



Protected Area Staff Training

Guidelines for Planning and Management

Svetlana L. Kopylova and Natalia R. Danilina, Editors

Peter Valentine, Series Editor



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Foreword

The world's protected areas are managed by dedicated staff. Their passion and commitment are unparalleled. Many work in remote locations and often are so consumed with their day-to-day responsibilities that it is difficult to have the time to catch up with some of the developing ideas in the management of protected areas. Over the past few years, a project sponsored by the Global Environment Facility (GEF), and delivered by the Centre "Zapovedniks", has trained many such people across Russia, Ukraine, Belarus and Kazakhstan. Through the course of these activities, the Centre gained considerable experience and compiled a great deal of information of relevance to building the capacity of protected area managers.

I have encouraged that this information be presented in these new Guidelines on Protected Area Staff Training. This volume is different from previous issues in the Best Practice Series in a number of ways. First, the topic itself, as it is not a collection of PA management practices in a particular field, but a technical guideline on building the capacity of those enthusiasts who devote their lives to *in-situ* nature conservation, to assist them in their daily hard work. For many years, experts from protected area training centres and universities have been discussing the need to collect lessons learnt and to share these experiences and methods in teaching protected area management.

There is of course much information on this topic in the world. These Guidelines focus mostly on planning and delivering short courses for practitioners with experience in their backyard. It is aimed specifically to assist instructors and managers of protected area training centres, as well as universities and NGOs. Of course, there is also direct relevance for protected area agencies, site managers and experts, consultants and trainers, who work with them.

While this publication is based more on examples from the Northern Eurasia region, it nevertheless contains universal methodologies and case studies from other regions of the world, but the experience of the authors lies more in Russia and neighbouring countries. This region has accumulated a lot of experience to share with the global conservation community, but it is quite often not as widely known as it should be. This book brings a little bit of this experience to the arena.

I hope you find the content useful wherever you are in the world, and we will be glad to get your comments and ideas for further editions.

Nikita (Nik) Lopoukhine
Chair, World Commission on Protected Areas

Preface

The mid-90s were not the easiest time in Russia. Dissolution of the Soviet Union and the subsequent severe economic, social and political crisis had a direct impact on protected area management. Funding for PAs decreased exponentially, and invasive poaching, fishing and timber extraction all increased. Decision makers all over the country were struggling to take land away from PAs while poor local communities invaded the areas in search of resources. The situation was aggravated by the fact that PA managers, isolated from each other with almost no internet connections and funds to cover transportation costs, had no experience in dealing with these new challenges – and had no idea who to ask. It was, in fact, a catastrophe.

This was when Centre “Zapovedniks” was established, first as a WWF project, and then as an independent NGO which, in the face of a mounting crisis, had to teach PA staff some of the basics of survival.

For the first few years the work focused on training PA environmental education specialists. The detailed training needs assessment of PA staff was implemented through consultations with the best experts in the field. We communicated with PA training centres in the USA, Canada, Australia and Europe; made a lot of new friends; and studied the existing rich Russian heritage in the educational field. During the first four years of its existence, Centre “Zapovedniks” was holding seminars and developing training toolkits for the first group of environmental interpreters

for Russian protected areas. The profession of Environmental Interpreter was completely new to the region at that time – so, we re-educated former researchers, rangers and other PA managers to take on this new role. Our efforts resulted in the official approval of the profession by the Russian Government in 2000.

We soon came to realize how much PA managers need to know to be effective in the modern world. Education techniques, PA history and operation, national and international legislation, conflict resolution, interaction with different stakeholders, fundraising – and many more topics – were new, but indispensable. Later on, still more topics were added to this list. Our alumni had to become pioneers – strong, self-confident, positive and creative. They needed to feel that they were part of a professional community; a team of friends who will always support each other, even over distances of 9,000 km. This was the ambition for our training sessions.

A lot of time has passed since then. And a lot has been done. The Russian protected area system has survived and is still one of the most important refuges for global biodiversity. Challenges are still present, changing and re-appearing each day, but the main pillar of our PA system is PA people – and they are still there and successfully managing protected areas. And if we can do something to help them in their important mission – then we are also doing a good job. This book is, in fact, about these kinds of values.

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The book is based upon the 13-year experience of Centre “Zapovedniks”, which would never have been possible without all the practical work of its Director, Natalia Danilina. We also acknowledge the input of all the Centre’s former and current staff members and consultants, in particular, Victoria Sinitsyna, Vitold Yasvin, Dmitriy Voitovich and Elena Nikolaeva.

These Guidelines are the result of collaborative work by a team drawn from PA training centres in Belarus (a division within the Berezinsky Biosphere Reserve), Kazakhstan (NGO EcoCentre “Tabigat Elemi” working in close cooperation with the State Committee for Forestry and Hunting, Ministry of Agriculture), Ukraine (based at Kanivsky State Nature Reserve) and Russia. It is an honour to acknowledge the work of the national project coordinators in developing the best practices we are citing here: Valerij Ivkovich and Alexander Kashtalian (Belarus), Kairat Ustemirov, Aliya Iralina and Gulmira Kabanbaeva (Kazakhstan), and Anatoliy Podobaylo and Mikola Cherniy (Ukraine).

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Special thanks are due to IUCN/WCPA Chair, Nik Lopoukhine, who led the Steering Committee (SC) of the GEF/UNEP SNTC Project and contributed much to the development of the Network of PA Training Centres of Northern Eurasia; Marc Hockings, Marija Zupancic-Vicar and all other members of the project SC, whose ideas, during the three years of project implementation were more than useful for our work. We also recognize the advice of David Sheppard (Head of the IUCN Programme on Protected Areas (PPA), 1993–2009); the input of all IUCN/WCPA Steering Committee Members and Task Force Leaders, who assisted us in collecting information, especially Nigel Dudley (IUCN/WCPA Vice-chair on Capacity Development) and Jim Barborak (former IUCN/WCPA Training Task Force Leader); and the assistance from the IUCN PPA team (Pedro Rosabal, Delwyn Dupuis) with publishing the book.

Members of the European Training Task Force of IUCN/WCPA also provided a significant contribution to the elaboration of our ideas as well as contacts and information for the case studies. We recognize, in particular, the help of Peter Townsend and Maurilio Cipparone.

These Guidelines would not have been possible without financial support from the GEF/UNEP Project “Strengthening the Network of Training Centres for Protected Area Managers in Northern Eurasia”.

Acronyms

CBD	Convention on Biological Diversity
GEF	Global Environment Facility
IUCN	International Union for Conservation of Nature
PA	Protected Area
PES	Payment for Ecosystem Services
PoWPA	Programme of Work on Protected Areas (of the CBD)
PR	Public relations
SNTC	GEF/UNEP project “Strengthening the Network of Training Centres for protected area managers of Northern Eurasia”
TNA	Training Needs Assessment
ToT	Training of Trainers
TC	Training Centre (for PA staff)
UNEP	United Nations Environment Programme
UNDP	United Nations Development Programme
WCPA	World Commission on Protected Areas (one of six IUCN Commissions)
WWF	Worldwide Fund for Nature

Executive summary

Qualified, competent and committed staff are central to the success of protected areas. Training of PA staff is more and more recognized as a vital component of efficient protected area management. As well as being an essential tool at local, regional and national levels, capacity building for PAs now has a strong international context and is being embedded into major global conventions and PA-related decisions (see Chapter 1). The principal goal of PA staff training is to raise the capacity of PA managers to adapt to new challenges, using innovative and creative approaches.

These Guidelines treat each training course as a project that follows the classic project cycle: from identifying training needs through resourcing, development and delivery of training to assessment of the use of the competences acquired.

Identifying training needs should precede any learning initiative. The job of the training provider is to be the first to identify demands arising with respect to new technologies, tools and skills and to propose new learning solutions, possibly even before PA people realize their need. Tips for making a good and cost-effective Training Needs Assessment (TNA), with a detailed description of methods that could be used, are given in Chapter 2. This chapter also summarizes some of the results of international TNAs for PA managers: these are generalizations, but comparison with national/regional realities could help in rethinking the content of your trainings.

A PA manager today has numerous opportunities to enhance his/her qualifications. These vary according to the type of provider (independent training centre, training and consultancy centre within a university, initiatives and programmes of international organizations etc.), type of qualification, origin of participants (from local to international), target groups, and diversification of training curricula, funding sources and availability of distance-learning opportunities (Chapter 3). A lot of case studies are cited to draw a comprehensive picture of the modern global PA staff training market and some of its players.

The book focuses on several management issues that need to be dealt with to make sure a training centre is successful and effective. First, strategic and business planning for PA TCs is recommended to demonstrate the centre's capacities and sustainability (including financial sustainability) to internal and external stakeholders, to apply for funding and to rethink the working principles. It is also an important exercise in building corporate teams (Chapter 4). Second, establishing PA TC networks at national, macro-regional and international levels is foreseen as a priority. Possible forms of interaction between TCs within the network and benefits for individual centres from networking are discussed in Chapter 5.

The principal component of a successful training course is a comfortable and creative training environment. Important steps in achieving this are identified and some useful methods are listed (Chapter 6):

- Focus on the needs of participants;
- Foster a creative group climate;
- Try to improve trainees' self-appraisal;
- Always think about the interests and wishes of the trainees;
- Facilitate the trainees' desire and capacity for professional growth;
- Create positive informal relations within the group;
- and many more.

The organizational and technical aspects of conducting a training session may seem evident and unimportant – but all details matter. Preliminary and on-the-job training arrangements and responsibilities of the training manager, with some templates, exercises and case studies, are the subject of Chapter 7. Some ideas on how to make your training more practice-oriented (individual final course projects, group publications etc.) can be found there as well.

Monitoring and evaluation of the impact of training are top priorities. This is usually achieved through a combination of several processes: 1) daily monitoring; 2) end-of-course evaluation; 3) post-training assessment of related practical changes. The last is extremely important and extremely difficult at the same time. And, of course, adapting your programmes, according to the results of monitoring and evaluation, is indispensable (Chapter 8).

Certification of training course graduates remains a difficult question in almost all PA training centres around the world. More and more managers agree that it is time to develop some sort of criteria to ensure quality control between various initiatives, programmes, diplomas and certificates available in the field. But what should those criteria include and who could become a certifying authority for PA training centres at the international level? How should the quality control be implemented? And how are we going to standardize the training curricula and does it make sense even to try? Chapter 9 poses these questions, but does not provide any answers – WCPA will be working further on this issue and would welcome feedback from users of this guide.

The case studies elaborate on the statements discussed and contain more ideas and methodologies, which could be of use to new as well as to established PA TCs.

Introduction

Aim and objectives of these Guidelines

The overall goal of this book is to present the lessons learnt and good practices accumulated in the large and diverse field of protected area training. Existing since the creation of the first PA as a supportive activity, training and more generally capacity building have only evolved into a major professional field for protected areas during the last decade. The importance of raising the qualifications of PA staff has been recognized by the Convention on Biological Diversity (CBD) and other international policy instruments. The number and variety of actors dealing in this field has grown exponentially as well as the participation of PA staff in numerous courses, workshops and seminars all over the world. The action is taking place at all levels – from local to international. Numerous tools, methodological approaches and know-how have been put into practice all over the world. Many PAs, which once conducted their own training, now recognize that training is not their core business and have started using the services of the fast-developing PA training industry.

It is now time to summarize and critically analyze the lessons learned up to now, collect best practices and make them available to managers of PA training centres (TCs) all over the world. This idea was at the heart of the book you are starting to read. We hope that it will help specialists dealing with PA staff training to plan and organize their seminars more effectively. This, in turn, should contribute to building the capacity of PA managers to respond to a growing number of challengers that they have to face in their everyday work.

The Guidelines have the following objectives:

- To discuss the guiding principles of carrying out training needs assessments for PAs and priority topics for capacity building;
- To collect information about PA training centres of the world and discuss the different models used in their operation and networking;
- To present a step-by-step methodology of planning and conducting a training course for PA staff using innovative approaches;
- To give information about a monitoring and evaluation system for PA staff training courses and to discuss the certification procedures for PA TCs;
- To discuss some good practices for making effective seminars for PA staff.

Certainly, these Guidelines are not a universal tool to solve all problems. It was not our intention to describe all existing PA TCs or even the principal ones. We do not speak about all the methods and approaches that exist in the field, neither do we cover all training topics, nor give out-of-the-box solutions. If a centre is not described in the book, it doesn't mean that its experience is not worth mentioning. The authors took upon themselves the responsibility of choosing a number of case studies and good practices from a great number of options, simply to illustrate their statements and to present approaches that they considered valuable.

We should note that most of the practices showcased in the book are from one large region – Northern Eurasia – where we recently finished implementing the GEF/UNEP Project “Strengthening the Network of Training Centres for PA managers of Northern Eurasia” (SNTC). The experience we gained while working as a project team over three years (2005–2008), as well as during the previous 10 years of our work at Russian Centre “Zapovedniks”, laid the foundation for this book. However, many of the tools we are discussing here have been tested outside the Northern Eurasia region as well – and have been considered operational.

As always, this collection of best practices remains incomplete; we therefore encourage anyone who uses these Guidelines to let us know what works and what does not work, and to make suggestions for improvements in the future.

GEF/UNEP SNTC project: A success story

This publication is one outcome of the GEF/UNEP project “Strengthening the Network of Training Centres for PA managers of Northern Eurasia” implemented by Russian NGO Centre “Zapovedniks” and its partners from 2005–2008. The project not only provided funds to make this work possible but, much more importantly, it gave its team a chance to accumulate, analyze and test a great variety of international PA staff training practices and toolkits, and to discuss principal training issues within the training community. Here we summarize the main ideas of the project to help readers understand the challenges we have overcome and the conclusions we drew from our work.

The project goal being to improve the management of PAs in Northern Eurasia, the two objectives were: 1) to improve the skills of PA managers and staff in four project countries in critical aspects of PA management; and 2) to secure stronger political and other stakeholder support for PAs in the region.

It was initially decided to involve four Northern Eurasian countries in the project: after a selection process Russia, Ukraine, Belarus and Kazakhstan were chosen. In Russia we had Centre “Zapovedniks” with nine years of successful training experience – but limited mostly to work with environmental education professionals. In the other three States, no training was delivered on a regular basis: just some occasional events here and there which were not systematic. During the project preparation phase, we communicated a lot with staff of the PAs and PA agencies of all four countries and it was clear that one existing training centre would not have enough capacity to satisfy the needs of the 190 or so PAs at the national level alone (involving about 19,000 specialists) that we had to cover within our project. Thus, the idea evolved of developing a network of TCs in Northern Eurasia.

We analyzed international experience and communicated with a number of TCs in USA, Europe and Africa. All previous domestic training data were collected and reviewed, and databases of potential trainers and consultants created. Future directors of the new TCs and trainers were trained at Training-of-Trainers (ToT) sessions in Centre “Zapovedniks”. Our new TCs had no training facilities of their own, no official legal status, and no full-time trainers. Nevertheless, they started holding training courses, just two months after the project began, using tutors and training packages from the Centre “Zapovedniks” adapted to national conditions and needs. Our concept was to use a common approach at all four TCs, the main pillars of it being: 1) an interactive training method with the minimum of time devoted to lectures and presentations; 2) constant involvement of a psychologist to “create a positive and open environment” during the whole training; 3) “deep involvement” of participants in the process through delivery and accommodation arrangements and a combination of formal and informal activities etc.; and 4) development of final projects and post-training monitoring of their implementation. While those had to be similar in all TCs, each TC team was free to experiment with curricula, tutors and all other aspects.

Starting from environmental educators and rangers, we diversified our training product based on the findings of the Training Needs Assessment (the process involved about 20,000 PA managers in the four project countries). Twelve new training packages were developed for PA superintendents, accountants and financial directors, staff of eco-tourism and scientific departments, rangers, communications, PR and HR staff, PA Friends groups, eco-NGOs, volunteers etc. Our trainees often asked for assistance in their external communications – so, we developed and tested 28 multi-sectoral training courses for PA and tourist companies, PA and business, PA and authorities, business and eco-NGOs etc. The need to involve all PA-related stakeholders in our training programmes, starting from occasional events, soon became part of our strategy.

The training preparation process also evolved during the three project years. Development of a detailed training module

(with minute-by-minute instructions for the tutor) for each new training unit became a must – this helped greatly when the training materials of one TC were being used by the other three. Eight complex three-to-five-day modules were prepared and tested during the project, as well as about 10 smaller (one-day) units. About 10 ToT sessions were conducted to ensure the correct application of these modules by PA staff (to train their colleagues and other stakeholders). We, thus, came to a multi-level training concept: the first level of training was conducted in one of the four TCs with a new mini-training (training session) development as a final project. Back home, our alumni (with our assistance) developed their own training courses – and the same process could be repeated in up to four stages. This method allowed us to teach about 5,000 people in three years: 3,000 of these through training courses developed by our graduates. About 40 publications of national and world best practices of PA management, and a great number of additional training material, were produced and disseminated to be used at trainings and as additional information by our alumni.

In the first year, the three training centres in Ukraine, Belarus and Kazakhstan were established. We worked in close cooperation with national authorities (Ministry of Natural Resources and Environment of Russia, Ministry of Environmental Protection of Ukraine, Presidential Administration and Ministry of Natural Resources of Belarus, State Committee of Forestry and Hunting, Ministry of Agriculture of Kazakhstan) and project partners to find the best legal and administrative form for each particular centre. Simultaneously, national teams of trainers were expanded and trained at ToTs and during exchange and study visits.

After 1.5–2 years, our TCs were developed enough to start thinking about their sustainability after the end of the project. All of them have gone through a business planning process to determine principal target audiences, carried out a detailed marketing analysis for each training product, defined potential sources of future funding and calculated their financial options. Since the end of the project, we have worked hard to implement these plans, especially focusing on ensuring financial sustainability of the TCs. Now, more than two years since the project finished, with the centres not just open but are actively working and serving the needs of diversified clients, we can say that they are indeed sustainable.

An important part of our work was to receive official approval of our training packages from national PA agencies and to see the integration of our TCs into existing PA management structures. This was completely achieved in Belarus and Kazakhstan (in each case the TCs became part of the State PA agencies, with adequate funds assigned by the State to training) and partly in Russia and Ukraine (here the TCs are independent organizations and the PA authorities are just one of the consumers of training amongst several other clients). TCs also assisted national agencies to develop and

upgrade official job descriptions for PA-related jobs – the training curricula were upgraded correspondingly.

Our work with governments revealed that the TCs could also operate as consulting and, in some cases, lobbying agencies for a great number of PA-related questions. Thus, our TCs have assisted in the development of four national strategies for PA management (one for each country); several amendments to national laws on PAs and policy regulations; preparation of official guidelines for PA management; the creation of new PAs, etc.

As a mark of international recognition of the quality of our training courses, Centre “Zapovedniks” has been officially included in the Network of European Environmental Training Centres of Excellence (NEETCE). National recognition is

reflected by a constant flow of applications for participation in our new seminars and the warm words we hear from PA staff. In addition to the four main TCs, three more regional centres for PA staff have been established in Russia. Fifty-five percent of our alumni implemented their final course projects, thus directly contributing to increasing the efficiency of their PA management. The final evaluation we conducted at the end of the project showed that knowledge, skills and attitudes to work changed significantly for the majority (90–95 percent) of participants. This is actually our main achievement – and the reason why we have taken it upon ourselves to present our experiences (as well as the experience of our colleagues from all over the world) in this publication. We hope it will be useful and will help budding training centres not to repeat our mistakes and to become more effective.

1. Training PA staff: A way of increasing PA management efficiency

1.1 International recognition of the need of training for PA staff

“The capacity to manage is the product of willingness, competence, skills, capability, and adequate resources”.¹ Qualified, competent and committed staff are central to the success of protected areas. It is therefore not surprising that strengthening the capacity of protected area agencies and the individuals working in them has become one of the priorities in the development of PA systems over the last decade.

The CBD Programme of Work on Protected Areas called on its Parties to “complete national protected-area capacity needs assessments and establish capacity building programmes” (Activity 3.2.1). Responding to their obligations, most of the countries of the world have included training initiatives in their national CBD implementation processes.²

The International Union for Conservation of Nature (IUCN) emphasized in *Parks for Life: Action for Protected Areas in Europe* that good staff are vital to the successful management and development of protected areas throughout Europe and that their training should be a top priority. According to IUCN, “not only technical skills are required, but professional staff also need a wider range of backgrounds including a high level of managerial and communication abilities”.³

The Vth World Parks Congress (September 2003) declared that “effective management of protected areas in the context of global change requires that managers, protected areas staff including rangers, local communities and other stakeholders have the knowledge, attitudes, skills, capabilities and tools to plan, manage and monitor protected areas. Managers and stakeholders also need the skills to be able to establish and maintain the complex relationships and networks that are essential for sustainable and effective management of protected areas” (Recommendation V.2).⁴

Since then, the issue of capacity building for PAs has become a major priority within global conventions and the GEF. Raising the capacity of PA staff was among the principal enabling activities in the Biodiversity focal area of the GEF-4. Training is also mentioned as an important tool to achieve GEF Strategic Priorities 1 and 2. Almost all GEF PA-related projects approved in the last half-decade included a number of training initiatives for PA staff and relevant stakeholders.⁵ Capacity building for PA staff is also an important cross-cutting issue in UNEP’s and UNDP’s relevant programmes.

Training for PA staff has been discussed at the CBD COP 9 (May 2008), the IUCN World Conservation Congress (Barcelona, October 2008)⁶ and other major international PA-related events. All of them recognized the major role of capacity building for PA staff in improving the management efficiency of protected areas.

1.2 Why do we need to train PA staff?

PA managers are operating in a challenging world. If they want to prosper, they have to adapt to changes quickly. Let’s take just one example to illustrate this statement.

Inadequate funding is the most typical problem of a modern PA. There are several ways to solve this. First, innovative conservation finance mechanisms can be investigated (business planning, payments for ecosystem services, environmental funds etc.) specially designed to attract additional funding and/or raise the cost-effectiveness of PA operations. To benefit from these schemes, the manager needs to understand economy, financial management, strategic and financial planning, marketing and legal issues. They should also be quite skilled in communications, PR and government relations. Second, eco-tourism could be an option for attracting more funds for local communities, surrounding the PA. To make this an efficient option, the PA specialist should be competent

¹ See WCPA/IUCN website: www.iucn.org/about/union/commissions/wcpa

² Full text of CBD PoWPA is available online at: www.cbd.int/protected/pow/learnmore/intro/

³ IUCN, 1994.

⁴ IUCN, 2005.

⁵ GEF, 2007.

⁶ See www.iucn.org/congress_08/

in visitor management, PR and marketing, sales, infrastructure management, tour operating etc. Third, new sources of funding may be available – fundraising skills are therefore required as well as project management and reporting. It is very hard to find a PA manager who is competent in all these issues at the beginning of his/her professional development. Their entire career should be a lifelong training to become real experts.

Formal university education today (with very rare exceptions) is not tailored to the needs of in-the-field PA professionals. Compared to other careers, not many universities have special faculties or departments for PA staff. In most countries there is no institution where one can obtain an M.Sc. or Ph.D. in PA management. For such regions, short-term courses give the only possibility for PA staff to acquire the competences needed.

The other important goal of training is to provide PA staff with a chance to meet their colleagues and discuss their problems informally. Work in a PA very often means spending most of the time in remote areas, far from towns, and with limited communication and access to the internet. In such situations, training often becomes the only possibility to meet like-minded people and share experience.

Last but not least, the function of training is “to recharge the enthusiasm batteries” of participants. Tired from their daily routine and various problems, PA managers often come to training with only one overall expectation – that it will inject some enthusiasm back into their working lives and reassure them that they are doing important work that is needed and appreciated. An appropriate training environment helps them to feel useful again – and this can be even more important than the simple transfer of knowledge and skills.

2. Training needs assessments: Approaches and results

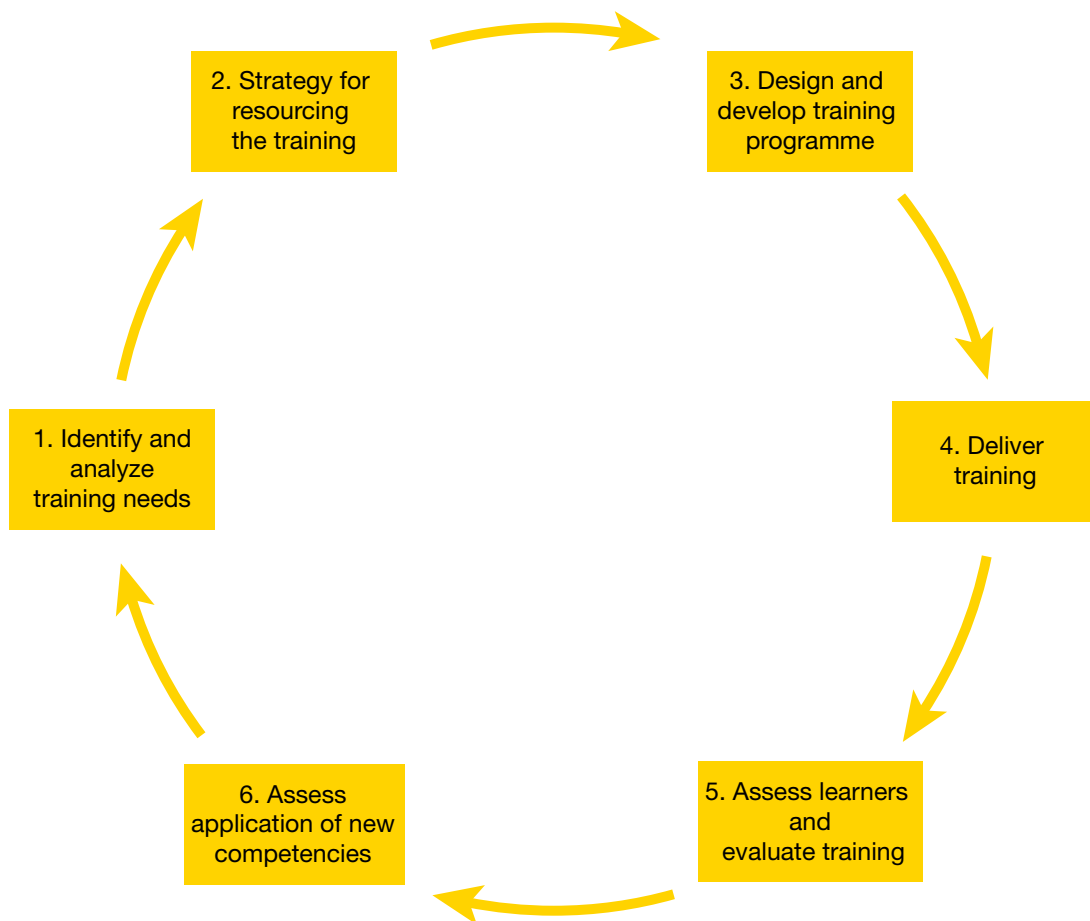
2.1 The basis of training needs assessments (TNAs) for PA staff

At first sight, it seems evident that each training preparation process should start from an analysis of needs of the future clientele. But, *de facto*, a great number of training courses conducted today in the field of PA management are not tailored to the needs

of participants. Many learning initiatives are driven by donor priorities, existing funding, preferences of project managers, availability of tutors and many more factors that lay far beyond what should be the basis for this process – the demands of future trainees.

Preparation of each training course should follow the classic project cycle (see Figure 1).

Figure 1. Training cycle



Identifying training needs should precede any learning initiative from one-day seminars to a series of courses. *The TNA helps training institutions by:*

- enhancing the practical effect of learning;
- helping to avoid useless investments of funds and effort;
- ensuring a good atmosphere during the workshop as expectations of participants are met;
- helping create a good image for the training institutions without costly investment in PR;
- facilitating dialogue between the training institution and the government;
- aligning training to other human resource processes at the PA such as performance management, development of competency standards etc.;

- providing a baseline for the evaluation of training efficacy and planning future training;
- providing a base for developing a capacity-building strategy for the PA system.

Below you will find some tips on how to carry out a good TNA with the minimum of resources.

2.1.1 Do it on a regular basis and aim to be the first in the market to identify new trends

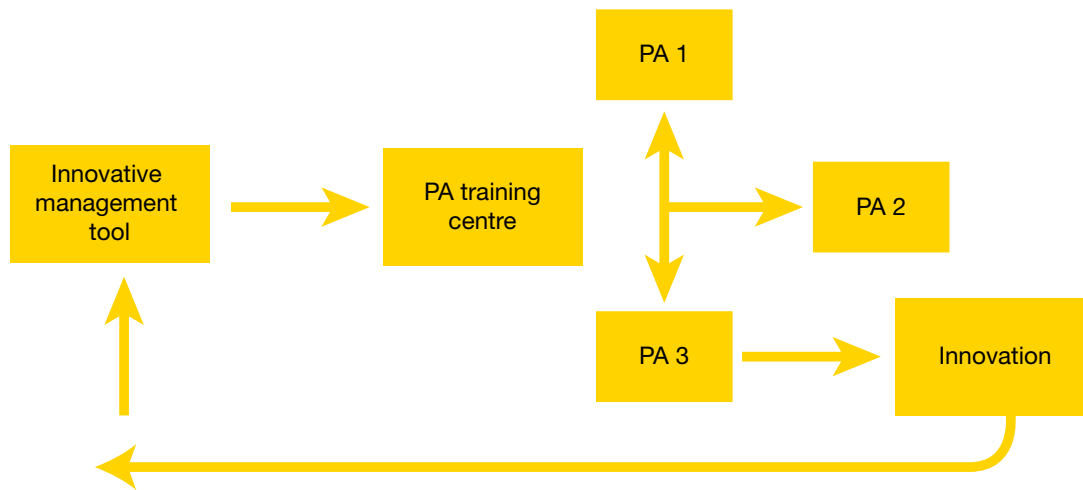
Carrying out a TNA is similar to cleaning a house – difficult after a long break, but easy and quick when done regularly.

At the beginning of a new training project or a new training centre, it makes sense to carry out a detailed survey. It should make

you familiar with the current level of capacity of your target audience, trainees’ background, previous training experience, competences required by job descriptions etc. You should also analyze your future market, competitors, potential staff for the training centre, demand for good practice materials etc. The initial TNA survey is time-consuming and ideally you need to have a specific staff member to coordinate this work. But it is worth doing once to set high standards for your training from the beginning.

When you are already in the market and are doing TNAs regularly, all you need is periodic updates. The modern world poses more and more complicated tasks for PA professionals. *It is the job of training providers to be the first to identify new demands in technologies, tools and skills and propose new learning solutions – before PA professionals even realize that they need them* (see Figure 2).

Figure 2. Transfer of innovations between PAs and PA training centres



To be aware of innovation, you should interact with your target audience on a regular basis. To update the information you already have, you can use different methods – from a short questionnaire sent before Christmas to all PAs, together with your new leaflet and a short report on your work during the last year, to informal surveys among your alumni at national conferences or when they drop into your office for a cup of tea. Two or three questions are more than enough.

2.1.2 Use different assessment methods for various PA staff members

Very often a training centre has one questionnaire which is automatically sent to all participants of all seminars – from the head of a PA agency to a field ranger. Such a questionnaire usually contains very common questions like personal data, work experience and previous trainings attended. We definitely need to know all this, but is it enough? Of course, it is not.

It is worth taking time to develop varied methods to collect information by taking into account the professional position of your respondents. You are unlikely to find a PA director or PA agency head who will agree to fill in several pages of a questionnaire. It is better to have an informal interview with them at lunch. But do not be afraid of spending an extra hour discussing the details and difficulties of work with park rangers if they are available – they are likely to appreciate your attention and you will get a better understanding of the situation at the PA they work in.

2.1.3 Start long before the training

The TNA can take a lot of time. For the initial TNA you will need at least two months to send the requests for information and collect the responses. PA staff tend not to be very quick to deal with things that lie outside of their everyday responsibilities. The season matters as well – in summer they can simply be out in the field for a month or two – you should be aware of this when planning your schedule.

2.1.4 Increase the representativeness of your sample

The principal question for the TNA is the scale of the sample. What is the critical number of PA people we have to interview to receive a clear picture of the situation in field? It is definitely worth involving all PAs in your region in the survey if possible – it does not cost too much to send the same questionnaire to additional parks. There are several reasons why limiting your survey to a dozen PAs (random sample) may give you the wrong picture. First, the response rate of PA staff is usually not high: 35 percent should be considered a good result. Second, PAs vary in size, staff composition and competencies as well as in the efficiency of their management. If, however, you already know your market, you can easily limit your survey to a smaller group of PAs – but then you should ask “winners”, “losers” and “middle-level PAs” in equal proportion. If it is your first research, it really does make sense to ask as many PAs as you can.

The scale of your sample will not significantly increase the amount of work for you and your staff if you apply the *multi-level approach to TNA*. This means training managers only communicate with the heads of PAs asking their assistance in forwarding questionnaires to their middle management, who are then responsible for collecting data from the field staff. The questionnaire templates for each staff level are developed by training managers who send them together with a letter to the PA director. PA staff are not responsible for analyzing information – just for filling in the questionnaires. To facilitate and speed up this process use the “administrative resource” if possible: ask staff of PA agencies to send an official request for information to all PAs.

You have one more resource you can use for distributing your questionnaires and gathering responses – your alumni. Simply send them the form and ask them to ensure their colleagues fill it in. The informal relations you have with these people can be good drivers to help move your survey forward.

This multi-level approach allows you to make a really wide-ranging survey at a minimum cost. Such approaches were used to assess the training needs of PA staff in four States of Northern Eurasia (Russia, Ukraine, Belarus and Kazakhstan) at the beginning of the GEF/UNEP SNTC project. The survey targeted 190 PAs at the federal/national level in four countries and involved approximately 19,000 managers from PA directors to rangers (the average staff of a PA being 100 people). The whole job was done by one project manager over a two-month period (the manager spent about 10 percent of his time on this task). This example gives an answer to our “representativeness question”: *do not be afraid of large-scaled surveys*, involve as many PAs as you can to be sure to benefit from your efforts in future.

2.1.5 “One level up” and “one level down”

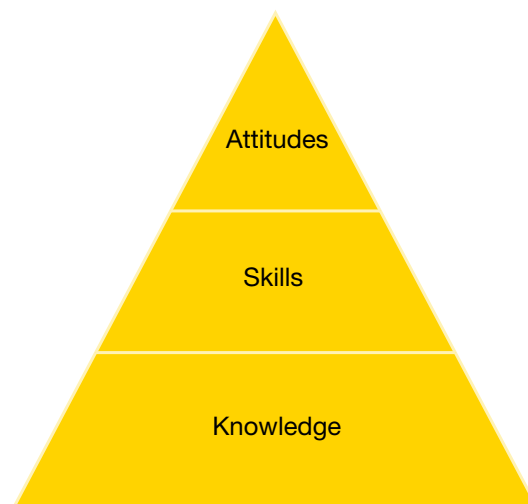
Remember one important thing – PA managers are not always aware of their training needs themselves. We cannot see ourselves from the outside and it is not easy to define your own weaknesses and the need to improve, for example, your own communication skills. One can not be objective in evaluating one’s own performance. But you do need an objective picture to develop a training course.

This problem can be solved by using the technique of *cross-check questioning*. The method is very simple: if you want Mr Y to participate in your training, you ask three people to fill in your questionnaire – Y, X who is Y’s direct supervisor and Z who is directly under Y in the PA hierarchy. Prepare a series of indirect questions for X and Z that will allow you to assess the skills of Y (leadership, communication, team building, partnership etc.) and reveal some problems within the organization of Y’s work. It is particularly useful to compare the responses from X and Z and try to understand the origin of any differences.

2.1.6 Evaluate knowledge, skills and attitudes

While composing the TNA questionnaire, think about the three principal points you should be planning to address: knowledge, skills and attitudes (see Figure 3).

Figure 3. Pyramid of training needs



The first thing your training course should influence is the participants' knowledge on the chosen subject. You can achieve this in the form of a lecture and by providing trainees with materials to read after the course. Your task becomes more difficult if you are also focusing on transferring new skills and you will have to use interactive "learning-by-doing" sessions. Even after such exercises there is no guarantee that participants will develop a new skill. Your task is even more complicated if you are trying to change attitudes whether it relates to the PA job as a whole or to some minor process people are dealing with in their everyday work. Attitudes evolve very slowly as most people are basically conservative. You will need to apply a series of different training techniques to influence the trainees' attitudes.

As soon as you decide on the level of desired "intervention", start preparing questions for your TNA. For the "knowledge level", it is sufficient to include only direct questions which will reveal what the managers know and then compare it to what they should be aware of, according to their job description. Ask about professional background, work experience, on-the-job training, foreign languages etc. For the "skills level", add indirect questions which will help you to evaluate communication, presentation, leadership, technical and other skills. Finally, for the third level you should add questions which reveal attitudes. Examples of this type of question include managers' perceptions of the PA system as a whole and of their PA, of difficulties and constraints they have to face in their daily work, whether they feel useful given their position and why so, what do they lack for self-satisfaction in their job etc.

If you have all three groups of questions in your survey, mix them up as much as you can.

2.1.7 Combine different assessment methods

Possible tools and techniques for carrying out a TNA are discussed further in this chapter. Just remember to mix the methods you use as often as possible.

2.1.8 People who know it all

Already at the TNA stage, you will meet people who seem to need no training. According to their responses they already know all there is to know and more. Do not be afraid of inviting such people on to your course and do not change your curricula too much to fit them. The practice shows that, in most cases, these "super-experts" are not as "super" as they suppose. Always remember that the real professional will always find something new and useful in every event they attend. And, moreover, if they are really as good as it seems, it is not a problem for your training – it is a benefit.

To understand your know-all participant better, do not use too many direct questions like "Please evaluate your leadership capacity using a scale of 1 to 5". It is more effective to mix concrete questions revealing a person's knowledge ("What is the difference between the visitor centre and traditional museum of nature?") and "scenario" tasks ("If you have to make decisions, how do you usually proceed: 1) discuss the situation with your colleagues and vote for the decision; 2) discuss the situation with colleagues and make a decision yourself; 3) decide everything yourself?"). The more indirect questions you pose, the more likely you will get the real portrait of your "know-all" and not just a self-image. The cross-check questioning method, described above, can also help.

Box 1. Ways and means of identifying training needs

1. Gather and record information

- Think about who will gather and record the information (will you do it yourself, will you ask others to help you – if so, who, and do they need training to use the method(s) you have chosen?).
- When recording information, try to do it in such a way that you can start immediately to sort it out (leave some space for your own notes; use different colour pens for different themes/ categories of information; use codes to identify different groups of respondents etc.).

2. Analyze and interpret information

- Think ahead to sharing your results – if you know what you want to share and how, you can sort your information accordingly (i.e., extract it from the notes/sources where it was gathered).
- Review all the information – consider using a small team to do this independently and then pool the results.
- Identify and prioritize all the issues – it is useful to decide if your focus is on qualitative results, (e.g., trends) and/or quantitative results (e.g., frequency of responses).

Source: Hinrichs and Levison, 2000.

2.2 Ways and means of identifying training needs

The most common methods you can use for your TNA include:

- questionnaires;
- interviews;
- group discussions/focus groups;
- complex research as a combination of above-mentioned methods;
- analysis of job descriptions;
- self-assessment.

2.2.1 Questionnaires

Benefits of using this tool:

- It is the cheapest (especially, if you send the questionnaires via e-mail) and the least time-consuming method (you don't need to meet with your respondents);

- You can involve as many PAs as you wish, spending approximately the same amount of time and money;
- You can use the multi-level TNA and delegate a great amount of work to your ex-trainees or PA top management;
- It is easy to compare the results of surveys across the years and examine the dynamics.

Disadvantages of using this tool:

- Low return rate – 35 percent should be considered a good result;
- You miss direct contact with your respondents and many of their ideas may be lost;
- If the respondent doesn't understand a question, you don't have a chance to explain;
- Even after testing, the questionnaire can be far from an ideal way to tell you everything you want to know;
- The top management will be unlikely to take the time to complete questionnaires.

Box 2. Tips for developing a good questionnaire

- Review existing questionnaires from other sources before automatically starting from scratch and developing your own.
- Keep the questionnaires short and simple.
- Test (pilot) the questionnaire first with a small group that is representative of your sample.
- Ensure that you provide clear instructions (including how and by when to return completed questionnaires to you).
- Include an explanatory covering letter.
- Consider using alternative distribution methods (such as via a contact person in a branch, e-mail, etc.).
- Include a short introductory paragraph to explain the purpose of your survey and highlight the anonymous character of your research. Use different fonts to make information more readable. Thank your respondents at the very beginning of the questionnaire.
- Mix various types of questions: open and closed, direct and indirect etc.
- Always leave room for an "other(s)" response.

Sources: Hinrichs and Levison, 2000 and Centre "Zapovedniks".

Below you will find two examples of questionnaires. Both were used in one study – the initial assessment of the training needs of a large number of PAs – but for different purposes. The first one contains general questions, the same for all staff members

– from a director to a ranger. This part of a survey usually helps to assess attitudes of PA staff towards their work and gives "statistical" information on their age, background, previous training experience etc. (see Box 3).

Box 3. Questionnaire for Training Needs Assessment of PA Managers of the Kamchatka Region, Russian Federation¹

Dear colleagues!

The GEF/UNEP project has an objective to create a new PA training centre for the Kamchatka region. The centre's goal is to build the capacity of PA staff.

To be sure that our courses meet your requirements, we need your assistance in completing this survey!

Please fill in the following questionnaire. Your responses will help us to develop the strategy and training courses for Kamchatka PA Training Centre. The survey is strictly anonymous. You are free not to give your name. All personal data is needed for statistical purposes only.

Thank you in advance for your assistance!

1. Have you ever participated in training courses/in-service training/placements?

Yes No

If yes, please list ALL training in the field of PA management that you have taken part in:

Training topic	Training provider and dates	Duration	How do you assess the efficacy of that training for you? (please, put a score from 0 (no effect) to 5 (very useful))	What was the most useful for you in that seminar?

2. How satisfied are you with your current job? (put a score from 0 to 100 percent):

0 10 20 30 40 50 60 70 80 90 100

3. What attracts you most in your current job?

4. What is your biggest success in your current job?

5. What part of your job is the most problematic for you?

¹ Another example of a questionnaire to assess the training needs of PA staff can be found at Appendix 1.

6. List the principal difficulties (2 or 3) of your current job?

7. What keeps you from doing your job well?

8. What does work at the PA mean for you?

9. Are you planning to continue working in your current position for the next ... :

- | | | |
|-----------------|------------------------------|-----------------------------|
| <i>year</i> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <i>3 years</i> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <i>5 years</i> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| <i>10 years</i> | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

If you are thinking of changing your working place, what are the factors that influenced your decision at most?

- *Salary*
- *Relations within the team*
- *Policy of your bosses*
- *Unstable situation in the PA system in Russia*
- *You are no longer interested in what you're doing*
- *Uncertain future*
- *Lack of social package*
- *Lack of career prospects*
- *Lack of self-development opportunities*
- *Difficult working conditions and safety risks*
- *Other (please be precise):* _____

10. What training topics would be the most interesting for you to participate in?

(Range in order of importance) _____

1	PA management, strategic planning and HR management
2	Environmental education and interaction with local communities
3	Visitor centres and nature museums
4	Eco-tourism development
5	Patrolling PAs: organization of work
6	Scientific monitoring and research
7	Training-of-trainers on environmental education, eco-tourism, patrolling etc.
8	Management planning
9	Alternative livelihood programmes
10	Economics and financial management
11	PR and fundraising
12	Interaction with decision makers, business and local communities
13	The school of PA accountants
14	PAs and tourist companies: ways of interaction
16	Sustainable resource management
17	Other:
18	Other:

The second part of a questionnaire should be focused on evaluating the concrete skills and knowledge of each PA staff category. The questions here are as detailed as possible in order to reveal knowledge gaps or lack of skills (see Box 4).

Box 4. Thematic questions for environmental education specialists

1. What questions would you like to discuss during training? (please mark 5–6 items in order of importance)

- Methods of environmental education work
- Psychological aspects of interaction with local communities
- Eco-tourism development
- Legal aspects of nature conservation in Russia
- History of environmental education work in Russian PAs
- Others (please be precise) _____

2. How long have you been working in:

- environmental education? _____
- eco-tourism? _____

3. Please, assess your experience in environmental education on a scale of 0 to 5:

(0 – no experience at all, 5 – consider myself an expert) _____

4. What problems do you usually face while working with local communities? _____

5. Have you ever organized an ecological tour? If yes, what exactly did you do? _____

6. What methods do you use in your work with visitors at your visitor centre?

7. Does your PA have:

- *interactive visitor centre* Yes No
- *nature museum* Yes No
- *equipped ecological trails* Yes No
- *educational toolkits for schoolchildren* Yes No
- *educational toolkits for adults* Yes No

8. What's the difference between the visitor centre and the nature museum? _____

9. You are starting your usual working day. Please list 3–4 principal tasks that you are going to accomplish today:

2.2.2 Interviews

Benefits of using this tool:

- Many people prefer to express their ideas in oral form and won't do the same in a questionnaire;
- You can go deeper into details, turn the conversation where you want it to go and receive more information from body language and intonation;
- Respondents feel themselves more involved in the training needs assessment and feel that their contribution is useful;
- You select your respondents more carefully and choose only the best experts.

Disadvantages of using this tool:

- It is probably the most time-consuming method and if you are interviewing people face-to-face, it is also very expensive;
- You risk being overloaded with unnecessary details;
- The sample size can not be big enough to allow good representativeness;
- You will more likely talk to the most active respondents while the others will be out of your sample.

Box 5. Tips on how to do a good interview

- Structure the interview (this is useful for a few reasons including logical sequencing and consistency over a large number of respondents).
- Prepare thoroughly beforehand – knowing the content of your questions and their purpose will help you to stay on track even if a respondent deviates.
- Make a definite appointment – even for a telephone interview.
- Complete a rough draft of the interview – check back with a respondent to verify your interpretation.
- Be aware of your biases and mind-set – these may skew your interpretation.
- Think twice in selecting the respondents you need – they should be experts with various backgrounds: PA professionals, decision makers, representatives of local communities, universities, environmental NGOs etc. If you expect to hear opposite opinions from two respondents, interview them both.
- Appoint a staff member to transcribe the full texts of the interviews and to make an initial analysis for you. Ask him/her to present the results of the analysis in graphic form.

Sources: Hinrichs and Levison, 2000 and Centre "Zapovedniks".

2.2.3 Group discussions/focus groups

These typically involve meeting with respondents in groups of up to 10, who represent a specific work area (colleagues from different PAs or staff from different departments of one PA).

Benefits of using this tool:

- The idea of one participant can easily generate a dozen ideas from his colleagues;
- More time and cost-effective way of gathering information than face-to-face interviews;
- Respondents feel themselves involved in decision making about the training curricula.

Disadvantages of using this tool:

- The sample size is very small and the opinion of the focus group may not correspond to that of the whole target audience;
- The group can start arguing about different things from those that you need to focus on;
- Much more time is required to prepare and conduct focus groups compared to questionnaires.

Guidelines:

- You need a professional moderator to maximize on the value of the group discussion.

- Your training courses are a generally underestimated opportunity to get to know your audience better. Use training time to conduct discussions and brain-storming sessions on future training needs of your trainees. You can start a tradition of leaving a couple of hours at the end of each course for planning future seminars together. Besides giving you ideas and a needs assessment, your participants will likely become the main marketing tool for you as they will advertise your future initiatives when back at their PA.

- Plan the line-up of the group very carefully and try to make it as diverse as you can.

- Think beforehand on how you are going to interpret the results of a focus group: write down a plan of questions you wish to be discussed and try to keep close to it.

2.2.4 Scheme of a complex TNA

When you are launching a new training initiative, use the combination of questionnaires, interviews and focus groups to receive maximum information about the situation in the market and with your target audiences. Your life will be easier if you appoint a special staff member to coordinate all the surveys, analyze the information and present the generalized results.

Case study 1. Example of a complex TNA (GEF/UNEP SNTC project)

A complex set of TNAs have been conducted within the GEF/UNEP SNTC Project in four countries of Northern Eurasia (Russia, Ukraine, Belarus and Kazakhstan). The following issues were evaluated and reported on by each national coordinator: existing training opportunities in the State, non-governmental and commercial sectors currently available for PA staff; existing baseline for conducting training courses for PA staff in the country (available trainers and experts, their expertise and needs in terms of training-of-trainers; available methodological and information materials on various topics of PA management and preliminary publication plans for the new training centres; preliminary target groups and proposed training topics for the new TCs). The information for these reports was collected by project national coordinators in consultation with the authorities responsible for PA governance, experts from science, PA staff of different levels, managers of national and regional projects etc. Most of the organizations more or less involved in PA management at the national level were interviewed.

In each country where incentive workshops to launch the project were conducted, the training needs and opportunities for new TCs were discussed with the expert's community. The experiences of previous training courses conducted by various institutions and projects at the country and/or regional levels were also collected by national coordinators and their "pluses" and "minuses" analyzed. Outputs from these surveys included databases of potential trainers, methodological materials, a preliminary training plan and a publication plan.

The template for these TNAs can be found in Appendix 2.

2.2.5 Analysis of job descriptions

Benefits of using this tool:

- You do not need to disturb your respondents – you can carry out all the work yourself.
- The information is objective, precise and usually well structured.
- You receive the exact information on what PA managers are supposed to do and can easily compare it with what they are actually doing.
- Job descriptions are written by heads of PA or PA agencies. It is always useful to know the position of "bosses" and to tailor your training courses to the "officially recognized" needs. If you are acquainted with the required competences of PA staff, you'll be more effective in advertising your training product to governmental bodies.

Disadvantages of using this tool:

- Qualification standards and job descriptions for all categories of PA staff may not exist in a country.
- You always have to bear in mind that "formal" job requirements can be very different from the reality on the ground.
- You lack direct contact with your respondents.

Guidelines:

- Use this tool as a supplement to direct contacts with PA staff through questionnaires and interviews.
- If your country still has no detailed qualification standards for each category of PA staff, you have a unique opportunity to launch and lead the development of such standards. Prepare job descriptions in consultation with PA managers and tailor your courses to the needs identified during the

preparation process. You are sure to receive a lot of new and useful information while working on this initiative.

2.2.6 Self-assessment

This tool is very rarely used in TNAs for PAs, but this doesn't mean it cannot be an option. The procedure consists in asking your respondents to keep a diary of the individual's activity each day for a certain period of time. You can easily extract job-related training needs from these papers.

Benefits of using this tool:

- Respondents may find this method useful for thinking about the organization of their work and their time management. Thus, the tool is a TNA and a training activity at the same time.
- You receive objective information of what people really do and see the problem areas they may need to be trained in.
- It is probably the most cost-effective method.

Disadvantages of using this tool:

- It is very time-consuming for your respondents as the diary should be kept every day over a two-to-four-week period to be useful. It is hard to find a lot of PA staff willing to participate in the procedure.
- It is rather time-consuming to analyze the information gathered and, especially, to separate it from superfluous data.
- The method doesn't allow you to evaluate the respondents' performance in doing their jobs.

2.3 Some examples of TNAs

This section contains several case studies of TNAs conducted at international, national and regional levels. The authors used various methods to get their results.

Case study 2. WCLN's TNA methodology

The World Conservation Learning Network (WCLN) is an IUCN initiative lead by its Commission on Education and Communication (CEC). WCLN is a global partnership to build the capacity of professionals on-the-job to meet conservation and sustainable development goals. By partnering faculties, other institutions of higher education and training, networks of academics and NGOs, WCLN aims to develop and deliver "New Learning for Sustainable Solutions".

1. Assessing the demand for training

In order to explore the demand for learning opportunities, as a first step we reviewed the existing literature on needs assessment for protected areas. We then conducted 29 semi-structured in-depth telephone interviews among protected area practitioners around the world (questions below). Among the participants there were: 10 protected area managers, 12 protected area system planners, and seven protected area communicators. Respondents were evenly distributed around the world with a minor focus on Oceania. We interviewed professionals who could speak either English or French. During the interview, we aimed to identify the management problems that they face. We also aimed to investigate the key features which may motivate them to undertake training (terms, language, format, subjects, key topics and other issues, ideas, things to avoid, suggestions).

2. Assessing the supply of training

The supply of learning opportunities was initially explored through the in-depth telephone interviews described above. Through collaboration with UNDP, Conservation International and Ramsar, we identified other training suppliers. Personnel of training institutes, environmental NGOs and universities were interviewed. Finally, Google-research was also conducted.

As for the demand, the aim of the supply survey was exploratory and did not cover all the available supply. Since the research could not make a proper assessment on the training content, it was also not possible to assess the quality of those learning opportunities.

In-depth interview questions:

- What are the most important challenges in your work?
- What are the most important target groups or audiences you need to reach out to or communicate to?
- What are the most important difficulties in reaching out to these groups?
- Hearing about the proposition to develop an e-learning module for PA managers on communication and outreach, what are your first reactions and comments?
- What are the important (aspects and) conditions that would make e-learning opportunities a real success?
- What existing training are you aware of in the field of capacity development and communication? Can you list some if you know them?
- What courses should we address? What topics?
- What specifically would motivate you to use the module and make it possible to use? Do you see any obstacles for which it would not work?

Source: Lampariello, 2005.

Case study 3. Needs assessment survey of the Interagency Arthur Carhart National Wilderness Training Center

A survey was conducted in the winter of 1996 to identify wilderness/wilderness study area management issues, training needs, and educational outreach needs. A total of 1,704 surveys were sent to 893 offices of the four agencies that manage the National Wilderness Preservation System. Two surveys were mailed to each office, one to the manager (line officer) and one to the staff person most responsible for wilderness or wilderness study area management. Of the 893 offices surveyed, 575 (64 percent) responded. Of the 1,704 surveys sent, 840 (49 percent) were returned.

The method consisted in asking only one simple question to as much respondents as possible. The task was to identify one's top three wilderness issues. The responses were first categorized into broad general issues, then into specific issues. For most respondents, Recreation was the number one general issue, followed by Administration, Special Provisions and Illegal Activities.

Source: Myers, 1996.

Case study 4. National Parks Service, Victoria, Australia: Competency survey and determination of training priorities for routine training

The National Parks Service (NPS) Department of Natural Resources and Environment has developed a framework to deal with the routine training of all staff.

In the absence of a set of relevant national competency standards, a comprehensive set of in-house competency standards has been developed covering all aspects of work within the Service. The standards were developed from existing Departmental procedural documents which prescribed the standard of most work within the service. They also related to existing relevant national competency standards such as those from the tourism and hospitality industry, the public administration sector and the fire industry.

The competency standards were aligned with the Department's Performance and Remuneration Management (PaRM) system and with the Australian Standards Framework (see Figure 1).

All staff were surveyed against the standards – selecting those that applied to their job and career aspirations and then, in conjunction with colleagues and supervisor, comparing their current performance with that required by the standards (see Figure 2). The end result of the process was an individual training plan listing a range of developmental activities the person was required to take responsibility for plus a list of training needs requiring external facilitation (i.e., courses).

The results of the survey were entered on a spreadsheet and, in consultation with management, priorities for training determined for each park, local areas and the state.

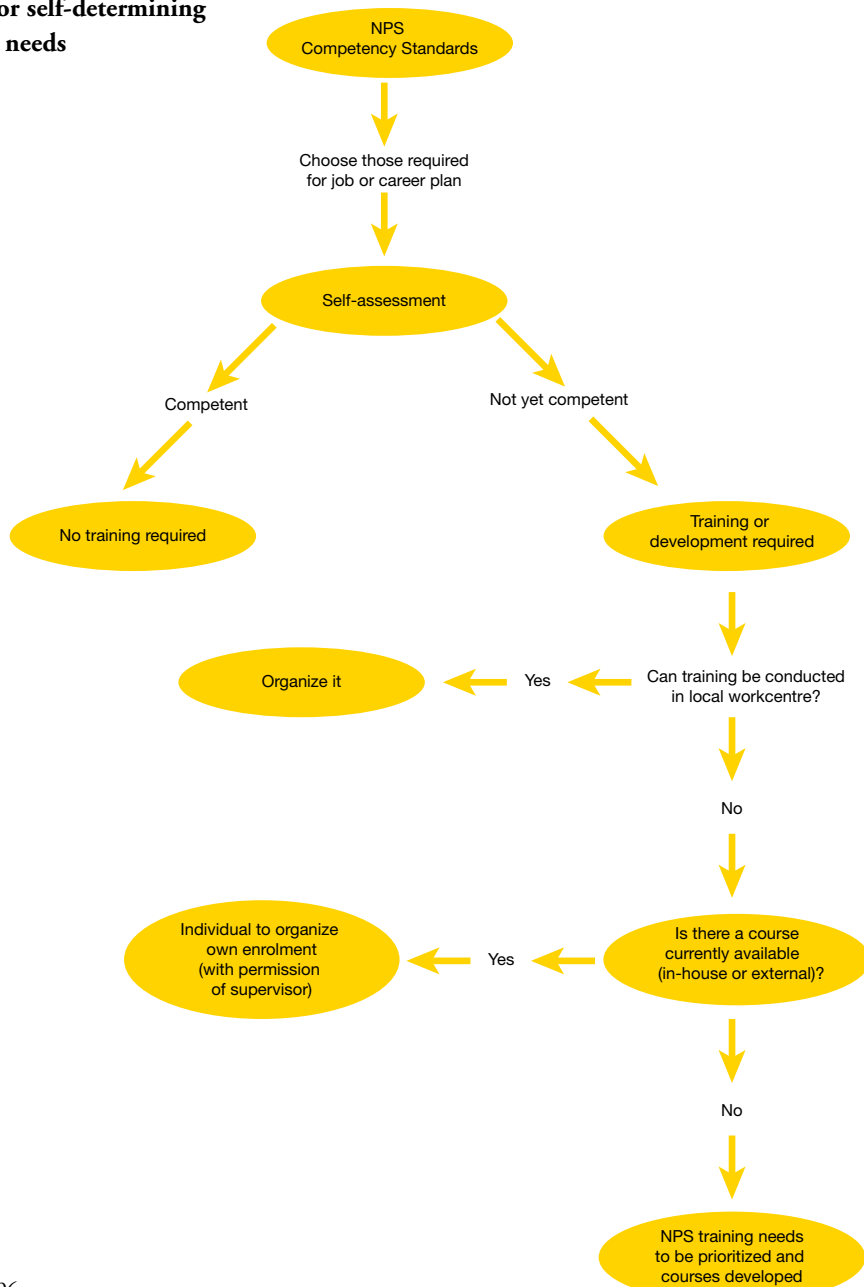
Figure 1. Units of competency

Select the personal skills, planning and business skills and NPS activities that apply to your current job or career plan.

Generic personal skills (apply to a range of activities)	Generic planning and business skills (apply to a range of activities)	NPS activities
1. Professional self-management	10. Planning	16. Natural heritage protection
2. Interpersonal communication	11. Project management	17. Historical and cultural site protection
3. Written communication skills/ reports	12. Budget management	18. Visitor facilities
4. Client service	13. Works programme management	19. Tourism and promotions
5. Human resources administration	14. Business management	20. Education and interpretative programmes
6. Supervision of staff and monitoring of contractors	15. Research and monitoring	21. Pest plant and animal control
7. Training and presentations		22. Distribution site rehabilitation
8. Use of field equipment		23. Fire suppression
9. Use of office equipment		24. Prescribed fire management
		25. Roding
		26. Enforcement
		27. Emergency incident response (non-fire)

Case study 4. National Parks Service, Victoria, Australia (cont.)

Figure 2. Model for self-determining training needs



Source: Dobbin *et al.*, 1996.

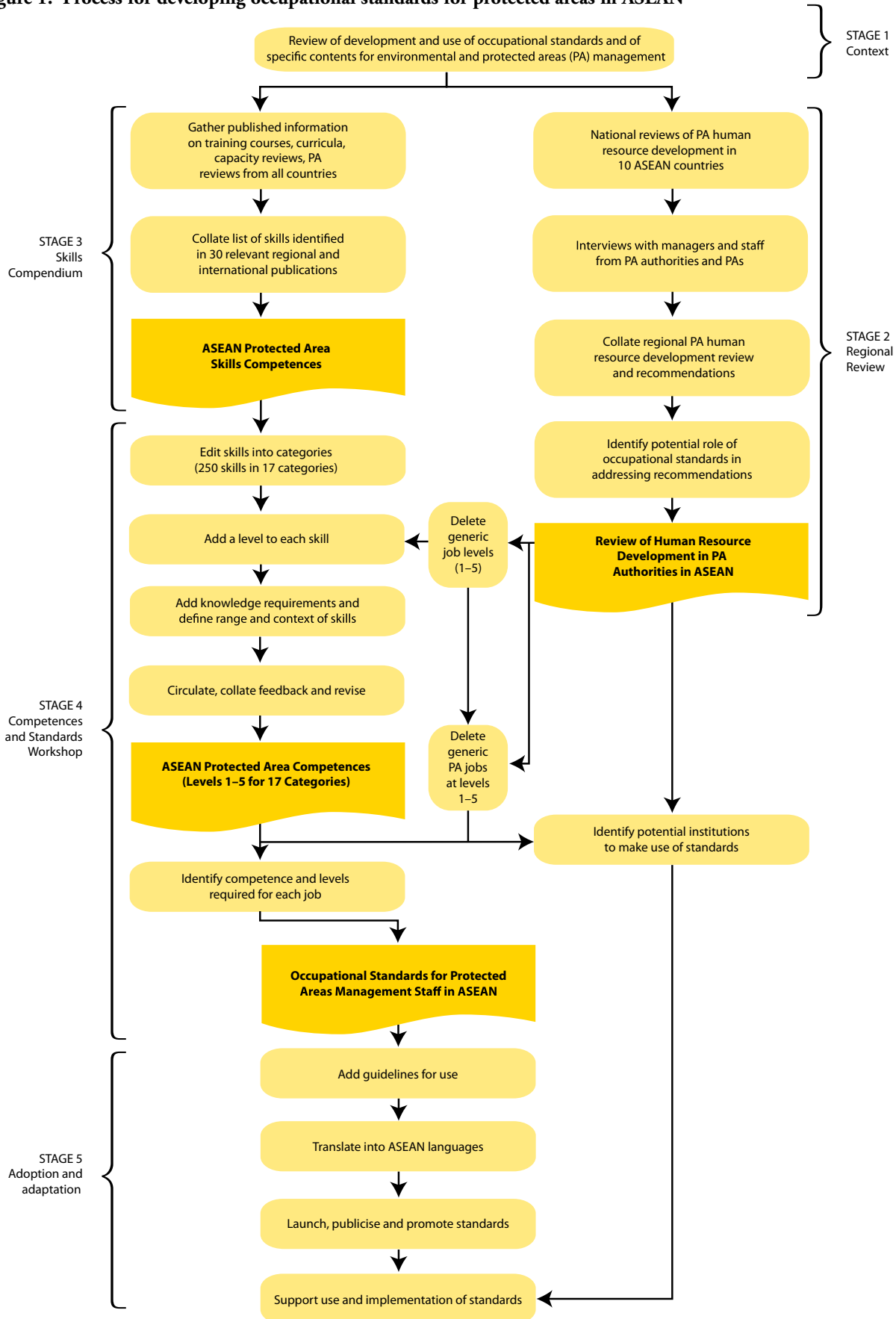
Case study 5. Standards of competence for PA jobs in South East Asia

Between 1999 and 2002, the ASEAN Regional Center for Biodiversity Conservation (ARCBC) supported a set of national training needs assessments for biodiversity conservation in SE Asian Countries, with a view to developing a regional conservation curriculum. Instead of trying to “push” the countries towards improved capacity by imposing a universal curriculum, ARCBC decided instead to attempt to “pull” them by developing agreed standards of competence, initially for protected areas jobs, that everyone would be encouraged to achieve, but in their own way. Developing such standards was seen as a means to highlight the need for improved training and development in the workplace and to bridge the gap between education, training and day-to-day work. Such occupational standards are widely used in other sectors and, if developed as a non-prescriptive tool, could be used in a wide variety of ways by employers, organizations, trainers and trainees and could be readily adapted to local cultural, political and environmental conditions (see Figure 1 below).

Development of such standards and the following self-assessment of PA staff is an interesting alternative to traditional TNA studies via interviews and questionnaires.

Case study 5. Standards of competence for PA jobs in South East Asia (cont.)

Figure 1. Process for developing occupational standards for protected areas in ASEAN



Source: Appleton et al., 2003.

2.4 International protected area training needs: Results from assessments

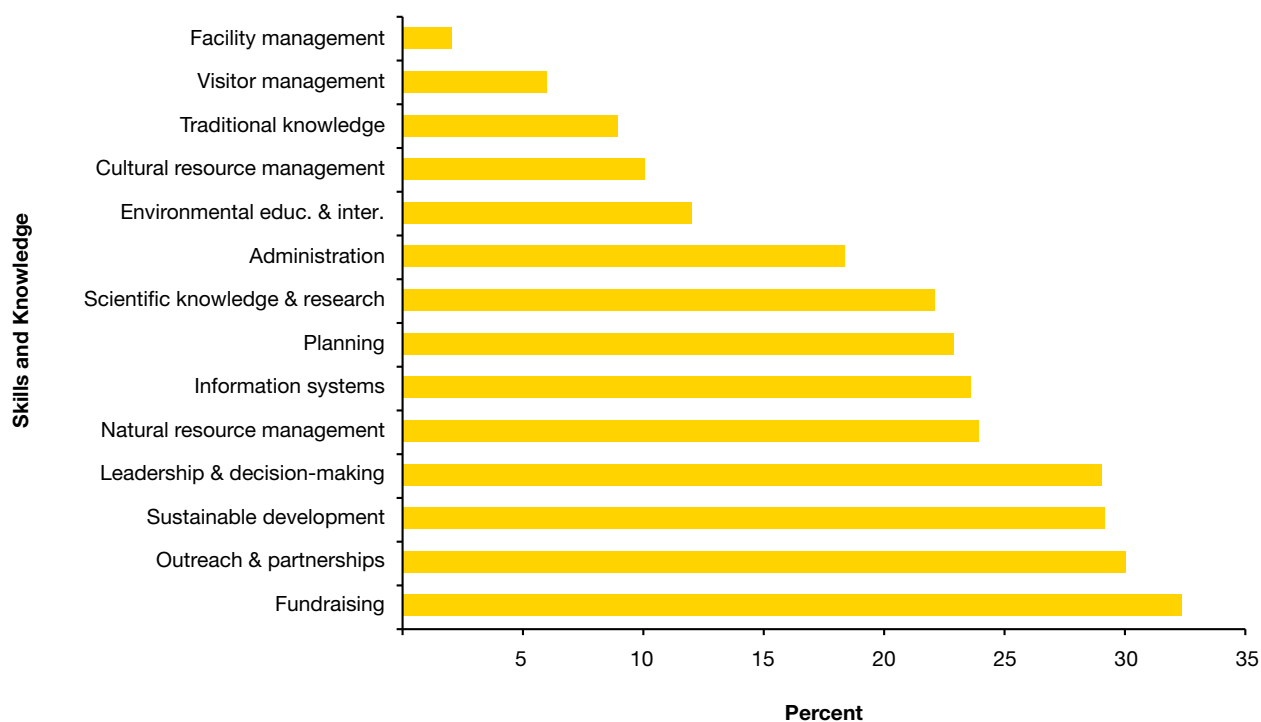
2.4.1 Some findings from an international PA staff survey

The results of a TNA for PA managers differ significantly between regions, continents and even between two

neighbouring PAs. However, it is always useful to compare your own conclusions with an international context. A useful basis for these comparisons is the findings of the 2003 IUCN World Parks Congress Delegate Survey conducted in Durban (South Africa) which covered a range of issues including PA training needs. The questionnaires were distributed to 2,056 respondents and 564 surveys were returned (27.4 percent return rate). Box 6 presents the main conclusions.

Box 6. International protected area training needs: Some findings from the 2003 World Parks Congress Delegate Survey

Table 1. Desired training topics



Box 6. International protected area training needs (cont.)**Table 2. Desired training topics by position (%)**

	Number	Elected official	Executive management	Middle management	Field staff	Scientific support
Topic		22	202	127	27	89
Administration		9.1	24.8	13.4	14.8	15.7
Cultural resource management		18.2	7.9	5.5	33.3	5.6
Environmental education		22.7	10.9	11	18.5	12.4
Facility management		0	2	2.4	0	1.1
Fundraising		13.6	40.6	29.9	18.5	25.8
Information systems		18.2	19.3	25.2	25.9	24.7
Leadership and decision making		22.7	31.7	37	22.2	20.2
Natural resource management		45.5	20.8	23.6	33.3	20.2
Outreach and partnerships		13.6	27.2	34.7	33.3	33.7
Planning		31.8	19.8	31.5	18.5	16.9
Scientific knowledge and research		22.7	14.4	19.7	22.2	40.5
Sustainable development		40.9	31.7	29.9	37	25.8
Traditional knowledge		4.6	5.9	10.2	11.1	13.5
Visitor management		0	5.9	7.9	11.1	6.7

Table 3. Training delivery effectiveness score (on a scale of 1 to 4, with 4 being the most effective) for different training delivery methods

Training delivery method	Effectiveness score
On-the-job training	3.3
Local on-site short courses	3.2
International training courses	3.1
Job exchanges	3.1
Advanced degree programmes	2.8
Nationally-based training courses	2.7
Local university training courses	2.5
Web-based training	2.3
Distance education, written materials	2.3
Video, CD, satellite training	2.2

Source: Hockings *et al.*, 2005.

2.4.2 What shall we teach PA people today?

It is very difficult to name the “main” training themes needed by a modern PA manager as they vary between different regions, countries, types of PA etc. Here we enumerate only the major training packages we consider a necessary part of the inventory of a PA TC nowadays. The list below is the result of analyzing numerous training curricula of international, national and regional-level seminars for PA managers, resolutions of international conferences, TNAs, professional discussions in PA training communities and other relevant documents.

1. PA management

- a) Strategic planning and operational management of a PA
- b) HR and motivation for a PA
- c) Social marketing
- d) Conflict management
- e) Private sector and the PA
- f) PA and governmental structures – ways of interaction
- g) Cooperation with NGO sector
- h) PA and local communities
- i) Work with cultural and religious leaders
- j) Participatory management
- k) PA management in the face of global changes

Courses for PA senior management are always vital. Today, just as was the case ten years ago, many PA heads have a biological or geographical background, but often lack managerial skills. We therefore need to educate PA directors prior to other staff members to ensure that an incompetent chief won't “reduce to zero” all the results of training his specialists.

The content of this training package has been evolving over the last five years. Strategic planning, management practices and administration have recently disappeared from the top 5 topics in the agendas with PA people having become more or less familiar with them. Conversely, all topics connected with relations management, either inside or outside the PA (conflict resolution, negotiations, interaction between a PA and different stakeholders, staff policy) have become of the highest importance. According to the Durban Accord and IUCN statements, a PA should play an important role in enhancing the livelihoods of people, providing “benefits beyond boundaries” to surrounding communities. In fact, PAs are still an arena of numerous conflicts of interests over the use of nature. PA people need to improve their communications skills and become good psychologists to manage their external environment. The special term “co-management” (or participatory management) has been introduced to describe the relations a PA should have with local communities. PA staff all over the world are changing their attitudes towards integrating the local population into decision-making process. All these new trends are among the most popular elements in modern training courses.

Adaptive management is another very popular topic. The world is changing much more quickly today. PA staff urgently need special skills and attitudes to “stay in line” with their changing environment.

2. Institutional setting and management plans

- a) Management planning and business planning
- b) Institutional setting/arrangements
- c) Financial management
- d) Legal aspects of PA system management
- e) Monitoring and evaluation of PA management effectiveness

Management planning has been a globally recognized conservation tool for a long time. But it is still new for a great number of countries and types of PA – and, thus, still relevant. New courses are constantly being developed to teach PA people how to deal with financial and business plans: one of the latest examples is the “Business planning for PAs” online course, a joint initiative of Washington State University, The Nature Conservancy and UNEP. Modern PAs exist in a world of business and have to compete for funding sources and increase the efficiency of their operations. They have to demonstrate benefits from environmental services to all potential customers and involve stakeholders in collaborative management. International designations (such as UNESCO Biosphere Reserve status) as well as more and more national laws require that PAs elaborate management plans. Donors and local residents want to see PA financial reports and business plans to start negotiations. PA staff need the competences and knowledge to “speak a common language” with all stakeholders.

Evaluation of PA management effectiveness is a priority issue in international debates over the last decade.² According to Hockings *et al.*, “evaluation of effectiveness is now recognised as being a critical step in successful management by a growing number of protected area agencies and their government departments”. The CBD and UNESCO's World Heritage Centre have both placed a priority on evaluation and are setting concrete targets for member States. Donor agencies, including the World Bank and the GEF, are requiring that any protected areas they help to support must conduct assessments as a regular feature of the project cycle. The results of evaluations are widely used for adaptive management, in communication with donors and stakeholders and as a good public awareness tool. Evaluation techniques and tools are becoming more and more popular training topics over the last few years.

3. Conservation finance mechanisms for protected areas

- a) Environmental funds
- b) Payment for bio-rights
- c) Fees and royalties

² See Hockings *et al.*, 2006.

- d) Valuing ecosystem goods and services
- e) Payment for environmental services (PES)
- f) Kyoto Protocol Clean Development Mechanism (CDM) and Joint Implementation (JI) projects (carbon offset)
- g) Fiscal instruments
- h) Fundraising for PAs
- i) Others

According to the PoWPA of the CBD, sustainable financing for PAs and PA systems is the number one priority of the current decade. Searching for the innovative financial mechanisms to raise the sustainability of PAs is now the principal activity at the international as well as at national levels. Sustainable financing has become one of the strategic priorities for GEF biodiversity projects. The Conservation Finance Alliance³ and other resources have been created specially to explore this topic and provide resources for PA staff. Trust funds are being established in various countries to attract resources for PA systems – operation of these funds requires special knowledge. The need for economic evaluation of the environmental services provided by protected areas is widely recognized. It is now evident that only a clear demonstration of these services to current and potential users will help a PA to gain the support of stakeholders and raise funds. Various PES schemes are being developed and some of them prove very effective. All these new mechanisms and trends, however, are still unknown to a majority of PA people – a gap that training courses should focus on covering.

4. Environmental education and public awareness

- a) How to organize a public awareness campaign
- b) How to organize environmental education campaigns in schools
- c) How to prepare good awareness-raising material
- d) How best to market a PA
- e) How to work with mass media
- f) Visitor centres and nature museums
- g) Work with visitors at eco-trails
- h) Groups of Friends of PA and how to organize their work
- i) Volunteering for a PA

Public awareness work has remained among the top training priorities for the last two decades. But the methods of work are changing – and so are the training curricula. The ways of involving children and teachers are now more or less evident to environmental educators. Much more problematic is raising the awareness of the adult population, including business and authorities. Innovative approaches to interaction with these groups (such as informal meetings with business, philanthropy, lotteries, sustainable livelihood programs with local authorities, volunteering etc.) have been developed in recent years and are being explored by PA people at training courses. New skills are required to plan

an interactive exposition for a visitor centre and to initiate and officially register a PA Friends' Club as an NGO. Marketing and PR for PA are important training topics as well.

5. Eco-tourism development

- a) Basic principles of the organization of a tourist industry, types of tourists
- b) Specificity of ecological tourism
- c) Visitor planning and management
- d) Limits of acceptable change: different approaches to calculation
- e) Legal framework of eco-tourism development in a PA
- f) How to develop a tour
- g) How to create and certificate ecological paths in a PA
- h) Tourism infrastructure development
- i) Monitoring of the impact of recreational activity on a PA
- j) Marketing and development of the ecotourism product
- k) Interaction between a PA and tourist companies
- l) Others

Sustainable tourism and PAs have been closely related ever since the first PA was created. But, as with the previously mentioned topics, the demand for concrete training products is evolving. Calculation of limits of acceptable change (LAC) is an especially important issue nowadays. During the last decade the negative impact of recreation on ecosystems has become a major problem for PA staff. Sound visitor management, monitoring of impact and adaptive measures to make tourism at a PA sustainable are all required. PA staff in most countries have already become familiar with attracting visitors, creating tour products, and sales. However, planning ecotourism development according to the LACs still remains an issue.

The other very popular topic is planning and construction of ecological trails and visitor centres and their application in environmental education. Marketing PA tour products and cooperating with tourist companies are also in great demand today.

6. Alternative livelihood programmes, relations with indigenous populations and community conservation areas

- a) Evaluating PA impact on regional socio-economic development
- b) Alternative livelihood programmes at a PA: methodology, best practices
- c) Integrating local communities into ecotourism development at a PA
- d) Developing micro-credit funds and PA-based micro-credit programmes for local communities
- e) Restoring traditional cultural and ethnographical tourism

³ See www.conservationfinance.org

- f) Creation of Public Councils and other co-management structures
- g) Indigenous and community conserved areas
- h) Others

According to the Durban Accord and other international documents, good relations with local communities are crucial to effective conservation at a PA. The easiest way to make local people positive towards a PA is to enable them to gain economic benefits from the PA's existence. Sustainable livelihood programmes have become an indispensable element of almost all PA-related projects sponsored by GEF, the EU's TACIS Programme and other donors. PA people lack the specialized knowledge and experience of implementing these complex programmes and are constantly asked to be trained in such.

7. Ecological monitoring and research

- a) Innovative methods of data accumulation and processing (GIS etc.)
- b) Ecological monitoring and data interpretation
- c) Complex research at a PA and interaction with scientific organizations
- d) Application of scientific data in PA management practice

New equipment, software and data interpretation techniques are being created and should be therefore used in PA science. But staff still often lack the knowledge to operate this equipment. In many countries, universities and scientific organizations do not co-operate much with PAs which, therefore, lack the professional knowledge to carry out research. The problem of practical application of scientific data for PA management is very real in the Northern Eurasia region where PA scientists' attitudes frequently need to be changed.

8. Training for rangers

- a) Legislation and law enforcement
- b) Prevention and documentation of law violations (protocols etc.)
- c) Work with poachers
- d) Fire prevention and bio-technical activities
- e) Environmental interpretation in the work of rangers
- f) Evaluating the effectiveness of the PA ranger service
- g) Others

Training courses for rangers are necessary at all time. Legislation is the subject of constant change in all States and regions of the world. Evaluating the effectiveness of ranger services is still a challenge as there is no universal method available. A very useful element of any ranger training course is interactive role playing of difficult situations from their everyday work: conflicts between

rangers and local people, fighting with poachers etc. Training-of-trainers is also highly recommended in this field: it is always easier to create a local team of trainers from experienced rangers who can then teach the newcomers.

9. PA accounting and finance

- a) Accounting systems
- b) Financial reporting to international and national donors
- c) Documentation of the commercial activities of a PA
- d) Fiscal policy as it applies to PAs
- e) Financial management and economics
- f) Others

This category of PA staff is very rarely involved in training activities at present. The most that PA directors usually do in terms of training in this area is to send their accountants and financial managers to specialized professional courses for accountants, sometimes very useful, but not at all linked to PA activities. However, it is important to organize seminars for PA accountants, to discuss specific problems of PA finance and legislation, case studies and best practices. Reporting to donors is a special issue for all PA financial staff, especially in the developing countries where PAs get most of their funding from international donors.

10. Cultural heritage management

- a) Cooperation with cultural institutions in studying, inventory and conservation of cultural heritage
- b) Inventory and conservation of museum holdings
- c) Organization of exhibitions
- d) Public awareness of the cultural value of PAs
- e) Management of sites with special international status (UNESCO WH Sites, European Diploma etc.)
- f) Co-management of areas of traditional nature use with local communities. Community conservation areas and traditional land-use zones within and outside PA.
- g) Sacred sites and religious values within PAs

The interrelationship between cultural and natural heritage conservation has been recognized at the international level.⁴ PAs are very often places where cultural and traditional land-use values are found – for many years these values were ignored by PA specialists. This caused numerous conflicts with indigenous communities. Collaborative management of cultural values and sacred sites with local populations is very important in creating positive attitudes towards PAs. These are new topics for most PA people and training packages should be developed to fill this gap.

Several examples of training programmes for PA managers can be found in Appendix 3.

⁴ Wild and McLeod, 2008.

3. Protected area training centres around the world: International review of training opportunities for PA staff

It is difficult to say exactly how many training centres and initiatives are available to PA managers today: it depends on the criteria used for analysis and is changing day by day. It was not the aim of this publication to provide a comprehensive overview of training centres around the world. We cannot even assume that we are aware of the main or the most important initiatives currently available. A list of training opportunities for PAs of different regions that we reviewed in this study can be found in Appendix 4. Their experience is presented through case studies below in this and in the following chapters. We would like to stress, however, that this

is only a preliminary survey. It is envisaged that more good practices will be collected after this first step and that the guidelines will then be modified as appropriate.

3.1 Types of provider

Modern PA managers possess numerous opportunities to improve their qualifications, including at *independent training centres*, State or private, non-profit or commercial courses.

Case study 6. Centre “Zapovedniks” – a Russian PA Training Centre

The environmental education centre “Zapovedniks” is a Russian national network of non-governmental organizations. The EcoCentre was founded in 1996 in the framework of a WWF Project on “Public Awareness of Russian Protected Areas and Environmental Education”. Its mission is to raise public awareness and support for Russian protected areas.

The Centre’s resources include:

- staff with an in-depth knowledge of nature and protected areas;
- forty regional branches based in protected areas and adjacent lands all over Russia;
- more than 350 experts in biodiversity conservation and PA management;
- close cooperation with the Russian federal network of *zapovedniks* (strict nature reserves) and National Parks, and many regional and local PAs;
- thirteen years experience of successful implementation of international projects;
- collaboration with the Russian Government and business sector;
- more than 60 methodological toolkits and publications;
- a database of Russian PAs;
- a strong relationship with and support of international organizations.

Today, Centre “Zapovedniks” has several functions:

- PA training centre;
- Coordinating the all-Russian Movement of Friends of PAs;
- International volunteer centre;
- Providing methodological support and infrastructure planning services for environmental education and cognitive tourism in PAs;
- Facilitating multi-stakeholder dialogues between PAs, business and NGOs;
- Information centre for PA management.

Case study 6. Centre “Zapovedniks” – a Russian PA Training Centre (cont.)

The PA TC has been an essential part of Centre “Zapovedniks” since the very beginning of the organization. Over 13 years, the TC has trained more than 5,000 PA managers from Russia and other Northern Eurasia countries, developed about 30 training modules and toolkits and implemented about 10 international capacity-building projects. It has also established three new national and one regional PA TCs in Russia, Ukraine, Belarus and Kazakhstan.

The Russian PA TC works in cooperation with the national PA Agency (Ministry of Natural Resources and Ecology) in carrying out TNAs, selecting trainees, evaluating seminar results and other aspects. But it was never part of the State authority and never relied completely on its funds (although the Centre has received several grants and implemented a number of projects for the Ministry). It has always been independent legally and financially. The years of work have shown that this is a benefit – the Centre can afford to be flexible and provided support to PAs when the Ministry was undergoing a difficult transition period and couldn't run the PA system adequately.

The years have also shown that independence from State PA authorities makes it much more difficult for the training institution to maintain its long-term financial sustainability. Centre “Zapovedniks” staff members are constantly in search of new sources of funds for organizing seminars and developing new training products. The main funding sources over the last 12 years have been: WWF, GEF/UNEP, UNDP, the EU TACIS programme, grants from private foundations (McArthur, Mott Foundation etc.), donations from the private sector, State funding, and fees for workshops and study tours etc. Fundraising has never been easy, but the need to attract new funding sources has stimulated innovation (new products, new target groups, new content of the existing products) as the Centre has had to be “the best” to be selected by its donors and clients. It has also forced the staff to be as cost-effective as possible.

Our survey shows that more than half of the TCs in the world are structures (department/service/programme etc.) within national (regional) PA agencies with a varying degree of independence.

Case study 7. US National Park Service training centres

The US National Park Service (NPS) has a special Division of Learning and Development Programs (DLDP) with a mission “to work with agency leaders to predict and develop strategies/approaches that contribute to a workforce capable of accomplishing NPS strategic goals”. The mission is being realized via 12 training centres located in various PAs around the country, specializing in different types of courses and training topics. Although some centres only serve the career development needs of the NPS, most are inter-agency centres and build the capacity of all PA-related employees of the US Department of the Interior.

The DLDP has a comprehensive strategy and 12 TCs operate as a single network to achieve the six strategic goals:

1. *Develop and deliver a comprehensive training program to address the identified essential competencies – knowledge, skills, abilities – for each career field.*

Sixteen career fields have been identified for all NPS employees and the aim of the DLDP is to define the essential competencies necessary for each identified career field, conduct workforce analyses to determine numbers and grades of employees and turnover rates in each occupational group, conduct TNA to determine the specific developmental needs for each position, develop a comprehensive training programme, core curricula and methods of delivery.

2. *Develop and sustain career development programmes for all employees beyond and apart from essential competencies training.*

This includes identification of cross-training needs caused by reorganization activities, development of a training programme and an environment that will encourage mentoring as a developmental approach, support and promotion of existing advanced degree and certificate programmes, offering re-orientation to all employees within the next two years, development of criteria to define the appropriate balance between organizational needs and professional growth etc.

Case study 7. US National Park Service training centres (cont.)

3. *Develop and distribute a comprehensive listing of training and development opportunities that includes the best possible match between the competencies to be developed and the facilities, locations, methods, technologies, and strategies for delivery.*

This means, mainly, to evaluate and implement appropriate techniques and methods (formal classes, details, on-the-job training, and correspondence and computer-based courses) through which each competency can be developed.

4. *Expand training and developmental opportunities with governmental and private sector partners to facilitate an exchange of information and strategies.*

5. *Establish a process for validating training courses and developmental programs to assure that they result in the organizational and individual benefits for which they were developed. Review and refine process as needed.*

6. *Develop a funding program for training and development that achieves these goals and implements the action items.*

All TCs are funded from the NPS budget but all struggle to fundraise also from outside sources. To achieve this, they offer training and development products to other agencies and organizations on a fee-for-services basis.

Source: National Park Service, 2001.

Case study 8. International Academy for Nature Conservation, Germany

The International Academy for Nature Conservation (INA) on the Isle of Vilm is part of a branch office of the German Federal Agency for Nature Conservation (BfN).

It provides a forum for the discussion and solution of national and international nature conservation issues. It is a place for debate among conservation experts and communication between the German Federal Government and the Länder (states). This makes it a centre for dialogue between representatives of many different fields, including: science and public administration, politicians and industry, associations and foundations.

The Academy serves the needs of BfN and its subordinates such as the German PAs, regional environmental authorities etc. At the same time, it provides training courses for a global conservation community – through several series of thematic workshops, conferences etc. Such international activity is very important for BfN's global image.

The INA is mainly funded by the BfN, but attracts additional funds from seminar and conference organizers (e.g., Conservation Finance Alliance, CBD Secretariat etc.). It offers superb facilities for closed meetings, workshops, seminars and scientific conferences, as well as for excursions and studies in the region. It can be used as a conference centre by any institution wishing to hold events on any topics related to conservation or the environment.

Source: BfN website: www.bfn.de/06_akademie_natursch+M52087573ab0.html

In Europe and North America, most TCs have been established by the State and continue to rely on its funding for all or 90 percent of their operations. It is usually the responsibility of the Ministry of Environment (Nature Conservation) or forest authorities, but can be that of agricultural, heritage conservation and other official bodies. In developing countries, international (donor) funds (GEF, WWF, Conservation International and other grants) have more often been used to create the TCs. Once

established, the centres are sometimes transferred to national PA Agencies, but more often become NGOs with a diversified funding strategy.

However, even if a TC is registered as an NGO, in most cases it is closely connected with the official PA authorities who are the main consumer of the training product and, most often, its main fundraiser.

Case study 9. New PA training centre in Kazakhstan

A new PA training centre was created in Kazakhstan within the framework of the GEF/UNEP SNTC project. Over three years, the centre held training courses under the umbrella of the State Committee of Forestry and Hunting (SCFH, Ministry of Agriculture of Kazakhstan Republic). The staff were employed by the project and the TC itself didn't have any legal status – all financial operations were carried out via SCFH.

When the project came to an end, the team started to think about the future sustainability of the new institution. An expert was hired to make an analysis and select the legal form best suited for the needs of the TC. The variant finally chosen was to create an NGO called Environmental Education Centre “Tabigat Elemi” which became formally independent with its own budget, team, office etc.

At the same time, close cooperation with the “parent” State PA authority (SCFH) has been preserved and is regarded as a guarantee of the sustainability of the Centre in the future. SCFH is the TC's main funder as it covers 50–100 percent of the seminar costs. It helps the Centre staff in their communications with PAs and regional environmental authorities: course invitations and marketing for the new seminars are done using “official” communication channels. SCFH staff often work for the Centre as consultants on training needs assessments, tutors, and authors of publications. SCFH has some training facilities 150 km from Astana (the capital of Kazakhstan where most of the national-level trainings are held) and discussions are now underway on the possibility of the Centre using them in their work.

It is very important that such cooperation with State structures is of mutual benefit. In its turn, the Centre helps SCFH to improve its understanding of PA managers, organizing special round tables and mixed focus groups (with PA and SCFH staff) to discuss current issues. The Centre's experts provide consulting services for SCFH in modifying PA-related legislation and policy etc. This is done using the “collective opinion” of PA staff expressed during the seminars, which is important for making decisions better tailored to the needs of practitioners in the field. The Centre also provides training and related consulting for the other GEF and non-GEF projects implemented in Kazakhstan that are all administered by SCFH.

Such close cooperation is very natural as the mission of the PA TC is usually “to improve PA management effectiveness through building capacity of national (regional) PA staff” or something very similar. Being formally, or at least informally, part of a national PA Agency, makes life in the TC much easier: from a “political” point of view (all training programmes are in line with official PA job descriptions and can be adapted quickly to satisfy the changing needs of the PA authority) as well as a financial one. TCs in developing and “economies in transition” countries face more challenges being independent NGOs or private companies – but gain more flexibility and usually have a more diversified product line to achieve long-term sustainability.

The second big group of training opportunities for PA staff is *training & consultancy centres within universities*. We are not speaking here about the numerous academic courses covering PA-related issues that are offered worldwide by biological, geographical, environmental, forestry and other university faculties – they are beyond the scope of these guidelines. But many universities also provide courses for PA practitioners – these vary from M.Sc. and Ph.D. to short (a few days) training courses, fellowship opportunities and consultancy on concrete questions of PA management. The differences from traditional academic programmes include interdisciplinary curricula, the significant role of field exercises and study trips combined with a minimum of time spent in the classroom.

Case study 10. London University Centre for European Protected Area Research

The London University Centre for European Protected Area Research (CEPAR) was established in 1998 to integrate a range of research, consultancy and training activities in protected area policy and management. A central interest of CEPAR is to assess and promote the role of PAs in the delivery of sustainability in the UK and elsewhere in Europe. CEPAR has strong links with UK statutory conservation organizations (such as Natural England) and with the voluntary sector (including the National Trust, the Wildlife Trust Partnership, and the RSPB), with international and European bodies (such as IUCN and EUROPARC), and with national agencies, particularly in south-east and central Europe.

CEPAR is the home of a programme of professional training for PA and other countryside staff. A part-time Graduate Diploma in Ecology and Conservation (integrated with a B.Sc. in Biodiversity and Conservation) is taught in the evenings, mainly to students living in London. The postgraduate Diploma in Countryside Management and an M.Sc. in Management (Protected Area Management) is also part-time (over two years) and is taught via occasional weekend meetings in London and week-long residential courses elsewhere in the UK.

CEPAR has a very small number of permanent academics who are all employed by the university but also draws on a wide multi-disciplinary range of associate staff whose skills and expertise have been harnessed in a variety of research, consultancy and training activities.

Learning points:

- “Badging” the activities of research and teaching staff can enhance the profile of protected area management and make it easier to win contracts and to attract funding.
- This need cost nothing – all that is needed is cooperation between individuals with similar interests.
- Research and degree teaching are closely linked to professional training modules.
- International cooperation and good links with national agencies and NGOs is vital.

For more information see: www.bbk.ac.uk/ceresearch/cepar/

Source: Richard Clarke, CEPAR, University of London, Birkbeck.

This case is an example of very efficient organization of a TC that is not supported by a national PA Agency. It is not exactly a “centre” in the direct meaning of the word, more like a research group of several trainers/experts working on an *ad hoc* basis to provide training courses or to implement PA projects. Such a “centre” usually has no staff (but someone has to be responsible for external communications, PR, marketing and contacts with clients – so better to have one full-time manager-secretary for this work), no

permanent office and training facilities (usually those of the “parent” university are used or training is conducted at the client’s workplace).

A very efficient phenomenon increasingly seen in PA training is a consortium of several universities, often international, united to provide PA training. Such consortia are very popular in the USA and in Latin America to serve the needs of Latin American PAs.

Case study 11. Organization for Tropical Studies

The Organization for Tropical Studies (OTS) is a not-for-profit consortium of more than 60 universities, colleges and research institutions from the United States, Costa Rica, Peru, Mexico, South Africa and Australia. Founded in 1963, OTS develops and carries out graduate and undergraduate programmes in the tropics in Spanish, Portuguese and English. It also operates three first-class research field stations based in different ecosystems in Costa Rica where thousands of international researchers and students have conducted long-term research projects. In addition, OTS provides training for policy makers and natural resource managers in the US and Latin America. OTS works closely with its host governments in promoting environmental education and biological conservation activities.

For more information, see: www.ots.ac.cr

Several TCs of this type specialize in just one course (or seminar) repeated annually.

Case study 12. International Seminar on PA Management (ISPAM)

Designed for mid-career planners and managers of nationally significant protected areas worldwide, this integrated state-of-the-art course examines strategies to conserve the world's most special places. The programme (sponsored by the USDA Forest Service International Programs, the Consortium for International Protected Area Management, and the Universities of Montana, Idaho and Colorado State) evaluates policies and institutional arrangements that sustain both people and natural resources.

Through site visits and in-depth case study critiques, participants learn of assessment and planning tools, techniques to address visitor interests and impacts, and mechanisms to reconcile resource protection with development pressures.

Programme activities take advantage of the rich experiences and multiple cultural perspectives of the participants, as well as the unique heritage and resources available in the Northern Rocky Mountain region. To experience the opportunities available in the region, the seminar participants travel to several types of PA. During these visits, participants have opportunities to interact with respected experts in the management of national parks, wildlife refuges, privately held land conservancies, and multiple-use forest and grassland reserves.

Seminar themes comprise: Integrated Planning for Protected Areas, Community Involvement, Tourism, Concessions and Visitor Management, and Transboundary Management in the Face of Climate Change.

According to trainees' evaluation, ISPAM participants benefit most from the multi-national environment and each others' presentations which give a diverse picture of PA activities worldwide and inspire them with new ideas to meet challenges.

For more information see: www.protectedareas.net/seminar/ispam.htm

Such centres can only sustain themselves if their course is recognized at the global level. All new initiatives face serious challenges to attract their first group of trainees, especially if participants have to pay a fee. Significant investment is required at the initial stage (at least, the first two to three groups) to gain a reputation – only after this can such “one-product” centres survive.

The third source of training opportunities is *initiatives, programmes and ad hoc seminars of international organizations*. All the principal international foundations and instruments of PA-related conventions provide some sort of capacity building for PA staff. The main providers include the Wildlife Conservation Society, World Heritage and Ramsar Conventions, Conservation International, BirdLife International, The Nature Conservancy, WWF and others.

Case study 13. Some training initiatives provided by international NGOs

1) *The Wildlife Conservation Society (WCS), Training & Capacity Building Program (TCBP)*

The aim of the programme is mostly to promote, support and coordinate the extensive capacity-building work being carried out across other WCS field programmes and projects (with a focus on internal organizational training needs). But the TCBP also runs several grant-based programmes where PA people from the whole world can participate. Those include: the Research Fellowship Program (designed to support individual field research projects for fledgling scientists), the Graduate Scholarship Program (assist the conservation leaders of tomorrow in undertaking graduate studies), NGO Institutional Development Program (provides institutional development support to partner NGOs in Africa, Asia and Latin America through an annual grant-making programme funded by Robert W. Wilson).

For more information see: www.wcs.org

2) *Fauna & Flora International (FFI)*

FFI runs vocational training courses for national personnel, provides learning materials, and supports individuals to take part in workshops and conferences. They also occasionally sponsor outstanding conservationists to obtain higher qualifications.

For more information see: www.fauna-flora.org

3) *BirdLife International*

Four module, one-year course, in finance, business and human resource management. Regional training programmes increase the technical skills of partners and the sustainability of local communities. Active in Africa, Asia and the Americas.

For more information see: www.birdlife.net

4) *The Nature Conservancy (TNC)*

TNC provides training opportunities to partners around the world, including biodiversity protection programmes and materials, and a bi-annual training week for staff and partners in Washington, DC.

For more information see: nature.org

5) *World Heritage Centre of the World Heritage Convention*

Conducts environmental education workshops for teachers, local communities, NGOs and managers of WH Sites. No direct focus on PA staff training, but some seminars could be useful for them.

For more information see: whc.unesco.org

6) *Regional Training Centres of the Ramsar Convention*

Provide training courses for local communities and decision makers with no special focus on PAs, but sometimes hold workshops for PA staff and other wetlands managers.

For more information see: www.creho.org

The main training priority of these organizations is to build the capacity of their own staff and of local beneficiaries of their grants. However, many training possibilities are

available, from time to time, to PA staff, especially from developing countries – often with full or partial reimbursement of participants' expenditures.

Case study 14. Conservation Leadership Programme (CLP)

CLP is a collaborative effort between British Petroleum (BP), Wildlife Conservation Society, BirdLife International, Fauna & Flora International, and Conservation International to develop the potential of future biodiversity conservation leaders. This is achieved by providing a range of awards, training, advice and sustained support via an active international network of practitioners.

The programme has the following key objectives:

- Identify, engage, encourage and enthuse the conservation leaders of the future, and promote their professional development;
- Provide and share appropriate skills and knowledge;
- Create and develop productive linkages and networks;
- Ensure the effective and practical application of conservation science, in particular its translation into changed public attitudes and behaviour.

The Programme now focuses on a set of 20 countries that have significant business interest for BP. These are currently:

- Africa: Algeria, Angola, Libya, Egypt
- Asia: China, India, Indonesia, Malaysia, Pakistan
- Eurasia: Azerbaijan, Georgia, Turkey, Russia
- Latin America & Caribbean: Argentina, Bolivia, Brazil, Colombia, Mexico, Trinidad & Tobago, Venezuela.

The Programme offers a number of grant opportunities, comprising Future Conservationist Awards, Conservation Follow-up Awards and Conservation Leadership Awards.

As part of the award, one member from each team is selected to represent their project at a training course and the Society for Conservation Biology international meeting. The introductory course is aimed at developing innovative project management, education, facilitation and communication skills. By linking with the annual Society for Conservation Biology Meeting, the programme links participants to a strong, professional network, facilitating future international collaboration.

For more information see: www.conservationleadershipprogramme.org/

3.2 Types of qualifications

PA managers can choose between training options, according to the qualification they wish to obtain. Universities and “university TCs” usually provide *undergraduate, graduate and post-graduate courses* which last for 1–2 years and lead to the equivalent academic degree.

Case study 15. London University M.Sc. in Protected Area Management

London University's M.Sc. in PA Management is a highly interdisciplinary programme, built around two "core" modules. Each of these is based on occasional weekend (Friday and Saturday) meetings in London plus a one-week residential school, usually held at Easter, alternating between an upland and a lowland PA:

- The Countryside Resource – the ecological and historical background to the countryside, including key habitats and landscapes, and strategies for their management.
- People and Policy – the social and political framework of countryside management, focusing predominantly on the users of the countryside, and the social and legislative framework within which it is managed.

In addition to the core modules, students take a number of optional "specialist" modules, each of which is delivered as a one-week full-time course, often in collaboration with PA administrations or training organizations, and which may be held anywhere in the UK or Europe. The list of modules available includes:

- Area Studies
- Coastal Zone Management
- Earth Heritage Conservation
- Ecological Survey and Monitoring
- Environmental Communication
- Environmental Ethics, Values and Decisions
- European Environmental Policymaking and Organization
- Interpretive Planning and Interpretive Technique
- Landscape Character Assessment
- Interpretation and Preservation of Archaeological Sites and Monuments
- Protected Area Management Planning
- Sustainable Tourism

Teaching is through lectures, seminars, group and practical work and a good deal of independent study (each module is accompanied by a written study guide and other material) supported by personal tutorials. Assessment is through coursework and written examinations and in addition, every Masters student has to write a dissertation based on an independent research project (completion of the taught course and examinations leads to the award of a postgraduate Diploma).

The structure of the programme means that the M.Sc. can be taken by students who live anywhere in the UK (or Europe) within weekend-commuting distance of London. The specialist modules can also be taken independently as stand-alone professional training.

Conformity with the Bologna Accord* and ECTS (European Credit Transfer System) means that these modules (each rated at 15 CATS points) can also form part of other award programmes, both within the university and with other providers, in Britain or elsewhere in Europe.

* A process which aims to harmonize 40 different European higher education systems by creating a single system of degrees (Bachelor and Master qualifications) within an agreed framework and with a consistent credit and grading system.

Source: Richard Clarke, CEPAR, University of London, Birkbeck.

Many TCs, especially those in Africa, provide *qualification courses* for managers wishing to become PA professionals – these are non-academic qualifications, but are usually recognized

officially and allow a trainee to move up a level in his/her career development.

Case study 16. Southern African Wildlife College

The Southern African Wildlife College (SAWC) has been training natural resource managers from conservation organizations across the Southern African Development Community (SADC) for the past ten years. Established by WWF South Africa, the College is a non-profit organization and now the training wing of the Peace Parks Foundation. SAWC is strategically poised to focus primarily on training staff within Transfrontier Conservation Areas.

The establishment of the SAWC was due to the ever-increasing need to have an institution dedicated to the training of protected area managers within the SADC region. The aim of the SAWC was to meet SADC training needs within the sphere of natural resource management, and from its inception, the SAWC offered full-time qualification course programmes (certificates and diplomas).

These courses are held on campus and target PA and natural resource managers from southern Africa who are already in the service of conservation and environmental agencies. The course structure emphasizes practical, hands-on skills, rather than using a strictly academic or theoretical approach.

The Certificate course is aimed at individuals who have been identified as having the necessary skills to develop into junior managers within their reserves. A learner who has achieved this qualification will be able to integrate supervisory knowledge and skills within the operational specifics of a conservation area. Modules covered in this qualification include: Tourism Management, Philosophy and Ethics of Conservation, Legislative Guidelines and Implications for Law Enforcers, Personnel Management, Basic Ecology, Vegetation Management and Monitoring, Animal Management, Integrated Catchment Management, Infrastructure Management, Management of Cultural Heritage Resources, Introduction to Protected Area Management Plans, Introduction to Community Development & Conservation, Environmental Education, and Ensuring Ecosystem Integrity.

The Diploma course is aimed at mid-level PA managers. Modules covered in this qualification include: Research Skills, Human Resource Management, Protected Area Management, Freshwater Ecology, Environmental Development Plans, Landscape Management, Introduction to Applied Resource Economics, Project Management, Community Development and Conservation, Environmental Education, Tourism Management, and Natural Resource Protection – Strategic Operations.

Source: Sowry, 2008.

The courses may last from six months to one year of full-time studies. The curriculum is usually linked to the national qualification framework and, even in non-governmental centres, graduates receive officially recognized certificates/diplomas. Course completion, thus, is regarded as a passport to the next rung on the career ladder. On the positive side, it is very good for motivating trainees. But this positive aspect can turn into a negative if these qualifications are regarded too formally.

Finally, *short courses* (from one day to one month) are the most popular form of PA staff training today. In most TCs, trainees graduate with informal certificates issued by the TC itself and not related to official educational levels. It is a good idea to have these papers signed by the State PA Agency or some other

respected professional organization. Even if it is not formal, this can raise the status of your alumni in their senior managers' and colleagues' eyes as well as in their own.

3.3 Origin of participants

When establishing a TC, one may choose to work at different levels – from international to local. *International* groups of trainees are usually accepted for the courses run by global conservation NGOs and at a few globally recognized seminars, like ISPAM (see Case study 12) and the Spanish courses offered by the Center for Protected Area Management of Colorado State University.

Case study 17. Center for Protected Area Management & Training

Overview

The Center for Protected Area Management & Training (CPAM) is housed within Colorado State University's Warner College of Natural Resources (WCNR). The WCNR is one of the oldest and largest colleges in the US. CSU is one of the highest ranking of the nation's 52 forestry schools in the instructional, research and extension fields. The Center was formed in 1999 to assist PA professionals in strengthening the management of the world's protected areas and adjacent lands. The majority of the work is carried out on-the-ground in the USA and in Latin America. The areas of expertise include the development of capacity-building programmes in protected area management, protected area planning, visitor management, infrastructure and trail development, interpretive guide training, ecotourism, the development of funding strategies for conservation, land-use planning, private lands conservation, and project evaluation.

Programmes

CPAM carries out an annual five-week training course on PA management in Colorado in collaboration with the International Programs Office of the US Forest Service. The course, taught in Spanish, focuses on the development of technical skills, leadership skills, and networks of support for protected area management. Approximately 70 percent of the course is conducted in the field. It provides practical examples of the management of a wide variety of PAs and an ample range of exercises to provide participants with the practical concepts, methods and techniques required to improve management of the PA. CPAM has helped to develop and deliver a similar course in Mexico.

For more information see: conservation.warnercnr.colostate.edu/

Source: Ryan Finchum, Center for Protected Area Management & Training, WCNR, CSU.

The curriculum of these initiatives is usually based on their multi-national background: exchange of good practices and lessons learnt between trainees is the core of the seminar. Participation of trainees from one country is usually limited to two persons, but the tutors come, mainly, from the State that is hosting the seminar. The most difficult thing is to make the training content relevant for specialists with very different work perspectives – that is why trainees'

presentations and group discussions often constitute the core learning methods. The best thing with such initiatives is the chance to speak to colleagues from other corners of the world – it often gives a completely different perception of a PA system.

Many TCs are choosing to focus on serving the needs of a particular *macro-region*.

Case study 18. International Academy for Nature Conservation seminar programme

The International Academy for Nature Conservation (Isle of Vilm, Germany) hosts an annually updated programme of around 80 national and international seminars. A significant number of them are designed for participants from CEE and CIS countries. They generally focus either on political issues (e.g., implementation of the CBD Programme of Work on Protected Areas) or on innovative approaches to PA management (e.g., a series of seminars on Conservation Finance). Among the strengths of these workshops, participants mention the mixed group of various stakeholders (PA Agency and PA staff, other environmental authorities, representatives of NGOs etc.) from the neighbouring States of Eastern Europe and the former USSR. "In our country the Isle of Vilm is already very famous as a place where we meet all our neighbour-colleagues. We hardly find another place like this. It's a bit strange that we have to go to Germany to meet people from Ukraine or Moldova, but it's really great the Germans do this work for our regional conservation" says one participant from Russia. PA managers of the CIS countries often use Vilm seminars to "improve relations" with their national decision makers as it is easier to do it in the cooperative environment of a workshop than during formal meetings at home.

Source: Interview with Russian seminar participant.

From a curriculum point of view, their task is easier as neighbouring countries often have very similar PA systems and are facing the same problems.

Case study 19. PA staff training in post-Soviet countries

After the dissolution of the USSR, the Newly Independent States inherited similar PA systems based on *zapovedniks* (Strict Nature Reserve, IUCN category Ia) and a principle of total human exclusion from the core areas. PA staff from these countries, used to communicating a lot in Soviet times, suddenly lost all connections and possibilities to exchange experience. Some States, especially the Baltic countries (Lithuania, Latvia and Estonia) completely “turned away” from their former compatriots towards their European (EU) neighbours.

After 10 years, this lack of communication became critical as contacts between the PAs of post-Soviet countries were maintained only through WCPA/IUCN channels. The work of Centre “Zapovedniks” attracted the interest of colleagues in neighbouring States and finally the national PA authorities of the CIS asked the Centre to train some of their staff at seminars in Moscow. A number of training courses have been held for a mixed group of participants from Kazakhstan, Kyrgyzstan, Georgia, Uzbekistan and others. Among the most useful elements of these seminars, all participants especially mentioned the chance to speak to their colleagues from other NIS States. “We have so similar PA systems, legislation, categories, functions and challenges as if we’re still living in a single country”, said one of them. “But during the last decade we’ve all tried various approaches in order to survive. It’s a benefit we now have access to our colleagues’ experiences as nobody from the whole world could help us more than these people we see here. It’s really a unique chance for all of us”.

Since then, the Centre has trained more than 400 PA managers from neighbouring States. This is made easier by the fact that all the people in these countries still speak Russian – the official seminar language. The Centre has also created new national PA TCs in Ukraine, Belarus and Kazakhstan which have formed a network, exchanging training materials and modules. Other States are also sending requests for training, including Baltic countries whose PA systems are still closer to those of the CIS than to their EU neighbours.

For more information see: www.wildnet.ru

National seminars conducted by the national-level TC are the most common, especially for a State-owned TC serving the needs of a national PA Agency. It is certainly beneficial for a national PA system to have its own training institution that can teach in the national language, according to national qualification frameworks and job standards. The courses are usually linked to the national hierarchy of PA jobs – managers of the same level have to go through training to move forward in their careers.

Finally, a great variety of training opportunities exists at *regional* and *local* levels. The demand for regional TCs is especially high in

large countries where it is not cost-effective to make trainees travel across the whole State to attend a course. It is important that these TCs function as a single network: either as branches of the national TC or as independent structures. The networking approach can be different with two principal variants of “division of labour”: “geographical division” (all TCs conduct similar training courses and share common training methods, each acting in their own region of the country) and “content division” (all TCs serve PA staff from the whole country but specialize in particular seminar topics and fields of work). A network of the first type is now being created in Russia (Case study 20 gives an example of the first regional TC already established in Kamchatka).

Case study 20. Kamchatka Wildlife Training Centre, Russia

The idea of establishing a Regional PA TC in Kamchatka has been discussed over the last 10 years at a local as well as at a national level. Kamchatka is very rich in PAs (strict nature reserves, nature parks and nature reserves) but so remote from the capital of the country that it is almost impossible to send PA staff to courses in Moscow.

During the first phase of the GEF/UNDP project “Kamchatka Biodiversity Conservation” in 2004, the need to create a regional TC for PA managers of Kamchatka was formulated as an objective for the second phase. In 2007, the strategy for the new TC was formulated with consultancy support from Centre “Zapovedniks”. First local tutors were trained at ToT courses in Moscow and on international study visits. The Centre at Kamchatka has already held more than a dozen large seminars and about 20 smaller events: some of them with help from outside consultants, the others run by its own tutors.

Besides training courses for all PA staff categories, the new Centre will target specialists from the Kamchatka environmental authorities, teachers, students, tourist companies and individual nature guides, staff of the GEF/UNDP project itself and local environmental NGOs. It already has several training modules and toolkits developed specially for its use by outside consultants. Now the team is working to create more training products.

Kamchatka TC interacts with Centre “Zapovedniks” on a regular basis, widely using their materials and tutors. It is envisaged that the two TCs will function as a network and continue to share best practices.

An example from the US National Park Service illustrates well the second concept: the country has 12 TCs offering various seminar series at a national level. A more detailed description of TC networking mechanisms can be found in Chapter 5 of these Guidelines.

3.4 Target groups and training curricula

Although all the training institutions discussed so far deal with PA staff, many of them work with various other stakeholder groups or, alternatively, focus only on a specific category of PA managers. In general, the following audiences are targeted by PA TCs:

- Senior PA officials, including superintendents;
- Middle and low-level PA staff;
- PA policy makers, including staff of PA agencies;
- Environmental authorities;
- Other decision makers;
- Staff of environmental NGOs;
- Teachers and schoolchildren;
- Young conservationists;

- Undergraduates;
- Graduate and postgraduate students;
- Conservation scientists;
- Local community members and others.

The list can be expanded to include ecotourism companies (cooperative ecotourism development within and outside PAs), business (environmental education, volunteering for PAs, development of cooperative alliances with PAs and environmental NGOs etc.) and a few other groups of stakeholders.

Most of the State TCs offer not only courses for PA staff, but also for environmental authorities working in PA agencies, and in forest, natural resource, wildlife and cultural site management etc. It increases efficiency when capacity building for all these groups is being governed by a single institution. A good idea is to organize seminars or discussions for mixed groups of participants from various hierarchical levels to brainstorm on actual problems and improve understanding between different conservation-related organizations.

For regional and local TCs it is almost a must to include workshops and environmental education programmes for community members, NGOs, teachers and local business. CATIE in Costa Rica functions at a macro-regional level, but is a good example of the diverse programme structure a TC can offer.

Case study 21. CATIE, Costa Rica

The *Centro Agronómico Tropical de Investigación y Enseñanza* (CATIE) is an international institution focusing on research and graduate education in the agricultural sciences and natural resources, and on environmental aspects related to both. Its mission is to benefit humanity through the application of knowledge, experiences and technologies in order to stimulate development, conservation and the sustainable use of natural resources in the American tropics.

Today's CATIE was formally created in 1973, originally associated with the Inter-American Institute for Cooperation on Agriculture (IICA, headquartered in San Jose), but now an autonomous regional institution. CATIE's regional coverage and hemispheric influence allow it to synthesize, adapt and make available a wide range of methodologies, results and experiences to numerous countries, all products of research and testing. The Centre promotes development through training events, technical assistance and by taking advantage of its work carried out in the environmental and social spheres.

CATIE offers graduate and short courses for PA managers within its "Forests and Biodiversity" focus area. Besides this, it provides educational opportunities on Agroecology, Tropical Forestry and Tropical Agriculture, Global Change, Integrated Watershed Management, Eco-enterprises, Environmental Socio-economics etc. at various levels. This list, which is by no means comprehensive, illustrates well how widely a training product can be diversified: but it is very important not to lose one's specialization and not to forget about the principal target audience.

For more information see: www.catie.ac.cr

Many national-level TCs also choose to develop environmental education programmes – often in the form of training-of-trainers. Working with teachers and youth, including PA volunteers, is still one of the most popular areas of work. But

more and more TCs are launching programmes for business aligned with corporate social (and environmental) responsibility programmes and corporate team-building exercises. This is a relatively new and unusual target group for PA TCs.

Case study 22. Meetings "at the Green Hall", Centre "Zapovedniks"

The idea of meetings "at the Green Hall" arose three years ago during one of the Centre's seminars. The discussion topic was "how to make business understand PA values and support PA projects?" A participant from Pleshevo ozero National Park described how their business friends were members of a special Club and met regularly in a comfortable dining room to communicate informally with the park staff and receive feedback on the outcomes of park projects they had helped to fund. Later, such meetings began to be described as "at the Green Hall" as opposed to the official negotiations and thematic conferences which used to be the only places where PA staff came into contact with business people before.

The Centre decided to test the idea with its sponsors and friends from the private sector in Moscow. About 15 people were invited to an informal cocktail party for 2–3 hours one Friday evening. Very brief presentations were made on the three best projects that had just been implemented thanks to the financial support of the guests present. They were then given the opportunity to speak briefly about their successful initiatives. These sponsors and friends from business received small presents and certificates declaring them to be "the Warden of a PA", "the most environmentally responsible company of the season" etc. Representatives from a couple of PAs were also invited to the party and were given a few minutes between cocktails to present some mini-projects they wished to be supported by the private sector and to explain the benefits that a potential donor could gain. All these presentations took no longer than half an hour and were followed by informal conversation and a slide show with nature photos from PAs.

The effect of the meeting was surprisingly significant. New donors and partners came forward to support some of the Centre's projects and PA staff launched some projects in cooperation with the companies present. Participants at the first meeting asked if it could be repeated and over the last three years, four more such meetings have been held – all of them with positive outcomes. Moreover, many PAs in different regions of Russia have repeated the idea and conducted similar informal events with representatives of their local businesses and authorities. Many projects have received support (financial, informational, partnership etc.) due to these events. This form of interaction with business seems much more effective than traditional training courses and environmental education campaigns and it is now an integral part of the Centre's work.

For more information see: www.wildnet.ru

Some TCs provide even more diversified training products, including elementary courses on conservation for almost everybody. An example is the Wildlife Institute of India

which offers training courses for zoos and veterinary institutions, law enforcement agencies, central services and even for the armed forces.

Case study 23. Wildlife Institute of India

The mission of the Wildlife Institute of India is to:

- Train managers and biologists in PA management and wildlife research;
- Train education and extension specialists in land-use management;
- Provide orientation courses for those involved in land-use management;
- Conduct and coordinate applied wildlife research and evolve relevant techniques suited to Indian conditions;
- Create a database for building up a wildlife information system employing modern computerized analytical techniques; and
- Provide advisory and consultancy services to central and State governments, universities, research institutions and other official and non-official agencies.

The Institute offers postgraduate and certificate courses as well as short training courses in different aspects of wildlife management. Short courses and workshops of one to three weeks duration are available and workshops are also conducted on specific themes and techniques in various subject areas. These allow participation by people from a wide range of target groups such as from zoos and veterinary institutions, central services, law enforcement agencies and the armed forces, NGOs and others, which are otherwise not covered by the institute's regular courses. Some such courses and workshops conducted regularly are:

Interpretation and Conservation Education

This 10-day course is open to participants from protected areas, zoos, armed forces, NGOs, wildlife tour agencies and nature camp organizers, and formal and non-formal educators. It enables participants to learn various approaches and methods of presenting ideas and information for public consumption, and equips them with the necessary technical skills for effective communication.

Endangered Species and Zoo Management

There are two courses – one for zoo directors/managers, institutional heads, senior veterinarians and curators, and the other for middle-level managers and technical staff. The courses address the essential components of modern zoo management and introduce participants to the techniques and measures needed to improve standards.

Environment and Nature Conservation for Army Forces

Orientation to nature conservation and the role of the Army.

Control of the Illegal Wildlife Trade in India

The participants of this course include officers from customs, police, revenue intelligence services, CBI, wildlife and forestry departments, the legal profession, coastguards, border security forces, other paramilitary forces, and NGOs. The course discusses the law and issues related to wildlife trade and poaching, anti-poaching measures in India and the contribution of different agencies in controlling illegal trade in wildlife.

For more information see: www.wii.gov.in/

Specialization on a particular target group can be a different but also very efficient strategy to position a training institution on a global arena.

Case study 24. Peace park training for transfrontier PAs, SAWC, South Africa

The SAWC's courses were all designed with input from conservation organizations across the Southern African Development Community (SADC) and remain relevant to training needs identified across the region. The establishment of the Peace Parks Foundation (PPF) and the realization of transfrontier conservation areas (TFCAs) developing across the SADC region, led to the SAWC becoming a training institution primarily focused on training the staff of these TFCAs. The SAWC is now dedicated to the empowerment, improvement and capacity building of the conservation sector throughout SADC, specifically to those communities associated with TFCAs. Training curricula have evolved to include new issues arising from the 'transnational' character of these new PAs.

The Peace Parks Foundation is now the main fundraiser for the SAWC. Organizations that fund the development and park planning of TFCAs need to budget for training and capacity building from the initial planning phase of a project. A training plan and budget must be developed and must incorporate community involvement and possible new venture creation in areas adjacent to the protected areas. The Peace Parks Foundation and the SAWC are working together on projects to ensure this happens and is not overlooked.

Source: Sowry, 2008.

The curricula and learning approaches of the TC also vary significantly in different geographic regions and types of PA systems. African TCs focus on ranger and law enforcement courses, training for safari guides, and ecotourism development and community involvement programmes. European TCs deal more with environmental interpretation, interaction with different stakeholders and landowners, Natura 2000 etc. But behind these very general trends, there are significant differences caused by a complex range of reasons: many of them are discussed further in subsequent chapters of this book.

3.5 Sources of funding

The question of funding is, for sure, the most challenging, both for a newly created training institution as well as for an established one. For the majority of TCs, the State is the principal (or sole) funding source. The funding may come from the federal PA Agency (as with the TC in Kazakhstan, the International Academy for Nature Conservation (Germany), the *Atelier technique des espaces naturels* (France), US National Parks Service, Parks Canada etc.) or from regional environmental authorities (e.g., the Alfred Toepfer Academy for Nature Conservation, Germany). In the best-case scenario, the PA agency has a special budget line for capacity building and the funding is available on a regular basis, depending on the training needs at any one time. Other variants include financing individual seminars or where a TC receives State grants on a project-by-project basis. In the last two cases the TC usually has other funding sources, but, anyway, the State-guaranteed budget is an important factor to achieve sustainability in a long-term perspective. Almost all of the well known TCs with an international reputation benefit from State funding: most of them are located in the developed countries of Europe and North America.

The situation is much more difficult for PA TCs in developing and transition States where the whole PA management budget is rather limited: unfortunately, capacity building is the type of activity that is first to be cut when money has to be saved.

International foundations and projects often become principal donors for such TCs. These include SAWC, created and for many years sponsored by WWF-South Africa that is still its main donor together with the Peace Parks Foundation; the Ukraine PA TC, established within a GEF/UNEP project and now financed, mainly, from the GEF/UNDP project; the Kamchatka Wildlife TC in Russia, created and financed from the GEF/UNDP 'Biodiversity conservation at Kamchatka region' project etc.

Almost all TCs (even those with adequate State funding) use fees to cover, at least partially, their operational costs. For a newly established training institution, benefiting from project or State support for at least 2–3 years, it is a good idea to give bursaries for study at the very beginning, while testing out their programmes and trying to build up their reputations. However, the experience of many TCs shows that only a few of them (e.g., Losehill Hall, UK) can survive in the long term using participants' fees as the only funding source. PAs in most countries today have deficits and not many are prepared or able to pay adequate fees to make a TC sustainable. Seminar fees, thus, are indispensable, but not enough for a TC to survive.

Other sources of funding (private donations, charity, training courses and team-building activities for non-PA-related stakeholders etc.) can also be used, but mostly as additional, not primary incomes.

3.6 Forms of education

Besides the traditional seminars, many training institutions are now offering various *distance-learning opportunities*: interactive web-based training, correspondence courses using videotape or CD-ROM and printed materials, audio-conferencing, and interactive television (ITV) delivered via satellite broadcast etc. Some TCs provide preparatory material and exercises to be carried out at home at an individual pace, then a live-TV course where students can pose questions. Most of the distance learning is offered by non-academic institutions.

Case study 25. Some distance-learning opportunities for PA staff

The National Parks Service offers a myriad of courses; among them they have an e-learning centre (www.nps.gov/training/tel/). The interactive training allows students immediate access to their instructor. The US Fish & Wildlife Service (www.distance-learning.fws.gov) provides a variety of distance-learning courses on environmental education and communication, from conflict management to negotiation.

The International Agricultural Centre (IAC) at Wageningen University offers courses in conflict management, co-management concepts, participation, monitoring and evaluation, stakeholder analysis, public participation and conflict management, adult education and social learning. IAC supports learning activities with web-based tools (communities, networks, learning platforms).

The WWF College for Conservation Leadership (www.wwfcollege.org) offers a wide range of on-line distance-learning courses in fields such as advocacy and lobbying, economics and the environment, effective communication: communication for leadership, human resources management, integrated river basin management, leadership skills, marketing, negotiation and conflict resolution, personal effectiveness.

The United Nations University (UNU) has created the Global Virtual University (GVU) which is a consortium of universities that work together to enhance learning for environmental sustainability. The partners currently are Agder University College (Norway), Kwame Nkrumah University of Science and Technology (Ghana), Makerere University (Uganda), and the University of Pretoria (South Africa). The pedagogy requires active and regular participation among the students and provides incentives for online discussions and joint assignments. Students meet their classmates in virtual classrooms, in some cases supported by a face-to-face session at the beginning of the course. The level of commitment is about 15 hours per week per course. GVU offers a master's degree programme in environmental and developmental studies called Global Environment and Development Studies (GEDS), which currently includes two areas of specialization: Development Management and Environmental Information Management.

Interpretation Canada offers two basic modules in interpretation (www.interpcan.ca/training.html).

EcoPortal.net offers an eight-month distance-learning programme in "Ecología Humana y Gestión Ambiental" in collaboration with Universidad Bolivariana of Chile and "Gestión Sostenible del Turismo" with Universidad para la Cooperación Internacional of Costa Rica.

Source: Lampariello, 2005.

A large number of environmental fora and networks have appeared on the internet: from the PALNet project (www.parksnet.org) to a lot of thematic, regional and even local networks. E-mail lists (WCPA members list, Youth for PA Yahoo Group etc.) are also very popular. All these

are, certainly, not training opportunities in the traditional meaning of the phrase, but they help PA professionals to communicate with each other at almost no cost (except for traffic), to share best practice materials, and to consult colleagues and experts.

Case study 26. Protected Areas Learning Network (PALNet)

Protected area practitioners have several pressing needs if they are to do a better job. They need:

- a global perspective to give their local actions context;
- early warning of emerging challenges and rapid access to tried and tested solutions;
- to understand emerging trends and potential impacts on their protected areas;
- practical and immediate advice on which to base action;
- innovative approaches to problems;
- to be able to share experience and learn from others; and
- to argue their case effectively in political and socio-economic circles.

PALNet, the Protected Areas Learning Network, is designed precisely to meet this need.

PALNet is a web-based interactive service, backed by IUCN and WCPA scientists and practitioners, and partner individuals and organizations, which aims to help protected area managers to access and generate new knowledge and raise their professional capacity by sharing and exchanging field-based experience and rapidly developing science. It contains databases of trainers and training centres, PA-related projects and professional organizations working in the field, and materials and case studies on different topics of PA management. It is envisaged that the server will also offer online courses to PA staff, and include significant Resources and Lessons Learnt sections with downloadable good practice materials – these links already exist, but the content is still being created. The PALNet Forum can also be used as a place to share opinions and create networks.

For more information see: www.parksnet.org/

Case study 27. Environmental forum

Wageningen University has launched The Nature Valuation and Financing Network (topshare.wur.nl/naturevaluation), to stimulate the development of practical tools for the proper valuation of the goods and services provided by ecosystems and biodiversity, so that decisions about economic development are made with a full understanding of all the costs and benefits involved. The site offers the opportunity to both download and upload information (publications, case studies, meetings, etc.) on the following topics: valuation methods and guidelines, finance mechanisms, application of valuation in decision making, water, valuation and financing. It also provides access to key organizations and databases and to discussion groups where you can share your experience of ecological, economic and cultural valuation and application of this knowledge in decision making regarding conservation and sustainable use of nature and natural resources.

The network's objectives reflect one need observed in the demand articulation; that is, measuring and proving the economic benefits of protected areas. The web page is also nicely developed. Unfortunately, the content is still scanty and the few available documents seem not so easy to read. Despite the declared objectives, the forum seems empty, no discussion threads.

Source: Lampariello, 2005.

The serious weakness of many distance-learning opportunities, especially with fora and e-networking, is the very limited number of active users: many initiatives also do not stay active for very long. The problems, from our point of view, include inadequate investment in advertising and content update, undeveloped funding schemes, lack of time and the fact that PA managers are

unaccustomed to interacting in a virtual environment. The benefits for users are not clearly defined in many such initiatives – this is a complex issue. But the situation is slowly changing with more and more PA professionals starting to use web services more actively and more traditional TCs launching web-based courses in parallel with their “live” training.

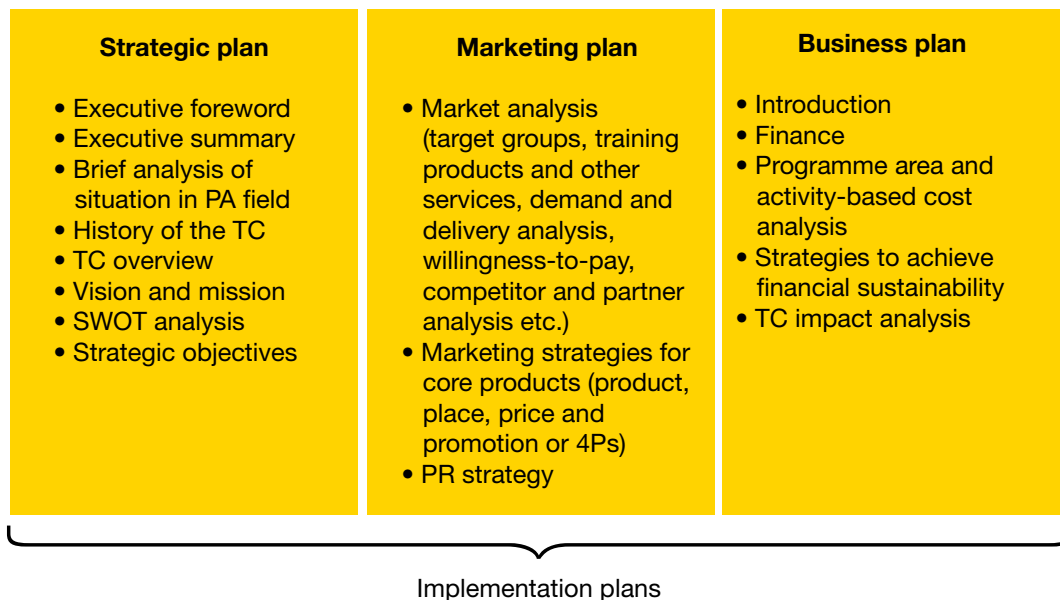
4. Strategic and business planning for training centres

Strategic and, especially, business planning is not as popular among PA TCs today as it should be. Key principles, obvious to all profit-making enterprises, are still being neglected by many non-profit PA-related institutions. From 32 PA training initiatives analyzed, only about 10 had strategic and business plans formulated, and only five of them were available to the public on their websites. Such statistics pushed us to discuss this issue in more detail in this chapter.

Several types of plans can be issued by PA TCs. First, you need to have a *Strategic Plan* – a major document describing a TC’s development priorities in the short, medium and long term, according to the current situation, resources available and identified trends in delivering the training product. The TC Strategic plan is a comprehensive document that should provide a complete snapshot of the centre: from Vision and Mission to Implementation Plan. It is an essential document.

Having identified strategic priorities, one needs think about the most efficient ways to realize them. Several types of planning instruments are needed to help achieve this. A *marketing plan* reviews the prospects of launching new training products and diversifying existing ones, capturing new markets, and assesses the demand for the TC’s services and provides relevant recommendations on modifying the training product. The *Business Plan* (often also called the *Financial Plan*) is used to evaluate and plan funding to implement the Centre’s strategy. It should be noted that the literature gives many different meanings for the above-mentioned terms (e.g., “business plan development” often refers to the whole planning process, starting from the vision and identification of core competencies). The relations between the various types of plans as referred to later in this book are shown in Figure 4.

Figure 4. Elements of a PA TC strategy



Developing a strategy is, thus, a comprehensive multi-step task. TCs often choose to limit their efforts and only do part of the job: most TCs define Vision and Mission, many of them also conduct a SWOT analysis and determine strategic priorities, but only a few proceed to making a detailed marketing analysis and formulating business plans. We recommend that the TC goes through the whole planning process to increase the effectiveness of its operations – but if you want to restrict yourself to a particular document only, just skip to the relevant section below.

4.1. Why do we need to develop plans for TCs?

There are various reasons why PA TCs develop strategies or parts thereof. The plan can be used to demonstrate the TC’s current situation, potential and/or development limitations to State authorities (including the PA Agency), current and possible donors and investors, the PA system, colleagues, local

communities, etc. It can be cited in new project proposals to showcase concrete directions where funding is being requested or in reports to donors illustrating the positive dynamics after intervention. Business planning is the main instrument when thinking about the financial sustainability of the TC, and is especially needed in times of significant change (e.g., if a project that provides major funding for the

TC's work is coming to an end). The plan is a good tool for sharing the TC strategy with its own staff to give managers a comprehensive picture of goals, objectives and directions of work as well as of the financial situation. We have listed only a few among many possible tasks. Several more objectives for strategic and business planning are also illustrated by the case studies below.

Case study 28. Business planning for Stephen T. Mather TC, NPS US

The purpose of business planning in the National Park Service is to improve the abilities of parks, regional offices, training centers, and Service-wide program areas to communicate more clearly their financial status with principal stakeholders.

The business planning process is undertaken to accomplish three main tasks. First, it provides the training center with a synopsis of its funding history. Second, it presents a clear, detailed picture of the state of current training center operations and funding. Third, it outlines training center priorities and future funding strategies.

Source: National Park Service & US Department of the Interior, 2005.

Case study 29. Extract from the Strategic Plan 2004–2014 of the Garoua College of Wildlife Management, Cameroon

The strategy to achieve financial self-sustainability responds to the need to cover funding gaps for certain activities, especially field work in forests. Taking into account existing needs, stability and the experience of the teaching staff, the strategy will push the elaboration of consultancy projects for stakeholders outside the college.

For more information see: ecoledefaune.org/plan-strategique

Planning is a process, not a product. Developing a plan for a TC is training in itself. It is highly recommended that you include all your staff in the planning process: this will inspire you with new ideas and will be a good motivation for your team – people work better if they know their final goal. It would be even better if you could involve other stakeholders (PA managers, State PA Agency staff etc.) in the discussions.

It is also important to realize that your plan will be significantly influenced by the purpose of training and the principal target audience. Points will need to be formulated differently for internal use than for investors. So, the goal of business planning should be identified at the first stage of the process.

The planning period is another question to answer at the very beginning. Commercial companies usually plan for 3–5 years (medium-term), sometimes also using 10-year periods for long-term prognostics. In addition, annual work plans are often developed to implement the strategies. For PA TCs we propose developing detailed plans (as described below) for a three-year period and to update these annually at the same time as planning concrete sets of activities and calculating the

finances for their implementation. The non-profit sector as a whole, and PAs in particular, face significant challenges now due to very rapid changes in political and socio-economic factors that influence them. This makes it really difficult to plan for periods of longer duration. Vision, mission and strategic priorities should nonetheless be identified from a long-term perspective.

4.2 Structure of a PA TC Strategy

4.2.1 Strategic plan

This is the initial stage of every planning effort. The aim of this plan is to formulate the TC's general concept and define core competencies and the main directions of work based on analysis of the current situation, long-term goals and differences between ideal and reality. The plan usually consists of the following chapters:

- Executive foreword;
- Executive summary;

- Brief analysis of the current situation in the PA field;
- History of the TC;
- Overview of TC programmes (functional areas) – management, legal status, resources, external and internal relations;
- PA TC Vision and Mission;
- SWOT analysis;
- Strategic objectives.

The *executive foreword* is used to inform future readers of the goal of writing a plan, who it is targeting and what the authors are expecting as outcomes of their planning initiative. It is also a good place to thank those who contributed to the plan and to acknowledge all partners, donors and friends of the TC. The case below cites an extract from the business plan of Toledo Institute for Development and Environment (Belize) that is not strictly a TC, but works more like a PA system management agency – however, it illustrates well the content of this chapter.

Case study 30. Business plan initiative of the Toledo Institute for Development and Environment, Belize

As we approach our tenth anniversary, we reflect on our limitations and many accomplishments as we plan the way forward. The continuous financial support of our donors and friends, and the dedication of our staff and local communities, have contributed tremendously to the effective management of reserves and private lands; however, the reality is that we cannot continue to rely fully on the charity of donors to achieve our ambitious goals. We therefore embark on a business plan initiative that is intended not only to generate funding to offset our increasing administrative cost, but to provide additional job opportunities for local communities and to contribute to sustainable tourism in the Toledo District.

Source: Epstein and Avila, 2007.

The *executive summary* gives the main findings and conclusions of the whole plan in brief. It makes sense to write it at the final stage of your planning work. The summary is probably the most important part of the document as it is the only part that most of your potential donors, investors and partners will really read.

A *brief analysis of the current situation in the PA field* is important for understanding the core conditions that determine the strategy of the PA TC. The current political situation in the PA field, socio-economic environment, legislation, principal challenges and threats that PA managers have to face are critical to understanding the demand for new training products, the most relevant topics etc. It makes sense to review the recent changes in policy and legislation in the PA sphere as well as to get an update from the PA community on the most serious problems of the moment.

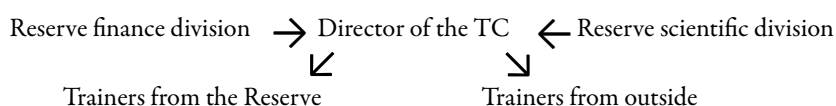
The *history of the TC and overview of its current programmes, resources and management* are often united in one chapter. The historical overview should be very brief and list only the changes that led the TC to its current state and those needed for the development of the TC conceptual framework. Analysis of the current situation usually includes information on the following aspects: TC legal status (State/private, profit/non-profit, division of another organization/independent body, accredited/non-accredited by State officials as a training provider etc.); organizational structure (in the form of an organigram); location, available facilities, including accommodation for trainees, vehicles, equipment; staff information; methodological materials and toolkits (including copyright information); external relations (with the State PA Agency, other PA-related projects, NGOs etc.). Case study 31 gives an example of how this chapter might look.

Case study 31. Extract from Belarus TC Strategic Plan

Legal status of the TC

The TC is legally a division within the Berezinsky Biosphere Reserve. All financial and juridical questions are being currently processed through the reserve administrative office. In future, it is envisaged that the TC will have a separate bank account while staying a legal part of the reserve.

TC organizational structure



Case study 31. Extract from Belarus TC Strategic Plan (cont.)

TC location

The Reserve's House for Environmental Education (Domjericy settlement). The TC also uses the facilities of the Hotel "Serguch" (60 places) and the Reserve's administration office.

Material resources

1. Facilities (office space, conference hall, hall for round-table discussions, exhibition rooms, library, computer lab);
2. Equipment (computers, printer, scanner, xerox, multimedia projector, video and photo cameras);
3. Hotel "Serguch" accommodation facilities;
4. Transport (car, mini-van) is owned by the reserve.

Human resources

1. Trainers from the Scientific and Forestry Divisions of the Reserve;
2. Trainers from other PAs in Belarus, Ministry of Natural Resources, Forest Service, Zoology and Experimental Botany Academic Institute, Belarus State University etc. are hired on an hourly-rate basis;
3. Foreign trainers are hired when necessary (Centre "Zapovedniks", Russian Biodiversity Conservation Center, PAs of Russia and Ukraine, French experts etc.)

Financial resources

State budget (Environmental Fund), international funds (RSPB, TACIS etc.), training fees, in-kind contribution of Berezinsky reserve.

Methodological resources

1. Training programmes and modules including: "GIS in PA management", "Management planning for PAs", "Training for rangers", "Eco-tourism development", "Environmental education";
2. Library on PA management issues;
3. Training toolkits from other members of the Network of PA TCs of Northern Eurasia.

External relations

All TC training courses are supported by the Presidential Administration of Belarus (Department of Nature Management) and Ministry of Natural Resources and Environmental Protection. Good cooperation with academic institutions, universities, Forest Service, and all the PAs in Belarus.

Vision and mission give the TC's principal long-term goal (mission) and a picture of the "ideal" TC being aspired to in the long term (vision). By Vision you answer the question "What is your TC going to become in 10 (20) years?"; by Mission – "Why do you want it to become like that?". These concepts are well known to most TCs, and almost

all of them have formulated vision and mission (see some examples below). It is very important to take some time to formulate your vision and mission so that they are as concise as possible and reflect your philosophy. They will be the basis for the definition of your goals, objectives and strategic priorities.

Case study 32. Organization for Tropical Studies Vision Statement

Over the next ten years, OTS will:

- train the next generation of tropical scientists via experiential, field-based learning,
- catalyze and facilitate critical and innovative research in the biological, physical, and social sciences that relate to the tropics,
- strengthen its existing field stations as critical centers for research, education, and wise stewardship of natural resources,

Case study 32. Organization for Tropical Studies Vision Statement (cont.)

- create new models of global partnerships that enhance training and research throughout the tropics,
- share OTS expertise and tropical information broadly through an information network,
- instill in its alumni, independent of their eventual career path, recognition of the importance of the tropics and the value of tropical research,
- make the consortium pan-tropical and increase geographic, disciplinary, gender, and ethnic diversity,
- create and set in place programs, facilities, and services that are seen as standards of excellence,
- be an organization that maximizes its resources to meet its goals.

Source: Organization for Tropical Studies, 2006.

Case study 33. Arthur Carhart National Wilderness Training Center Vision and Mission

We are national and international leaders in the development and implementation of wilderness training, information, and education programs.

Our mission is to preserve the values and benefits of wilderness for present and future generations by connecting agency employees and the public with their wilderness heritage through training, information, and education.

For more information see: carhart.wilderness.net

Case study 34. The Stephen T. Mather Training Center Mission Statement

The Stephen T. Mather Training Center commits itself to the professional growth and continuous learning of all employees in its assigned career fields and special programs. The primary mission of Mather Training Center is to provide employees comprehensive, competency-based, and mission-focused training and development programs.

Source: National Park Service & US Department of the Interior, 2005.

A SWOT analysis is a very well known tool that PA TCs often forget to use in their strategic planning. However, it could provide you with a lot of ideas if done as a team brainstorming exercise. The aim of group discussion is to provide an up-to-date picture of your TC's Strengths, Weaknesses,

Opportunities and Threats. Remember, that the first pair of concepts deal with the TC's internal characteristics, while the second pair deals with the external environment. Having defined the four items, you should formulate strategies to overcome weaknesses and avoid/minimize threats.

Case study 35. Extract from Centre "Zapovedniks" SWOT analysis

Strengths:

1. Profound understanding of PA staff training needs, problems and specificity of their work in Northern Eurasia region.
2. Many years of close cooperation with PA Agencies in Russia and other countries in the region.
3. Training programmes and toolkits on the main PA management issues; widely recognized as efficient by PA community.
4. Interactive training modules – very detailed, may be used by any professional trainer.
5. A great number of publications, methodological materials, documents developed and published.
6. Unique (in Northern Eurasia) library on PA management and related issues (more than 4000 documents).
7. Wide network of experts (trainers) both in Moscow and in all Russian regions who regularly work at seminars.
8. Own newspaper and web server (www.wildnet.ru).
9. Leadership of the Northern Eurasia Network of PA TCs.

Case study 35. Extract from Centre “Zapovedniks” SWOT analysis (cont.)

10. Good contacts and cooperation with many international TCs, projects and international organizations (IUCN, WWF, GEF, UNDP and others).
11. Experience of successful implementation of a great number of PA-related international and national projects.

Weaknesses:

1. Principal target audience – federal PAs – have very limited capacity to pay for training courses.
2. The TC is not that well known to many of its potential target audiences beyond the federal PA system.
3. Little experience in working with potential target audiences except for the federal PAs.
4. No adequate PR strategy; any market research has been sporadic and the results are not much used.
5. No financial support from Russian State PA Agency.
6. Little cooperation with other PA-related international projects in Russia and CIS.
7. Absence of own training facilities.

Opportunities:

1. Regional PA Agencies are being created in some Russian regions. The TC can use these contacts to provide its services to regional PAs.
2. Environmental training for private companies is more and more in demand. The TC can provide such services.
3. Some PAs are willing to conduct seminars at their workplaces. This can be an alternative to Moscow-based training courses.
4. Several PA-related international projects (mainly, GEF/UNDP and GEF/UNEP) are now being implemented in Russia. All of them require training. The TC can provide such services for these projects.
5. The European Community sometimes supports PA-related projects within Russia and CIS (often cooperation with an EU partner is required). The TC can apply for such grants.
6. Investing in education and environment is becoming popular in Russia. The TC can develop a business plan and search for an investor to build its training facilities.

Threats:

1. Competition for the new training products the TC is going to develop could be high.
2. Competition for international grants is increasing in Russia while the number of grant opportunities is decreasing.
3. Difficult political situation in the sphere of PA management in Russia.
4. Changes in NGO legislation in Russia.

Source: Kopylova *et al.*, 2008.

If done properly, the SWOT analysis usually leads you directly to the definition of the *strategic objectives* of the TC. Many TCs limit their strategic planning initiative to this part only, skipping all the previous points, but our experience shows that objectives become much clearer after the comprehensive analysis – and they

can be different from those you formulate “at first glance”. It makes sense to define no more than 3–4 objectives that your TC should achieve and, in contrast to the mission, operate in a medium-term perspective (five years). The following case studies provide examples of how these objectives could be formulated.

Case study 36. Strategic objectives of Centre “Zapovedniks” for 2007–2012 with verifying indicators

1. Diversification of training product (new target groups and new services for existing target groups)

At least five new seminars/study tours developed and tested by the end of 2008; at least one training course for each group (authorities, private companies, NGOs) conducted by the end of 2008; marketing and PR strategies developed by the end of 2008.

2. Establishment of a network of Russian regional PA TCs and interaction with international networks

Agreements concluded and work on the creation of new PA TCs started in at least two Russian regions by the end of 2008; Centre “Zapovedniks” became a member of the European network of TCs (NEETCE) and developed good contacts with other international PA TC networks.

Source: Kopylova *et al.*, 2008.

Case study 37. Strategic objectives of the OTS (Organization for Tropical Studies), Costa Rica

While OTS programmes are acknowledged to be world-renowned models for tropical education and research, the organization is no longer the sole purveyor in these areas. OTS now finds itself in a highly competitive marketplace for its products. To remain a force for change in the tropics, OTS itself must adapt to a changing environment. Three fundamental tenets highlight the new strategic direction for OTS:

First, OTS will elevate its commitment to education by broadening and diversifying its offerings. Responding to the needs of an increasingly diverse and global audience, OTS will offer a broader array of undergraduate, graduate, and professional courses in the natural, physical, and social sciences.

Second, OTS will strengthen the field of tropical studies by developing institutional capacity throughout the tropics to teach the next generation of scientists, practitioners, and policymakers. OTS' past educational expansion outside of Costa Rica has revealed an enormous and unmet demand for field-based educational programs. To sustainably meet this demand over the long term, capacity must be developed within home-country institutions. Under the new strategic vision, OTS will partner with institutions and help build these skills throughout the tropics.

Third, OTS will catalyze innovative research focused on emerging frontiers in tropical science. OTS research stations, especially La Selva, already serve as world-renowned centers of research excellence, and OTS will strive to maintain and enhance these facilities. Under the strategic vision, OTS will extend its historic role of facilitating research to that of a catalyst. By taking on the latter focus, OTS can harness its unparalleled network of global tropical researchers on the key future problems of tropical biology. Modern and forward looking facilities and infrastructure at OTS stations will be a critical ingredient to implementing this new strategic direction.

Source: Organization for Tropical Studies, 2006.

Case study 38. Strategic goals of the Training and Development Division (T&D) of the NPS US

1. Develop a more flexible and capable T&D organization that is responsive to NPS leadership and strategic goals.
2. Build a competency-based, integrated system for managing employee performance.
3. Ensure all employees are grounded in the history and mission of the NPS and understand their contributions to our success.
4. Develop and implement a measurement system to monitor the effectiveness of what we do.
5. Develop an agile workforce that is capable of responding to changing organizational and personal needs.

Source: National Park Service, 2001.

4.2.2 Marketing plan

This plan deals with TC core competencies: defines its principal target groups, main products and proposes strategies for product placement. The plan usually consists of the following sections:

- Market analysis
- Marketing strategies for core products
- PR strategy

Market analysis is a detailed analysis of the TC products and services in order to optimize their structure. You should start by defining your target groups – be as detailed as possible. If,

for example, your TC works only with PA staff, it makes sense to differentiate, say, between PA superintendents and rangers. For each target group, the TC may propose several types of training product (workshops, study tours, distance-learning course etc.) – they should be listed in a separate file. For each product, it is necessary to specify the stage of the product lifecycle, place and conditions of product delivery, delivery requirements and limitations. Try to assess the demand for each product and willingness-to-pay of the potential users. If the product is new and you have no figures available, try to estimate using the market average info and the results of your training needs assessment. Detailed research is often needed to verify your prognostics.

Market analysis also includes a survey of principal competitors and actual/potential partners of the TC. They should be done for each training product separately.

The results of a detailed analysis are used to select your “*core competencies*” – training products you are specializing in, as a first priority, according to your proficiency, competitive advantages, optimal demand-supply balance and other factors. The *marketing strategy* usually answers the 4P questions: Product, Place, Price and Promotion.

Product: Each of your core competencies is a separate product. We suggest developing a separate marketing strategy for each of these products. The example of a product can be “training package for PA rangers” or “study tours for foreign PA specialists”. For each product you should formulate concrete actions you are going to take in order to improve the service and/or promote it more efficiently. The actions should be presented in the form of an implementation plan with timetables, responsible staff and measurable delivery indicators.

Place: This includes not only the physical location of the training (your TC, participants’ work place, study tour, distance-learning course etc.) but also a planned form of delivery of the service. Again, a concrete action plan on how you’re going to “spread” your training to other regions, what information you’re going to gather from your trainees etc. is recommended. We suggest that you make a comparative financial analysis of conducting seminars at your office and, for example, at one of the nearest PAs (if your TC is located in a city) to find the most cost-effective option for each seminar.

Price: You should carefully list all funding sources you’re going to use to conduct each type of seminar. If tuition fees are going to be your principal funding source, calculate the net cost (don’t forget to include indirect costs) and desired profits, and develop a reasonable fee structure, paying attention to what your direct competitors are proposing. If you are just launching a product, you may think of charging minimal fees – at a “zero balance” level. For already popular services, the fees would be higher to allow some profits. The final price will also depend on how much time and effort you will spend advertising the product.

Promotion: You should develop an implementation plan with concrete actions, specifying where, when, how and to what target group you are going to advertise the product; what support (from the State, your alumni, etc.) you will need and how you are going to receive it; what other stakeholders (not just the potential trainees) you need to inform about this product; how you are

going to do it, etc. Remember to allocate resources for product promotion and building relations.

Finally, the summary for each product formulates (usually in one or two sentences) the main strategic lines of action regarding it.

The *PR strategy* can be developed either as a special part of the marketing plan or as a separate document. The goals of such a strategy usually include the following: 1) to inform target groups of the vision, mission and achievements of the TC; 2) to attract potential trainees and other clients from all target groups; 3) to gain support (not always just financial) from State authorities, projects, NGOs, the PA community, other stakeholders, etc. It is recommended that you develop a precise and concise implementation plan and hire a dedicated staff member whose sole responsibility is PR work.

4.2.3 Business plan (Financial plan)

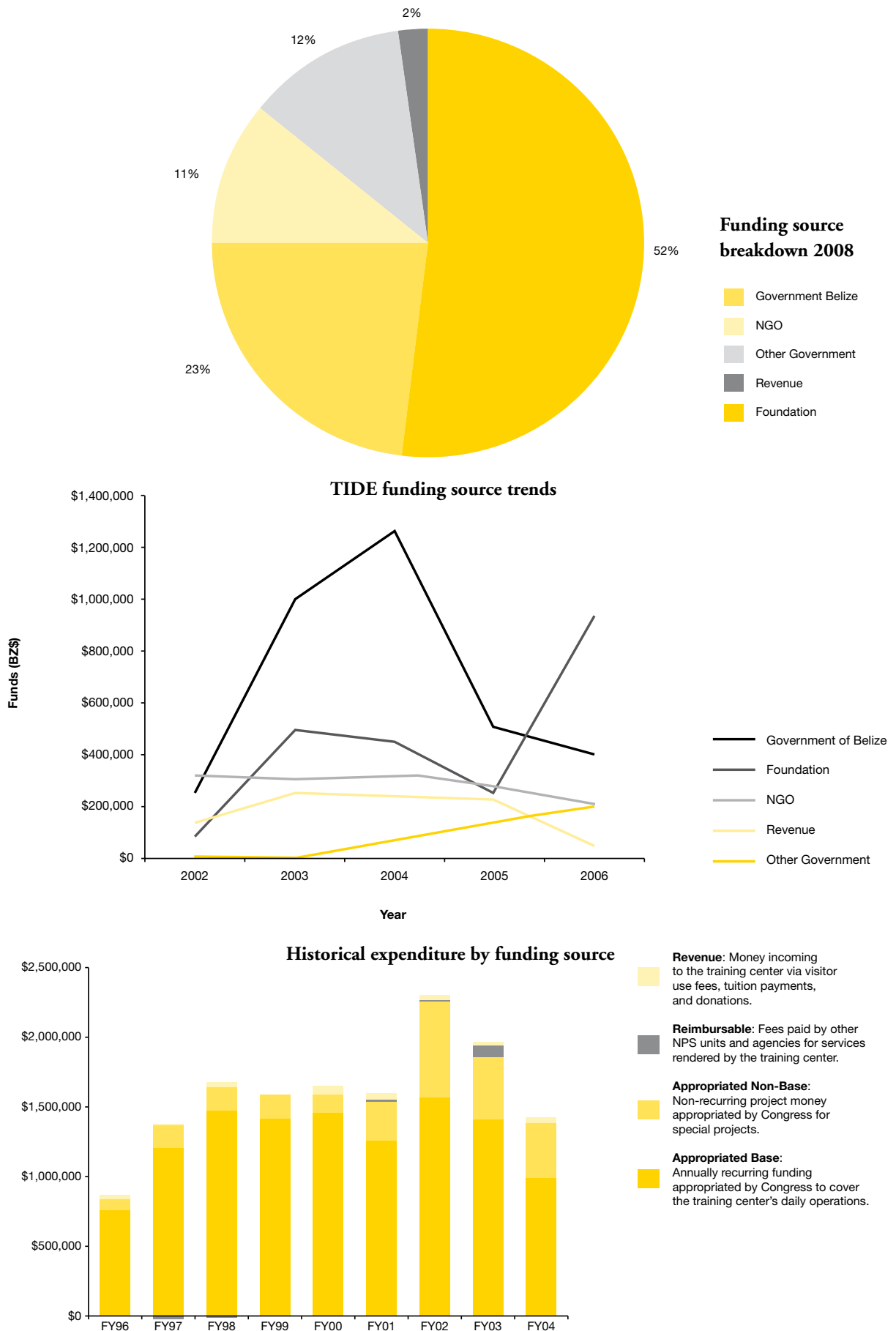
This plan is, probably, the most important part of the whole strategy. It provides a blueprint of a TC’s current financial situation, states clear and measurable financial targets in a medium-term perspective and in accordance with the TC Strategy and Marketing Plan and outlines a way to achieve them.

The business plan (BP) usually consists of the following chapters:

- Introduction;
- Income analysis;
- Expenditure analysis;
- Financial issues: summary financial statement, financial breakdown according to functional areas;
- Activity-based cost analysis;
- Strategies to achieve financial sustainability: types of strategies, optimistic and minimum-cost scenarios, plus a detailed implementation plan for each strategy;
- TC impact analysis (at different levels).

The *income analysis* gives a picture of a TC’s funding sources and their respective roles in financing TC programmes. It is useful to look at the current situation as well as at the dynamics of funding from different sources during the last 5–10 years. Examples of charts you may find useful are given in Figure 5.

Figure 5. Funding source breakdown and historical funding source analysis for different PA TCs

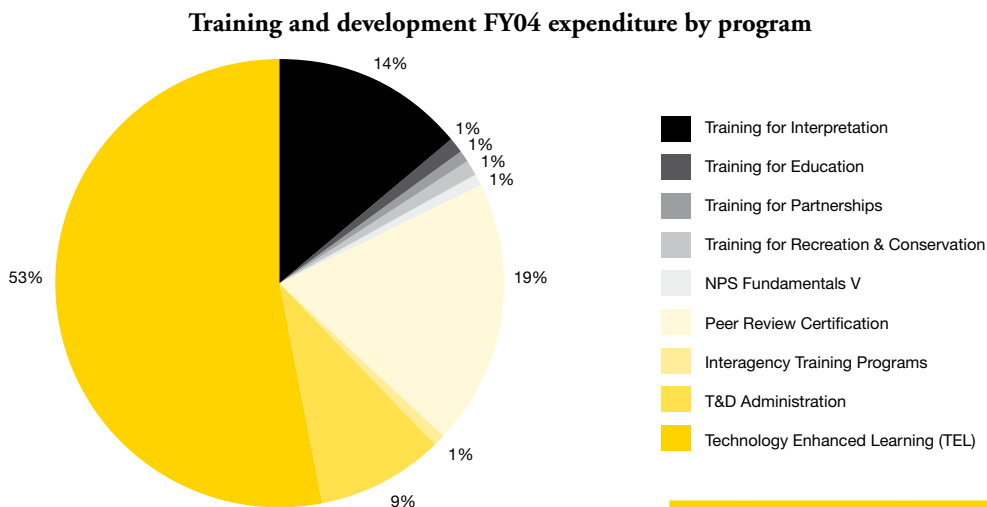
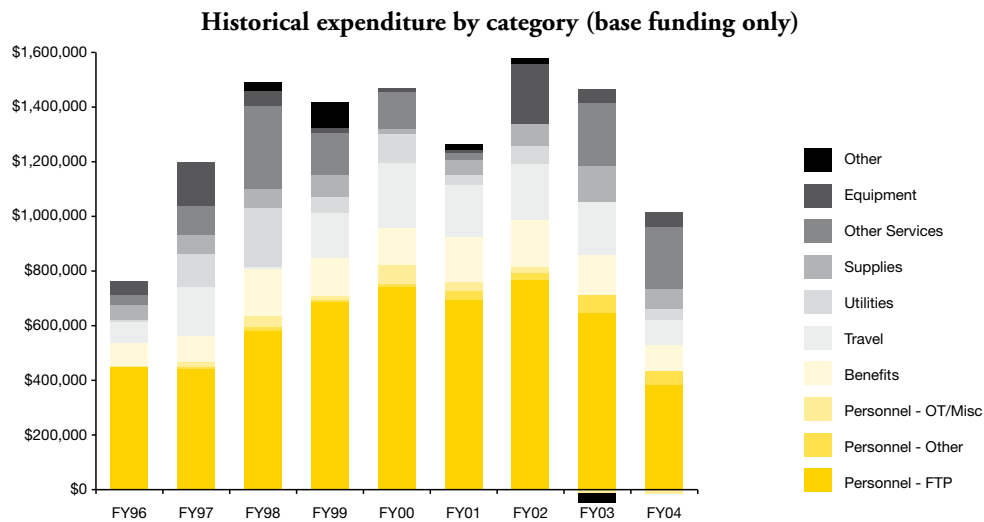
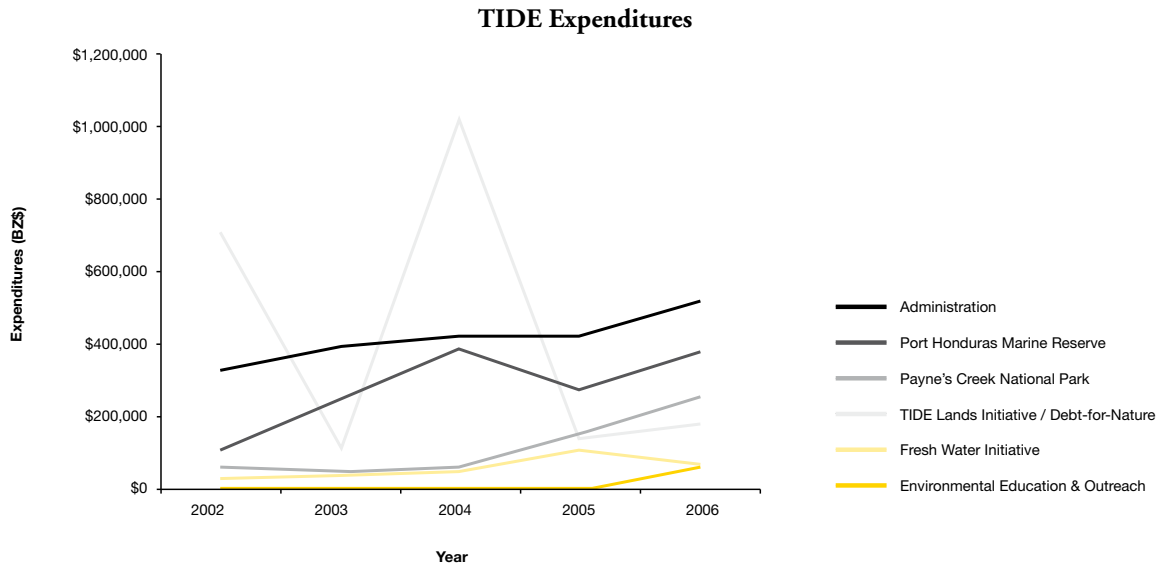


Sources: Organization for Tropical Studies, 2006 and Epstein and Avila, 2007.

The *expenditure analysis* shows what the money has been allocated for. Again, it is useful to receive a current snapshot (for the last full financial year) and look at the dynamics during, at least, the last five years. You may choose to break down your expenditure

by category (e.g., equipment, supplies, utilities, travel, personnel, accommodation etc.) or by programme (TC functional areas) or to combine these two methods. Figure 6 provides examples of the charts you might end up with.

Figure 6. Expenditure analysis for two PA TCs



Total required		Available		Shortfall	
FTE	Fund	FTE	Funds	FTE	Funds
9.4	\$1,264,925	5.1	\$711,411	4.3	\$553,514

Sources: Organization for Tropical Studies, 2006 and Epstein and Avila, 2007.

The *summary financial statement* shows the available funding for the planning period, the required funding at the mission critical and optimal state levels, and the funding gaps. Based on the dynamics of your expenditures, you can calculate the required funding at two levels: 1) needed to implement only your mission critical functions and 2) the desired (optimal) income. *Mission critical functions* are those activities indispensable for the TC's survival (office maintenance, key staff members' salaries, basic premises) and to fulfil its mission at the minimum possible level (e.g., you could determine that you need to conduct at least five seminars

per year to be able to build capacity of the critical mass of your core target audience). *Optimal state* is defined as the level of operations and resources that the TC has identified as necessary to fully meet the goals and objectives of all its programme areas. These are realistic goals which could be reached if the funds were available. They refer to the ideal future of the TC within the planning period. The *funding gap* shows a difference between required and available funding for each TC programme (functional area/department). This section can be organized in the form of an Excel spreadsheet (see Figure 7).

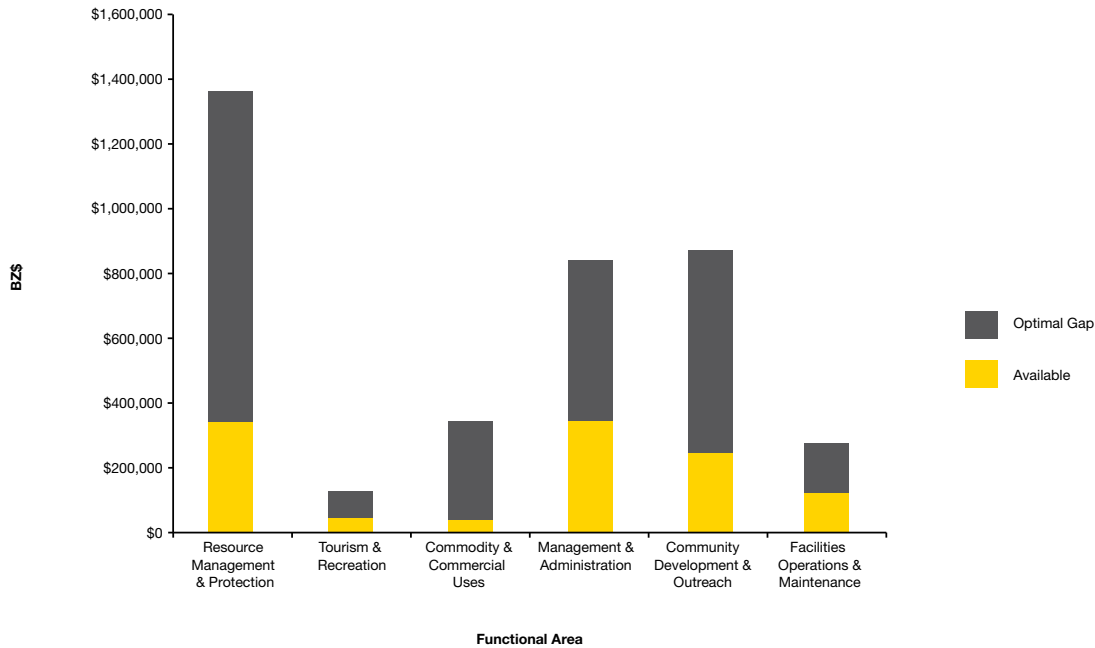
Figure 7. Template for summary financial statement for PA TC

TIDE	AVAILABLE (BZ\$)						REQUIRED (BZ\$)				GAP (BZ\$)			
					TOTAL		Mission Critical		Optimal State		Mission Critical		Optimal State	
	Gov't	NGO	Founda- tion	Rev- enue	FTE	Funds	FTE	Funds	FTE	Funds	FTE	Funds	FTE	Funds
RESOURCE MANAGEMENT & PROTECTION														
Patrolling and Enforcement	\$21,700	\$20,600	\$77,600	\$0	9.8	\$119,900	10.4	\$166,600	11.4	\$250,200	0.6	\$46,700	1.6	\$130,300
Scientific Monitoring and Research	\$97,900	\$11,400	\$44,600	\$0	2.6	\$154,000	3.0	\$337,900	11.4	\$844,400	0.5	\$177,400	8.8	\$683,900
Habitat Restoration & Wildlife Management	\$3,000	\$10,500	\$0	\$0	0.9	\$13,500	2.5	\$60,600	3.5	\$81,900	1.7	\$8,800	2.7	\$30,100
Zoning and Boundaries	\$45,700	\$2,800	\$0	\$0	1.0	\$48,500	1.9	\$168,600	2.9	\$185,400	0.9	\$120,100	1.8	\$136,900
Wildlife Fire Management	£200	£0	\$500	\$0	0.1	\$800	0.5	\$27,900	0.7	\$39,900	0.4	-\$5,900	0.6	\$39,100
Cultural Resource Management	\$0	\$0	\$100	\$0	0.0	\$200	0.1	\$5,100	0.2	\$7,500	0.1	\$4,900	0.1	\$7,300
Subtotal	\$168,700	\$54,400	\$122,800	\$0	14.4	\$336,900	18.4	\$766,600	30.0	\$1,409,300	4.0	\$352,000	15.7	\$1,027,600
TOURISM & RECREATION														
Visitor Safety and Protection	\$2,400	\$600	\$8,000	\$0	0.4	\$10,900	0.5	\$22,800	0.9	\$43,200	0.1	\$11,800	0.4	\$32,200
Recreation Fee Collection	\$900	\$100	\$1,100	\$0	0.0	\$2,100	0.0	\$2,100	0.0	\$2,100	0.0	\$0	0.0	\$0
Visitory Education and Interpretation	\$18,100	\$1,600	\$9,400	\$0	2.0	\$29,100	2.6	\$53,700	4.1	\$81,100	0.6	\$24,600	2.1	\$52,000
Concession and Recreation Special Uses	\$0	\$0	\$0	\$0	0.0	\$0	0.0	\$0	0.1	\$2,000	0.0	\$0	0.1	\$2,000
Subtotal	\$21,400	\$2,200	\$18,600	\$0	2.4	\$42,200	3.1	\$78,600	5.0	\$128,400	0.7	\$36,400	2.6	\$86,200
COMMERCIAL & COMMODITY USES														
Fishing (Marine Resources)	\$0	\$0	\$0	\$0	0.0	\$0	0.0	\$0	0.0	\$15,000	0.0	\$0	0.0	\$15,000
Timber and Forest Products	\$0	\$0	\$0	\$0	0.0	\$0	0.0	\$0	0.0	\$0	0.0	\$0	0.0	\$0
Non-Renewable Resources	\$4,100	\$0	\$100	\$0	0.1	\$4,200	0.8	\$91,600	4.1	\$285,700	0.7	\$87,400	4.0	\$281,600
Special Commercial Uses	\$5,200	\$11,700	\$9,500	\$0	0.5	\$26,500	0.4	\$9,200	0.8	\$38,100	0.0	-\$2,800	0.3	\$11,700
Subtotal	\$9,300	\$11,700	\$9,600	\$0	0.5	\$30,600	1.2	\$100,800	4.8	\$338,900	0.7	\$84,600	4.3	\$308,200
MANAGEMENT & ADMINISTRATION														
General Management and Administration	\$600	\$200	\$84,300	\$300	2.3	\$85,300	1.8	\$39,700	4.8	\$120,000	-0.5	-\$45,600	2.5	\$34,700
Financial Management and Administration	\$10,700	\$33,000	\$40,900	\$0	1.6	\$84,700	1.2	\$78,300	2.1	\$125,000	-0.3	-\$6,400	0.6	\$40,300
Planning	\$12,600	\$0	\$44,400	\$0	1.7	\$58,900	0.8	\$17,400	6.4	\$273,700	-0.9	-\$41,500	4.7	\$214,800
Partnership Relations	\$72,800	\$9,500	\$127,700	\$0	1.5	\$77,700	2.3	\$29,400	4.8	\$236,800	0.7	-\$48,300	3.3	\$159,100
Information Technology	\$2,400	\$40,000	\$20,000	\$0	1.4	\$62,500	1.6	\$53,500	2.4	\$87,400	0.2	-\$9,000	1.0	\$24,900
Subtotal	\$99,200	\$82,700	\$317,200	\$300	8.5	\$369,100	7.7	\$218,400	20.5	\$843,000	-0.8	-\$150,800	12.0	\$473,900
COMMUNITY DEVELOPMENT & OUTREACH														
Formal Environmental Education	\$26,700	\$14,100	\$22,500	\$0	1.5	\$63,300	2.9	\$91,300	4.3	\$117,600	1.5	\$28,000	2.8	\$100,800
Public Outreach and Information	\$20,600	\$9,800	\$59,700	\$0	1.9	\$90,100	1.7	\$65,500	3.0	\$131,700	-0.2	-\$24,600	1.1	\$41,600
Community Capacity Building	\$129,100	\$9,300	\$45,400	\$100	0.7	\$92,100	1.3	\$256,700	2.3	\$577,900	0.6	\$164,700	1.6	\$485,800
Subtotal	\$176,400	\$33,300	\$127,600	\$100	4.1	\$245,500	6.0	\$413,600	9.6	\$827,100	1.9	\$168,100	5.5	\$628,100
FACILITY OPERATIONS & MAINTENANCE														
Buildings, Grounds, and Utilities	£12,400	\$25,600	\$34,500	\$0	1.2	\$72,400	0.8	\$41,000	1.7	£117,700	-0.4	-\$31,400	0.5	\$45,200
Roads	\$0	\$0	\$0	\$0	0.0	\$0	0.2	\$17,400	0.4	\$28,600	0.2	\$17,400	0.4	\$28,600
Trails	\$1,000	\$600	\$100	\$0	0.1	\$1,700	0.4	\$5,500	0.6	\$9,500	0.2	\$3,800	0.5	\$7,800
Docking Facilities (Marine)	\$3,700	\$1,800	\$2,000	\$0	0.4	\$7,500	0.7	\$23,000	1.0	\$54,300	0.2	\$15,500	0.6	\$46,800
Transportation and Fleet	\$7,900	\$19,900	\$10,500	\$0	1.0	\$38,300	1.0	\$38,300	1.0	\$38,300	0.0	\$0	0.0	\$0
Campgrounds and Picnic Facilities	\$600	\$600	\$0	\$0	0.1	\$1,200	0.2	\$17,700	0.6	\$28,300	0.2	\$16,500	0.5	\$27,200
Subtotal	\$25,700	\$48,400	\$47,000	\$0	2.8	£121,000	3.3	\$142,800	5.3	\$276,700	0.5	\$21,800	2.4	\$155,600
Grand Total	\$500,700	\$223,600	\$642,800	\$400	32.8	\$1,145,400	39.7	\$1,720,700	75.4	\$3,823,300	7.0	\$512,000	42.6	£2,679,700

Source: Epstein and Avila, 2007.

Graphs such as the one below can also be used to illustrate this gap.

Figure 8. Optimal gap summary for PA TC



Financial breakdowns according to functional areas also contribute to a better understanding of which of your programmes lack funding and what your possible sources of fund transfer between programmes are, if any.

Activity-based costing (ABC) is a method of assigning the organization's resource costs through activities to the products and services provided to its customers. Instead of using broad arbitrary percentages to allocate costs, ABC seeks to identify cause-and-effect relationships to assign costs objectively, so that the cost of each activity is attributed to each product to the extent that the product uses the activity.¹

The ABC is a very good business planning tool. It helps to identify the true cost of managing each of the TC programmes, producing an accurate allocation of personnel and non-personnel expenditures to each of the functional areas. The method is very time-consuming, but gives a much better picture of the TC's financial situation and enables the fair distribution of overhead costs to different training products.

Strategies to achieve financial sustainability is the most important section of the business plan. Based on the analysis carried out in the previous sections, compare various scenarios of TC development and select those best suited to achieving the TC's strategy. You may choose between revenue generation or reducing costs and increasing efficiencies, or a combination of the two. To develop your own strategy, start with a collective (TC team members) brainstorming exercise to propose several variants of covering identified funding gaps. You will receive a list of possible intervention strategies, each of which should be subject to a comparative cost-benefit analysis (a technique designed to determine the feasibility of a project or

plan by quantifying its relative costs and benefits). Examine each strategy with two scenarios in mind – optimistic and minimum-cost. It is very important to ensure the strategy correlates well with the TC general strategy and marketing plan formulated earlier. After the best option(s) for your TC has (have) been selected, you should develop a detailed implementation plan for each strategy.

The *TC impact analysis* is a review of the current and planned economic impact of the PA TC activities within its broader community. If, for example, your Centre is running seminars for the local population on alternative livelihood development and business planning, and the new pro-biodiversity businesses they launch after the course will bring \$1,000 to the local economy – this is an economic impact of the TC's work. This is a simple example of the multiplication effect. It is very difficult to measure the TC's impact in figures, but you should have a general idea of what economic benefits the community (at local, regional, national or international level) will receive subsequent to your TC operations. It is not so important to give exact numbers in this section – it could be enough just to describe the current and planned impact of your activities. This section is a good tool for lobbying for your TC in governmental structures, attracting investors for your projects and reporting to donors.

Strategic and business plans are efficient tools for systematizing all the processes that occur within a PA TC, and for planning for the future. Very often, TC staff feel they are too busy with their day-to-day tasks to take on this time-consuming work. But if you stop and think about all that you are doing and are going to do, you will be surprised, and maybe even shocked, by the volume of your operations. If you survive the exercise, you will have a host of new ideas to think about.

¹ See: en.wikipedia.org/wiki/Activity-based_costing

5. Networking mechanisms between training centres

Most PA TC staff keep in contact with their colleagues, participate in thematic meetings and share lessons learnt. However, networking is not as popular in this professional community as it could be. We highly recommend establishing PA TC networks at national, macro-regional and international levels. In this chapter we use two examples – the Northern Eurasia Network of PA TCs (Russia, Ukraine, Belarus and Kazakhstan) and the Network of European Environmental Training Centres of Excellence (NEETCE: Germany, UK, Italy, France and Russia) – to discuss some of the lessons learnt from the functioning of these networks and the best practices they have managed to accumulate.

5.1 Benefits of becoming a TC network

There are many benefits to be gained from creating a network of TCs including:

- Sharing training programmes, toolkits and other learning materials that have been developed.
- Exchanging trainers and experts, and combining efforts to build the capacity of all the staff and tutors (sharing costs to conduct ToT, etc.).
- Exchanging participants i.e., organizing study visits and joint seminars for one another as well as sharing the costs of hiring external experts.
- Joint fundraising – by submitting common project proposals or attracting donors and investors for common activities. Experience shows that multi-national (multi-regional) and multi-cultural projects are more likely to gain financial support these days.
- Best practices of PA management can be disseminated throughout several national PA systems via the network of TCs.
- Common marketing and promotion of the network and its members can be more effective than individual efforts.
- Developing a common system of accreditation and, thus, ensuring the high quality of their educational product. Accepting a new PA TC into the network will serve as recognition for the newcomer and, thus, an indicator of the good quality of its training services.
- Common certification and diplomas recognized by all member TCs could facilitate mobility of employment of

PA staff between the member States and appraisal of staff competences by the relevant national authorities.

- A higher lobbying potential than an individual TC.
- External communication with relevant international training networks and the broader PA community can be easier and more cost-effective if shared.
- Uniting their fellow communities and using the network's potential to promote their products and to influence wider PA-related decision-making processes.

5.2 Northern Eurasia Network of Protected Area Training Centres: lessons learnt from SNTC project

Establishment of this Network was one of the principal outcomes of the SNTC project and involved four countries of the Northern Eurasia region: Russia, Ukraine, Belarus and Kazakhstan. Over three years (2005–2008), an international project team worked together to create the TCs (some lessons learnt from this stage of the project were discussed in Chapters 2 and 4), develop networking mechanisms and make sure that the network could continue operating after the end of the project. More than a year and a half has passed since the project finished and the network is still functioning – a good indicator of the effectiveness of the team's efforts. A brief history of the creation of the network and the lessons learnt from this process are given below, in the hope that they will be of use to other PA TC networks.

As mentioned earlier, the idea of creating a PA TC network was evident to the project implementing agency, Centre “Zapovedniks”, several years before the project finally received GEF/UNEP funding. A particular circumstance influencing this concrete project was that no TC, except for Centre “Zapovedniks”, existed before the project started. Thus, the networking mechanisms were integrated into each new TC concept from the outset which has turned out to be an effective approach. From the beginning, the Network “automatically” involved the three new TCs, established by a project team in Ukraine, Belarus and Kazakhstan. Within two years, the Kamchatka Regional Wildlife Training Centre (Russia) was also created within the UNDP/GEF project “Demonstrating the sustainable conservation of biodiversity in four protected areas of Kamchatka” (with advisory support from the SNTC project team) and became a member of the network.

There was no official document (such as a Memorandum of Understanding) to regulate the network's activities but all the TCs shared common project rules and had to implement a common work plan. Twice a year, each TC had to develop an Activity Plan with a timetable for all training events and submit it to the Project Manager. Individual plans were then reconciled with each other to avoid important events clashing, were approved by the UNEP Task Manager and then implemented. Each TC employed a national project coordinator responsible for implementation, including partnership obligations. These coordinators were under the overall Project Manager who was responsible, particularly, for the functioning of the networking mechanisms. The partners also developed a common Monitoring & Evaluation plan with reports submitted twice a year. External evaluation missions (one every 18 months), with visits to each of the member centres, were useful for comparing the work of the partners and identifying good practices, not always recognized as such by the centres themselves. Such an organizational structure has proved to be effective – but the difficulty is that it is only possible when the member TCs are involved in a common project with a special budget assigned for networking activities – and this is very rarely the case.

A network logo was developed at the very beginning of the project. All publications, booklets, training toolkits, press releases and other materials were published in the same format, using the same logo and references to the network and the project. At the same time each TC had its own house style or brand – this should not be forgotten when entering into any similar alliance. However, using the logo of the network in parallel with this brand can only strengthen the overall image of each constituent. Cross-marketing of the other member TCs through, for example, publishing the network's website on all TC publications adds value to each individual member's promotion efforts.

The common website is another thing that was developed at the very beginning of the SNTC project. Each centre had its own page there and links to national partner websites were used to promote the site to national target audiences. Practice has shown that the number of visitors to the common website with separate pages for each centre is much higher than the number of visitors to individual websites with cross links to one another. But, again, this works well in cases where the TCs are implementing a single project with a special budget (to pay for the webmaster, hosting etc.), but becomes a problem when no common funds exist. However, we recommend sharing costs and hiring a moderator to support, at the very least, the network's web page on the website of any of its members; at most, the whole site with relevant pages.

Everyday communication between national TC managers was carried out via e-mail, reports to the Project Manager, mailings to all members with information on forthcoming events, and postings to the News column on the website. The working group (two representatives from each TC) met regularly (at least, twice a year

plus at each other's seminars) to share experiences and discuss principal problems.

Much more than simple technical and marketing cooperation, the TCs initially developed a common philosophy and approaches to training. The most important of these were as follows: 1) interactive participative learning environment; 2) teaching innovative approaches to PA management; 3) demand-driven training topics; 4) "creative workshops"; 5) end-of-course projects and post-seminar assistance in their implementation; 6) regular feedback from alumni, monitoring of their careers and personal development, maintaining the alumni network. Four to six common basic principles are enough, but the member centres should promote these everywhere to create a definite image of their network among their stakeholders. At the same time, it is very important to maintain independence in terms of innovative thinking and developing your own approaches, methods and products. This degree of interrelation should be very carefully managed by network members.

The TCs shared training modules, programmes and methodological toolkits. As soon as one of the network members developed a new module, it organized a test seminar and invited colleagues to participate. Their feedback was used to fine-tune the programme. The module was then adapted to other TC national situations and made available to all. Another option was that the TC which had developed a new programme, conducted a ToT for the other members to teach the module to national trainers and revise it, in the light of their comments and recommendations. A third option was that trainers from a partner TC could visit a seminar in the other centre to get acquainted with the new topic.

One of the project principles was to use local specialists as much as possible – in cases where there was no local expert in a particular field, then ideally someone should be trained to become an expert. External consultants were hired to conduct ToTs for potential trainers from all member centres. The costs for those experts were also shared. In cases where some country could not find an appropriate person to lead a topic, they invited trainers from the partner TC on an hourly-rate basis.

Exchange of trainees was another important direction of cooperation within the network. Many seminars were initially planned for a multi-national audience or became such upon request from a partner TC. Study tours to successful PAs in the partner country were, in some cases, even more popular than training courses. The list of these activities was developed together by national coordinators and regularly updated via e-mail communication. Sometimes the TCs helped each other to attract new clients from their country – if the client demanded a product on which the partner TC was more professional. Within the SNTC project this was done for free, but, theoretically, some fee for attracting new clients (a fundraising fee) could be charged if the centres have no common funding. However, this may be difficult to achieve if the centres compete with each other in cases of very limited funding sources.

5.3 Network of European Environmental Training Centres of Excellence (NEETCE)

The NEETCE is a long-term collaborative effort of (initially) five environmental training centres in Europe, initiated to promote standards of excellence in this field. The founding members include: the Alfred Toepfer Akademie für Naturschutz (NNA) from Germany, Losehill Hall (UK), the PANGEA Institute (Italy),

the Atelier Technique des Espaces Naturels (ATEN – France) and the Tour du Valat Biological Station (France).¹

Collaboration between the centres also occurred during implementation of the TOPAS project (Training of Protected Area Staff) which was carried out from 2001–2003 and involved 20 partners (mainly PA TCs) from nine European States. The funding came from the EU's Leonardo da Vinci Programme. The project ended with a number of successful outcomes, although not all the initial objectives were fully realized (see Case study 39).

Case study 39. The TOPAS Project

The TOPAS (Training of Protected Area Staff) project was a three-year project (2001–2003) funded by the EU's Leonardo da Vinci Programme Phase II, involving 20 partners from nine European countries.

The aims were to:

- a) develop training courses leading to a high standard of new vocational qualifications,
- b) develop standards for the continuing training of staff in European protected areas,
- c) publish training materials on the TOPAS website to facilitate distant learning,

and by so doing, contribute to the conservation of the European natural heritage.

Activities focused on a series of one-week courses on different topics; each course was developed by one partner, and then translated and tested in one of the other participating countries.

The courses were as follows:

- Foundation Ranger Training (UK/Iceland)
- Habitat Restoration and Management – Heathlands (Germany/Portugal)
- Sustainable Woodland Management (Slovenia/UK)
- Basic Interpretive Skills (Italy/Germany)
- Sustainable Tourism and Visitor Management (Switzerland/Czech)
- Basic Ecology (Austria/Germany)
- Mountain Area Sustainable Development (European Mountain Forum/Italy)
- Management Planning (France/Portugal)

Quality standards were assessed by a TOPAS Technical Board, and courses were certificated by London University's Centre for European Protected Area Research. Each of the eight courses resulted in a "final course document" which specified its aims and objectives (including underpinning knowledge and practical skills) as well as a day-by-day syllabus (identifying subjects, teaching methods and key learning outcomes) and a compendium of resource materials which were published on the TOPAS website (see below).

The TOPAS experiment was a "bottom-up" initiative by training providers themselves and proved an immensely worthwhile learning experience for all those involved in it – partners, as well as students on the courses. The experience of curriculum development and teaching across nations and cultures enriched the course provision and delivery of the institutions involved, and helped to build networks and to forge strong bilateral links amongst training providers in Europe.

¹ Network of European Environmental Training Centres of Excellence (NEETCE), 2004.

Case study 39. The TOPAS Project (cont.)

However the project also had major weaknesses and failed in several of its key aims. No teacher ever follows completely the syllabus or class plan produced by someone else. These always need to be developed in the light of the needs of students, of the local conditions where the course is held, and the individual inclinations and expertise of the teacher(s) involved. The published course documents therefore at best could only give suggestions for what might be included in a course. More importantly, the lack of major institutional patronage (e.g., by EUROPARC or IUCN) meant that the activities and their outcomes were never embedded in a lasting pan-European agreed programme of accreditation and training. And because the courses did not form part of any award, they did not contribute to any formal qualification for the individual students involved.

One conclusion from the study is that a formally agreed framework of Pan-European training standards and a pan-European Certificate and Diploma in Protected Area Management should be a long-term goal. This will require a more systematic analysis of the role of protected areas in different countries including occupational mapping and TNAs of their staff. In the meantime, more bilateral training links provide a way forward and collaborative modules such as those of the University of London-University of Ljubljana Masters programmes will be easier following adoption of the Bologna Accord (see Case study 15).

For course documents and more information see: www.nna.de/topas/

Source: Richard Clarke, CEPAR, University of London, Birkbeck.

Building on the vision and achievements of the TOPAS project, in 2004 the above-mentioned partners declared their intention to work together and establish the NEETCE. In contrast to the previous example discussed, the founding institutions were already recognized centres of excellence in their field, completely independent as regards their training methods, approaches and finances. Under these circumstances, signing a formal Memorandum of Understanding was a useful start to creating the network. The document formulated the vision of “a coherent network of European environmental training centres of excellence with international recognition, and a common programme of activities, that build the capacity of protected areas people”.² The aims of NEETCE were defined as follows:

- Support national and international policies by providing protected areas people with knowledge and skills to enhance nature conservation and sustainable development of protected areas.
- Develop knowledge and skills of network members, by sharing experiences, tools and methods, and developing and running common projects and activities.
- Seek to develop European recognition through funding, promotion and marketing of the network, and endorsement of our activities.
- Promote and facilitate pan-European experience of protected areas staff.
- Develop links with relevant international training networks.

With no special budget for networking activities, members of NEETCE communicate mainly via e-mails. The international conferences and other professional meetings attended by all (or almost all) of the members are used as an opportunity to get together and discuss major challenges face-to-face.

Work priorities are agreed based on consensus. One of the members takes the lead in each action, based on their own interest and capacities, and then becomes responsible for animating the network on this particular action. Some basic activities are the permanent responsibility of all members:

- circulating to the network the list of learning events they will be organizing, together with information on the possibility for other members to attend as observers at no cost, so as to promote exchanges of experience, methods and tools;
- advertising/ publicizing the network to the target European bodies from which the network seeks recognition.

Similar to the previous case, the member centres, while staying completely independent in their training policies, share a common philosophy regarding a general approach to training. According to this approach, “a European Environmental Training Centre of Excellence:

- Is a centre/hub/core that provides participative learning to meet the needs of protected area people;

² NEETCE, 2004.

- Has a willingness and capacity to work internationally;
- Has a proven track record of high quality learning;
- Has a commitment to the network vision;
- Is a learning organisation itself”.

The MoU gives a detailed explanation of the highlighted terms that are considered to be the basic principles that each NEETCE member should respect.

The absence of a common budget (and individual budgets for networking) gives the members very limited opportunities to conduct training and other activities together. However, they share ideas, approaches in course development and provision, and best practices. If there is a chance to invite partner TC staff to some event (using the event’s budget or any other funds), they always use it. Exchanges of information on new initiatives and funding opportunities represent an important opportunity for cooperation. Several efforts are being made to develop a common project proposal to launch concrete activities for NEETCE’s own capacity building. The other important pillar of cooperative work is an initiative to establish a pan-European system of accreditation and certification. Once part of the TOPAS project, this ambitious goal is still a challenge that the NEETCE members are struggling to meet.

Finally, one more lesson we can learn from the NEETCE experience is a well elaborated system of membership criteria. To become a member, the TC has to prove that it really is a centre of excellence. The criteria include characteristics of TC facilities, staff competencies, quality of training materials and many other factors. Having met these criteria, in 2007, Centre “Zapovedniks” was recognized as a NEETCE member. However, acquisition of new members is hampered by a lack of comprehensive

knowledge about training initiatives across Europe. Gathering this information should become one of the NEETCE priorities and funds should be raised to facilitate this development.

5.4 Possible forms of interaction between TCs within the network

- Communication via electronic tools: e-mail, e-groups, fora, common website etc.;
- Meetings to discuss matters “in person”;
- Meetings at professional conferences and other events (with costs partially covered by outside organizations);
- Cooperation in fundraising;
- Implementation of common projects;
- Joint seminars, study visits, training-for-trainers – exchange of tutors, participants and best practices;
- Cost-sharing publications;
- Brainstorming and other strategic planning efforts;
- Establishment of working groups within existing international organizations, representations at world congresses etc.;
- Joint lobbying at international and national levels, and preparing joint policy documents;
- Common certification and accreditation policy;
- Facilitation of PA staff mobility through collaboration in developing job descriptions etc.;
- Sharing training philosophies and general principles.

6. How to create a positive “group climate”? Psychological aspects of successful training programmes

We have spoken a lot about the organization of TCs. Now we are going to start discussing the training itself. How to make it effective? How to organize space and time? What standards should we establish and which criteria should we apply? How do we assess the results? We will briefly discuss all these issues in the following few chapters.

From our (of course, subjective) point of view, the principal component of an effective training course is the *training environment* (or *educational milieu*). Psychologists have proven that a comfortable environment is more conducive to knowledge assimilation and is sometimes more important for the cumulative learning effect than the seminar content itself. This idea is not at all new – it is a basic concept of modern pedagogy and the training business. However, experience shows that a great number of training initiatives, especially in PA-related fields, still pay very little attention to this “creation of the milieu”. So, at the risk of repeating well known things, we are going to dedicate this chapter to discussing how to create a positive educational milieu for PA staff training. We will define an “educational milieu” as “an environment, consisting of trainees, tutors, training managers and technical staff who interact with each other in diverse ways, thus, providing varied opportunities for individual development of each participant”.¹ So, what do we need to create an effective learning environment?

6.1 Focus on the needs of the participants

The educational environment will be positive and effective only if the training is driven by the actual demands of its participants. This is the only condition under which people will make the most of the educational opportunities offered to them.

Training needs assessments were already discussed in Chapter 2. So, we will just reiterate that it makes sense to take care not only of the demands directly identified by the future trainees themselves, but of their unconscious needs as well. These latter can include: 1) the need for *self-actualization* as defined by Maslow² (the need for continuous individual development and practical implementation of one’s ideas

and potential); 2) cognitive needs and interests (the constant desire to learn something new); 3) the desire to accept group principles and become a part of the group (at least, during training); 4) the wish to be recognized as a professional and as an individual by other group members, tutors and training staff (= social demands); 5) the need to improve one’s self-image; 6) the wish to become more professional in one’s field of interest; 7) material requirements (good food, comfortable accommodation etc.). If some of these demands are not satisfied, it can arouse negative emotions, decrease productivity and thus reduce the effectiveness of the course.³

6.2 Invite a good psychologist to create a productive group climate

The experience of many PA TCs and programmes shows that it is a good idea to invite a professional psychologist to conduct a session during the first day or two of the course. The aim of their session is not simply to introduce participants and tutors to each other and discuss their expectations together. It is also to help trainees to adapt themselves to a new, creative and very intensive environment in a gentle manner and to become a part of the group.

The objectives of this “psychological” part of the training include:

- Introductions between participants and tutors and the creation of an atmosphere of trust and mutual support, that is comfortable for everybody;
- Emphasizing the need to pay “respectful attention” to one other;
- Encouraging trainees to become “active partners” in their interactions with each other and with tutors;
- Overcoming negative moods if these exist within the group; “switching over” from personal “outside” problems to collective creativity inside a group;
- Motivating trainees to actively engage in the group exercises and make the most of all the educational opportunities;
- Developing and formulating positive expectations from the seminar.

¹ Danilina *et al.*, 2006.

² See Maslow’s hierarchy of needs: en.wikipedia.org/wiki/Maslow%27s_hierarchy_of_needs

³ Klimov, 2004; Shadrikov, 2007 etc.

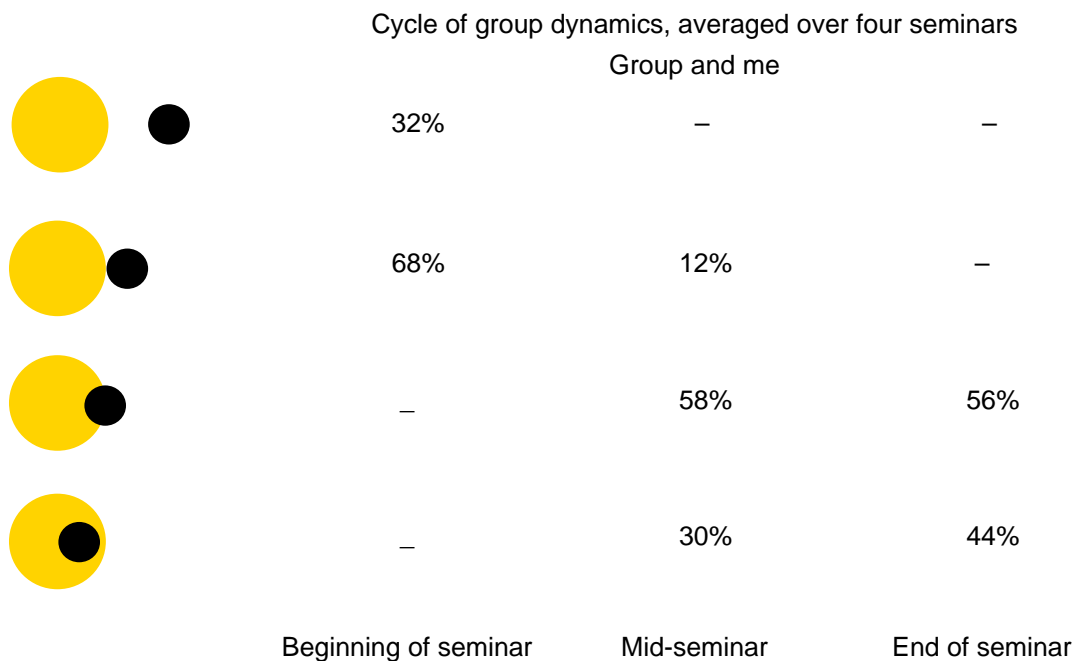
The first day of the course is usually the most difficult for both participants and training managers. The most important outcome of this day (or couple of days in a long training session) is the creation of an open and interactive environment where everyone is ready to listen to the others, to accept a diversity of viewpoints and can speak without the risk of being interrupted, ignored or criticized for their position. During this part of the training, the group should agree on the common principles of their “life together” during the seminar. These principles can include attention towards one another, respect for each other’s point of view and professionalism,

confidence, tact, non-critical judgments, active involvement in the process (interactive environment) and many more. Each group is unique and will formulate its own principles and norms of conduct. The role of the psychologist and training organizer is just to help them to come up with these statements and to ensure that, once formulated, these norms are followed during the whole seminar.⁴

If you can afford to hire a psychologist for the whole training period, do – it can be very useful (some examples of how you can use him/her are given in Box 7).

Box 7. The role of the psychologist in PA-related training

Centre “Zapovedniks” used to hire a psychologist for the whole course (two weeks). He lived in the hotel together with all the trainees and spent all his time with the group. After the first two days, his role was to maintain the positive group climate through everyday psychological exercises, during tea breaks, at the beginning and at the end of each day etc. He monitored the group dynamics using special graphic tests (see figure below) and advised tutors on training methods and exercises that would be more appropriate, according to the current stage in the group cycle. He was also responsible for final course evaluation and making recommendations for future seminars regarding “the milieu”.



Source: Danilina et al., 2006.

All these exercises result in the creation of a specific “group climate” which is positive and open-minded and stimulates the participants’ creativity.

6.3 Try to improve trainees’ self-image

A positive self-image helps people to widen their range of “I-can-do-it” things. It may seem strange, at first glance, but the training

manager should try very hard to achieve this as it will make the whole learning process much more effective. Self-confidence and self-respect increase when a person is recognized by other group members as a professional. The role of training providers is to facilitate such attitudes towards everyone at the seminar. This aspect is especially important for PA-related training as PA specialists are often under-valued by other members of society and in consequence have a much stronger need for colleagues’ acknowledgement and positive reinforcement than is the case with many other professions.

⁴ Danilina et al., 2006.

You can achieve this goal in different ways. The main principle is to make your trainees feel your respect from the first minute they arrive at the seminar. You may, for example, write their name by hand, rather than type it, on all official letters you send prior to training. This small thing emphasizes your individual approach to everyone. You may talk to each trainee to firm up the details of their arrival and requests for accommodation / food etc. Don't forget to find out whether somebody is a vegetarian or has some other special requirements. It makes sense to try to find out as much as possible about your course member in advance, in order to get to know him/her better. This will help greatly in your communications, especially during the first day. You may do it through a special questionnaire you ask everyone to fill in prior to training or through your contacts network. A good step is to prepare a personal greeting and information leaflet to give to each of the trainees on their arrival. Receiving such detailed information at the very beginning will make people feel more comfortable in their new environment.

You may ask participants to conduct their personal master class at one of the evenings after the training. Adult learning is difficult as the trainees are already professionals themselves and may feel uneasy in the position of “student”. Personal master classes or similar activities are helpful for increasing participants' self-confidence: everybody likes to share their unique experience and lessons learnt, to discuss their own problems and get feedback from the group. If you are putting such evening activities in your schedule, don't forget to notify the trainees about it some time before the training – they will feel better if they have had time to prepare their presentations at home and brought all the presentational materials with them. During the first days of the seminar you should make a

schedule of personal evening classes and make sure everyone knows it in advance. However, it is also very important not to force anyone to conduct a master class – it should be completely voluntary.⁵

The other possible option is to think about giving awards or certificates to “the best PA professionals” at the end of the training. You may invent as many different nominations as you wish to recognize the people who merit this and are not recognized enough by their bosses and other relevant bodies. However, it is very important to give awards for the people's real PA work, not for their activity during the training course where the “non-judgmental principle” should be applied.

6.4 Always consider the interests and wishes of the trainees

The trainees' interests can be roughly divided into two groups: 1) those connected to their professional ambitions; and 2) personal (individual) wishes and preferences. The training course will be most effective if it manages to satisfy both. Most PA seminars are focused only on the first group of interests: they include lectures and discussions on principal topics of PA management like economic, legal issues, interaction with stakeholders and many more. However, it is very important not to forget the second group: what do people want to do now, what do they like to do, how can we make them having fun during the training, what are they passionate about etc. Below is an extract from a survey of course members, giving an idea of the combinations of these interests.

Box 8. Survey of course members (extract), Centre “Zapovedniks”

Question: What did you like most of all on this training course?

Answers:

- Exchange of information, opinions, best practices;
- Psychological training;
- Informal communication within the group, with tutors and training managers;
- Personal master classes;
- Meetings with representatives of donor organizations;
- New knowledge and professional information;
- High quality education.

Question: What didn't you like?

Answers:

- Overloaded with new information;
- High intensity of the educational process;
- Lack of time for informal communication;
- Lack of information on particular topics;
- Staying indoors all the time;
- Lack of time to think about the new ideas;
- Lack of mobility.

We can see that many participants were generally dissatisfied with anything that kept them away from informal communication with the group members and tutors. So, their principal interest lay in the sphere of interpersonal communications – this should be the main focus when organizing future courses for similar audiences.

Source: Danilina *et al.*, 2006.

⁵ Voitovich *et al.*, 2007.

It is important to realize that the interests and wishes of participants are not static – they are changing on a day-to-day basis. An important role of the training manager (and/or the psychologist) is to follow this dynamic and adapt the training programme and methods to keep up with these changes.

6.5 Facilitate the trainees' desire and capacity for professional growth

When starting a new training initiative, you should realize that, no matter how long your training is going to last, it is impossible to teach people everything they need to know to become professionals in their field. This can't even be regarded as a goal of a seminar. However, the training can do much more, namely, develop the participant's own intentions to enhance his/her professional capacity.

The role of training managers is to arouse participants' interest towards their profession by, for example, showing them the international importance of their jobs, comparing their achievements with those of their colleagues from other regions and countries, giving examples of successful implementation of the most crazy ideas or attracting funds for PA projects etc. You may focus on discussing the methodology of their work – to make them aware of how complex it is and how sophisticated they need to be to carry out their job well. Such understanding often stimulates people to think more about their career development and how they can advance more in their work. Brainstorming and other discussions on motivation, objectives of work, long-term vision and mission may also have a positive effect. A good idea is to try to initiate the establishment of a community of your TC alumni or any other professional group that will allow its members to exchange best practices and share problems after the end of the training. You may try to propose that they report to the group on their achievements (for example, on the completion of your final course project) within some fixed period of time – this will be a stimulus for them to move on.

6.6 Create an effective educational milieu, following a few key principles

- *Avoid judging others*

“Don't judge others!” is the fundamental principle we highly recommend you ensure that all your trainees follow. All comparisons risk having a negative impact on somebody's self-esteem – no one likes to see that they are not the best. PA training often gathers people with very different backgrounds and levels of competencies. Instead, you should follow a well known principle

of Eastern pedagogy – “*Compare yourself with yourself from yesterday*”. Such an evaluation method always helps to identify positive trends in everyone's professional and individual development that should be recognized by the rest of the group, thus making the person sure he/she's doing his/her best.

- *Avoid performance appraisals*

We suggest not using any performance appraisal during the seminar or at the end of it. In adult learning the comparison of competences is not as important as the individual growth path of each trainee. This does not mean you should avoid monitoring and evaluation – but when you do it, you are evaluating your own performances (as those of a training manager), not those of your trainees.

- *An interactive environment is critical for adult learning*

This is a well known idea relevant to every adult learning activity. Scientists have proved that an individual takes in about 10 percent of what they hear, 50 percent of what they see, 70 percent of what they repeat and 90 percent of what they do by themselves. The other very popular name for this concept is “learning-by-doing”.

- *The environment should be creative and stimulate creativity*

The training manager should ask all tutors to constantly pose problems that require non-standard solutions and provoke discussion. In a creative environment, participants not only use the learning opportunities provided by the training managers and tutors, but create their own opportunities through active sharing of their experiences, posing questions, initiating new discussions etc.

- *Make sure the trainees are always aware of their current thoughts and feelings*

Such analysis can usually be carried out using each other's feedback during interactive training sessions.

6.7 Create positive informal relations within the group

S. Amonashvili, the author of the terms “optimistic pedagogy” and “cognitive humour”, wrote that “the teacher should learn how to make his studies joyful, how to laugh and make others laugh during his lessons to make the students remember them as a very happy time spent together”.⁶ We highly recommend that you do everything you can to make your training courses not just work, but also fun.

For example, try and remember any particular group activity (apart from the training itself) that stands out from any of the seminars you yourself have attended. It is probably somebody's birthday celebration, a final party or some other informal activity involving

⁶ Amonashvili, 1984.

the whole group. It is the task of the training manager not to forget about such “emotional events”. Another method is to initiate the preparation of a final poster to be displayed during the party at the end of the training, to remind the participants about the life they have shared during the course. They will remember this creative work together for years after the training. And it might also be interesting for them to compare their own poster with those of previous groups.

The Russian pedagogue A. Makarenko wrote that “the real stimulus of the human life is tomorrow’s happiness. Pedagogues should consider this ‘tomorrow’s joy’ as their main object of work”.⁷ You should make the time to discuss with each of the trainees the perspectives of their work in the PA, their chances to participate in future seminars, study tours, exchange visits and other interesting events. Such conversations help to create a positive mood.

We also recommend using games and various role-playing exercises in-between training sessions to make people relax, forget their fatigue, laugh and communicate in a more informal manner. Wake-up exercises during the first and last five minutes of each session, between formal lectures and presentations, and in-between different seminar topics and discussions are also highly recommended.

Collective discussion of impressions after each training session may have a much bigger learning effect than the training sessions themselves. Informal communication should remain informal – you shouldn’t impose any rules or moderate the discussion. However, in cases where serious conflicts arise during informal communication, you may need to intervene, but do it indirectly and as gently as possible.

⁷ Makarenko, 1988.

7. How to organize space and time: Delivery of practice-oriented training

7.1 Preliminary arrangements and responsibilities

7.1.1 Roles and relationships within the training team

Preparation should start long before training – two months before, at least. To get everything done, we recommend putting together a team (including full or part-time staff as well as experts working on an hourly-rate basis – see Box 9).

In cases where funding is inadequate, the functions of training adviser and training manager can be in the hands of one person. He/she will work in close cooperation with the training consumer (Head of PA or PA system or PA department etc.), discussing the required service in detail before and during the seminar as well as evaluating results.

7.1.2 Organizational matters to think about before training

The training manager has many things to do in advance. The first part of their responsibilities consists in *communicating*

with future trainees to ascertain their detailed training needs and develop an agenda of interest to everyone. Another important matter is distributing information about the seminar to participants – it is best to do it in advance, and no later than two weeks before the course. If people need a visa to attend the training, this period should be at least a month or two. PA staff as well as other civil servants usually require official invitations to attend seminars to arrange their business trip with their superintendents. People need to have a final version of the agenda in advance with detailed information about the excursions (where, when, for how long etc.) and any other extra-curricular activities within the course. If you wish the trainees to provide a personal master class (as described in the previous chapter) or a presentation, you should discuss it with each of them beforehand, especially focusing their attention on the objectives of the event and timing. And, definitely, all details of accommodation, meals, transportation, transfers, expected weather forecast, dress code and any special rules your TC may have, should be sent to participants at the same time.

Let us say a few more words about the group. Psychologists consider that the optimum number of people for an interactive

Box 9. The roles of the training team

a) Training adviser

The person who suggests, prescribes, even orders, the purchase of a product, or treatment. The training adviser is responsible for dealing with the “gap between the expected performances and actual performances”. The training adviser is in charge of training: he or she expects results and delegates their realization to the training manager.

b) Training manager

The person responsible for training who organizes the resources (technical, financial and human) allocated to training towards a precise goal determined by the training advisers. The training manager coordinates the planning of the training, and follows up on the implementation and the results of the training course. The function of the training manager is fundamental to the constitution of a management strategy for training. He or she insures the coherence, the smooth running, and the evaluation of the process of training.

c) Trainer

The expert in a particular field of knowledge, occasionally a member of the team, but usually from outside the training centre, the trainer is responsible for the transfer of competencies. An essential participant in the training activity, he/she follows the instructions defined by the training manager concerning the educational objective of the training. During preparations for the course, the trainer is in contact with the training manager and with the trainees. During training, he/she is exclusively in contact with the trainees.

Source: Petit-Uzac and Thevenin, 2000.

training course is no more than 12. In practice, however, it is not always possible to have such small groups: the fewer the people, the higher the cost per person, as many training costs (paying the trainer(s) and training manager, renting training rooms etc.) don't depend directly on the number of participants. As a compromise between training requirements and budgetary issues, we suggest a group of about 15 but certainly no more than 18 people. If there is a need to work with bigger groups, one possibility is to divide them into several smaller groups and get together from time to time to discuss general questions "in plenary".

If there is a selection procedure and you can choose your trainees yourself, bear in mind the following considerations (in addition to professional competency, background, references provided etc.). The group will operate more effectively if the gender balance is more or less equal. Depending on the objective of your training, you might consider whether to have people from different geographical regions (nation-wide training courses are usually more interesting when people come from various parts of the country) or, alternatively, to concentrate on a particular cluster of PAs with similar challenges and conditions. There are opposing views on whether the level of professional experience within a group should be broadly similar or diverse; we consider diversity to be a benefit, and not only for the less experienced members of the group.

The next important task is *communicating with the trainers*. The role of the training manager certainly should not be limited to finding tutors and establishing the agenda and the schedule. Before the seminar it makes sense to discuss each planned lecture or workshop with its tutor in as much detail as possible, even if it is the hundredth time that you are working with this person and the previous 99 times were very successful. Every group is different – and the methods the trainer used once with 100 percent success could be 0 percent effective next time. The training manager should give a tutor comprehensive information about the group: who are the participants, where do they come from, what background do they have, what is their experience in the field, etc. The easiest way of doing this is to analyze the trainees' pre-course questionnaires that you can ask them all to fill out and return when you are discussing the agenda with them, and to give the results of this survey to trainers – this will facilitate their work in preparation for the workshop. An example of such a pre-course questionnaire can be found in Appendix 4. The training will be more effective if the tutors also know the precise objective of their workshop and the course overall, what "concrete results" trainees are supposed to demonstrate at the end, and details of the proposed topics of final course projects, etc.

The experience of many TCs shows that it is a good idea to ask your tutors to submit detailed plans of their workshops in advance, together with presentations, documents to be printed for training and all resource materials, to be copied onto a CD

for participants to take home after the course. Better to keep all this information in one structured database to ensure you can sort some of it out for your alumni at the time required. Don't forget that all documents related to the training should contain the logo of your TC, your contact details and relevant copyright information.

Work on the *methodological and technical aspects* of the seminar is the third main part of pre-course preparation. In addition to documents and recommendations for home reading given by each of your tutors, the training manager might also consider creating a seminar library, specific to each training course. In the meantime, it is a good (and cheap) option to collect mainly electronic copies of books and articles, rather than thick paper books, although in some cases this last option is the only one possible. If you update your library before each seminar, in a few years your TC will own a valuable collection of PA-related publications that, for sure, will give you added value in the eyes of your clients. For example, Centre "Zapovedniks" has built up a library of more than 5,000 books in the field of PA management and thousands of articles, which is now the biggest PA-related library in Northern Eurasia. There was no special project or funding for this – it just happened due to their efforts to prepare for their courses as thoroughly as possible. If you are providing participants with a CD, don't forget to arrange the numerous documents there in a systematic way and to put in hyperlinks to facilitate the search for a particular file. Also, try and make the CD cover illustrate the seminar you have had, for example, you could print out a common group photo for it. This will also help people not to lose the CD amongst the myriad of others.

Office supplies, printed forms for final course projects, daily questionnaires, and scenarios of "warm-up" activities – all these little things are very important to think about in advance, not when the seminar is already in progress.

An important issue to think about is the *place where you are going to conduct the seminar*. If you are not lucky enough to have training facilities of your own (that is the best option, for sure, but not always available), it makes sense to establish long-term relationships with some training institution, university or even just a hotel that provides conference services. Explore the different options to find the best "value for money". So, what is the ideal training location? It allows participants to be close to each other and to the trainers and, at the same time, be separate from other hotel residents or other training course participants (in the case of a big training centre that caters for many groups at a time). A restaurant or café should be located close to the training room as well – although, sometimes it is a good idea to have a 10-minute walk in between, if the surrounding landscape is suitable. The rooms should be maximum for two people, though a possible variant is to have blocks of two double rooms with a shared bathroom. An important aspect, especially when the rooms are small, is

whether there is a place (a hall or some other special room) nearby where the participants can meet in the evenings, in a relaxed and informal way, to spend time together, have a glass of wine etc. Gathering again in the training room is not a good idea – after a long working day everybody is tired of the same surroundings and would like a change. It is important for the atmosphere of the course.¹

It would be a very good idea for the training manager to visit the seminar location a day or so beforehand to check how all the equipment and facilities work, whether the tables are easy to move, where the tea and coffee are going to be served etc., just to make sure everything is as it should be. Every last detail is important at the pre-seminar stage of organization – the smallest thing has a role to play when you are trying to create a positive and effective training environment.

7.2 Arrangements and responsibilities of the training manager during training

“After the official opening of the training, we start moving away tables, putting chairs into a circle, putting aside pens and notebooks and begin telling the group about ourselves. For some time, this exercise seems strange enough for participants – they’re waiting when the “normal lessons” will commence. But they’re going to spend at least a day “playing these games” – and it’s only a couple of days after that they will start realizing what it was all for”.

Source: Danilina *et al.*, 2006.

It is important to always remember one simple piece of advice – if you surprise your audience from the very beginning, it will

be easier to work afterwards as attention levels will be higher. And at the same time, also very simple, use as many different forms of teaching as you can, rotate training methods and make sure participants are involved in the learning process – if not, quickly change the method.

At the very beginning of the training course, one step that could be very important is to gather people’s expectations of the course, write them on a board or flipchart and hang it somewhere for the duration of the whole course – you will need to get back to this list at the very end to verify whether expectations have been met.

During the course, the training manager is expected to be with the group all the time – at formal as well as at informal meetings. They are not only responsible for keeping to the schedule, ensuring meals and coffee breaks are delivered in time and for assisting trainers and trainees to solve any problems they might have. Their role is also to participate in all workshops and monitor the process: how is the trainer dealing with people, what is he/she telling people and what is the reaction of trainees, what questions are they asking, how is the trainer interacting with the group and is the group active enough, what additional information would people like to receive on the item in question and where is it possible to take it (does the trainer or some of the participants have it?), when is it time for some warming up or a break or a move to working in small groups etc. All these and many more similar questions should always be in the head of the training manager – better to have a special notebook or laptop close to you and immediately fix all the thoughts you have for the post-seminar detailed analysis. Don’t forget about breaks and meal times – these are very important times for you to speak informally with people and get their immediate feedback on what has been happening and how they are reacting. In many seminars the training manager doesn’t even have a permanent place to sit during lunch or dinner, but moves around constantly to be able to talk to as many people as possible.

Box 10. How to make sure people are aware of where they are and what is going on

Once you have worked as a training manager for some time, you will notice that some things are common to almost all groups. One of these is that people very rarely remember the name of the project within which the current course was made possible, or the name of a sponsor organization. They are so involved in their own group relations, that everything else simply doesn’t matter. However, it may be important for you to make them remember, at least, the name of your training centre and some basic information about your company. There are several ways to achieve this. At the beginning of the course, you could make a presentation about your project – but be as precise and concise as you can not to overload people with information they will not remember. Your personalized products (flag, badges, posters, T-shirts, pens, notebooks etc.) with your logo can also work effectively if they are placed around the training room – and it is good practice to encourage people to take some of them home. Several days after the first presentation (which not many people will remember well), you can return to this topic and find some time to speak about the different programmes you are implementing or discuss some of your special projects with the group.

Source: Danilina *et al.*, 2006.

¹ Danilina *et al.*, 2006.

To contribute to a more stimulating learning environment, the training manager may collect and hang in a visible place the most interesting and/or problem-posing results of the group work of the previous days. These are very useful to the trainer as well, who has the opportunity to get quickly involved in the thinking process and, thus, understand the trainees better.

7.3 Delivering practice-oriented training

All trainers want their work to have concrete results in the practice of PA management. But only few of them really have an action plan to achieve this ambitious goal. Below you

will find several ideas on how to make your training more practice-oriented.

There is one element that is particularly important for this – the final course project. The research we conducted showed that TCs which encouraged participants to prepare final projects at the end of each seminar were more effective in getting the results of studies integrated into practice. The process of project development usually starts even before the training course – participants receive information about the final projects from the training manager and are asked to think about the topic prior to coming to the course. On the first day, the trainees get a printed form for the final project and listen to a brief presentation on the goal of this part of the course. An example of a possible final project matrix can be found in the box below.

Box 11. Template for the development of a final course project

Date _____

FINAL COURSE PROJECT OF THE SEMINAR _____

1. PROJECT INFORMATION

Project name	
Author	
Applicant	
Location	
Duration and timeframe	
Project beneficiaries	
Number of indirect beneficiaries	

2. PROJECT GOAL, OBJECTIVES AND OUTCOMES

Goal	
Objectives	
Outcomes	

Box 11. Template for the development of a final course project (cont.)**3. PROJECT PARTNERS**

Role in the project	Organization, position in the project

4. CRITICAL SUCCESS FACTORS

Factor 1 _____

Factor 2 _____

5. POTENTIAL THREATS

Threat 1 _____

Threat 2 _____

6. BRIEF PROJECT DESCRIPTION

Dates	Activities	Responsible	Resources

7. CHARACTERISTICS OF ONE'S PROJECT ACTIVITIES (your choice)

Project activity	
Goal, objectives	
Target group	
Timeframe	
Materials and equipment	
Methods of implementation	
Description	

8. INFORMATION SUPPORT OF THE PROJECT

Draft information about the project for the media

--

Project applicant _____

Source: Centre "Zapovedniks".

If we want our trainees to develop good project proposals, a relevant workshop is needed as part of the seminar – to teach people the difference between “outcomes” and “outputs” and other similar things. The topics for final course projects should be relevant to the general objective of the seminar – to be illustrative of the knowledge and skills that participants have obtained during the course. Topics for concrete projects are discussed with the training manager throughout the duration of the training. One of the last training days could be completely devoted to preparation of the projects: participants could work individually or under the supervision of the training manager or a trainer. On the very last day, they “defend” their ideas before a commission (training managers, training advisers, trainers, outside experts, representatives of national PA authorities etc.) and their colleagues, indicating the timeframe for project implementation and its funding sources. In cases where the TC lacks special funds to give micro-grants to the trainees, you could encourage people to develop

projects that are realistic even in the absence of additional funding – simply, using the existing budgets of the PA which they have access to. But, if it is in any way possible, it is a very good principle to make a competition and award two or three small grants (US\$ 500–1,000) for the best projects as decided by the commission. Even if the sums are very small, people will take it more seriously (not just see it as a learning exercise), carry out the task as planned and report on it to the TC. The other effect is that if a person has even a small amount of money for a project, they are much more likely to attract additional funds. Participants of the seminars of the Network of TCs of Northern Eurasia managed to raise significant funds for their work, using a symbolic grant from our TCs as their “first capital”. And the attitude of PA directors to a TC improves if they see that it is not “simply studies”, but can provide some concrete support for PA management. Below are a couple of examples of final course projects which were selected for funding at our seminars in Russia.

Box 12. Examples of final course projects from Centre “Zapovedniks”

“Ugra” National Park received a grant for improving cooperation with private companies, working in the region near the park. It organized a so-called “Meeting in the Green Hall” (see Case study 22) for business representatives. During the meeting, it presented success stories of projects already implemented together with business as well as new project ideas. After the meeting, several new cooperative projects were launched.

“Kenozero” National Park in the Russian North got funding for the development of cooperation with a very famous cultural heritage site in Russia. They used the grant to organize two field study visits to get to know each other’s work better. The idea of making training courses for a mixed audience (cultural heritage sites and national park staff) was born from these tours and is now being implemented.

The work on final projects should not finish as soon as the participant leaves the TC – through in many cases this is currently what actually happens. If you really want something to happen in practice after your course, your work with the group shouldn’t stop after the graduation ceremony. A good idea is to establish an Alumni Network (you can give it an easily recognizable name, invent a logo, principles and whatever will make it a unique group of people) and monitor the progress towards implementation of the various projects. In practice this has very rarely been achieved due to lack of resources for supporting the network. However, it is worth doing, and the work is not as time-consuming as might be supposed. If you remind people about their projects six months after the training, then in a year, and once more in two years, say – that is enough. Your task will be easier if you develop a follow-up questionnaire and simply ask people to fill it in. The personal relationship you have established with them during the course will be a sort of guarantee that they will respond. Our experience shows that people are more likely to continue working on their projects if they are being gently monitored by a TC team. The other aspect is that the alumni really appreciate such mentoring, especially if they know they can consult the TC or the other members of the network on any question they may have during project implementation. Such consultations and experience sharing after the course are often cited as being of more value than the training itself. Information

on the degree of project implementation should be regularly collected, disseminated within the Alumni Network (especially, the most interesting projects which could serve as best practices for the others), posted on the TC website and so on. Nothing can be more interesting to your previous trainees than information on the progress of their colleagues.

Several TCs prefer cycles of seminars to independent and unconnected training events. The idea is to make participants of the seminar meet again in the same group some time after the course (e.g., in six months time) to report on their progress in the implementation of their pilot projects, discuss challenges which have arisen and find solutions. Such programmes are always very popular and have proved to be efficient – though they cost more and need special funds to be realized.

One more way to make your training more results-oriented is to oversee the production of a final publication (or any other final joint project) by the whole group. People can start discussing the joint issue in some of the workshops within the course and create a small working group (better with one leader) from the most active participants who will lead the continuation of work after the course. In an ideal situation, the TC will provide funds for this group to meet again, at some point, to discuss the results of their activities. The group should develop and implement

a concrete and time-limited work plan to finish preparation of the publication and send it for review to all alumni. Then, it is usually the TC that takes responsibility for publishing the paper – but it could also be the national PA agency or some donor institution. One such successful joint project arose out of a seminar for PA Scientific Managers at the Kazakhstan TC. The group has rewritten the *Guidelines on the preparation of “Letopis prirody”* (Annual PA Scientific Monitoring Paper), published it, had it approved by the National PA Agency (State Committee

for Forestry and Hunting) and disseminated throughout the national PA system for use by all PA scientific staff. All alumni as well as their PA directors were really impressed by the “practical” results of the seminar in question.

Anyway, no matter which method you are going to use, you should always think of turning your training to serve the practical needs of participants – this is one of the criteria of your success.

8. Monitoring and evaluation of training effectiveness

Daily monitoring, and immediate and longer-term assessment of the results of training courses are top priorities for those wishing to really build the capacity of PA people and, much more importantly, to make them use new knowledge and skills to improve PA management. However, we are aware of many training initiatives for PA staff which still lack a comprehensive M&E (monitoring & evaluation) plan and pay little attention to measuring the impact of their programmes. In this chapter you'll find some tools for carrying out your M&E and some arguments for the need to get involved in this additional and sometimes time-consuming activity.

When implementing a project, especially if it is funded by an international foundation or through the GEF mechanism, one of the first things you will have to do is to develop an M&E plan, which you should follow and use to report on the results of your surveys. In fact, it should be exactly the same with any training you're conducting, no matter who pays for it. The plan

can be designed in different ways – the table below provides one example of what it could look like. Anyway, implementing such a plan will be easier if you have your indicators clearly formulated and SMART,¹ with means of verification, timeline and budgets defined for each indicator. It makes sense to develop indicators for different levels: starting from those for your general objective (to achieve the mission of the TC), through indicators for outcomes (for concrete projects you are implementing, or programmes or fields of activity within the TC etc.) to those measuring the success of individual seminars. We will focus on this latest group further in this chapter, but it should always be remembered that each M&E activity is part of a broader monitoring of TC effectiveness. Well chosen indicators for assessment of training will help you considerably when preparing a report on general TC work for your donors or higher authority – that is one more reason for taking the time to carefully select appropriate indicators at an individual training level.

Table 1. Example of a Monitoring & Evaluation plan for a PA Training project

Indicators	Means of measurement	Timeframe	Baseline	Target	Budget
Outcome 1.1 PA staff are applying new skills in PA management					
PA staff knowledge of essential PA management and biodiversity conservation principles and management practices	Survey of trainees prior to and following training	On-going for all training Summary analysis at Evaluation of Project (EoP)	Initial survey of trainees	Achievement of training objectives as perceived by trainees	Budgeted within training projects
Change in PA management systems and practices in sites where staff have been trained	Survey of trainees and directors of PAs where staff have been trained to assess changes in management practices and performance of staff that relate to training	EoP	Included in final survey	“Minimum” change at least achieved in majority of PAs with concrete example	Directors' survey – full population cost (about US\$500)

¹ Specific, measurable, achievable, relevant and time-oriented.

Table 1. Example of a Monitoring & Evaluation plan for a PA Training project (cont.)

Outcome 1.2 Sustainable training institutions are operating in each of the four project countries					
Financial sustainability of TCs	Long-term business plans Secured funding	EoP	No TCs	Long-term business plans Secured funding for coming 12 months	Not required
Training programmes are meeting needs of PA management agencies	Evidence of directors seeking further training for staff Records of number of applications for training places relative to availability	On-going	Baseline for each country available	66 percent of directors seek further training for staff All training is fully subscribed	Not required
TCs meet international standards for training	External evaluation of TC curricula and process by European Network experts	EoP	No TCs	At least one other centre meets standards Others show substantial progress towards standards	Cost of external evaluators' work (about US\$1,500)
Integration of TCs into existing PA management structures	Documentation of relationship	EoP	No relationship	Operational integration	Not required

Source: GEF/UNEP SNTC Project, 2007.

Monitoring and evaluation of each seminar is usually a combination of several processes: 1) daily monitoring; 2) end-of-course evaluation; 3) post-training evaluation of related practical changes.

8.1. Daily monitoring of the educational process

Daily monitoring is a tool which combines at least two important functions. First, it helps you to assess the “group climate” and if necessary to correct it to raise participants’ inclusion in the process and adapt the training programme according to changes in people’s feelings and expectations. Second, comparison of the results of day-to-day monitoring permits you to draw a “training trail”, find the reasons for “ups” and “downs” and evaluate your work at the end of the seminar. Various methods can be used to conduct daily assessment – we’re going to discuss just some of them here.

8.1.1 The “Way of Thinking” Method²

Box 13 gives a template for the assessment of group dynamics. You can use it to fix changes in mood at the group level. Concrete questions can vary a lot, but they should be helpful in revealing the evolution of perceptions and the range of attitudes within the group. Psychological interpretation is needed to analyze the results of this survey, and we highly recommend getting this done by a professional. The answers can be anonymous. It may be useful to compare the results of individual assessments with each other every day, to present the aggregated results for trainees next morning and discuss some tendencies all together, as well as to compare the results of daily surveys at the end of the course. This method is, however, not sufficient to understand the “pluses” and “minuses” of the training in detail – it is too subjective and its results depend too much on a great number of outside factors you have no power to influence. You should, therefore, use it in combination with other more objective and fact-based surveys.

² Danilina *et al.*, 2006.

Box 13. "Way of thinking" template

Way of thinking ____ of the day («_» _____ 200_)

Your Phrase of the day:

Your Colour of the day

Your Symbol of the day

My activity today



My personal freedom



The process meeting my expectations at ____%

Features of the day:

- 1.
- 2.
- 3.

Your Desire-leaf:

I am proud of _____

I regret that _____

Participant that influenced me most of all today _____

Relations between the group and myself:



I would also like to add that

Last name

Signature

Source: Danilina et al., 2006.

8.1.2 Daily evaluations by topic, trainer etc.

Numerous methods exist to get participants' feedback on the topics discussed during the day, trainers, interactivity of the learning process, way of communication within the group, concrete exercises implemented and so on. Again, as in the previous case, if you are conducting such micro-surveys each day, you will accumulate well structured material for

comparisons and final evaluation. One piece of advice here is not to use the same methods for gathering opinions every day; ideally one method should not be repeated twice during a single seminar, no matter how long it is. Otherwise, there is a risk that people become bored with it and fill in the assessment just as a formality, which is not what you want. Several examples are given in Box 14, but thousands more can easily be found on the internet or simply invented.

Box 14. Short games used for daily evaluations

Game 1

The trainer makes red and green leaves from paper. Students are asked to write the thing they liked most of all during the day on the red leaf, and something they'd like to be done differently next time, on the green one. The people stick both leaves to the painted tree, before leaving the class-room at the end of the day. They don't need to explain anything to the others unless they want to. A very quick opportunity to get feedback of the "plus-minus" type.

Game 2

Participants are sitting in a circle at the end of the day. The trainer takes a small ball, says "thank you" to everybody for this day together and briefly describes his/her own feelings at the moment, then throws the ball to a participant; that person should do the same: thank everybody and tell about his/her feelings. He/she then throws the ball further – till everybody says something. This is a good exercise after "conflict" discussion or role playing to reconstruct a warm and friendly atmosphere in the group. Indirectly it helps to evaluate individual perceptions from the day, especially, if the similar exercise was conducted in the morning and you, therefore, have material for comparisons.

Game 3

The trainer can prepare a short (4–5 questions at most) questionnaire where participants have to score each topic they have discussed during the day, mark the efficiency of core exercises etc. It is better not to ask people to evaluate tutors directly – you will very rarely get honest answers. But it is possible to pose questions such as: "Which manner of communicating with the group was easier for you, № 1 or № 2?" and other comparative questions.

8.2 End-of-course evaluation

This type of M&E procedure is actually the most popular among PA TCs worldwide: at least 60 percent of the TCs we surveyed use some form of final assessment to get participants' feedback. A great variety of methods is available to conduct such evaluation. It is not the aim of this book to describe all of them, but we will provide several examples of how such a survey can be carried out.

8.2.1 Analysis of initial expectations

One of the most popular ways of getting feedback on what trainees have got from the seminar is to collect their individual expectations at the very beginning of the course and to discuss which of those have been met at the end. Usually, people are asked to name one or two principal things (knowledge of some facts or methods, toolkits and guidelines to solve some concrete problems, skills, established contacts with colleagues from other PAs etc.), that they'd like "to take home" from the training. These wishes are written on the flipchart, which will be visible to all participants during the seminar. On the last day, people sit down together, read out the expectations, one by

one, and ask the authors whether they feel satisfied with them and to what degree. This method doesn't provide a comprehensive evaluation of the seminar content or learning methods, but it is useful in giving a general picture on your success in meeting the most important training needs.

8.2.2 Subjective evaluation by participants

Again, this is one of the most popular methods. Usually, on the last day of the training, participants receive a questionnaire in which they can assess the following aspects of the seminar: content (relevance of the topic to their work, quality of presentation of material), interaction between the trainer and the group, training methods used and their efficiency, degree of inclusion of the individual into the group atmosphere, facilities, accommodation, meals, other organizational matters and so on. An example of such a questionnaire can be found in Appendix 5.

A good variant is to ask trainees to fill in two questionnaires: one at the beginning and the other at the end of the course. You can include similar questions, revealing the attitudes of PA staff to their work and then compare the answers and analyze changes.

8.2.3 Objective evaluation through tests and exams

This kind of assessment is much more typical for formal education than for PA TCs. However, it may be useful to conduct short knowledge reviews or skills tests in between the seminar sessions to get more objective information on the results of your work.

Adult learning differs from undergraduate studies in the fact that professionals don't like taking formal exams and feeling like students again. Therefore, if using this method, we should be very careful in making the whole process useful not only for training managers, but to the participants themselves as an additional training exercise. Box 15 demonstrates how this can be done.

Box 15. Examples of final course skills tests

The main objective of our Training-of-Trainers is to teach people how to use the training methods (games, brainstorming, work in small groups etc.) and communicate with a group. To see whether we've succeeded in this task, we can make a sort of "exam" during the last couple of days of the seminar. Participants develop and conduct their own mini-training sessions of about 45 minutes each. We encourage them to work in pairs – this is how "real" trainers usually work and also helps people to feel more at ease. The trainers work with their pair to assist in planning their session. During the students' sessions, all other group members become "trainees" and participate in the process as if it were a real training course. We try to choose actual topics which should be in line with those discussed during the seminar – often topics we did not have time to discuss at our previous sessions. This makes the exercise not just a skills test, but a logical continuation of our course. After each mini-session, the group sits together in a circle and provides brief feedback to the authors. This is very much appreciated by the students as it is their chance to receive comments on their work as trainers. Many of them report later that they conducted such sessions with their PA staff or other stakeholders.

Source: Centre "Zapovedniks".

8.2.4 Assessment of final course projects

We have already discussed the development of final course projects in detail. Let's just remember that these projects could also be a great tool to assess the effectiveness of the training process as a whole, as a lot of different skills and knowledge are used while preparing and presenting these projects. You can ask well-known PA experts to come to the "official" ceremony, where the trainees report on their projects on the last day of the course. Such a recognized "jury" will act as an additional motivation to people to try to make their projects as good as possible. You can also have a closed meeting of jury members afterwards to evaluate students' performances and the efficacy of your seminar. However, we recommend that this jury doesn't give any formal "marks" to the projects presented, but just gives people feedback on what's good and what could be done better.

Some project ideas are born during the seminar, but years can pass till the person finds the necessary resources to implement them. The question is whether we can consider this an impact of our training? Another example: people have met each other during the seminar for the first time. If they start doing some work together for the benefit of their PA – is it, again, the effect of our work? The list of such cases can be continued – and almost all of these questions have no single answer. Therefore, all evaluations, discussed later, are very much approximate. However, in this case, it is always better "to do something than nothing".

8.3 Post-training evaluation of changes in PA management

From our point of view, this is the most important element of the whole M&E process as it really shows the effect of your work on the practice of PA management. All PA TCs declare that "improvement of PA management is their overall goal", but in fact not many of them are actively doing something to assess the impact of their training on practical work. This is also the most complicated part of the whole evaluation process as it is often impossible to separate the effect of concrete training from a myriad of other factors, which, all together, have generated some positive change in management of protected areas.

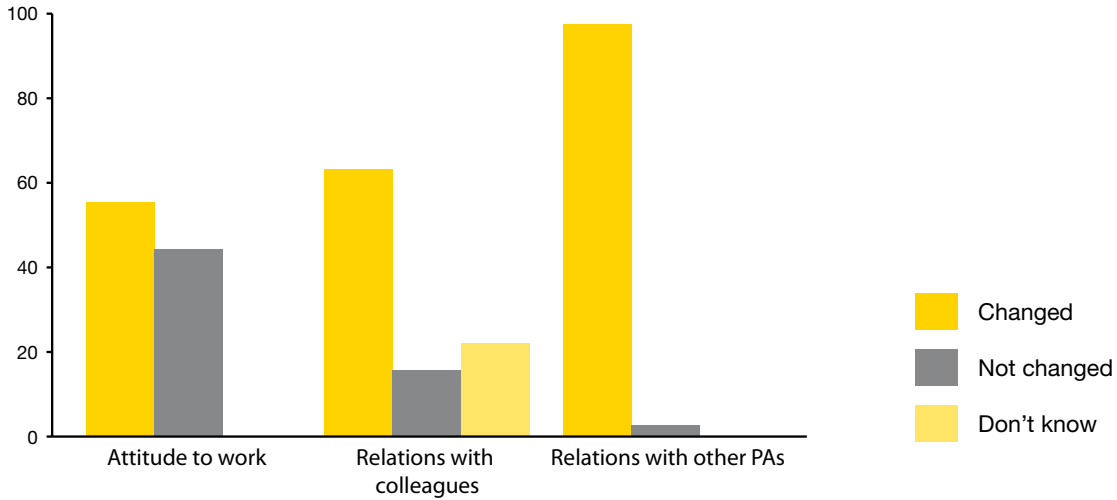
8.3.1 Evaluation by participants themselves

This method seems very logical at first sight – if we want to know whether our course was useful, why can't we just ask people about this? Yes, we've already asked them at the end of the seminar, but the warm words they gave us at that time could have been more of an emotional (that's still very important!) than an objective assessment. Be prepared to receive very different answers from the same people in six months or a year after the course. Again, comparing both surveys can provide valuable feedback.

When developing a questionnaire, remember to include not just questions like "Was the course programme relevant for your work?", "What do you remember first when thinking about that seminar?", "Which of the seminar topics was especially useful for your further work?" etc., but also those which will assess concrete changes in practice. The more indicators you use to follow the link between these changes and your course, the clearer the picture you will get. Some examples from the surveys are given in Box 16.

Box 16. Trainee evaluation of seminar utility a year after the course

A year after the seminar, alumni were asked to answer some questions including: “Has your attitude to work changed since the training?”, “Have your relations with your colleagues and other PAs evolved due to the course?” Their answers are presented in the graph below.



It is very important to ask people to give examples of those changes and to explain how they are related to the given seminar. These examples can be things like: “I’ve launched a co-operative project with the other PA”, “I’ve started to work as a trainer”, “I’ve developed new ways of interacting with visitors” etc. Using these examples, you can understand which seminar topics were especially effective from the practical point of view.

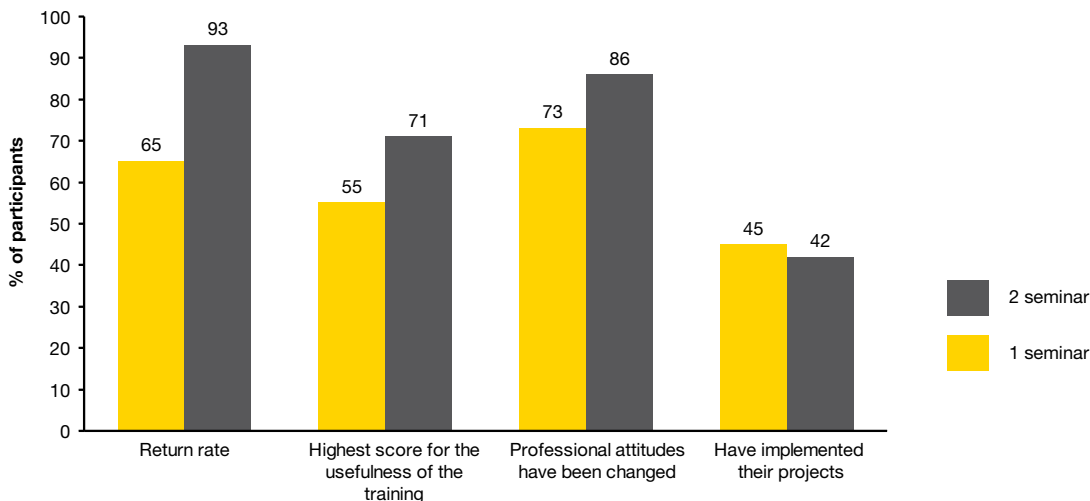
Source: Centre “Zapovedniks”.

It is necessary to think about the methods of collecting this data from your alumni. This can be attempted six months after the course, a year or even longer. Our experience shows that a year is a better time period than, say, six months as people need time to implement the ideas that they have planned during the seminar. The methods of contacting alumni can also vary from simple e-mailing to phone conversations, using the Alumni

Network (e.g., Alumni Forum at the TC website) or “official” channels (like formal letters of request for information from the PA Agency).

For courses that you have conducted regularly for several years, you may wish to see the dynamics of the results of post-training evaluation (as illustrated by Figure 9 below).

Figure 9. Presentation of post-training evaluation results



Source: Centre “Zapovedniks”.

The most difficult issue with this method is achieving a high response rate as everybody is busy with their own jobs and pressing deadlines and do not wish to spend much time filling in questionnaires. Two simple rules will help you to reach as many people as possible: 1) keep your questionnaires as short as you can; 2) invest time in keeping good contacts with your alumni. The last recommendation is especially important not only for evaluation purposes. The TCs which maintain permanent working relations with all their trainees get a lot of benefits as a result. A good example is the world-famous LEAD programme,³ working not only with PA staff, but in the broader sustainable development education field. LEAD keeps in contact with all of its alumni through its network of country offices. As the former trainees advance in their careers, they help LEAD to conduct their next sessions, fundraise for new seminars, work as tutors and help to solve “political” questions. Your alumni network is, probably, the greatest resource you will ever have – don’t lose it just because of lack of time.

8.3.2 Evaluation by PA directors and colleagues

A survey of PA directors and colleagues can give you more objective feedback on the changes in alumni work after the training. You can ask questions about new projects and ideas that the trainees have started to implement since the seminar; about the training or presentations they have delivered to their colleagues on return; about materials they have brought from the seminar etc. PA superintendents are always busy, so

the most effective way to ask them these questions is informal face-to-face communication during meetings, conferences, working trips etc.

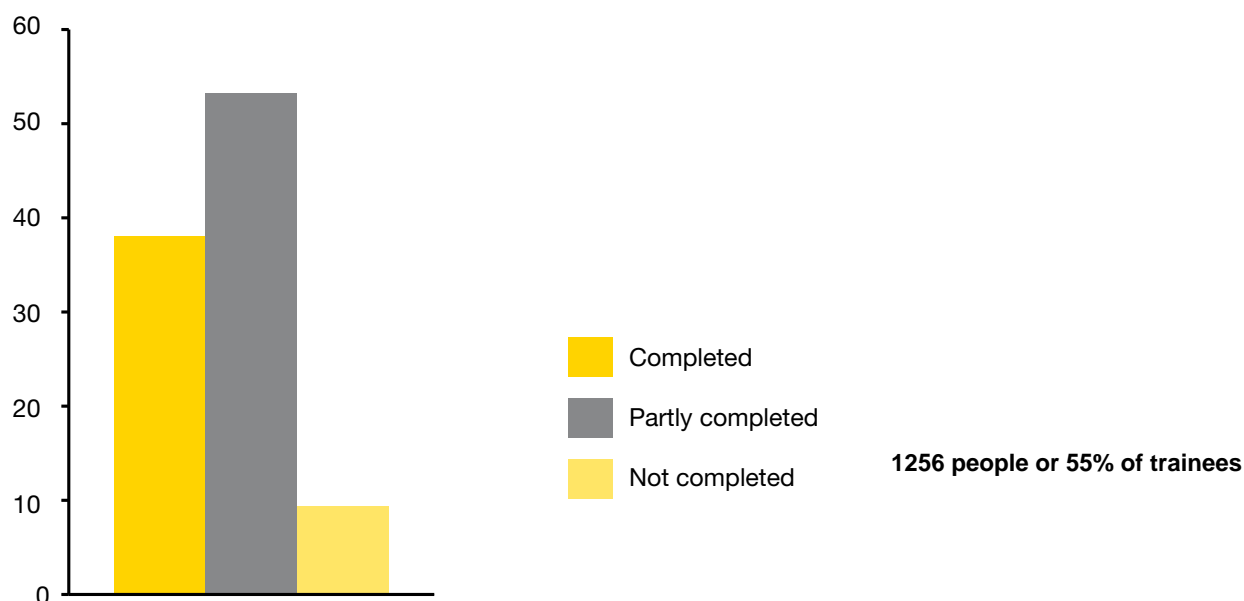
8.3.3 Career development

One of the indirect indicators of the impact of training on the future work of participants is the advancement of their careers after the course. If you see that a large proportion of your alumni have been promoted to superior positions shortly after the training, it shows your effectiveness as training provider.

8.3.4 Progress in implementation of final course projects

As we have already described above, it is a good idea to ask participants to report on the degree of implementation of their projects in, say, a year after the seminar. You could also encourage them to send you information on their progress in this field 2–3 years after the seminar or even later – some ideas really need time to be put into practice. Figure 10 and Table 2 show how this information can be presented and interpreted. This information would be more valuable if the people add brief descriptions of what has been done, with what resources and what difficulties they had to overcome. If the TC can afford to disseminate this information throughout its Alumni Network (or, at least, publish it on its website) or even consult its former trainees on some questions related to project implementation, it would be a big plus both for PA managers and for the Centre.

Figure 10. Implementation of final course projects



³ For more information see: www.lead.org

Table 2. Assessment of training effectiveness based on implementation of final course projects

Training and its dates	Participants, country of origin, name of PA	Brief description of progress made towards project implementation	Training effectiveness based on this indicator
Training-of-trainers "Environmental education and public awareness for PA", September 2006	Participant № 1 +	New training programme for rangers developed, five training courses held, involving 100 participants	66%
	Participant № 2 +	Two workshops carried out with local stakeholders, US\$ 5,000 raised for implementation of PA projects	
	Participant № 3 -	Project not implemented due to lack of financial resources	

Source: Centre "Zapovedniks".

8.3.5 Evidence of PA directors and project managers seeking further training for their staff

This is another indirect indicator of your effectiveness as a training provider. The easiest way to measure is through comparison of number of applications with the availability of training places. Of course, this will depend on many factors, far beyond the actual desire of PA directors and agencies to send people on the course. However, there is a direct correlation between the number of applications you're receiving and the degree to which your training programmes are meeting training needs.

A good indicator is also the relative proportion of applications coming from PAs (or other institutions) that have already sent participants to your training courses before. A high figure indicates loyalty of those PAs to your TC, which can be a consequence of their satisfaction with your work.

8.3.6 Collection of all evidence of training-generated change

Creating a register or a database of, at least, the most significant changes people are reporting as a result of your training is not

a waste of time. At the very least, you can use these records in your own reporting and fund-raising; at best it could help you change something in your training curricula.

8.3.7 Other evaluation methods

You can also use external assessments, conducted by independent evaluators; invitations for the TC to become a member of recognized international networks; official approval of your training curricula by national PA Agencies (in case your TC is an independent organization); the number of commercial contracts to conduct training that you have concluded or even the net benefits (if you are charging fees from participants). The sustainability of your TC (including, but not limited to financial sustainability) in a long-term perspective (such as 10 years and more) is, in fact, one of the best indicators of the relevance of your activities. But, again, only an indirect correlation exists between this and the practical use of the knowledge and skills by your trainees.

It doesn't matter which method or combination of methods you use for your Monitoring & Evaluation; what really matters is how you adapt your training, using the results of your assessments. Regular adaptation and openness to innovation are very important in the work of a PA TC.

9. Certification and accreditation in PA staff training: Some questions to consider

Certification of courses remains a difficult question in almost all PA TCs surveyed. There are, in fact, not many options to choose from. The easiest way, which most Centres now follow, is to issue their own certificates under the auspices of their TC. Such a certificate does not have any official status or any recognition with national governments, nor do they matter from the point of view of educational authorities. However, their real value can be very high, depending on the reputation of the issuing institution. A great many international seminars, held during world congresses and conferences, for example, give out this sort of certificate, which are of significant value throughout the PA community worldwide.

The second option is certificates issued by a national (regional) PA agency. This means the person's qualifications are officially recognized within the national PA system and participation in the course will be valued by his/her superiors and may directly contribute to the career development. "State" certificates are usually given to graduates from State courses, initiated by a PA agency, but there are exceptions for accredited non-governmental training providers as well.

One more variant is if the TC has a permit to issue authorized certificates, proving that a person has a certain competency level, according to the existing national qualification framework in PA management (environmental studies, conservation or other wider thematic areas). Such qualification frameworks exist in the UK, South Africa and Southern African Development Community States, USA, Canada, Australia and some other countries. In the UK, for example, there is a system of National Occupational Standards for Environmental Conservation which divides all learning curricula into special units and elements that it is possible to assess and accredit. Each training course is linked to these units so that comparison between courses of different providers can be easily carried out.

If the first two methods of certification are used, the TC alone or in cooperation with its national PA agency is responsible for the acknowledgement of its alumni. In the third case, the need to obtain a licence arises – it is usually given by the national Ministry of Education or equivalent body, though there may be exceptions. The procedures and criteria for getting a licence differ

according to national legislation and policy. Information on this can be obtained from national authorities.

Finally, the fourth option is when the certificate issued by one PA TC is also recognized in other countries – members of the same network of TCs. As far as we know, the only plan to achieve such a level of international cooperation is now being discussed amongst European PA TCs and is going to be based on the European Qualifications Framework (EQF)¹ and its Credit Transfer System. The major problem in launching a common certification system is how to accredit TCs and how to control the quality of the training product to ensure that the services of all TCs result in the same levels of competencies for alumni. More and more PA TC managers now agree that it is time to develop some sort of criteria to ensure quality control between various initiatives, programmes, diplomas and certificates available in the field. But what criteria should those include and who could become a certifying authority for PA TCs at the international level if there is such a need? How should the quality control be implemented? What could be the mechanisms for integrating various stakeholders into this decision-making process?

Protected area management in many countries is a heterogeneous, fragmented, geographically dispersed and often low-paid profession. The numbers of PA staff are small compared to other occupations but also very varied. Even particular categories of staff (such as Park Ranger) may have very different roles in different areas. In some places they act as park guards or police, elsewhere they may have an educational or interpretive/tourism role, or be involved in scientific research. In some countries, PA managers are often foresters, elsewhere they may have qualifications in recreational management, landscape ecology or spatial planning. How are we going to standardize the training curricula and does it make sense even to try? The TOPAS project, implemented in Europe several years ago, tried to develop a European-wide curricula and certification for PA staff training, but failed to create a common understanding. Is it possible that we can all agree on such issues some day?

One more challenge, directly linked to the above-mentioned, is how to "force" PA heads to give preference to managers who

¹ For more information see: ec.europa.eu/education/lifelong-learning-policy/doc44_en.htm

have graduated from any of the “accredited” TCs and to advance them more quickly in their careers than other staff? And how to “certify” those staff members who have been working in PAs for ages, have a lot of experience, but never participated in the “official” training programmes? These questions still lack

adequate answers. They probably need to be the subject of new discussions, new publications and new projects in this field. One option currently under consideration is for the IUCN World Commission on Protected Areas to play a coordinating role in this development.

Conclusion

The PA staff training industry is developing rapidly. The new challenges arising and the number of questions we ask ourselves today exceed the number of answers we have. Therefore, there is room for more publications in this field and, certainly, updates of this book will be needed soon. Below we will list just a couple of ideas for more research, which could be useful in this field.

We realize now that the Guidelines contain very limited information on the content of PA staff training. It would be a good idea to prepare a companion volume compiling the most successful training modules, session descriptions, games, exercises for work in small groups etc., directly focusing on PA managers. The copyright question may make this idea difficult to implement (and this is the main reason we decided to put this task aside for the moment), but many TCs are now publishing at least some of their products, so it may be possible in the future.

The list of TCs analyzed here is not at all complete – for example, we only covered a couple of best practices from Australia and Oceania. However, Australia now has one of the most effective PA systems in the whole world – including numerous successful capacity-building initiatives for its staff at regional and cross-regional levels. These gaps were, mainly, caused by the limited time we had for preparation of the Guidelines: the priority was to make available all the material we already had. However, information about other centres and their work should be taken into consideration and disseminated globally.

Besides training itself, a lot of work is being done on wider capacity-building issues for PA staff. Nothing was said here about staff exchange programmes (which have proved to be a very efficient option); the “Buddy experiment” (recently implemented by IUCN/CEC); individual secondments of staff to other PAs

(“twins” model); internships at major conservation organizations; and many other possibilities PA staff now have to improve their qualifications. This is also a subject for more detailed research.

A special issue within this broad topic is building the capacity of young PA professionals. Priorities here are not only to deliver quality training, but to think about general motivation of young specialists to work in protected areas, how we can attract them and make PA jobs prestigious not only in a few countries of the world, but everywhere. As far as we know, there have so far been no detailed studies of these issues at a global level – and here is an enormous piece of work for specialists.

Finally, more and more PA-related training centres today are focusing on building the capacity of mixed groups of stakeholders, interacting with PAs on a regular basis. Joint seminars for PA managers and representatives of tourist companies, local communities, cultural heritage sites, decision makers etc. are becoming the new reality and proving to be successful. It is not traditional environmental education, but something between that and PA staff training. We also shouldn't forget the myriad of volunteers who are not staff, but are, in some cases, becoming even more professional than the staff, and, anyway, are making a significant contribution to the daily work of protected areas. There is, therefore, a need for a new publication on capacity building for **PA People**, including everybody who has an impact on PA activities. Needless to say that the methods of work will differ a lot.

The need to continue developing this topic and bring it to the international agenda is now higher than ever. We do hope these Guidelines have been useful and can be considered as a very small first step to a greater recognition of the importance of PA staff training at regional, national and international levels.

Appendix 1. Template for survey on training needs, Croatia

The aim of this survey is to assess the training needs of people in charge of biodiversity protection and protected areas at institutional/central level, including parks' managers (superintendents/directors) within the Karst Ecosystem Conservation Project Area.

We would therefore appreciate your help in filling in this QUESTIONNAIRE; it is strictly confidential, so please feel free to report your own view. Thank you in advance!

QUESTIONNAIRE

A. Personal data

1.	Full name:
	Age:
2.	Protected Area:
	Address:
	Tel. and e-mail:

B. Education

1.	Degree:
2.	Knowledge of foreign languages (which and level):

C. Training

1.	Before your current job:
2.	During your current job:

F. Training needs

1.	List the knowledge needed in your job (what you must know):	
2.	List the skills needed in your job (what you must be able to do):	
3.	Tick the training topics you think might be useful to improve your professional effectiveness:	
	International and national conservation strategies and protected area policies	<input type="checkbox"/>
	Environmental quality monitoring	<input type="checkbox"/>
	Biodiversity monitoring and management	<input type="checkbox"/>
	Communication skills	<input type="checkbox"/>
	Physical and landscape planning	<input type="checkbox"/>
	Planning and design of interpretive structures and media	<input type="checkbox"/>
	Environmental education planning	<input type="checkbox"/>
	Visitor safety planning	<input type="checkbox"/>
	Human resources management	<input type="checkbox"/>
	Preparing grant proposals	<input type="checkbox"/>
	Financial management and planning	<input type="checkbox"/>
	Social policies, community involvement and conflict resolution	<input type="checkbox"/>
	Law enforcement	<input type="checkbox"/>
	Sustainable tourism and marketing in protected areas	<input type="checkbox"/>
	Other:	
4.	Should the training be:	
	Intensive (full-time)	<input type="checkbox"/>
	Extensive (few hours per day)	<input type="checkbox"/>
	On-the-job training	<input type="checkbox"/>
	Study tour to a foreign country	<input type="checkbox"/>
	Other:	
	Lasting: <input type="checkbox"/> 1 week <input type="checkbox"/> less than 1 week <input type="checkbox"/> weeks: <input type="checkbox"/> months:	
	Placed in:	

Appendix 2. Template for complex Training Needs Assessment, SNTC Project, Northern Eurasia States

I. The current situation in capacity building of PA staff in the pilot country

1. What kind of organizations (State, NGO, commercial) deal with PA staff capacity building in your country?
2. What kind of seminars/courses/trainings have been conducted in your country during the last 10 years? What categories of PA staff were they aimed at? What organization/company were they conducted by?
3. Did PA staff in your country participate in any capacity-building programmes within international projects, including GEF projects? If “yes”, what was the purpose, the target audience and when did it take place?
4. Are any international training courses and staff exchange visits organized between PA staff of your country and other States? Who is organizing it? Which are the partner countries/organizations? Are these programmes conducted on a regular basis? What staff categories are targeted? How do participants evaluate their effectiveness?
5. Are there any State educational programmes for PA staff in your country? Are there any possibilities for cooperation between these programmes and our SNTC project?
6. What kind of international projects are being implemented in your country at the moment? Do they provide any capacity for PA staff education or raising awareness of other categories of people in PAs? Please list the options:
7. Are there any NGOs or commercial organizations dealing with education and capacity building in the field of PA? What do they specialize in?

II. Potential for development of capacity-building programmes for PA staff in the pilot country

1. Please name potential trainers for your training centre:
 - Staff from your organization;
 - Trainers from NGOs (what kind of NGO, their specialization, how can you use their resources?);
 - Trainers from the commercial sector (business training) – could you involve such trainers? Who, for which subjects, under what conditions?
 - Trainers from PA staff;
 - Trainers from State authorities;
 - Academics, university lecturers;
 - Scientists, environmental experts;
 - Other experts, consultants etc.

2. Please fill in the Trainers Database below:

Subject of training/ seminar	Name of trainer/ lecturer	Current place of employment	Education, degree, training experience	Previous experience with this training topic	Conditions of cooperation with SNTC project

Please fill in the Available Publications & Toolkits Database below:

Title, author, publication data	Summary	Target group of PA staff	Do you find it necessary to republish/disseminate these materials within the SNTC project?	Do you have the e-version of this publication?

- What kind of materials did you find it necessary to publish within the project? Please calculate the approximate costs.
- What specific materials would you like to receive from us or from other project partners?
- Please list below the publication plan for the first half of the 2006 (title, edition, budget, proposed co-financing sources).

III. Summary of the training needs assessment

1. What categories of PA staff should be trained first, according to your survey? Please, list the priority target groups.
2. What other target audiences are you going to train in your Training Centre? Please justify your choice below.
3. Please list the training programmes your Training Centre currently offers:

Subjects	Duration of seminar/training/ courses	Seminar/training/courses	Trainers (indicate if you do not have a trainer for this topic)

Source: GEF/UNEP SNTC Project, Centre "Zapovedniks", 2005.

Appendix 3. Some examples of training programmes for PA managers

1. *Environmental education and stakeholder interaction*

Duration: 100 hours/10–14 days

Such training would be useful for staff of protected areas, non-governmental organizations, international conservation projects, teachers and all those interested in environmental education and interaction with local communities.

Principal training topics:

1. Sociological and psychological basis of communication and interaction with population
 - 1.1. Personal psychology and its evolution
 - 1.2. Personality in relations and activities. Mechanisms of relations and interaction with people
 - 1.3. Sociological psychology of the groups. Person and the group
 - 1.4. Psychological and educational basis of environmental way of thinking
 - 1.5. Sociological research in raising public awareness of environmental issues
 - 1.6. Conflict resolution
2. Legal issues of conservation and PA management
 - 2.1. International conventions and agreements
 - 2.2. National and regional PA legislation
3. History of the current state of environmental education
 - 3.1. International and Russian experience of environmental education
 - 3.2. Aims, tasks, forms and methods of environmental education
 - 3.3. Arrangement of environmental education activities
4. Interactions with mass media
 - 4.1. Difficulties in interactions with mass media
 - 4.2. Appearance preparations for press, radio, television
 - 4.3. Organization of PR campaigns in the mass media
5. Advertisements and information activities
 - 5.1. Marketing and the basis of advertizing theory
 - 5.2. Organization of PR campaigns
 - 5.3. Design and corporate style in promotional materials
 - 5.4. Creation of photo and video products
 - 5.5. Creating internet sites
6. Eco-tourism development in protected areas
 - 6.1. Fundamental concepts of tourism (tour operator, tour agent, tour product)
 - 6.2. Eco-tourism in the present tourist system. International and Russian experience
 - 6.3. Managing wetland tourism. International and Russian experience
 - 6.4. Legal issues of managing tours
 - 6.5. Forms of tourism, managing tours
 - 6.6. Tourist infrastructure creation
 - 6.7. Involving local people in tourism
 - 6.8. Educational paths and routes: managing and providing
 - 6.9. Tourist flow control and codes of behaviour for visitors
7. Interactions with youth and children
 - 7.1. Principles of interaction with children of different ages
 - 7.2. School curricula and opportunities for the popularization of protected areas and nature conservation
 - 7.3. Environmental games as an effective method of environmental education
 - 7.4. Interactions with students
 - 7.5. Cooperation with educational authorities, methodological teachers' services, institutes
8. Public relations
 - 8.1. Public groups and their participation in organizational activities
 - 8.2. International and Russian conservation NGOs
 - 8.3. Creating NGOs
 - 8.4. Environmental holidays and actions
 - 8.5. Sustainable livelihood programmes
9. Fundraising
 - 9.1. Fundraising: "How and where ask for money"
 - 9.2. Collaboration with donors: funds, business, budget
10. Workshops on exchange of experience

2. Training-of-Trainers

Duration: 32 hours/4 days

The aim of this training – to enable the acquisition of various practical skills to improve and facilitate interaction with an audience, using different interactive methods.

The main topics:

- Aims and motivation of the participants
- Participants' expectations
- Channels of information perception
- Group process management
- Presentation skills. Five principles of public speaking
- Trainers' main skills. Attending skills. Effective communication skills
- Trainers' tools
- Verbal and non-verbal communication
- Comfort and discomfort zones
- Interactions with a problem audience and controlling conflict situations
- Trainers' professional image
- Feedback. Training effectiveness assessment

3. Public relations tools in environmental education

Duration: 32 hours/4 days

How to manage market research, choose the dominant groups of the population, appreciate their interests and needs; how can you adapt "common" PR tools and methods to protected areas? How can you create a unique style for your PA and what can it do for you? You can answer these and a lot of other questions by attending this training course.

Main topics:

1. PA brand definition
2. Social marketing. Identifying the dominant groups in the population, and interacting with them. Creating and controlling the external relations base
3. Public performance and negotiation skills
4. Interactions with mass media
5. Using and creating photo and video products about protected areas
6. Internet sites, fora, electronic distributions for advertizements and PR for your PA
7. Positive and negative potential in publishing newspapers and other periodicals

8. Trade mark, logo, souvenirs
9. Common mistakes in company image development
10. Company image elements in the "sold out" notice appearance, information panels.

4. Eco-tourism development

Duration: 56 hours/7 days

This course curriculum includes consultations with experts in tourism, advertizement, PR; and knowledge adaptations on the practice studies on tour-product development and promotion.

The main topics:

1. Preamble – basic concepts of eco-tourism management in protected areas
 - 1.1. PA tourism – basic concepts, features and missions. Types of tourism. Sustainable tourism principles
 - 1.2. PA tourism development experience in Russia and Northern Eurasia States. The main problems with developing tourism in protected areas.
2. Social and psychological features of managing tourist activities
 - 2.1. Sociological psychology of the groups. Person and the group
 - 2.2. Mechanisms in people's relations and communications. Psychological methods in the interactions with tourist groups
 - 2.3. Ways of settling disputes
3. Legislation in tourism development
 - 3.1. Nature conservation legislation
 - 3.2. Legislation in tourism
4. Tourist resources conservation (monitoring and methods of estimating the impact of tourist activities on nature. Estimating the maximum levels of recreational load)
5. Tour operating
 - 5.1. The stages of tour-product creation (analysis, planning, realization)
 - 5.2. Types of tourism (riding, hiking, water, scientific, historical and cultural, business tourism and others)
 - 5.3. Market research in tourism. Studying demand and analyzing consumer target groups
 - 5.4. Ways of developing PA tourism
 - 5.5. Price formation principles
6. Developing tourist infrastructure
 - 6.1. Development and functioning of the paths and trails network
 - 6.2. Hotel business

- 6.3. Restaurant business
- 6.4. Guest house management
- 6.5. Visitor centre management
- 6.6. Involving local people in tourism in the PA and in the buffer zones

7. Advertizing and supplying information on the tour product
 - 7.1. Supplying information on the tour leader
 - 7.2. Advertizing the prepared tour product. Creating a corporate style for the tour product
 - 7.3. Creating an internet site, showing the different tour services
 - 7.4. Making catalogues, tourist booklets and other printed materials
 - 7.5. Creating photo and video products
 - 7.6. Interactions with mass media

8. Specificity of interactions with different tourist groups (foreign tourists, VIP clients)

9. Fundraising
 - 9.1. Fundraising: “How and where ask for money”
 - 9.2. Collaboration with donors: funds, business, budget

10. Exchange of experience workshops

5. Basis of environmental journalism and interactions with mass media

Duration: 24 hours/3 days

Interactions with mass media and personal publishing activities are very important aspects of environmental education and one of the main parts of the PR campaign for PAs.

The aim of the training course is to assist in external and internal problem solving connected with interactions with mass media. This training would be useful for the staff of environmental education departments. Members of regional and local media groups that are interested in protected areas are also welcome.

The main topics:

1. Types of information materials
2. Preparing information materials about protected areas
3. How to make press packages
4. Coverage of actions for different levels of the mass media
5. Preparing and holding press conferences
6. Presentation skills (training)
7. Positive and negative potential in publishing newspapers
8. Publication and circulation of others' periodicals

9. Design, house publishing style

6. Strategic planning

Duration: 16 hours/2 days

The training includes the following topics: kinds of strategies, structure of strategic planning, means of assessing the strategic plan. Help to obtain skills in: the strategic planning process, choosing the strategy of development, making a strategic plan, assessing the strategic plan.

The main topics:

- Definition of “strategic planning”
- Mission, understanding, values of the organization
- Assessing internal and external situations
- Determining the organizational strategy
- Definition of the aims and objectives of the organization
- Drafting the strategic plan

7. Fundraising for protected areas

Duration: 32 hours/4 days

This seminar will be useful for anyone looking for additional sources of financing of ecological projects within the PA. This programme can be aimed at beginners as well as at specialists with existing fundraising skills.

The main topics:

- Kinds of additional financing sources, specifics of working with each source
- Basis of successful cooperation with the grant-giving organization
- How to do fundraising research?
- Working out and managing the project
- Monitoring and assessing the success of the project
- “Your application in the eyes of the donor”. The applications selection criteria of different donor organizations
- How to turn a temporary sponsor into a permanent one?
- Possibilities of getting income from commercial activities, legal aspects

8. The way towards cooperation in PA management

Duration: 40 hours/5 days

Aim of the seminar – to help foster mutually beneficial cooperation between PAs and various stakeholders, using wetlands as a specific example.

The main topics:

- Possibilities of sustainable cooperation
- Psychological aspects of working with adult people (training)
- Identifying the various population groups, and assessing the prospects for cooperation with each group
- Ways and methods of environmental education for different age categories
- Sustainable livelihood programmes for the local communities, best practices in implementation
- Experience of involving local residents in servicing visitors to the wetlands
- Forms and methods of cooperation with business
- Interaction with administrations and local decision makers
- Creating public councils for wetland protection
- Making cooperation with educational bodies more effective

Source: Voitovich et al., 2007.

Appendix 4. Template for pre-course questionnaire

Questionnaire for participant of the course

Please fill in the following questionnaire and send it to the training manager no later than a week before the seminar. Thank you and see you soon!

1. Name and surname _____

Name of protected area _____

2. To what degree do you feel that the course agenda is ... ?:

(please put a score from 0 to 5 next to each point below)

interesting _____

useful _____

new _____

relevant _____

matching your expectations _____

I recommend adding the following topics / exercises/ discussions to the proposed agenda: _____

3. Are you satisfied with your job?

yes; more likely, yes not sure no; more likely, no

4. What do you like most of all in your job?

5. What are your strengths in your job?

6. What are your main difficulties in your job?

7. What prevents you from doing your job well?

8. Which seminar topics are the most important for you? (please put a score between 0 (lowest priority) and 5 (highest priority) next to each topic)

- environmental education
- conservation science
- sociology for PA management
- PA legislation
- psychology for PA management
- other (please, indicate):

9. What materials and toolkits are you ready to bring with you to share with your colleagues?

Brief bio:

Age _____; how many years have you been working in PAs? _____;

Education _____

Experience in environmental education (years) _____.

Do you speak a foreign language (which one?) _____

Tel.(cell., office), fax, e-mail: _____

THANK YOU VERY MUCH!

Source: Centre "Zapovedniks".

Appendix 5. Template for post-course questionnaire

Questionnaire for the course

Please fill in the following questionnaire and return it to the training manager at the end of the course. Your answers are of great value for us and will help to make our future seminars better. Thanks a lot!

1. To what degree did you feel that the course agenda was ... ?:

(please put a score from 0 to 5 next to each point below)

- interesting _____
- useful _____
- new _____
- relevant _____
- matching your expectations _____

I recommend adding the following topics / exercises/ discussions to the agenda next time: _____

2. Please assess the following aspects of the seminar:

	very good	good	medium	bad
• content				
• quality of tutors				
• logistics and organization				
• informal communications				
• others				

3. Are you satisfied by your work at the seminar?

yes; more likely, yes not sure no; more likely, no

4. What did you like most of all at this seminar?

5. What didn't you like at this seminar?

6. Did the course influence you in the following aspects?

	yes	don't know	no
• your professional competency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• your private attitudes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• perception of your colleagues	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
• knowledge of the tasks you're to do	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Name _____

Comments _____

THANKS A LOT!

Source: Centre "Zapovedniks".

Appendix 6. Extract from proposal to include chapter “On capacity building for PA managers” in PA management plans

According to the Durban Accord (2003), effective management of PAs can only be implemented by highly qualified staff. To make sure we have such staff, it is recommended to include a special chapter “On capacity building” in PA

management plans. During the planning process, managers should assess the current level of qualification of all PA staff members as well as define priorities in PA development on which the training should focus.

Template for the assessment of current level of staff performance:

Staff member	Position	Education (what, when, field of specialization)	Has he/she ever attended any post-diploma professional courses and seminars? If yes, what and when.	Proposals of actions to improve individual qualifications

It is very important that the capacity-building process becomes systematic. Just as in medicine or in education, formal rules should exist for regular improvements of PA staff qualifications, without which, specialists can't move on in their career.

Work in protected areas is also connected with significant changes and challenges. Therefore, it makes sense to foresee regular capacity-building activities, which should involve every manager at least once every three to five years. For rangers and other staff members dealing with seasonal jobs (fire fighting,

protection of river sources, counting species, visitor management), annual technical studies should be also conducted, prior to the start of these works.

If a PA is starting (planning) a new project, an inception mission combined with training for the project team is highly desirable.

A capacity-building action plan should be developed and become an important part of the overall PA operating plan.

Template to register proposals on activities to build the capacity of PA staff to ensure efficient implementation of the PA management plan

Activity	Number of people	Comments
To send PA staff on external courses and seminars, and to institutes of higher education and other relevant organizations (once every three to five years for each manager)		
Participation of PA staff in scientific and thematic conferences, discussions, study tours		
PA managers are doing M.Sc. and/or Ph.D. studies at universities		
Conduct regular training courses and seminars at the PA, using its own managers as well as external experts as tutors		
Training and technical studies for seasonal jobs		
Inception missions and training prior to big events and/or launching new projects		
PA managers provide training for various stakeholders: Teachers Tourist companies and guides Local community members etc.		

Source: Danilina, 2009.

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