



# Project Developers' Forum

**Rondevlei Nature Reserve, 19 & 20 March 2009**

*Facilitating project development - from idea to proposal*

## **The workshop aims to equip participants to:**

- turn our ideas into viable project proposals
- assist our partners to develop project proposals
- be briefed on CAPE/SKEP Conservation Marketplace
- develop understanding of what funders are looking for
- improve the impact of projects on conservation and livelihoods
- develop our skills in drawing up accurate budgets

# Project development process



Submit Project Idea

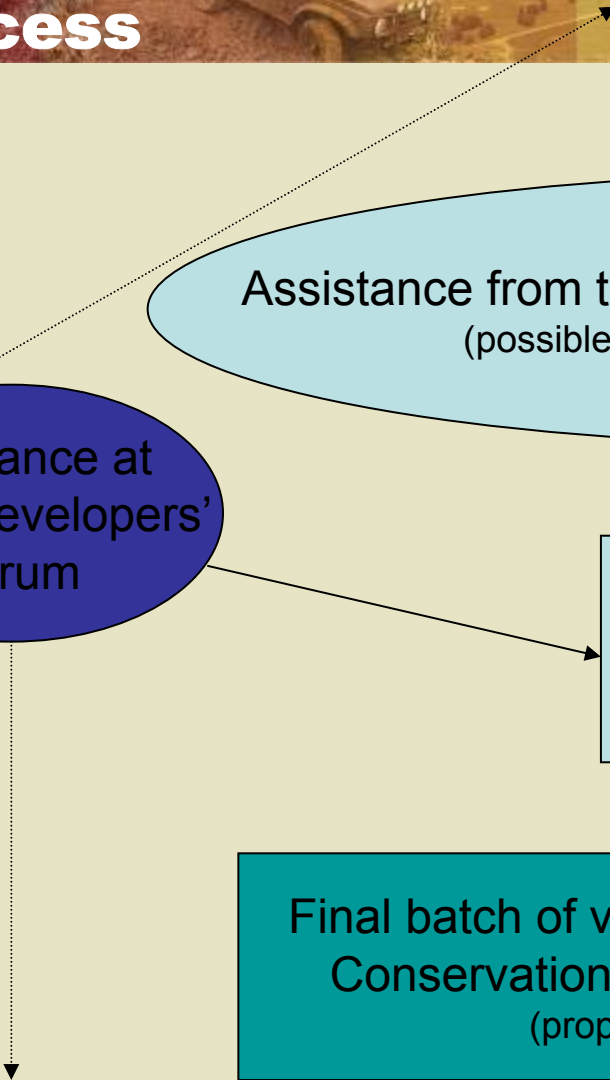
Assistance from the Project Development Support person  
(possible attendance at regional mini-workshop)

Attendance at Project Developers' Forum

Independent idea

Develop Project Outline

Final batch of viable, edited Project Outlines for Conservation Marketplace information pack  
(proponents attend Marketplace)



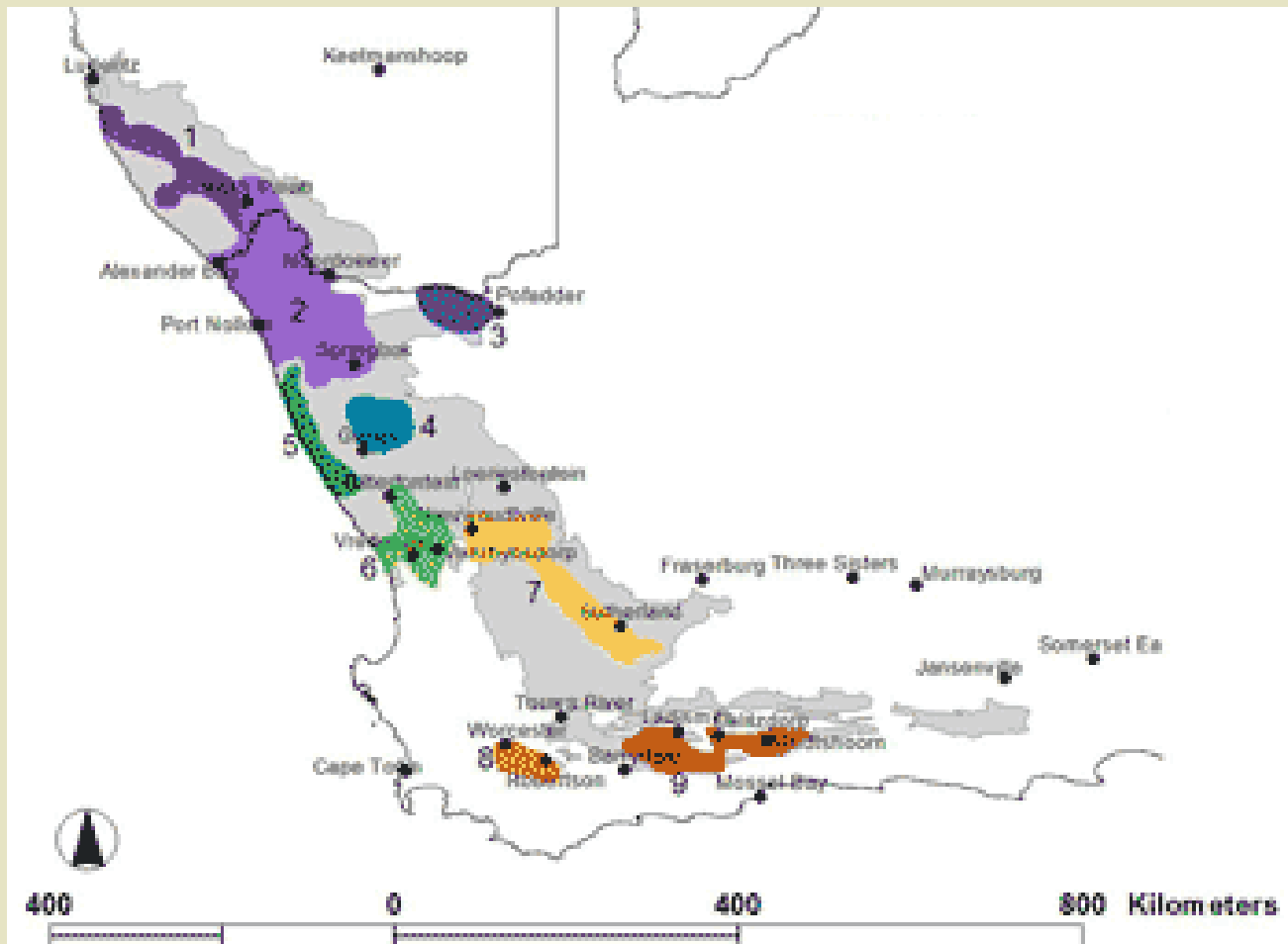


## **What would you like to get out of the workshop for yourself or your organisation?**

- Buzz in pairs
- Record on flipchart
- Revisit at end of workshop



# Succulent Karoo Ecosystem Programme





## **SKEP's Vision**



» The vision of the SKEP programme is that the people of the Succulent Karoo take ownership of and enjoy their unique living landscape in a way that maintains biodiversity and improves livelihoods now and into perpetuity.

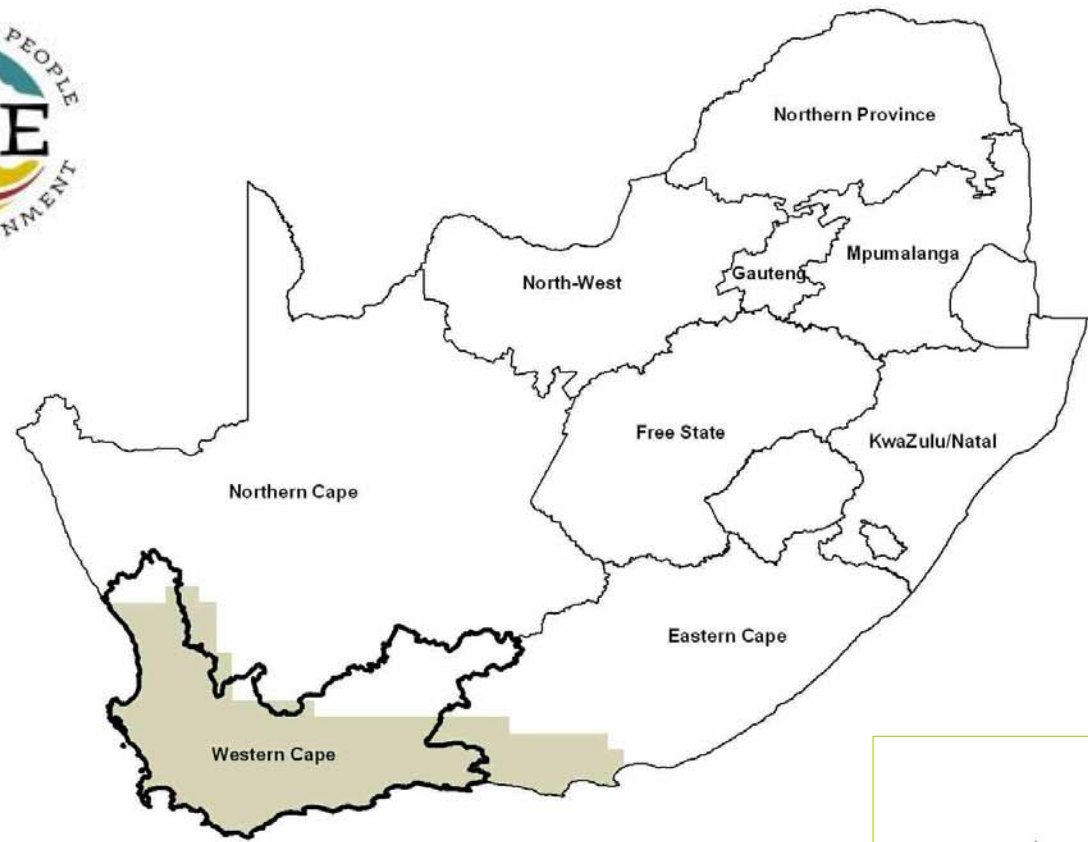


## **SKEP's strategic focal areas 2009-2014**




1. Securing land in priority areas
2. Expanding the SKEP partnership
3. Linking livelihoods and biodiversity
4. Building local government capacity
5. Enhancing the role of science in SKEP
6. Climate change and renewable energy
7. Involving the mining sector
8. Raising awareness

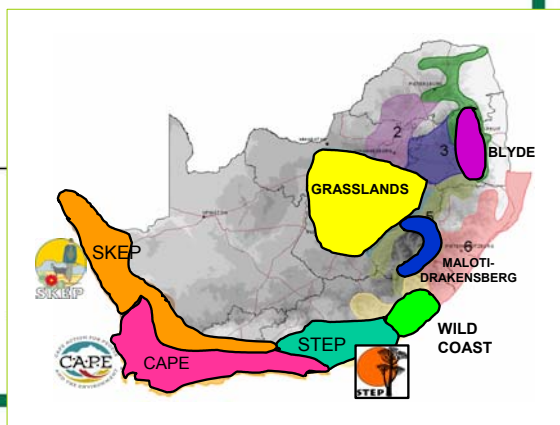


## C.A.P.E. in South Africa



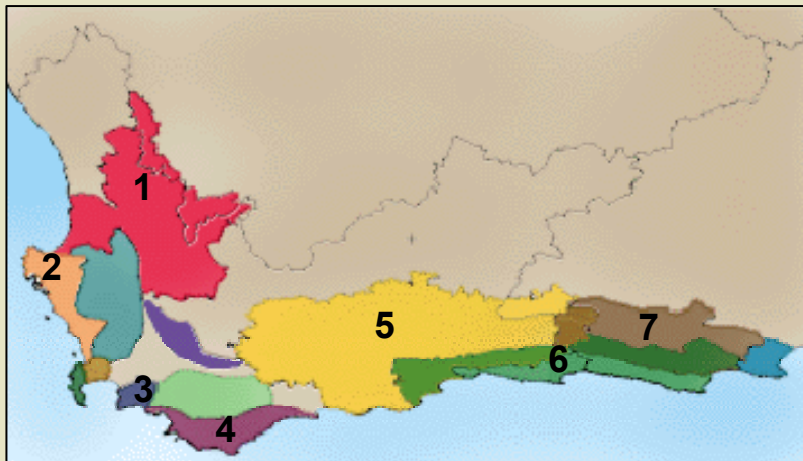
### Legend

-  Western Cape Province
-  Provincial Boundaries of South Africa
-  C.A.P.E. Study Area





## **C.A.P.E. Landscape Initiatives**



1. **Greater Cederberg Biodiversity Corridor**
2. **West Coast Biosphere Reserve**
3. **Kogelberg Biosphere Reserve**
4. **Agulhas Biodiversity Initiative**
5. **Gouritz Initiative**
6. **Garden Route Initiative**
7. **Baviaanskloof Mega-Reserve**



## State of the Cape Floristic Region

### **Programme Goal:**

**By the year 2020, the cooperation of capable institutions ensures that the biodiversity of the CFR is conserved, sustainably utilised and effectively managed, delivering significant benefits to the people of the region in a way that is embraced by local communities, endorsed by government and recognised internationally.**

#### **We can measure trends in:**

- The number and extent of vegetation types in each ecosystem status category
- The percentage of critical biodiversity areas transformed
- The Red Data List status of fynbos biome plants
- The status of selected near-shore marine species

#### **We have case studies on:**

- The current percentage of hectares of critical biodiversity areas intact
- Trends in the status of flagship species

#### **We would like to be able to measure trends in:**

- The loss of natural cover in the CFR
- The Red Data List status of selected species of animals



**Strategic Objective 1:**

**effective protection**

**an adequate and representative protected area network is secured and effectively managed**

**We can measure trends in:**

- The extent of terrestrial and marine protected areas
- The number and extent of stewardship sites
- The extent and number of vegetation type targets secured in protected areas
- Protected Area Management Effectiveness

**We have case studies on:**

- Private investment in stewardship sites
- Risks where the management of protected areas is not legally compliant

**We would like to be able to measure trends in:**

- Veld age distributions in protected areas
- The degree to which marine protected areas secure inshore and line fish habitat types



**Strategic Objective 2:**

**wise regulation**

**wise development, regulation and use of natural resources safeguards biodiversity**

**We can measure trends in:**

- The degree to which Spatial Development Frameworks (SDFs) incorporate biodiversity priorities
- The number of published bioregional plans
- The number of area wide plans & farm plans under development
- The level of public awareness of sustainable seafood consumption
- The number of sectors that incorporate standards for biodiversity conservation and the proportion of production sector footprints that are managed to certified standards

**We have case studies on:**

- EIA basic assessment decisions being informed by relevant biodiversity planning products
- Compliance with biodiversity management conditions set out in Record of Decisions
- The impact of SDFs incorporating biodiversity priorities on achieving biodiversity targets

**We would like to be able to measure trends in:**

- The proportion of EIAs informed by biodiversity planning products and of compliance with biodiversity management conditions in Records of Decision

**Strategic Objective 3:**



## **integrated management**

**integrated and coordinated management of natural resources ensures ecosystem integrity, resilience and functionality**

**We can measure trends in:**

- The degree to which catchments are protected
- The state of rivers
- The state of estuaries
- The extent to which Invasive Alien Plants have been treated and controlled to a maintenance phase
- The effect of invasive alien plant clearing on stream flow
- The extent to which Invasive Alien Plant management responds to fire events
- The degree to which biocontrol agents are having an impact on the overall management of targeted species

**We have case studies on:**

- Wetland Rehabilitation
- The success of biocontrol agents in combating particular alien species

**We would like to be able to measure trends in:**

- The degree to which fire is effectively managed, and the area of the CFR with appropriate fire intervals

**Strategic Objective 4:**



## **sustainable benefits**

**the sustainable use of biodiversity delivers direct socio-economic and cultural benefits to local communities**

**We can measure trends in:**

- The number of jobs and person work days directly associated with natural resource management in the CFR
- The number of biodiversity-based businesses initiated and/or supported through the C.A.P.E. partnership

**We have case studies on:**

- The delivery of social, cultural and economic benefits of biodiversity to local communities
- The replication or roll-out of innovative pilot projects benefiting local communities
- The development and implementation of a subsistence and small scale fisheries' policy with input from all stakeholders.



**Strategic Objective 5:**

## **capable institutions**

**the required enabling environment is established and sustained**

**We can measure trends in:**

- The number of signatories to the C.A.P.E. programme's Memorandum of Understanding (MoU) and the number of stakeholders registered with the C.A.P.E. programme
- The number of civil society-led projects that are funded and implemented through the partnership
- The degree to which task teams and steering committees coordinate activities across the CFR
- The number of integrated services centres in district municipalities
- The number of institutions responding to conservation training priorities

**We have case studies on:**

- The development and application of economic instruments for promoting conservation stewardship and / or sustainable living being developed and applied
- Increasing resources for partners' biodiversity conservation mandates

**We would like to be able to measure trends in:**

- Protected area revenue generation
- The extent to which conservation mandates are funded



**Strategic Objective 6:**

## **shared knowledge**

**an established managed network for learning and research underpins the programme and informs policy, planning & practice**

**We can measure trends in:**

- The existence and implementation of a coordinated CFR research programme
- The degree to which conservation education is coordinated across the CFR
- The number of C.A.P.E. toolbox resources, case studies and papers on lessons learned
- The number of reports, publications and dissertations in the online bibliography
- The number of people accessing established knowledge and information systems including the C.A.P.E. website and bibliography
- The number of mentions of the C.A.P.E programme and/or biodiversity conservation in the CFR in the media

**We have case studies on:**

- Research and / or pilot projects informing planning, policy and decision-making
- Social learning networks supporting governance, integration, learning and collaboration across the CFR and reflecting a changing culture of cooperation



## **A funder's perspective...**

- Onno Huyser of Table Mountain Fund
- Questions and discussions



## **Planning for outcomes and impacts**

*from "Project Planning: tools for biodiversity conservation and development projects"*

Phases in deciding on the focus of a project:

- Analyse the potential participants – their problems, interests, contribution and relationship to others
- Analyse all the interrelated problems you wish to address and how they are related, choosing a focus
- Turn the problems into objectives, choosing a focus
- Select your approach or strategy for achieving these objectives



## Defining the project elements

*from "Monitoring and evaluation: tools for biodiversity conservation and development projects"*

- Developmental goal

*OUTCOMES*

- Project purpose
- Outputs
- Activities
- Inputs



## 1. Development Goal

- The unique biodiversity in the urban lowland fragments of the Cape Floristic Region is conserved in a way that benefits people of the Cape Flats and is embraced as a valuable element of urban life in line with the City of Cape Town's Integrated Metropolitan Environmental Policy and Biodiversity Strategy.



## **2. Project purpose**

- Sustainable conservation management of sites in the City of Cape Town's biodiversity network is achieved through active partnerships between government, the private sector and community-based organisations.



### **3. Outputs**

- Sustainable conservation management is demonstrated at four pilot sites within the City of Cape Town's biodiversity conservation network: Edith Stephens Wetland Park, Harmony Flats Nature Reserve, Macassar Dunes and Wolfgat Nature Reserve.
- A new cohort of skilled urban conservation managers and champions from surrounding townships is established to conserve the biodiversity of the Cape Flats, and is supported by Cape Flats Nature to implement all other outputs.
- A campaign is conducted to gain broad support for conservation of the four pilot sites and Cape Flats Nature's work through awareness raising, promoting use of the sites by the people of the Cape Flats, and securing benefits from biodiversity conservation for the local communities surrounding the pilot sites.



## **Outputs contd.**

- An advocacy campaign is conducted to secure support for biodiversity conservation on the Cape Flats at all levels of government and lobby, particularly local government leadership, around specific issues as necessary.
- Lessons for sustainable urban conservation management practice from Cape Flats Nature's work at four pilot sites are captured and shared, and Cape Flats Nature's approach is introduced at two additional sites in the City within the context of a roll-out strategy for the City's biodiversity network.



## Group work process

### *After lunch:*

- Go through your Project Ideas rapidly with each other
- Take half an hour for each person and evaluate the ideas in relation to the key questions
- Refine the ideas, taking notes on the flipchart

### *After tea:*

- Each person gives 3 minute reportback on their idea, highlighting any changes / additions made



## **Budgeting issues**

- Identifying the costs elements of your activities
- Including all potential cost categories
- Getting comparative quotes to ensure value for money
- Building operational costs into achieving project outcomes
- Allowing for inflation, exchange rate fluctuations, funding delays and contingencies
- Setting up a system for receiving funds and reporting on expenditure



# 1. Identifying the cost elements of your activities

Example from [www.sasix.co.za](http://www.sasix.co.za)

- non-biodiversity example from Food and Trees for Africa
- Makapanstad in North West province
- project to provide training and resources in permaculture farming, business skills and better nutrition to a community garden project, enabling them to improve their food security



## Enterprise Development Projects

Sort By Region 

Sector	Project	Risk	Rating	Province	Cost	Shares Issued	Shares Available	
ED	<b>Gadra Advice and Community Work:</b> A beekeeping project for blind people			<a href="#">Eastern Cape</a>	R 29 450	589	0	<a href="#">REPORT</a>
ED	<b>Calabash Trust:</b> An income-generating soap enterprise			<a href="#">Eastern Cape</a>	R 224 000	4480	0	<a href="#">FUNDED</a>
ED	<b>South African Institute for Entrepreneurship:</b> Basic business skills training for crafters			<a href="#">Eastern Cape</a>	R 102 450	2049	0	<a href="#">REPORT</a>
ED	<b>Khumbulani Craft:</b> Business skills training for Hlulani glass bead-makers			<a href="#">Mpumalanga</a>	R 103 450	2069	0	<a href="#">REPORT</a>
ED	<b>Khumbulani Craft:</b> Business skills training for Kruger Park crafters			<a href="#">Mpumalanga</a>	R 153 300	3066	0	<a href="#">REPORT</a>
ED	<b>Siyazigabisa:</b> Business skills training for unemployed women			<a href="#">Gauteng</a>	R 64 200	1284	0	<a href="#">REPORT</a>
ED	<b>Gadra Advice and Community Work:</b> Business skills, tools and			<a href="#">Eastern Cape</a>	R 36 450	729	0	<a href="#">REPORT</a>

### Find a project

[search](#)

### By sector

- [Early Childhood Development](#)
- [Food Security](#)
- [Enterprise Development](#)
- [Orphans and Vulnerable Children](#)
- [Animal Protection](#)
- [Education](#)
- [Basic Healthcare](#)
- [Environment and Conservation](#)
- [HIV/Aids](#)

### By province

- [Eastern Cape](#)
- [Free State](#)
- [Gauteng](#)
- [KwaZulu-Natal](#)
- [Limpopo](#)
- [Mpumalanga](#)
- [National](#)
- [North West](#)
- [Northern Cape](#)
- [Western Cape](#)

### By status

- [All Projects](#)
- [Funded Projects](#)
- [Partially Funded Projects](#)



## How much detail to show?

*For project outline for Marketplace  
- broad categories, no detail:*

• Awareness workshops and brochure for community	R50 000
• Alien clearing operations	R200 000
• Training for emerging contractors	R63 000
• Monitoring and evaluation	R15 000
<b>TOTAL</b>	<b>R328 000</b>



## How much detail to show?

*For your own detailed budgeting first:*

*- much greater level of detail*

- Fencing R7 560
- Fencing @ R120/m R7 560
- Fencing 63m @ R120/m R7 560

2 X water tanks, stands, materials & labour	21 000
Borehole	40 000
Fencing: 63m @ R120/m	7 560
Compost, mulch & topsoil	3 600
Vegetable seedlings: 50 000 @ 2c each	1 000
Fruit trees: 60 @ R50 each	3 000
Herbs/Medicinal plants: 200 @ R17 each	3 400
On site training – 10 people X 3 day courses @ R1400 per day	42 000
Educational resources: R50 per person x 20	1 000
Workshop meals @ R20 per person p.d. x 20	12 000
Trainer's accommodation & meals @ R400 p.d. x 3 days	12 000
Gardening Tools	3 000
10 X Travel JHB - to North West 600Km return trip @ R2.50 per km	15 000
2 X people to attend Permaculture Course for two weeks @ R6 000 each	12 000
Project events and resources	4 800
Project administration	27 205
Contingency	1 435
SASIX administration	14 700
<b>TOTAL project budget:</b>	<b>R224 700</b>



## **2. Including all potential cost categories**

- Administration
- Operational costs
- Travel & subsistence
- Workshops
- Printing & publications / materials
- Media liaison & PR
- Time of staff members / salaries
- Fees to service providers / consultants
- Project monitoring & evaluation



### **3. Getting comparative quotes to ensure value for money**

- Two or three quotes
- Allows you to get value for money
- Don't usually have to show funders
- Keep the paperwork in case of auditing
- Enables you to practice procurement policy
  - e.g. finding a black-owned catering business in your town
  - e.g. printing on 50% recycled paper



## **4. Building operational costs into achieving project outcomes**

- Funders' attitudes to operational costs
- NGOs' struggle to sustain themselves
- Direct approach – complete synergy, track record
- Building staff time into project costs
  - percentage of person's salary
  - Number of hours / days of time
  - Administration fee



## **5. Allowing for inflation, exchange rate fluctuations, delays and contingencies**

- Allow for 10% higher costs a year from now, extrapolate
- Allow for lower exchange rate e.g. R9: \$1 (rate at 10:1)
- Gambling on when to bring money in
- Earn interest on money if possible
- Realistic start date of project depending on funds
- Add contingency at the end, or “pad” some elements
- Sometimes too much is hard to spend!



## **6. Setting up a system for receiving funds and reporting on expenditure**

- What are participants' experiences of common problems?
- Is it sometimes hard to spend money within the time framework?
- Do you have a system to track income vs expenditure?
- What do you do when there's a major discrepancy?
- What is best way to report on changes in project structure?