strategic objectives in the light of a more careful look at the new National Curriculum Statements. Instead of “integrating the Landcare philosophy into the school curriculum” they might want to re-state the objective as “Supporting primary and high school teachers to teach about caring for our land through the national curriculum”. This is much more do-able, given that the Department of Education had concluded its recent curriculum development process and is now focussed on implementation. In the workshop Johan met Clement Cupido from the Cape College of Agricultural Training, who explained the role of his unit as the dissemination of new information

including research into sustainable agriculture and conservation. Clement used the workshop to plan how this could be done better, including the provision of information on CD to high school teachers of Agricultural Science.



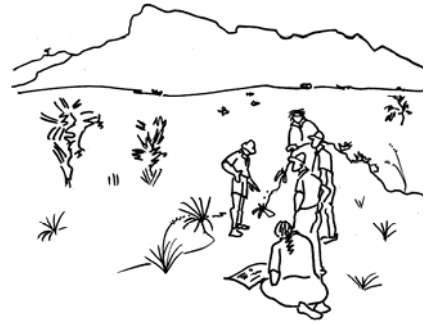
### **Guide to planning a workshop based on the toolkit**

The toolkit can be used flexibly. The CCEP has used it as the basis for a two-day workshop, during which participants worked systematically through all the tasks in the Workbook, using the inserts as support materials.

We have found the following a useful format, but this can be adapted, for example smaller groups may need less time on activities.

Note that the suggested order in which we worked through the Workbook, differs somewhat from the order of tasks in the workbook. The workbook order makes conceptual sense, while the suggested workshop order facilitates a more effective workshop process.

<b>Activities</b>	<b>Resource</b>	<b>Time Guide</b>	<b>Notes</b>
Setting the scene: Introduce the workshop	Introductory notes in the Workbook, CCEP brochure	15 mins	Clarify the broad scope of conservation learning actions.
Setting the scene: Clarify own strategy needs	Task Sheet 10, the first two blocks	45 mins including report-backs	Report-back helps people to articulate what they need to do in the workshop; everyone also gets to hear who else is there, and why.
Start situational analysis: What is already happening? Identify, describe and record existing learning actions taking place	Task Sheet 1, CCEP brochure with map and conceptual framework, map of own locality	60 mins	Participants can place their own maps in the centre of the CCEP brochure. Remind the group that local learning actions can involve a range of processes (e.g. stewardships).
Situational analysis cont: Identify, describe and record learning support materials that have been produced	Task Sheet 2, CCEP brochure with map, map of own locality	30 mins	It is most useful to focus on materials that have been <i>produced</i> (and not just used) by organisations.
Start gap analysis: What should you be doing? Review relevant policies and legal frameworks and consider their implications for conservation learning in your organisation	Task Sheet 4, Policy and Legal Frameworks Reference, relevant policies and guidelines (e.g. other organisational strategies)	60 mins	It is useful to have copies of a range of relevant documents, e.g. the National Curriculum Statements.
Gap analysis continued: Explore which educational processes are evident and relevant in your context	Task Sheet 6, CCEP brochure with conceptual framework	60 mins	First discuss examples of the various educational processes on the map, and others one might want to add.
Back to the situational analysis: Reflect on and record what resources you have in place	Task Sheet 3	60 mins – at the end of Day 1	Note that partnerships and staff are also resources.
Clarify your particular mandate, mission and educational priorities	Task Sheet 5; first column of Task Sheet 7	45 mins	Include report-backs. Ask for clarification of links between mission/ mandate and priorities; introduce planning table.
Plan how to address educational priorities	Task Sheet 7 and pull-out planning table (first 6 columns)	45 mins	Add report-backs if time allows. Use the pull-out tables for report-backs.
Plan staff management and support	Task Sheet 8 and pull-out planning table (column 7)	30 mins	
Plan resources and partnerships	Task Sheet 9 and pull-out planning table (last 3 columns)	30 mins	Use the pull-out tables for report-backs.
Evaluation and planning the way forward	Task Sheet 10 (last 2 blocks)	15 mins followed by open discussion	Use discussion to clarify where participants can/should take the process from here. Focus practically on next steps. Collect evaluation sheets for feedback.



# Task Sheet 1:

## Existing Local Actions and Learning

**What are the existing local actions with a learning component in your organisation or project?** Answer the 4 questions below for each of your educational activities, attaching extra pages if necessary.

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**What is the action and where is it taking place?**

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**What is the nature and focus of the learning component?**

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**Who are the participants?**

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**How is it being evaluated?**

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**What is the action and where is it taking place?**

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**What is the nature and focus of the learning component?**

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**Who are the participants?**

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**How is it being evaluated?**

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***For Example:***

**Local action:** Door to door survey on wetland awareness in Khayalitsha, and dropping of pamphlets.

**Learning component:** Greater awareness of the value of wetlands in Khayalitsha.

**Participants:** The Education Desk of the CBO and residents near wetlands.

**What is the action and where is it taking place?**

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**What is the nature and focus of the learning component?**

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**Who are the participants?**

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**How is it being evaluated?**

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**What is the action and where is it taking place?**

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**What is the nature and focus of the learning component?**

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**Who are the participants?**

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**How is it being evaluated?**

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## Task Sheet 2:

### Your Educational Materials and their Use

**What conservation education materials have you produced in the past few years, and how are they being used?** Answer the 4 questions for each of your resources, attaching extra pages if necessary.

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**What is the resource?**

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**How is it distributed (if applicable)?**

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**How is it being used?**

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**How is it being monitored?**

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**What is the resource?**

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**How is it distributed (if applicable)?**

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**How is it being used?**

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**How is it being monitored?**

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**What is the resource?**

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**How is it distributed (if applicable)?**

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**What is the resource?**

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**How is it distributed (if applicable)?**

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**What is the resource?**

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**How is it distributed (if applicable)?**

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**How is it being used?**

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**How is it being monitored?**

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**What is the resource?**

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**How is it distributed (if applicable)?**

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**How is it being used?**

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**How is it being monitored?**

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# Task Sheet 3:

## Existing Resources, Partnerships and Networks



**What resources and partnerships do you have to support conservation education?** *Answer the following 3 questions.*

**What resources do you have to support conservation education in your project or organisation?** Think of staff (include positions); budgets; facilities.

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**List your existing partnerships which support conservation education. Also list issues associated with these partnerships e.g. sustainability.**

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**To which networks do you belong, and how are they useful?**

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# Task Sheet 4:

## Your Role in relation to Policy and other Guidelines



**What is the nature of your organisation or initiative? (E.g. local government)**

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**Which sector or sectors do you represent? (E.g. agriculture and education, tourism, etc)**

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**Which SA policies are most relevant to *your* work in conservation *and* conservation education? What do they say about what you should do?**

**Policies and Legal Frameworks**

**Implications for your Work**

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Examples might be National Acts like NEMA, the NWA, Marine Living Resources and Protected Areas Acts; Municipal Systems Act; CARA; Curriculum Statements and others.

**Which other guidelines, including other organisational strategies, are relevant to your work in conservation education? What do they indicate you should do?**

**Other Strategies and Guidelines**

**Implications for your Work**

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Examples might be other organisational strategies; and IDP; the Millennium Development Goals; World Heritage Convention Act; Agenda 21; the Tbilisi Principles for Environmental Education; the Millennium Ecosystem Assessment; the C.A.P.E. educational framework.

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# Task Sheet 5:

## Your Particular Mandate and Mission



**What is your particular role in conservation education, compared to other organisations?** Answer the questions below to clarify this role.

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**What is your organisation or project's mission with regard to biodiversity conservation?** Describe it in your own words, or quote.

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**What is the role of education in achieving your conservation mission?** Be as specific as you can, e.g. consider the learner groups this would involve.

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**Which other organisations have a similar role in your context?**  
Broadly evaluate their contributions.

**Organisation**

**Role**

**Perceived contribution**

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**How does your role differ from other organisations you listed?**

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**How could or should you support these other organisations?**

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**Using your answers to Task Sheets 4 and 5, now accurately describe your organisation's conservation education mandate and mission:**

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# Task Sheet 6:

## Educational Review

**How well are the following educational methods or processes presented by your existing activities (Task Sheet 1)?**



Methods and processes	Rating (well, somewhat, poorly or unsure)	Examples and Comments
Survey local landscape and change		
Audit biodiversity		
Investigate ecosystem services and livelihoods		
Assess environmental issues and risks		
Deliberate well-being, resilience & sustainable lifestyle choices		

**How well are the following educational methods or processes presented by your existing conservation education materials (Task Sheet 2)?**

<b>Methods and processes</b>	<b>Rating (well, somewhat, poorly or unsure)</b>	<b>Examples and Comments</b>
Survey local landscape and change		
Audit biodiversity		
Investigate ecosystem services and livelihoods		
Assess environmental issues and risks		
Deliberate well-being, resilience and sustainable lifestyle choices		



# Task Sheet 7:

Educational Priorities:  
Focus, Methods and Materials



**Drawing on the situation analysis and gap analysis conducted in the previous tasks, now complete the first 6 columns in the table on the pull-out Planning Table.**

Start with any column you like. Consider the outcomes of the preceding analyses, when you fill in the Planning Sheet:

- **Based on your mission, what are your educational priorities? Include in the Planning Table those existing educational actions (Task Sheet 1) and materials (Task Sheet 2) which clearly support your mission.**

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- **Are there any learner groups not currently included in your activities, which should be included, according to your mission?**

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- **Again considering your mission, which educational methods or processes (Task Sheet 6) seem to be required?**

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- **What materials do you need, to support these learning groups and processes?**

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- **What mechanisms could you use to evaluate local action and learning, and track and monitor the distribution and use of materials?**

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# Task Sheet 8:

## Staff Management and Support

**What are your staff requirements?** Complete column 7 of the pull-out Planning Table. Include staff needed for existing actions which should continue.

Carry forward the list of staff from the Planning Sheet, to the first column of the table on the next page in the Workbook.

Then complete the table, with the following information:

- The educational tasks of these staff
- The key performance areas associated with these educational tasks
- The support including training which staff might need to perform these tasks well
- Possible training, professional development and other opportunities (e.g. learnerships, courses).



<b>Existing Staff Positions</b>	<b>Educational Tasks</b>	<b>KPAs</b>	<b>Support/Training Needs</b>	<b>Opportunities</b>
<b>New Staff Positions</b>	<b>Educational Tasks</b>	<b>KPAs</b>	<b>Support/Training Needs</b>	<b>Opportunities</b>

# Task Sheet 9:

## Resources and Partnerships

### **What are your general resource requirements?**

Complete the last two columns of the pull-out Planning Table.

Carry forward the list of staff from the Planning Sheet, and your required resources, to the first column of the table on the next page of the Workbook.

Then complete the table.



	Ways to Mobilise Resources:		
Resources Required:	<b>Funding Proposals</b>	<b>Partnerships</b>	<b>Other</b>

# Task Sheet 10:

## Monitoring and Evaluation of Toolkit



Please help us to monitor and evaluate the C.A.P.E. conservation education strategy development workshops and toolkit use. Complete the 4 blocks.

<u><b>Who is developing your strategy?</b></u>	<u><b>What are your strategy needs?</b></u>
<p><b>Name of organisation/project:</b></p> <p><b>Participant:</b> <b>Designation:</b></p> <p><b>Participant:</b> <b>Designation:</b></p> <p><b>Participant:</b> <b>Designation:</b></p> <p><b>Participant:</b> <b>Designation:</b></p> <p><b>Participant:</b> <b>Designation:</b></p>	<div data-bbox="1053 1482 1455 1881" style="border: 1px dotted black; padding: 10px; margin-top: 20px;"> <p><b>For example:</b> “We need to revise our existing strategy in light of the new curriculum.”</p> <p><b>Or:</b> “Our staff are limited and we do <i>ad hoc</i> activities; we need to strategise for greater coherence and to access resources.”</p> </div>

**Has this workshop helped you to plan an educational strategy?**

**Please explain your answer:**

**What more needs to be done before you have a functional education strategy in place?**





# Biodiversity Conservation Education



## Conservation Education Strategic Planning Table

Organisational Mission: ↑										
	Learning Actions in Context:				Resource Requirements to Support Learning Actions:					
1. Educational Priorities from Mission: ↓	2. Methods / Process	3. Activities / Contexts / Topics	4. Learner Groups	5. Learning Support Materials	6. M & E Processes	7. Staff	8. Facilities	9. Funds	10. Partners	
↑										
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## Biodiversity Conservation Education



# Policies, laws & other guidelines

### **National Environmental Management Act (1998) [www.deat.gov.za](http://www.deat.gov.za)**

The 'umbrella' environmental legislation, NEMA provides environmental management principles for all sectors. Several principles emphasize participation and education. NEMA states that the participation of interested and affected parties in environmental governance must be promoted; and all people must have *the opportunity to develop understanding, skills and capacity* for equitable and effective participation (4f).

### **Environmental Impact Assessment Regulations, NEMA 24(5)**

Those who may cause pollution or environmental degradation must take reasonable preventative measures (28(1)). This may include (28(3)) measures to (a) investigate, assess and evaluate the impact; and (b) *inform and educate employees* about the environmental risks of their work and the manner in which their tasks must be performed in order to avoid causing pollution or environmental degradation.

### **National Water Act (1998) [www.dwaf.gov.za/documents/legislature/](http://www.dwaf.gov.za/documents/legislature/)**

The NWA states that *sharing information* with the public, water users and others, is critical for achieving its objectives. It makes provision for Catchment Management Agencies, whose responsibilities include the *promotion of community participation* in the management and conservation of water resources. See also **Conservation of Agricultural Resources Act (1983)** [www.nda.agric.za/docs](http://www.nda.agric.za/docs)

### **National Protected Areas Act (2003) [www.deat.gov.za](http://www.deat.gov.za)**

Protected area management plans should include procedures for *public participation* (41(2)e), and may include local management *capacity development and knowledge exchange* (41(3)b).

### **Convention on Biological Diversity (1992) [www.biodiv.org/convention/](http://www.biodiv.org/convention/)**

Ratified by SA in 1995. Countries must develop strategies or programmes and integrate the conservation and sustainable use of biodiversity into sectoral or cross-sectoral plans or policies. Article 12 refers to *training*; Article 13 calls for *public education and awareness*. See also **National Biodiversity Act (2004)** and **Marine Living Resources Act (1998)** [www.deat.gov.za/PolLeg/Legislation](http://www.deat.gov.za/PolLeg/Legislation)

### **National Curriculum Statements (2002, 2003) <http://education.pwv.gov.za>**

A values- and outcomes-based curriculum with a first principle that *A Healthy Environment*, Human Rights, Social Justice and Inclusivity are inter-related. Environmental learning outcomes are *integral* to all GET (Grades 1-9) learning areas and several FET (Grades 10-12) subjects.

### **Municipal Systems Act (2000)**

Outlines the roles and responsibilities of local government including: accountable government; provision of services to communities in a sustainable manner; promoting safe and healthy environments; and *encouraging the involvement of communities* and community organisations in local government matters.

### **Constitution of the Republic of South Africa (Bill of Rights, 1996)**

Gives everyone the right to (a) An environment that is not harmful to their health or well-being; and (b) To have the environment protected for the benefits of present and future generations through reasonable legislative and other measures that (i) prevent pollution and ecological degradation, (ii) promote conservation, (iii) secure ecologically sustainable development and use of natural resources while promoting justifiable economic and social development.

### **World Summit Implementation Plan (2002) [www.johannesburgsummit.org/](http://www.johannesburgsummit.org/)**

Requires governments to integrate sustainable development into education systems at all levels and provide all members of society with a wide range of life-long learning opportunities. For example, it recommends the promotion of training, education and skills enhancement in the agricultural sector as a way to provide livelihoods for rural communities.

### **Agenda 21 (1992) [www.un.org/esa/sustdev/documents/agenda21](http://www.un.org/esa/sustdev/documents/agenda21)**

A Programme for Action drawn up at the Earth Summit. It states that *education, awareness-raising and training* cut across nearly all its priority areas: the social and economic dimensions of environment; conservation and management of natural resources; and strengthening of groups (from local authorities and technology providers to NGOs) towards sustainable and equitable development.

### **Convention to Combat Desertification [www.unccd.int./](http://www.unccd.int/)**

Ratified by SA in 1997. Parties must establish strategies and priorities to combat desertification, address the underlying causes, *promote awareness and facilitate the participation of local populations* (Article 5).

### **World Heritage Convention (1992) [www.whc.unesco.org/en/conventiontext/](http://www.whc.unesco.org/en/conventiontext/)**

Ratified by SA in 1997. Parties must take effective measures to identify, protect, conserve, *present and transmit to future generations* cultural and natural heritage of universal value.

### **Man and the Biosphere Programme [www.unesco.org/mab](http://www.unesco.org/mab)**

The main functions of biosphere reserves are (1) conservation; (2) development; (3) logistic support, e.g. for demonstration projects, *environmental education and training*, research and monitoring.

### **Millennium Development Goals (2000) [www.un.org/millenniumgoals](http://www.un.org/millenniumgoals)**

Highlight the need for strategic action in areas such as poverty and hunger eradication; reducing child mortality; and ensuring environmental sustainability. The Goals can inform education and training programmes and systems, to become more responsive to current socio-ecological challenges.

### **Caring For the Earth (1991) [www.iucn.org/publications/](http://www.iucn.org/publications/)**

Guidelines published by the IUCN, UNEP and WWF, which broadened the concept of conservation to acknowledge the role of economics and culture in practices affecting ecology; challenged the idea of sustainable development with its emphasis on economic growth; and proposed 'sustainable living' as more appropriate for improving environments and human well-being.



## LOCAL ACTION AND LEARNING FOR SUSTAINABLE LIVING

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