



## Impact Evaluation Methodology

### Evaluation Process

1. Applicant project/organization (applicant) provides organizational documents and or other written confirmation to demonstrate adherence to Wildlife Impact (WI) criteria for evaluation. This process typically takes 15 -30 days following receipt of documentation.
2. Applicant pays \$300 fee to begin initial review, which results in an Outcome Analysis Framework. Upon receipt of funds, WI provides a list of documents and data needed based on goals defined in organizational documents from step 1, strategic plans and organization's public messaging.

Minimum written documents required are:

- Strategic plan if available; any available documentation on goals, mission and vision, and activities if no strategic plan
- Management plan if available
- Priorities/outcomes of key project funders
- MoUs or agreements with key stakeholders, especially government
- Policies and protocols for staff, management and operations
- Program overview – descriptions, costs, staffing
- Last fiscal year budget
- Most recent annual report or annual work summary
- List of actions and associated measures or indicators used to track progress, if available
- Documentation of work accomplished, and data on progress towards goals or specifically against indicators, if available

WI creates Outcome Analysis Framework (framework) which details recommended strategic planning steps, the specific indicators needed to determine outcomes and the data required to assess them. The initial review process typically takes 45 - 60 days following receipt of documents.

3. WI provides framework to applicant along with a decision if sufficient documentation exists to pursue full Impact Evaluation. If not, the \$300 fee is non-refundable but can be applied towards full analysis fees within a two year period. Where a lack of strategic planning is cited as a key gap, WI can provide planning services that the \$300 fee can be applied to in lieu of a full Impact Evaluation.
4. If evaluation can proceed, WI provides invoice and applicant pays remainder of evaluation fee and moves forward to on-site visit and evaluation. All evaluations involve an on-site visit to gather data, talk to project staff and other stakeholders, and visually evaluate work and outcomes. Site visits are typically from 1 - 5 days depending on the project type and evaluation needs. Please be aware that coordination and scheduling of the site visit can sometimes add unexpected delays to the evaluation process.
5. Upon receipt of funds, WI will provide applicant:
  - CV(s) of evaluator(s) to confirm there are no conflicts of interest. Alternate evaluator(s) will be provided if a conflict exists. Once evaluator is confirmed, WI will ask applicant to arrange for site visit by evaluator. Applicant arranged and pays for the reasonable travel,

accommodation and board of the evaluator (on site accommodation and board are recommended to decrease cost and ensure convenient access).

- a list of documents and data needed to proceed and a list of the indicators to be evaluated and what data will be used to do so.
6. Following the on-site visit, WI will evaluate the data gathered and produce a comprehensive report synthesizing outcomes of the project, assigning an overall grade for the project as a whole and within each outcome category, as well as detailing successes and challenges and specific steps that can improve outcomes. WI may communicate with the applicant, stakeholders and the evaluator(s) if there are follow up questions or information needed. The evaluation process typically takes 90 – 150 days depending on the complexity of the applicant's project(s) or organization.
  7. WI will communicate the names of applicants on its website and social media, newsletters and e-communications, and will promote evaluations with passing grades to donors and the public. Actual results of the evaluation are confidential to the applicant unless otherwise permitted by applicant. We encourage applicants to transparently communicate their results for the purposes of building trust with donors and the public; encourage greater support for the sector; identify common areas where support is required; and to help WI target and tailor its future programs to develop capacity where it is most needed by projects in the field. Scoring results and general outcomes will be used anonymously (without identification of the applicants) in compilations of all WI evaluation results, e.g. annual percentage of evaluations scoring a B grade, and percentage of projects that need additional funding support for strategic planning.

#### Evaluation methods and indicators

WI evaluation is based on principles of strategic planning, evaluation and adaptive management.

Ideally, projects operate following a strategic process:

1. Define what you want to accomplish
2. Analyze the current situation and threats, including identifying the stakeholders and underlying social, political, economic and ecological systems
3. Envision the desired situation and outcomes
4. Identify strategies and actions to create these outcomes
5. Develop measures to monitor progress and impacts
6. Implement strategies and monitor progress and impacts
7. Evaluate and adjust plans as needed to achieve success
8. Share lessons learned. (Adapted from [The Open Standards for the Practice of Conservation](#); Foundations of Success (FOS), The Nature Conservancy (TNC), and World Wildlife Fund (WWF))

In practice, strategic planning and evaluation are often difficult when projects struggle with few resources and staff to address time-sensitive issues in complex settings. WI helps organizations with strategic planning tools to identify appropriate indicators and monitoring actions, and provides independent evaluation of indicators and outcomes.

WI has developed a database of published and open source indicators, and develops specific indicators for each applicant depending on their goals and activities and the potential ramifications of their work in its geographic, biodiversity and sociopolitical contexts. This database is being finalized and will be available via the Wildlife Impact website for download and review.

We rely on indicators that meet the [Biodiversity Indicator Partnership \(BIP\) guidance](#) (2010):

1. Scientific validity, meaning “a) there is an accepted theory of the relationship between the indicator and its purpose, with agreement that change in the indicator does indicate change in the issue of concern; b) the data used is reliable and verifiable.”
2. Measured by data already available or data that could reasonably be collected by the project
3. Responsive to change in the issue of concern
4. Can be understood and communicated “a) conceptually, how the measure relates to the purpose, b) in its presentation, and c) the interpretation of the data”
5. Relevance to the applicant’s needs
6. Can reasonably be used, monitored and evaluated by the applicant (BIP, 2010).

WI evaluation processes, indicators and monitoring recommendations are based on the work of the Conservation Measures Partnership’s Open Standards for Conservation, Conservation Action Plans (The Nature Conservancy) Ferraro & Pattanayak (2006), Baylis et al. (2015), Conservation Excellence Model (Black et al., 2011), ENDCAP, European Union Animal Welfare Quality, International Companion Animal Management Coalition, Biodiversity Indicators Project, IUCN Action Plans for species or taxa (IUCN Species Survival Commission Specialist Groups), and Wildlife Impact.

#### Benefits

Benefits including outreach/promotion to funders and the public, and scholarships for capacity development are available as funding permits for two years following each analysis. Projects’ specific needs that would enable improved evaluation scores will be highlighted to funders and the public on Wildlife Impact’s website.

#### Rates for impact evaluation

Evaluation fees defray some of the evaluation costs. Fees are based on a sliding scale determined by applicant’s previous fiscal year total expenditures. All fees are non-refundable. Applicant pays all costs for evaluator travel and food/lodging on site. Every effort is made to minimize travel costs. There are no membership or annual dues. Wildlife Impact will provide assistance for applicants to pursue grant funding to cover evaluation costs. Wildlife Impact is developing a fund for projects with smaller budgets to apply for needs-based grants to cover some or all costs for Impact Evaluation or an Outcome Analysis Framework.

<b>Organizational expenditures, last fiscal year</b>	<b>Evaluation Fee (USD)</b>
Up to \$100,000	\$500; needs-based grants may be available to offset fees and cover evaluator travel and expenses
\$100,000 to \$249,999	\$750
\$250,000 - \$499,999	\$1000
\$500,000 - \$999,999	\$2000
\$1 Million – \$3 Million	\$3000
\$3 Million - \$5 Million	\$4500

For organizational budgets over 5 million, please contact us for fees. There is a non-refundable \$300 deposit for initial review; this is applied to total fee if Impact Analysis proceeds.

### **Wildlife Impact Principles**

Wildlife Impact holds itself accountable to the following principles:

- We are committed to improving conservation of wildlife and natural habitats and wildlife welfare in developing countries
- We abide by and encourage application of national and international wildlife laws and conventions
- We provide fair and safe work conditions and equal opportunity employment
- We recognize human rights, social justice and cultural sensitivity in interactions with human communities.

### **Impact Evaluation Criteria**

To seek an evaluation from Wildlife Impact, projects/organizations need to demonstrate they:

- Have an institutional commitment to wildlife conservation and/or wildlife welfare
- Projects act within and uphold local, national and international laws
- Meet the minimum criteria below.

### **Minimum Criteria**

Wildlife Impact cannot conduct evaluations of projects that participate in the following activities:

- Breeding of wildlife (excepting animals that are part of an active reintroduction project with confirmed release site and reintroduction plan)
- Research that compromises the well-being of individual animals or species
- Use of wildlife as pets, for the purposes of financial gain, or for entertainment of any kind
- Projects allowing the general public (individuals who are neither staff nor volunteers) to have physical contact with wildlife. Policies for staff/volunteer physical contact with wildlife must be based on precautionary principles to avoid disease transmission and deleterious behavioral modifications
- Projects not abiding by CITES conventions or other wildlife/conservation laws.

Our minimum criteria conform to the standards of the Global Federation of Animal Sanctuaries (GFAS) and the Conservation Initiative on Human Rights (CIHR). WI encourages applicants with questions or concerns to contact us directly at [info@wildlifeimpact.org](mailto:info@wildlifeimpact.org).