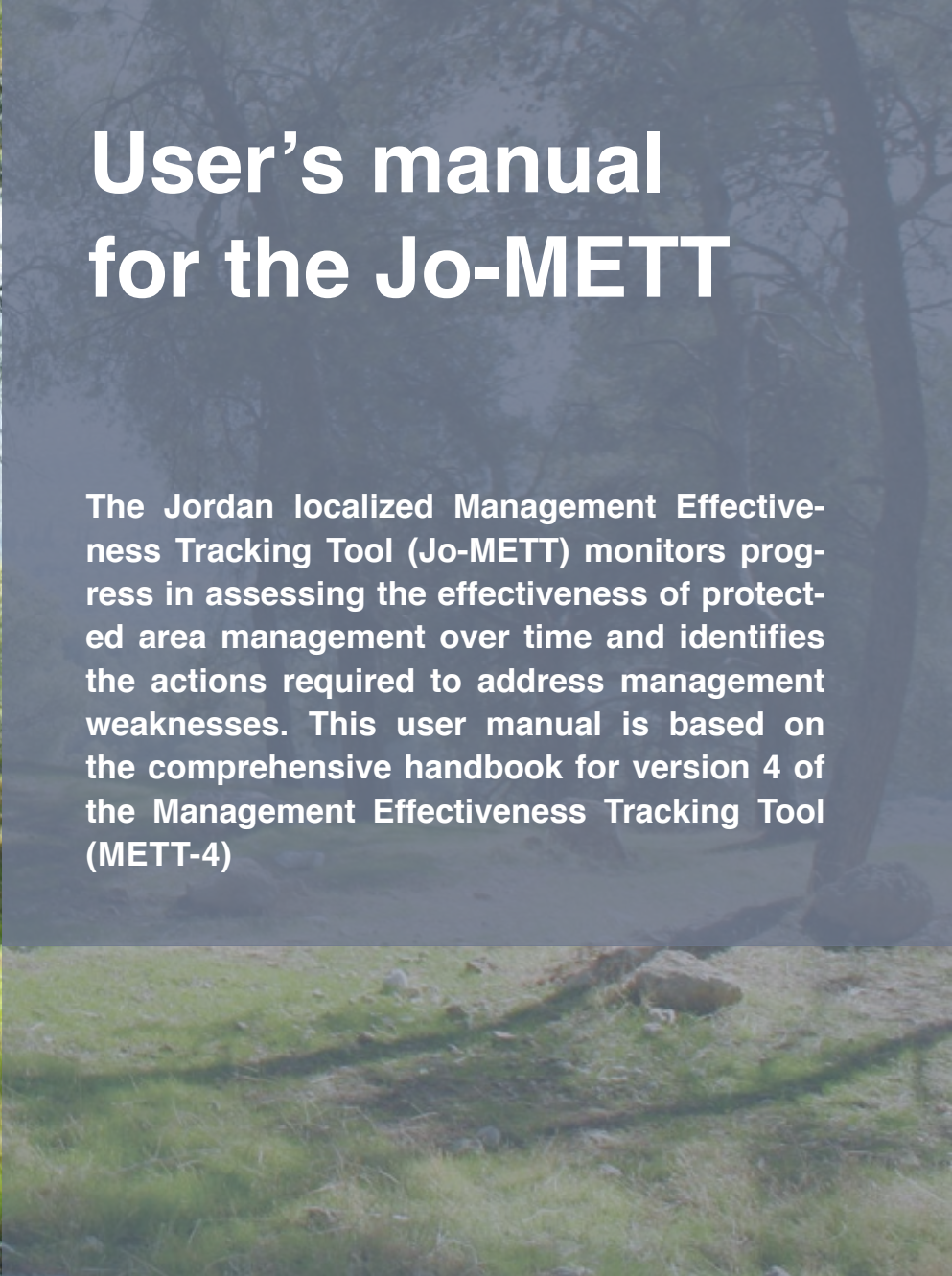




User's manual for the Jo-METT

The Jordan localized Management Effectiveness Tracking Tool (Jo-METT) monitors progress in assessing the effectiveness of protected area management over time and identifies the actions required to address management weaknesses. This user manual is based on the comprehensive handbook for version 4 of the Management Effectiveness Tracking Tool (METT-4)





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Executive summary:

The Management Effectiveness Tracking Tool (METT) is an internationally recognized framework developed by the World Bank and the World Wide Fund for Nature (WWF) to assess and monitor the management effectiveness of protected areas. It provides a simple, practical, and adaptable approach to evaluating how well protected areas meet their conservation objectives, drawing heavily on the IUCN framework for assessing protected area management effectiveness. To address Jordan's specific context, a localized version called Jo-METT was developed by incorporating additional evaluation criteria, including climate change and gender considerations. This User Manual serves as a guide for completing and optimizing the use of the tool. It emphasizes best practices for applying Jo-METT, ensuring that its components are completed accurately to generate reliable results and to track management performance over time. Today Jo-METT is widely accepted among stakeholders in Jordan and has demonstrated strong usability and effectiveness across the country's protected areas.

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Dr. Hany El Shaer, Regional Director

Mr. Ateff Alrabee, Project Coordinator

Eng. Hanna Haddad, PA Programme Assistant

Six good practices for completing the Jo-METT

Carefully plan the Jo-METT implementation

1. *Plan the implementation process.* Review the Jo-METT before undertaking the assessment and evaluate the information available to complete it. Then think about capacity and any pre-assessment training needs, adaptation, timing, scope and scale, verification, etc.

2. *Allow enough time to complete the assessment in full.* A good Jo-METT cannot be done in an hour; most questions take serious thought and ideally discussion between several people. The first Jo-METT is likely to take at least two days and perhaps more. Subsequent repeat Jo-METT's may be a little quicker.

3. *Complete all the Jo-METT including all questions on the data-sheets and narrative sections related to the multiple-choice questions.* The next steps section is essential as the steps identified create a quick checklist of needed actions. The excel version will not let you proceed without filling in next steps.

Do it properly and do it all

4. *Use quantitative data wherever available to support assessment, this is most important in the "outcomes" questions.* Data from monitoring, research, surveys, SMART patrolling and other sources can help to inform and improve the Jo-METT.

5. *The implementation of the Jo-METT should wherever possible include a wide range of rightsholders and stakeholders.* This can aid insight into the assessment results; including people outside the protected area, such as local communities, will bring richer insights.

Implement recommendations

6. *Completing the Jo-METT is only the first step of the assessment.* The implementation process should include adaptive management (e.g., a plan of action to implement results) and a communications process to share results locally and globally.

(1) https://wdpa.s3.eu-west-1.amazonaws.com/PAME/METT/METT_4_Handbook.pdf

Completing the Jo-METT

Below some overarching guidance on completing the Jo-METT is provided. The METT consists of three main sections: **datasheets** of key information on the protected area, an **assessment forms** containing a questionnaire with four alternative responses to 43 questions and an **action plan** to ensure results are used in adaptive management to improve management effectiveness. These are described in more detail below.

Datasheets

Protected area attributes

This worksheet compiles basic data about name of the protected area, size, any formal designations, etc., Assessors should work down the list of questions and click on the “your answers” box to complete the worksheet. Most of the questions/data are self-explanatory. However, the worksheet provides baseline information vital for the main assessment including on values, ecosystem services and management objectives. Guidance in these questions are given below.

- *What are the main values for which the protected area is designated?* major values might consist of either natural, cultural, social or economic attributes of the area. The Jo-METT provides space for the five main values to be listed. Answers should be focused and quite short. Additional information can be provided in the “notes” field.

Values may sometimes be written down formally (for instance in the protected area management plan), or they may be implicit. Values can be identified at a level of specificity that makes sense in terms of the management of the protected area. A value could for instance be a particular ecological community or a particular species of special importance. Sites may have a wide range of social, cultural and/or economic values but they would generally be expected to have at least some natural values. If detailed values have not been identified, a generic list of value types is provided (click on the “additional guidance” link to take you to the final Excel sheet containing detailed guidance, which can help guide your response).

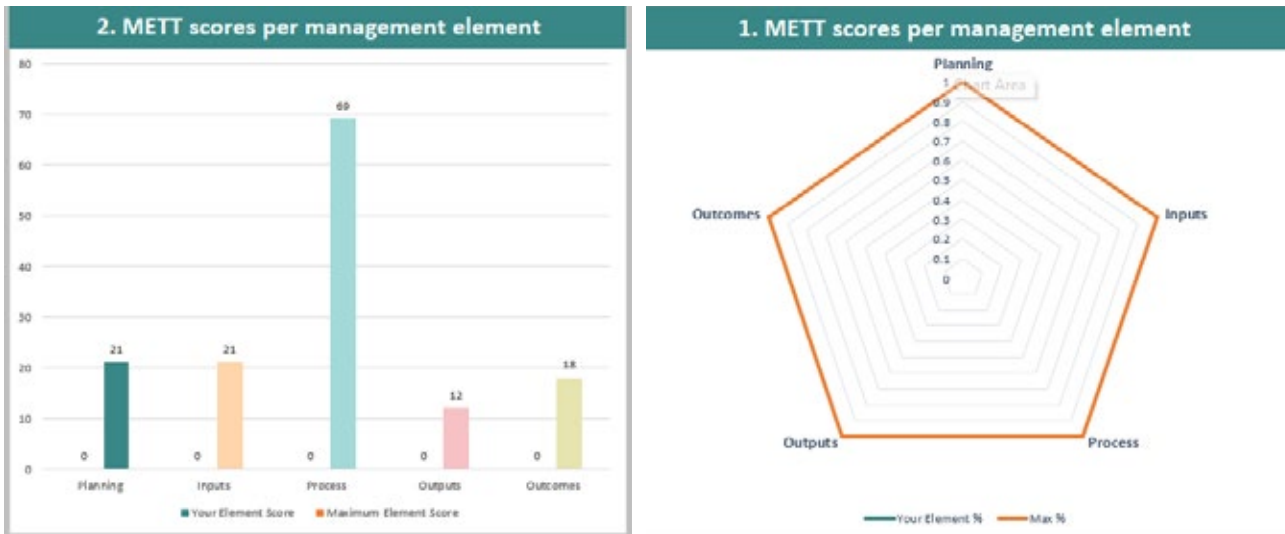
- *What are the main ecosystem services delivered by the protected area?* sites are increasingly being recognised for, and sometimes managed in part for, their ability to supply ecosystem services additional to biodiversity conservation. Some of these will be useful mainly to people living in or around the protected area, other ecosystem services will benefit people living further away or provide general benefits at national or even global scale. An understanding of the main benefits is important in building an effective management plan; some will also be a potential source of income. Note: some of these ecosystem services may already have been identified as values in answer to the previous question.

Sites are asked to identify up to three major ecosystem services and provide more details in the “notes” field. Potential ecosystem services include:



- *List the two most important protected area management objectives:* These should be in the management plan, but there will often be more than two. In this case, or if objectives have not been formally written down, people compiling the Jo-METT should agree on the two most important management objectives. At least one of these should have a conservation focus rather than, for instance, tourism management or supply of ecosystem services. Identifying the management objectives of the site being assessed is important as the assessment of management in the rest of the Jo-METT assessment should be made against these objectives.

Threat assessment



The graphical summary of the scoring of all METT elements /components. (source: author)

The threat assessment is based around an adapted [typology of threats](#) developed by the Conservation Measures Partnership (CMP) and IUCN. In this context, threats are the human activities or processes that have caused, are causing or may cause the destruction, degradation and/or impairment of biodiversity targets (e.g., unsustainable fishing or logging). Threats can be past (historical), ongoing and/or likely to occur in the future. It is important when completing the assessment to note that the first two threat categories are on the impacts of activities happening *within* the protected area, the rest of the assessment looks at impacts from within and beyond the area's boundaries, which can in some cases include activities beyond state and country borders. This assessment is linked to question 33 in the multiple-choice questions section of the METT (see below), which assesses how threats to the main values are being addressed by management.

Each column of the threat assessment is discussed below:

- ▶ **Columns A and B:** The threat classification is provided in the first two columns; the second column giving the more detailed description, which provides the starting point for the assessment.
- ▶ **Column C:** A short description of the threat should be given here. It is important to define the period of time being assessed here, e.g., is the threat ongoing or imminent (e.g., within 5 years).
- ▶ **Column D:** The more detailed threat assessment which follows should only be made for threats which impact the main values of the protected area. If more than one value is impacted by a threat, list these in order, from most impacted to least impacted.
- ▶ **Column E:** *threat extent*. This assessment is made using a drop-down list which assesses the extent of the threat (i.e., how much of the protected area is affected) rated as *very high*, *high*, *medium* and *low*, ranging from a widespread threat affecting the value throughout the site to very localised threats in only limited locations. Column I (see below) also includes a “notes” section where more information can be provided on the reasons behind this assessment choice.

² <https://cmp-openstandards.org/library-item/threats-and-actions-taxonomies/> (note: since developing the Jo-METT this list has been updated (<https://conbio.onlinelibrary.wiley.com/doi/10.1111/cobi.14434>))

- ▶ **Column F:** *threat severity.* This assessment is also made using a drop-down list with four categories from *very high* to *low*. Column I (see below) also includes a “notes” section where more information can be provided on the reasons behind this assessment choice.
- ▶ **Column G:** *source of information.* It is useful to add details on the information base used to make the threat assessment, both to help in acting on the results of the Jo-METT and for reference for those using the Jo-METT for future assessments.
- ▶ **Column H:** *management response.* This is the most important column; not only does it detail responses to specific threats, but it should also be noted when carrying out repeat assessments to see what actions were planned, to check if these took place and if they had an impact in mitigating the threat. Please ensure these responses are reflected in the responses to the multiple-choice question 33.
- ▶ **Column I: notes.** Any notes regarding the assessment can be added here, relating to the threat extent or severity or additional information regarding the threat.



Venn diagram of the the METT components. (source: author)

Jo-METT questions + scores

This sheet lists all the multiple-choice questions in the Jo-METT. Clicking on a question, will take assessors directly to the sheet that contains the respective question. At the top of each sheet there is a “Back to METT questions + scores” link, which will take assessors back to this overview page.

Where available, add any METT scores from a previous assessment to the column “Your METT score from last assessment”. This way, you can more easily identify potential trends or inconsistencies in scoring and see if management is becoming more or less effective over time.

Assessment form

The 43 assessment questions have an Excel sheet each. Each sheet laid out in the same format, which is explained below. Assessment forms containing a questionnaire with four alternative responses to the questions, each question has an associated score, a data field for notes and a justification for the answers, and a place to list steps to improve management if necessary. Some sheets also have additional points and assessment which are discussed later in this section.

- ▶ For each question, assessors are first asked if the question is relevant. Most questions should be relevant and completed; but in a few cases the question should be marked as not relevant, and the assessors should move onto the next (click the button indicated). If a question is marked as not relevant, please complete the narrative box below it to provide an explanation as to why the question was not answered (note that you will not be able to proceed without providing this justification if you select this option). It is worth reading the whole question and all the answers before deciding if the question is not relevant. The questions should thus not be marked as not relevant because a specific action or input to management is not in place (e.g., if there is no management plan) as these situations should be included within the assessment, and options in the multiple-choice questions are provided for such cases. If questions are marked as not relevant, the overall maximum score will be adjusted accordingly.

3. METT scores per management element (per cent)				
Element	Your Element Score	Maximum Element Score	Your Element %	Max %
Planning	0	21	0.00%	100.00%
Inputs	0	21	0.00%	100.00%
Process	0	69	0.00%	100.00%
Outputs	0	12	0.00%	100.00%
Outcomes	0	18	0.00%	100.00%
Total	0	141	0.00%	100.00%

The component and their max score. (source: author)



PAME in Jordan's workshop. (©IUCN ROWA)

- ▶ Each Excel sheet identifies the topic being assessed on the top line; gives the question, some additional guidance, and then four possible answers. The first step is to make the appropriate assessment of management by clicking on the button to identify which answer matches your situation most closely from the four options provided. The answers are automatically converted to a corresponding score from 0-3 for calculating overall management effectiveness results in the Jo-METT questions and scores sheet.
- ▶ Once a response to the question has been selected, assessors should go to the “Evidence and justification” line of the Excel sheet. Here a narrative explanation can be provided on the reasons for choosing the particular answer. Notes may also be needed on why a specific answer has been selected if the situation described in the options does not totally fit the realities of the protected area. This is a very important element of the Jo-METT because it provides a record of the thinking behind the assessment and helps make the tool useful for management, to provide a baseline for subsequent assessments, and to help people who may be filling in the Jo-METT in the future. You must provide a response in this field.
- ▶ A further narrative section “Actions to improve management” should detail next steps and be used to outline adaptive management actions if the response to the assessment reveals management weaknesses. This field is mandatory, so add “no actions required” if management is satisfactory. Actions should consider what would be needed to improve management to reach the levels outlined in the multiple-choice answers and thus for improving the overall Jo-METT score. This is often the most important part of the assessment because when the Jo-METT has been completed you will be left with a list of management objectives that can (i) form the basis of future planning and (ii) be the first things to check in future assessments. The answers provided in this section are then prefilled in the Excel sheet “actions to improve management” which is used to develop a full action plan to implement any necessary management changes as a result of the Jo-METT assessment.
- ▶ The final piece of information that can be completed when filling in Jo-METT is to provide more details about the information sources assessors used to help inform them about which answer/score to give for each question. Information sources are broken down into six categories (research and monitoring; planning documents and departmental data; staff experience; external expert opinion; community opinion/traditional knowledge and other). It also encourages the use of community opinion/traditional knowledge in the assessment.

Additional points

Questions 7, 31, 35 and 36 of the Jo-METT include additional questions which go beyond the basic multiple-choice assessment and identify whether good practices are in place in relation to issues such as management planning and management impacts. All these additional questions should be considered during the assessment. If the area complies with the question being asked, add a tick in the box next to the question. Excel will automatically generate the additional scores in the “Your additional points” field.

Detailed assessments

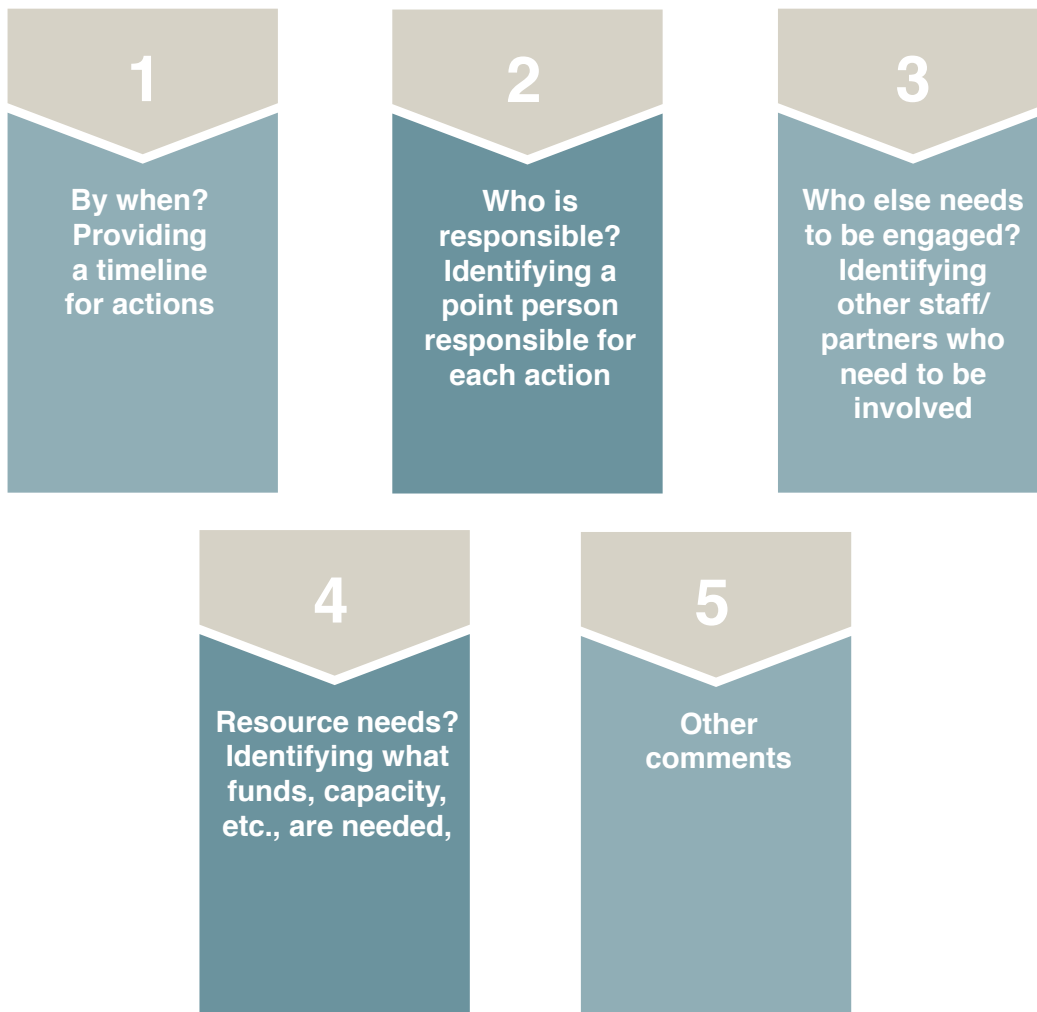
After questions 34, 36 and 37 there is an additional “Detailed Assessment of Values” sheet which should be completed where there are sufficient data available on the condition and trend of values, indicator species and habitats to be able to make an assessment. This additional assessment does not contribute to the overall “score” of management effectiveness in the Jo-METT but can inform the rating on the associated questions. In completing these detailed assessments, it will be important to review available monitoring results and to draw upon the knowledge of researchers, managers and community members in reaching a consensus. If there is insufficient knowledge to make these additional assessments, this should be indicated in the tick box provided and the questions should then be answered based on available knowledge. Given the significance of these question, a careful listing of “evidence and justification and information sources” is particularly important. The Excel sheets provide full guidance on the criteria to be used when completing these assessments.

Actions to improve management

Once the Jo-METT data and assessment sheets have been completed, an excel sheet will show what you have recorded in terms of all the “actions to improve management” that were identified. The first column of the table will automatically be updated to include the scores you have provided for each question. In the second column, you can add previous METT scores for comparison. The third column will take the text from the “actions to improve management” sections of each of the multiple-choice questions.



The table then allows you to develop an action plan by identifying for each of the suggested responses:



This table is the most important part of the Jo-METT in that it can serve as the basis of a work plan for the protected area and will make it easier to follow up on the results of the Jo-METT assessment. The table should be used soon after completion of the Jo-METT to draw up a work plan for implementation. Actions should be divided between those that are feasible within the current budget and staff members, and those that will require additional money and perhaps extra people or expertise. Then for each, actions should be ordered by priority. Those of high priority and within the current budget can be written into the current or, at latest, the next year's work plan. Priorities that need additional resources need to be identified in current and future funding proposals.



Wadi Rum Protected Area





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