

Step 7: Planning for implementation

Finally, the instrument is ready to be rolled out. This step involves formulating an action plan, preparing and signing necessary formal agreements, and handing over to the implementing partners. Its expected outputs are:

An action plan for implementation is developed, including a system for monitoring progress and impacts

Responsibility for implementation is taken over by the agreed lead institution, agency or group

Any formal agreements or contracts required to proceed with implementation are signed

Reports on and evaluation of the step-by-step process will have been made.

From now on, the key actors in the instrument should gradually take over the management and organisation of the implementation process and then keep the instrument up and running. We refer to these actors as ‘implementing partners’. Step 7 is ideally already being led or at least co-coordinated by the implementing partners. By the end of the step the implementing partners must assume full responsibility. Your team and the institutions or agencies you represent will then adopt a facilitating role to support implementation. Moving from a leading to a facilitating role may involve a loss of control, since political processes have their own pace, but it ultimately increases the chance of sustained and self-governed implementation and change.

The smoothness of handing over responsibilities to implementing partners will depend on how well they have been engaged in the overall process. By involving them as direct participants from the outset you should have secured their close cooperation, support and buy-in. Conversely, without such engagement, it is unlikely that the instrument will be acceptable, viable or sustainable in practice.

Task 7 A. Developing an action plan

By the end of Task 7A you and the implementing partners will have developed an action plan for implementing the selected instrument. This should i) detail the tasks to accomplish and the mile-stones to reach; ii) identify the actors responsible for undertaking them and the timeline for delivery; and iii) specify the means by which progress will be monitored.

What this task is about

The basic design and architecture of the instrument was put together in **Task 6A**, and the more detailed modalities and procedures were specified in **Task 6B**. Now you need to turn all this into a **concrete plan of action**, to show how it will be implemented in practice. This can be a means of sharing information with key stakeholders about activities to be undertaken and their expected outcomes. It will also demonstrate to potential funders and donors that a clear and logical plan for implementation has been thought through and formalised. Most action plans will contain some or all of the following information:

- The goal(s) of the instrument and the intended outcome(s)*
- Actions to establish and operate the instrument*
- Timing of activities*
- Who is responsible for carrying out activities⁺
- Targets, indicators and milestones of achievement⁺
- Costed budget⁺
- Monitoring plan

**Essential details / ⁺Helpful information*

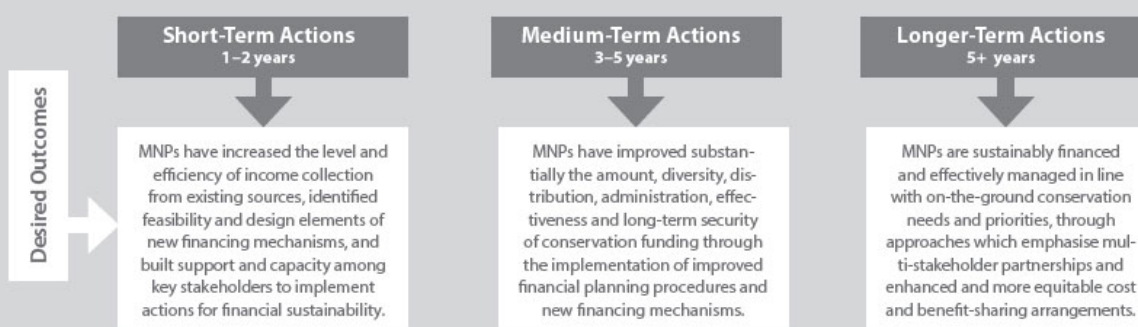
Box 3: Developing a sustainable financing strategy and action plan for Andaman Marine Protected Areas, Thailand (Nabangchang et al. 2012)

In 2012, a **sustainable financing strategy and action plan** was developed for three Marine Protected Areas (MPAs) in the Andaman Sea region of Thailand: Lanta, Similan and Surin. This was to help PA planners and managers to secure financial resources and to set in place incentives for local economic benefit and conservation support. It was put together through a process of fieldwork carried out in the three National Parks. It involved extensive research and consultation with the Department of National Parks, Wildlife and Plant Conservation (DNP), local fishing communities, tourist operators and other stakeholders.

At a **strategic level**, the overall goal was 'to enhance the financial sustainability of Lanta, Similan and Surin Islands Marine National Parks by ensuring that sufficient financial resources are made available, spent wisely and administered efficiently to enable effective MNP management and biodiversity conservation'. Four areas of financial need and opportunity were highlighted: enhancing existing revenues; developing new financing mechanisms; strengthening financial planning; and administering new sources of funds. In turn, twelve instruments were identified as feasible, appropriate and acceptable.



The action plan section of the document then listed the short, medium and long-term actions that would be undertaken to establish and develop each of these instruments, and laid out the intended outcomes.



One of the main instruments selected to achieve these outcomes was the establishment of a **Marine National Parks Conservation Trust Fund**. This would have two functions: 1) to provide a mechanism for receiving, retaining and allocating financial resources for the effective management of MNPs; 2) to administer grants and shared revenues to NGOs and communities to fund the promotion of marine and coastal conservation activities.

The broad design and architecture of the proposed Trust Fund was drawn up – including its intended beneficiaries, funding sources, administrative arrangements and institutional set-up – using similar processes to those outlined in Steps 5 and 6 of these guidelines. The actions required to establish and maintain the Trust Fund were then listed:

Short-term actions (1–2 years)	<ul style="list-style-type: none"> Initiate request for seed funds from Department of National Parks and other potential contributors, including private sector and external donors Review legal provisions and needs for trust fund establishment, operation and disbursement procedures Conduct consultation on trust fund options Carry out detailed design and feasibility studies Discuss and negotiate earmarking arrangements for existing and proposed income Develop fund operations manual Develop fund financial management system Develop formats for proposals, monitoring and reporting Establish monitoring system
Medium-term actions (3–5 years)	<ul style="list-style-type: none"> Draft and submit legal amendments if required Legally establish trust fund Establish bank account and other financial management systems Secure start-up funds Recruit staff and establish Management Unit Appoint Board of Directors Establish Technical Advisory Group Shortlist and contract potential third-party service providers Develop and approve medium-term and annual work plan Publicise and market fund to potential beneficiaries and donors Launch call for applications Commence fund disbursement Commence monitoring, reporting and audit procedures
Longer-term actions (5+ years)	<ul style="list-style-type: none"> Conduct regular monitoring and evaluation, reporting and audit Review, revise and modify fund focus and operations as required

Box 4: Setting targets and indicators for implementing local incentives for conservation in Lower Amu Darya Biosphere Reserve, Uzbekistan (Emerton 2010b)

In 2011, the Lower Amu Darya Delta State Biosphere Reserve was established in Karakalpakstan in north-western Uzbekistan. A 5-year business plan was developed to secure funding and local conservation incentives to enable the Protected Area Management Plan to be implemented.

Three types of community conservation incentives were identified: 1) locally-managed concessions and leases for undertaking sustainable land and resource activities, 2), development of ecotourism activities, and 3) a prize/award to recognise and reward good conservation practices. Four broad stages of activity were specified for establishing and operationalising these instruments, and their outcomes were elaborated. The aim was to give Biosphere an idea of what needed to be done within a given time frame to improve the engagement of local communities in conservation and its benefits.

Stages of activity		Outcomes
1	Scientific, social and financial/marketing scoping surveys	Appropriate concession areas identified and mapped, appropriate tourism activities identified and planned
2	Formalisation of terms and conditions for concessions, leases and prize/award system	Formal agreement of terms and conditions of concession areas and prize/award system completed
3	Implementation of concessions, tourist activities and prize/award system	Local people participating in and benefiting from concessions, tourist activities and prize/award system
4	Provision of technical and marketing support to local communities engaged in concessions and tourism	Local people benefiting from appropriate technical and marketing support to enable and maximise income generation

Next, the specific actions required to establish and operate each of the three groups of instruments were planned. Timing and responsibilities were specified for each action as well as targets and milestones of achievement. The aim was to make it clear to all the main actors involved what their role would be and when they would be required to participate in key activities. It is worth noting the importance of the action plan in securing this support and buy-in. For example, in relation to community concessions and leases the following actions, outcomes, timing and responsibilities were identified:

Actions	Timing	Target	Milestones	Responsibility
Use GIS, mapping and ecological surveys to identify potentially suitable areas for community concessions	2011	Appropriate concession areas identified and mapped	Concessions mapped by end of 2011	Biosphere Reserve authority
Carry out community consultations and financial feasibility analysis to identify potentially suitable activities and areas for community concessions				
Formalise terms and conditions for community leases and concessions	2011–12	Formal agreement of concession areas, terms and conditions	Drafting of terms & conditions commenced by mid-2011 and concluded by mid-2012	Biosphere Reserve authority, with support of local authorities and other line agencies
Allocate concessions and leases in Economic/Transition Zone	2012–15	Concessions and leases for Economic/Transition Zone lands allocated to local communities	First concessions and leases allocated by end of 2012; new allocations made each year thereafter	
Provide technical assistance and support to concession holders for sustainable land and resource uses and marketing/value-added opportunities	2012–15	Concession holders provided with appropriate technical and marketing support	Support commences by end 2012, continues each year thereafter	Biosphere Reserve authority, with support of local authorities and other line agencies
Provide continued monitoring and enforcement that the land and resource uses are carried out as agreed	2012–15	Land and resource uses in concessions carried out sustainably, in line with agreed terms and conditions	Baseline conducted by mid-2012, monitoring system in place by end 2012, monitoring and reporting activities continue each year thereafter	
Investigate possibilities of extending the range of sustainable land and resource uses that can be carried out under community concessions	2011–15	Agreement on further development of concession-based land and resource uses	Scoping and feasibility studies carried out by end 2011	Biosphere Reserve authority, with support of local authorities and other line agencies

The resulting action plan formed the final section of the 2011–2015 business plan for the Biosphere Reserve. The idea was that each year it would be translated into quarterly targets and incorporated into the Biosphere Reserve's annual management plan.

Something that is often especially important to monitor – but more difficult to do so than activities, outputs, milestones and budget spending – is the extent to which the instrument has been taken up and accepted by the main participants and is achieving the impacts or outcomes for which it was designed. There is often a need to demonstrate (to the funder, investor, or to political decision makers) that the instrument that you are implementing has been successful and effective from a conservation or development viewpoint. In a similar vein, many economic instruments are built on unproven hypotheses or unsubstantiated assumptions: for example, if we change land use here it will improve hydrological services there; or PES can reduce poverty at the same time as reducing forest degradation. Only when the instrument has been piloted can these theories be verified. The example in Box 5 describes the indicators and methods that were used to monitor these kinds of impacts and chains of causality for a pilot PES scheme in Vietnam.

Box 5: Monitoring Payment for Forest Environmental Services in Lam Dong Province, Vietnam (Winrock International 2011).

In 2006, a sustainable PES-based financing mechanism was initiated in Lam Dong Province, Vietnam. This was explicitly designed to maintain biodiversity at the same time as generating income for forest owners, thus helping to reduce rural poverty. It involved channelling payments made by forest ecosystem service beneficiaries (most notably hydropower and water supply companies) to rural communities and other forest owners (including Protected Areas, commercial companies and state-owned enterprises).

This was the first operational PES scheme in Vietnam and was intended to stimulate and inform the development of similar arrangements across the whole country. Thus it was particularly important to be able to demonstrate how well the intended goals had been met. Various systems were set up to monitor the impacts of the scheme, covering the key issues to be addressed and checking the underlying assumptions – most notably that improving forest owners' income and livelihoods would motivate them to increase forest protection, which would in turn improve key biodiversity and hydrological services). A deliberately wide range of project participants was asked to help collect monitoring data. This was to foster buy-in and awareness, as well as to make use of their different mandates, skill-sets and areas of knowledge.

Area of change	Indicators measured	Means of data collection	Undertaken by
Project delivery	<ul style="list-style-type: none"> Progress towards stated objectives, outputs and activities (as per work plan) Disbursement of project funding (as per budget) 	Project reports and records	USAID/Winrock International (project donor & implementer)
Forest protection	<ul style="list-style-type: none"> Time spent by forest owners on patrolling & management activities Number of forest protection violations and fines Payments to forest owners 	Monthly review of records and community meetings	Protection staff assigned by forest owner organisations,
Contracting procedures & payments	<ul style="list-style-type: none"> Contracting procedures Disbursement of payments Number of payers/payees Amount of payments 	Quarterly review of financial records, progress reports	Forest Protection & Development Fund
Household livelihoods Forest threats & status	<ul style="list-style-type: none"> Payments received Change in household income sources Role of PES in household income Incidence of poverty Number of arrests for illegal logging Forest area and quality 	One-off socio-economic survey of forest owners (households, national parks, seedling company) and payers (hydropower, water supply, tourism companies); literature review; key informant/expert interviews	Consultants hired by Winrock International
Water regulation & soil conservation services	Water discharge and sediment yields from representative land use/vegetation types: <ul style="list-style-type: none"> Broadleaf evergreen forest Pine forest Mixed agriculture systems Intensive agricultural systems 	Daily measurements from four gauging stations in sub-catchments of the Da Nhim watershed	Lam Dong Province Technical Working Group & Department of Natural Resources and Environment

How to go about Task 7 A

While there are many different methods by which an action plan can be developed, it is always desirable – and usually absolutely essential – to ensure that representatives of major stakeholder groups participate in it. Without their active input and support it may prove very difficult to put the plan into practice. At a minimum, they should be familiar with its contents and agree with them. Ideally, it is these actors who should lead the development of the action plan and take ownership of it, while you take on a supporting advisory role.

It can be useful to follow the structure of the action plan in Box 3.

Task 7 B. Drafting an agreement and handing over to implementing partners

At the end of Task 7B, implementing partners will have reached a binding agreement (e.g. a contract) and taken over the implementation and operation of the economic instrument.

What this task is about

Step 6 elaborated and documented the detailed design and key procedures for the economic instrument and secured a commitment to proceed from key actors: essentially an agreement to become implementing partners. In Step 7A you worked together with those implementing partners to develop a detailed action plan for implementation, and you identified workable monitoring systems and procedures. These arrangements now need to be formalised.

 **Even an agreement that is not legally binding may require a written format!**

In Thadee, the following document served to formalize the agreement between landholders and the PES Fund.



สมาคมอนุรักษ์สิ่งแวดล้อมนครราชสีมา สอสนต.
Association of NST Environmental Conservation ANEC

Certificate of Agreement for Thadee Sub-river Basin Ecosystem Service Fund Payments

Certificate no.: _____ Date: (Day)..... (Month) (Year)

This voluntary agreement is made between the Association of Nakorn Si Thammarat Environment Conservation (ANEC) as payer of the Ecological Fee and myself, (name in full:) _____ (ID Card Number),
as an ecosystem service provider.

I confirm that I own the rights to the land situated at (property number and street name)
(village/town/city) (Sub-district).....
(District) in Nakorn Si Thammarat Province.

This land is currently in use for:
☐ residential purposes (..... Rai) and/or ☐ agricultural purposes (..... Rai).

I hereby volunteer to join ANEC and to keep a total land area ofRai for storing runoff water and to stabilising the soil in order to help reduce flood and drought risk in the middle part of Thadee Sub-river Basin. I voluntarily commit to:
☐ keeping the above land for water infiltration and/or ☐ increasing and maintaining the growth of trees with deep roots.

My commitment is for the period from (month) (year) to (month) (year), inclusive.

In return for this, ANEC will pay me Baht. I understand that this agreement is not legally binding but serves to show that I will support ANEC's initiative to reduce flood and drought risk to residents of Nakorn Si Thammarat.

Signature of Receiver (Ecosystem Service Provider in NST Province): _____ Signature of Payer (PES Fund Manager for Thadee Sub-river Basin, ANEC): _____

Some instruments may not involve negotiating an agreement in a narrow sense, for instance in deciding prizes and awards, granting an environmental subsidy, eco-tourism activities or marketing nature-based products. Even so, the participants will usually need to **agree on strategic or practical issues** (e.g. to ensure financing or technical support) and perhaps on what to do if plans are changed or promises not kept. Some formal arrangement will often be necessary, such as registering as a legal entity or signing a contract with a financial intermediary.

Other types of instruments obviously require some kind of formal, binding agreement between the different parties involved: for example, most PES schemes require a legally binding agreement or contract. Eco-labelling or certification requires that particular production standards are maintained, and credit financing involves agreements between recipient and lender. In most instances, a **formal written document** is required which states clearly and unambiguously the purpose and details of the instrument, lays out rights and responsibilities, and safeguards the interests of all parties. This can be an umbrella agreement such as a letter of intention, a Memorandum of Understanding (MoU), or a co-management plan; or it can be a specific contract with individual actors for conservation rewards, certification scheme, product sales contract, revenue-sharing arrangement, etc. In some cases, an umbrella agreement will be a first step, followed by a series of more specific contracts.



An economic instrument often requires several formal acts and/or contractual arrangements!

In Thadee, the establishment of a hydro PES scheme involved two formal administrative acts: the official endorsement of the Klong-Thadee sub-river basin committee by the provincial representation of the environmental ministry
the registration of the Association of Nakhon Si Thammarat Environmental Conservation as juristic person in the provincial registry, signed by the governor, including official permission to use the name of the province in the title of the association and a list of the specific activities and the members of the executive committee.
Then, contractual arrangements were specified for making payments to communities and land holders in return for ecological activities.

Often the format and terms of this agreement will already be fixed, and will extend beyond the control of either the participants or the instrument itself. Microcredit and loan agreements, for example, will conform to the requirements of the lending institution; certification and eco-labelling standards will usually be based on predetermined criteria; and joint management contracts, concessions and leases will usually be standardised for all protected areas. In these cases, your main role is to facilitate information-sharing, to provide advice and if necessary to assist the local participant to understand and fulfil the requirements of the agreement they are entering into.

In the case of an entirely new agreement or contract for the implementation of an instrument, a written agreement can be drafted based on the design document, the feasibility study and the impact assessments. At this stage you should check that the provisions and mechanisms of this agreement are fully consistent with (and enforceable by) both customary practice and modern law. A draft agreement can be discussed by the implementing partners and amended and further specified as necessary. Template 14 contains a checklist of contract components to assist this. Legal advice may be required to ensure that the rights of all signatories are respected and there are no legal errors or inconsistencies.



Strong institutions and effective community self-organisation are vital!

In Pang-Ma-O, the ability of the community to organise and manage itself was a critical condition for successful collaboration with the agricultural bank. Bank representatives openly stated that the logistical and administrative challenges in the Tree Bank scheme (e.g. tagging and registering trees, setting up a committee, appointing leaders) were partly intended to test the community's ability to self-organise effectively. Since this went well, they were willing to discuss additional support and collaboration.

Three aspects of an agreement are particularly important to emphasise:

Cost and benefit sharing arrangements relate to who is entitled to gain from revenues, income or other proceeds generated by the instrument, and who should incur the costs of implementing it. These must be clearly specified, based on the work you carried out in [Task 5B](#). This includes agreeing who will bear which costs (or receive which benefits) and in what proportion, at what time, and in what form they will be allocated. In some cases, a more formal supplementary agreement may be necessary or even required by law: e.g. on bio-prospecting and the fair and equitable sharing of benefits arising from genetic resources. In some cases cost and benefit sharing arrangements can be incorporated into the agreement. In other cases, especially where arrangements are complex or involve significant new income and expenses, a separate contract or agreement may be necessary.

Management and mitigation arrangements relate to who is responsible for dealing with possible negative environmental, social and livelihood impacts of the instrument, and what safeguards or actions they are expected to perform. The design details elaborated in [Task 6B](#) and the action and monitoring plan in [Task 7A](#) will have ascertained whether these provisions are necessary and, if so, what they should involve. The agreement will need to i) include any social, environmental or other management or mitigation plan, ii) specify who is responsible for implementing it, and iii) detail the means by which compliance will be monitored and enforced and the penalties for non-compliance. In many cases a separate contract or agreement will have to be developed with the specific actor(s) responsible for management, mitigation or safeguards.

Related to the second point, contractual arrangements should specify what happens in the case of unforeseen difficulties or unintended negative effects, including options to **adapt or terminate** the instrument. For instance, direct payments within a PES scheme are usually made to landholders for activities that are expected to improve biodiversity (e.g. community patrolling to prevent poaching). If the activities are not carried out properly and the desired effects do not happen, then payments need to be stopped or the terms for paying them altered.

How to go about Task 7 B

Ideally, the implementing partners will have already taken the lead, so the job of your team is finished and you can hand over the implementation process with the completed action plan. Very often, however, you will still be actively involved in formalising the commitment between implementing partners and other actors involved.

Negotiating and eventually signing agreements can be a complicated and lengthy process. The path to achieving this includes [Task 6B](#), where you should have achieved buy-in from key actors. In fact, it goes back even further, to the consultations and discussions or even lobbying activities during [Step 5](#) when you prepared a workable and feasible proposal. From that point until a contract is finally signed can take months or years. Even more than before, the process during the negotiation phases needs leaders and strong characters. Success will depend on you making a viable and appropriate proposal, but also on the

ownership and engagement of implementing partners. As in all political processes, good timing and windows of opportunity can play a major role (e.g. political elections, disasters or events that highlight the need for change). When you started **Task 6B**, negotiations should have been far enough advanced to focus on fixing the details bringing them together within a formal document, and then signing it. Template 14 provides a checklist of contract components that can help to define an agreement and make sure that you have not forgotten any crucial aspects. Of course, a lawyer should review all agreements before signing.

Templates 7B: Checklist of contract components (adapted from UNEP 2008)

Context and form

- ☐ A title for the agreement
- ☐ Start and end dates
- ☐ Detail of the physical area the contract will cover
- ☐ Stakeholder details and addresses
- ☐ Objectives of the agreement
- ☐ Definitions (e.g. conservation measures, payments, land owner, etc.)
- ☐ Contract time frame
- ☐ Description of the legal rights of each party
(e.g. under what conditions the contract can be terminated; rights to verification)
- ☐ Signature of each party (must be legally of age or otherwise permitted)

Actions and responsibilities of parties

- ☐ Define and clearly state actions to be taken by each party (provider, beneficiary, degrader intermediary, other)
- ☐ Define responsibilities of each party and specify under what circumstances contract conditions are met, considering relevant criteria such as fairness, non-leakage, etc.
- ☐ Payment terms: type of payments (e.g. cash, in-kind, technical assistance,), timing (e.g. a schedule), recipient(s)
- ☐ Agreed role of third parties
- ☐ Clarify how risks of unavoidable loss (e.g. related to natural events) are to be handled and how this risk will be shared between parties
- ☐ Warranties (i.e. guarantees that specific facts or conditions are true or will happen)

Cost and benefit sharing arrangements

- ☐ Specify how revenues, income or other proceeds generated by the instrument will be owned and/or shared between actors
- ☐ Specify the purposes for which any shared proceeds will be utilized and the administrative arrangements
- ☐ Specify how costs and expenses of implementing the instrument will be covered and/or shared between actors

Management and mitigation plans

- ☐ Lay out any social, environmental or other management or mitigation plan that will accompany the instrument
- ☐ Specify the actors responsible for implementing management/ mitigation plans, and their roles and responsibilities, including funding
- ☐ Specify the means by which compliance will be monitored and enforced, and the penalties for non-compliance

Templates 7B: Checklist of contract components (adapted from UNEP 2008)

Monitoring and enforcement

- ☐ Monitoring requirements
- ☐ Verification requirements
- ☐ Consequences of regarding transgressions of agreements (e.g. punishments, sanctions)
- ☐ Actions to be taken in unforeseen circumstances
- ☐ Rules for modifying or adapting the contract
- ☐ Accepted reasons for terminating the contract

Task 7 C. Reporting on and evaluating the process and the instrument

At the end of Task 7C, you will have reported on the experiences and lessons learned from the process. At a later stage you will review the implementation process and the effectiveness of the economic instrument that you set in place.

What this task is about

At the end of Task 7C, you will have reported on the experiences and lessons learned from the process. At a later stage you will review the implementation process and the effectiveness of the economic instrument that you set in place.

The task of **reporting on** and **evaluating** the process is strictly speaking not part of – or necessary to – implementing an economic instrument. And yet a report is very often required by the funders of a project or the initiative that commissioned it. In addition, reviewing the different stages and activities of the process can be very usefully combined with identifying **experiences and lessons**, which in turn can be used to make **recommendations** for improving the process or instrument design. Formulating such lessons and recommendations is sometimes part of report requirements, but is in any case a very important activity that helps your team and others to benefit from what has been learned and apply it in the future.

Longer-term review and evaluation of the effectiveness and sustainability of economic instruments is often neglected, since implementation projects terminate at this point or run out of funding. This is unfortunate, since many lessons can only be learned by looking at longer-term functioning and in particular the longer-term impacts of a measure or instrument. As described in Task 7A, longer-term review and evaluation of social and environmental impacts should be built into the monitoring procedures. So you will have to decide whether you and your team, project or organisation should be involved in these tasks at all – and if so, to what extent and in what way: by contributing to these monitoring procedures or by going beyond. Going beyond could mean, for instance, comparing effectiveness across instruments or projects, or systematically analysing success factors to derive lessons and recommendations for future design and implementation. As mentioned in Task 7A regarding monitoring, indicators for measuring success are crucial. They should directly measure outcomes affecting livelihoods (e.g. the number of families with significant additional income), conservation activities (e.g. a certain number of trees planted per year), and environmental outcomes (e.g. improvement of water flow or quality). This also enables assumptions to be verified about relationships between activities and conservation success (e.g. whether agro-forestry reduces sedimentation in the river).

How to go about Task 7 C

The tables and checklists in the templates are a good basis for reporting the stages, milestones and outcomes of the step-by-step process. At the end of the project or even during it (annual or midterm) they can be easily adapted to meet reporting requirements. In order to derive lessons and recommendations, take time to sit together with your team and review what was done within each step by asking questions such as:

- What has been achieved here?
- What went smoothly, and why?
- What were the challenges? How did we overcome them?

Possible channels for disseminating lessons and recommendations include academic journals, policy briefs, or different forms of media.

Revisiting the implementation after 1 year and then after 3–5 years allows assessment of the longer-term impacts of the economic instrument on biodiversity and livelihoods, and whether the instrument is working sustainably. For ex post evaluation of effective functioning, in particular for comparative analyses across different sites or schemes, it can be a good idea to collaborate with researchers who may be interested in such analyses from an academic perspective.

Selected references and further guidance for Step 7

Guidance on preparing an action plan

Chapter 8 of TNC's Conservation Action Planning Handbook (2007) provides guidance pertaining to the staffing, time-line and costs of implementing conservation actions (Task 7A).

Guidance on monitoring

The Open Standards for the Practice of Conservation (CMP 2015) helps teams to be systematic in planning, implementing, and monitoring their conservation initiatives (Task 7A).

The World Bank (1998) has prepared 'Guidelines for Monitoring and Evaluation for Biodiversity Projects'.