



---

# Guidance for Implementing the WWF Project & Programme Standards

---

## Step 1.1

# Purpose, Team and Operations

### 1. EXPLORE

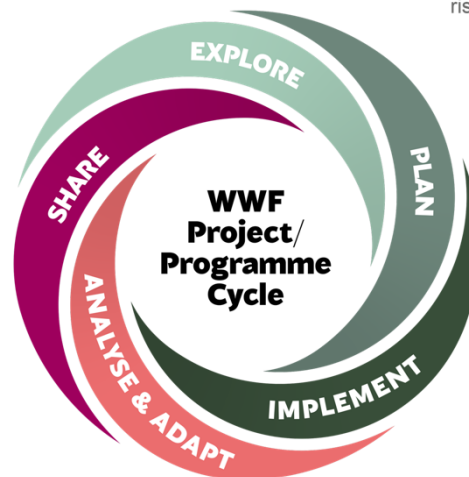
- Purpose & team
- Scope & focus
- Situation & stakeholders (Safeguards & Social Policies)

### 2. PLAN

- Goals, strategies, assumptions & objectives
- Monitoring, evaluation & learning plan
- Operational plans (finance, capacity, risk, safeguards, sustainability)

### 5. SHARE

- Document & share learning
- Evaluations & audits
- Foster a learning environment
- Reframe or sustainably exit



### 3. IMPLEMENT

- Work plans & budgets (detailed, inc ESSF mitigation)
- Fund raising
- Capacity building
- Partnerships & Stakeholder engagement

### 4. ANALYSE & ADAPT

- Prepare data
- Analyse results & operations
- Adapt plans & budgets



## Step 1.1 Explore Purpose, Team and Operations

### Contents

<b>1. Introduction</b> .....	<b>1</b>
<b>2. General Principles/ Tips for this substep</b> .....	<b>1</b>
<b>3. How to Explore Purpose, Team and Operations</b> .....	<b>2</b>
3.1 Appoint a Leader and Initial Team and Clarify your Purpose.....	2
3.2 Select Team Members and Define Roles.....	3
3.3 Define Team Operations .....	4
3.4 Write Down Your Project Concept, and Use It .....	5
3.5 And specifically - Get Institutional Buy-In and Approval.....	5
<b>Annexes</b> .....	<b>6</b>
Annex A: Descriptions of generic project roles.....	6
Annex B: Sample Analysis of Potential Team Members For a Project .....	7
References .....	7

<b>Owned by:</b>	Harmonising Programmes and Quality Assurance group
<b>Versioning controlled by:</b>	Will Beale (WWF-Int) and Phyllis Rachler (WWF-Int)
<b>Read in conjunction with:</b>	WWF PPMS Overview <a href="#">here</a> and <a href="#">here</a> Concept and Proposal templates (at the same links)
<b>Version history</b>	Version 1 March 2006 Version 2 March 2022
<b>General expectations:</b>	This document is intended as guidance to support the implementation of the <i>WWF Standards of Project and Programme Management (PPMS)</i> , which define the generally expected standards of practice. Although each step in these <i>Standards</i> 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. The term Project is used throughout this document as shorthand for Projects, Programmes and Initiatives; the guidance applies equally to all of these.

# Explore Project/ Programme Purpose, Team, and Operations

## Typical outputs for this substep:

- Selection of initial project team and designation of project leader
- Concept paper outlining some initial thinking on the project
- Charter outlining how the project team will function

## 1. Introduction

Conservation is fundamentally a human endeavour and a social process. To this end, the most important resources for any project are the people who will be involved in designing and implementing it. It is the commitment and skills that these people bring that enables effective strategies to be developed, implemented and evaluated over time. In addition, it is crucial that these people have (or develop) a clear purpose; this may sound obvious, but in a complex world and large organisation it can be a challenge to establish this clarity.

So if you set off with the right purpose, 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.

Below are some symptoms of effective and ineffective teams 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 purpose that fits with relevant wider structures or plans
- Clear objectives
- Good communication and 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
- High levels of motivation

## 2. General Principles/ Tips for this substep

- The WWF Project and Programme Management Standards (PPMS), including this guidance, apply equally well to projects, programmes and initiatives, including policy work. While they are written primarily with conservation work (in the widest sense) in mind, they can be adapted to **apply to all types of projects** as well as organizational strategies.
- You can **'enter' the WWF project cycle at any point** in the process. That is, if your project is already being implemented, you can engage with the Implementation and

Analyse/ Adapt phases of the WWF cycle rather than stopping and going back to Explore or Plan – unless you think there is a need to do so. Wherever you enter, you should start by reviewing and clarifying the purpose of your work, including the specific decisions and decision makers it will support.

- The purpose and the composition of the team are closely connected, since the **people involved will influence the purpose** that is defined as well as whether that purpose is achieved. Hence it is crucial to be thoughtful and clear about who is on the team.
- The **team may change over time**. 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. 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. In general:
  - 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 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.
  - Having team members with **different skills, knowledge, and experience** will generally lead to a more creative and resilient 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.

### 3. How to Explore Purpose, Team and Operations

Note that the steps below are described sequentially, but in practice they are interdependent and are often developed in parallel or iteratively. To help brainstorm and document some initial thinking, you could use a tool such as a [team canvas](#) or [mural](#), or simply google slides/ docs. Or you could go ahead and start filling in a [Concept](#) form directly.

#### 3.1 Appoint a Leader and Initial Team and Clarify your Purpose

Start by bringing together the people who are charged with moving the project forward. One team member typically serves as the project leader, responsible for the overall project team coordination and moving the team forward, so clarify who will lead the work - at least for now. Consider which phase the project is at (that is, where you are in the cycle), and hence clarify the purpose of your work.

##### Guidance:

- Have the team quickly (in an hour or two max!) **sketch out ideas** regarding the purpose of your work. Consider aspects such as the scope of the project, some likely objectives, issues to consider, what strategies you might undertake, and who the key stakeholders might be. This rough sketch will give you some idea of what skills and which organizations you might need to involve in various roles on the project team, and when.
- Perhaps revisit your organisation's **overall strategy** and current priorities to help clarify decisions already made, decision-maker expectations, timing of decisions, and assumptions about funding and other resources.

- Draw on what you and others have **learned from earlier iterations** of this project and/or similar projects. Consider new trends or challenges that can reorient the project or open new opportunities.
- If you are collaborating with partners, you should also **compare your respective missions and priorities** at the outset and identify where your needs and values may be compatible, as well as where they may conflict. Likewise, if you expect to work with a specific donor, you may want to encourage the use of the WWF PPMS (or the CMP Conservation Standards) as the primary process, or at least crosswalk terms and steps to reduce confusion.

### 3.2 Select Team Members and Define Roles

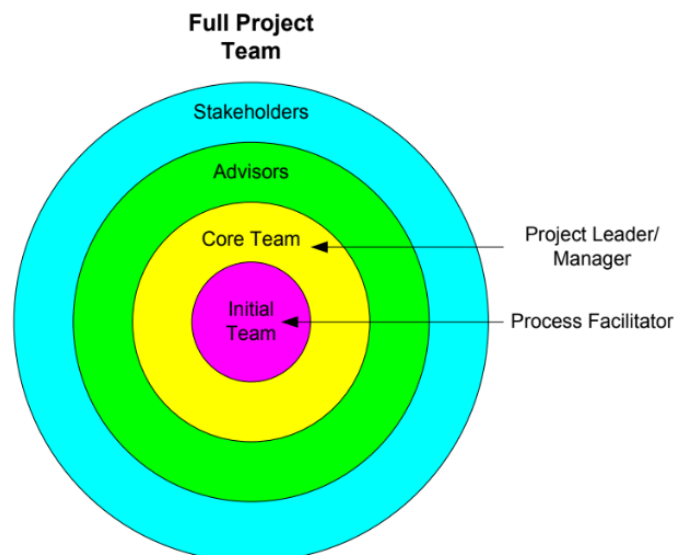
Based on your initial analysis, think about who would be good to have on your core project team, who might be good as an advisor, and who you should avoid having directly involved in your project. Ideally, you want to have a mix of different knowledge, skills, and experience that could include:

- 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 strategy development
- Experience in implementing and monitoring strategies
- Experience in communications and fundraising
- Experience in budgeting and risk assessment

You also need to consider and assign roles, and it can be helpful to visualise the different roles as a series of concentric circles, with those in the centre typically being the most involved and taking on the most responsibility.

Some roles, such as the leader and core project team members, are important for nearly all projects. But projects and programmes in WWF vary enormously in scale and complexity, and you will need to take this into account in deciding whom to involve in the team:

- In some cases, for example, you may have some stakeholders who are part of the core or initial team.
- WWF 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.



- It may be important to involve key partners at an early stage. This can help to build ownership and a collaborative relationship. At the same time such partners may have different priority issues in mind and you may need extra time to develop the project.
- WWF staff may possess some but not all of the required knowledge, skills and experience. You may need to involve “outside” expertise such as consultants or academic institutions.

See Annex A for description of **generic project roles**.

When considering skills and roles for the team, you may wish to develop a simple table to help, as shown in the example below (Annex B). Or if you want to be extremely formal about your analysis, you could even rank different candidates against defined criteria.

### 3.3 Define Team Operations

Once you have identified some of key people to be involved in the project, you can go into more detail and determine how the team members will operate and work together:

- Define what the team is setting out to do, what each individual will do, how the 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.
- Consider what will enable the team to **work efficiently** e.g. what tools will you use to share knowledge and assets, and the purpose, frequency and format of meetings. (Sometimes it is assumed that the project leader will define these arrangements, but other team members may sometimes be better equipped to do so).
- If necessary 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 (e.g. Will it be a paid position? Will they get credit in any scientific publications?)
- Formalise **management arrangements** as necessary, for the team itself and with regard to relevant bodies such as management boards, project sponsors, donors, or other key stakeholders.
- If multiple organizations are involved in the project, it may also be useful to develop a formal **memorandum of understanding** among the partners.
- If it is helpful, write down your operational arrangements in the form of a **project charter or terms of reference**.

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 or agile 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.

### 3.4 Write Down Your Project Concept, and Use It

It is important to capture the essence of your project in a short document. Writing the key points down helps ensure that you and the team have a common understanding of the project. Doing so is often also a requirement of organisational quality assurance processes,.

A [Concept Form](#) is used to capture the essence of the project in a few pages (recommended 3-6 pages only). Of course, in the early stage you may only have your initial ideas about the project as opposed to a full strategic plan<sup>1</sup>. So for now you can start to draft the Concept but you may not be able to complete all of the sections yet. You can at least clarify what you do and don't know! It is recommended to keep your Concept short (3-6 pages only). Click here for [Examples of Concept Notes](#).

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 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.

### 3.5 And specifically - Get Institutional Buy-In and Approval

Applying the steps in the WWF cycle with the project team is critical to ensuring buy-in to the process. It is also important to get buy-in at higher levels as well. Your team may be convinced it has the best project ever, but if no one else in your office or higher level offices in WWF agrees, the project is unlikely to go anywhere. It is particularly important to get this buy-in early on to help guarantee that the time and resources you spend the project will not go to waste. Again it can be very helpful to identify one or more advisors or senior managers to whom the core team can turn for honest feedback and counsel and who can champion your cause appropriately. To gain formal institutional approval, you should follow the approval procedures for your organisation, which should be in line with the Network's risk and quality assurance processes (see [guidance here](#)).

---

<sup>1</sup> In terms of WWF Network Standards requirements, note that for a small project (<€100,000 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 (i.e. develop a full Proposal). The Concept form can also be used to propose a scale down or exit from a project.

## Annexes

### Annex A: Descriptions of generic project roles

Role	Description
<b>Initial Team</b>	The specific people who initially conceive of and initiate the project. They may or may not go on to form the core project team.
<b>Designated Project Leader/ Manager</b>	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.
<b>Core Team</b>	A small group of people (typically 3-8 people) who are ultimately responsible for designing and managing a project.
<b>Full Team</b>	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 the project team.
<b>Project Advisors</b>	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 the cause. There may also be technical advisers, whose input may be sought on specific issues.
<b>Project Stakeholders</b>	Individuals, groups, or institutions who have an interest in, or influence on, the project or is likely to be affected by it (project affected people). 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, though critical, process. In WWF the Environmental and Social Safeguards Framework defines specific organisational expectations with regard to stakeholder engagement.
<b>Process Facilitator</b>	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 familiar with applying a planning process to “real-world” problems.



## Annex B: Sample Analysis of Potential Team Members For a Project

Person	Org	Skills/Knowledge	Roles	Comment *
<b>Core Team</b>				
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
<b>Advisors</b>				
Hubert	WWF	Process Coach	Process leader	
Mei-Lee	World Bank	Economics	Economic analysis	Good links to donor community
* <b>Warning:</b> Be VERY careful about writing down negative comments about a person.				

## References

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