

# Evaluation of the Barcelona World Conservation Congress

Final Report

Volume 1

By:  
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## A c k n o w l e d g m e n t s

We would like to take a few lines to express our gratitude to all of the IUCN Councilors, staff, managers, donors, and partners who took time out of their schedules to speak with us about their experience during the World Conservation Congress. Our thanks also go out to the IUCN Secretariat who supported us for two weeks in Barcelona, and especially to Mr. Alex Moiseev who helped to coordinate the evaluation and whose input was essential to our understanding of the functioning of IUCN in organizing an event convening 7,000 participants.



## Executive Summary

The IUCN World Conservation Congress (WCC) represents the highest decision-making organ of IUCN and is to be convened every four years. Initially designed as a strategic planning and decision making venue for IUCN, the mandate of Congress was broadened in 1996 (Montreal Congress) to include a public Forum where participants could share information and experiences, as well as discuss, debate, and propose solutions for the world's most pressing environmental issues.

At the request of the Congress Preparatory Committee of the IUCN Council, Universalis Management Group was commissioned by IUCN to conduct the evaluation of the 4<sup>th</sup> World Conservation Congress, held in Barcelona Spain in October 2008. The evaluation was designed to support the ongoing learning interests of IUCN and its accountability to members, partners and donors for the effective and efficient use of human and financial resources, the achievement of Statutory objectives of the Members' Assembly, the programmatic objectives of the Conservation Forum, and the overall corporate objectives of Congress itself.

Specifically, the WCC evaluation served four main purposes:

- 1) Assess the extent to which the Congress contributed to strengthening the Union's relevance, strategic position, responsiveness to conservation and development issues, and effectiveness as a convening platform;
- 2) Assess the extent to which the Congress and Forum were effective in generating specific conservation learning, knowledge sharing and capacity building;
- 3) Assess the effectiveness of Congress planning, management and implementation; and,
- 4) Assess the extent to which the Congress represents a good value for money, relative to the investment.

The report is divided into four broad sections that successively address 1) the context of this evaluation (i.e., overview of the World Conservation Congresses and the Barcelona Congress more specifically); 2) our approach to this assignment and the methodology used, 3) the major findings of the evaluation; and 4) conclusions and recommendations. The WCC evaluation is part of a three pronged approach designed to capture learning at a strategic, programmatic, and operational level. The other evaluation activities include: 1) the *Congress and Forum Learning Capture*, which aimed to capture data on key issues related to Congress planning, management and implementation; and 2) the *Forum Evaluation*, which intends to answer the fundamental question about the merit or worth of the Congress Forum, both to the members and to the IUCN Programme.

### Overview of the Barcelona Congress

The Barcelona Congress was the largest and most diverse event ever hosted by IUCN. It drew some 7500 participants from 183 different countries. More than 800 events were held during the four-day Forum and some 145 motions were presented before the Members' Assembly for its consideration (a 30% increase since the previous Congress). The Congress theme for Barcelona focused on laying a foundation for *a more diverse and sustainable world* and relied on an organizing framework that consisted of three streams (i.e., *A new climate for change; Healthy environment – healthy people; and Safeguarding the diversity of life*) and 12 content specific Journeys.

Building on the experience of past Congresses, Barcelona provided fertile ground to test a number of innovative approaches and ideas. Pavilions were introduced to showcase the work of the Secretariat and its members while providing an open space for networking, constituency outreach and partnership building; a member's lounge was created to provide space for private meetings or informal discussions; electronic voting was introduced to facilitate the motions and election processes; a more structured approach to Learning Opportunities was used to foster skill development; members and partners were provided with unrivaled opportunities to showcase their work; and opportunities for debate and discussion were purposefully strengthened through the use of more open forum events such as *knowledge cafes* or the use of roundtable discussions with panels of experts (e.g., the *sustainability dialogues*).

## Evaluation Approach and Methodology

To support institutional learning, the evaluation team's overall approach to the assignment was consultative, participatory, and utilization-focused. The evaluation team involved IUCN at every stage of the evaluation from planning to data analysis and the review of emerging findings and recommendations. This helped to build a positive precedent for the evaluation, create a sense of shared understanding, and strengthen the relevance of the final evaluation results.

The evaluation methodology consisted of several important steps, which are summarized as follows:

- Preparation of the evaluation workplan outlining the overall strategy for assessing the Barcelona Congress as well as the key questions and sources of data.
- The development of data collection instruments. To ensure validity, the evaluation team used a mix of data collection methods both on and off-site, including document reviews, stakeholder interviews, paper and electronic surveys and event observations.
- On-site data collection, which included the distribution of surveys, the conduct of semi-structured interviews and observations of Forum events and Assembly proceedings. Data collection during the Forum was supported by the IUCN evaluation manager and a complement of 12 Secretariat, regional and volunteer staff.
- An electronic post-Congress survey was administered in the weeks following Congress and remaining key stakeholder interviews were likewise finalized during this period. Overall, close to 4000 surveys were collected more than 60 individual interviews were carried out.
- Data analysis using both qualitative and quantitative techniques. Preliminary findings were drawn from the triangulation of multiple sources of data and subsequently validated through a two day workshop meeting between the Evaluation Team and IUCN, held in Montreal in January 2009. Consistency in the responses received across the range of methods used, and constituencies solicited, gives us confidence in the results of this study.

## Evaluation Findings

The evaluation report contains 22 findings organized around the following performance criteria: i) the *relevance* of the WCC relative to the needs of the Union, its constituencies, and key conservation and development issues); ii) the *effectiveness* of the Conservation Forum (i.e. the fulfillment of planned objectives at the output and outcome levels); iii) the *effectiveness* of the Members' Assembly (i.e., the extent to which the Statutory Requirements were effectively met); iv) the *effectiveness* and *efficiency* of Congress management; and v) the overall worth of Congress investments.

The major findings of the WCC evaluation are summarized as follows:

- 1) The convening authority of the IUCN and the adoption of a forward looking agenda considerably strengthened the Union's relevance as a strategic leader in the global conservation movement. The Barcelona Congress met the needs of the Union's constituencies and was relevant to the key conservation and sustainable development issues facing the world today.
- 2) The Barcelona WCC highlighted IUCN's effectiveness as a convening platform and ability to stimulate discussions around an ambitious global conservation agenda. Congress attracted a diverse community of stakeholders and largely succeeded in providing a unique platform where participants could share their knowledge and experiences, debate critical conservation issues, strengthen their capacity to affect change, and develop stronger linkages through networking and partnership building. Approval of a progressive Intersessional Programme further broadened the boundaries of the conservation movement, and helped set an important precedent for the future of conservation as a whole.
- 3) Forum events and Pavilions were widely credited for providing enabling conditions for the effective delivery of Congress objectives. Pavilions provided an innovative design feature that supported outreach activities by various communities of practice within the Secretariat and the Union more broadly, whereas Learning Opportunities were highly appreciated for their effectiveness in strengthening participant skill levels.
- 4) Despite widespread appreciation of the diversity of issues covered and the wealth of opportunities offered, the large number of events, complex programming structure and lack of information made it difficult for participants to make efficient decisions on how best to use their time.
- 5) The stated objectives of the WCC were not clearly defined and broadly disseminated. Beyond the statutory requirements of Congress, there are no set objectives with actionable results at the output and outcome levels to guide the planning and delivery of the WCC, strengthen the coherence between the Forum and Assembly, facilitate the development of a focused Forum programme, and engage participants towards specific ends.
- 6) The assembly met its statutory requirements in spite of a challenging process marked by a substantial increase in the number of motions submitted before the Assembly and the absence of clearly defined procedures for administrating these. In light of the difficulties that hampered the effectiveness of the motions process, it appears that the governance institutions regulating motions from submission to resolution have become unnecessarily complex and need to be overhauled.
- 7) The 2009-2012 Programme generated little on-site discussion and debate during the Assembly. While recognizing that the proposed programme was developed through widespread consultations prior to Congress, available evidence suggests that relatively few members seem to appreciate the importance of the Intersessional Programme relative to their activities and the work of the Union as a whole. Similarly, low rates of participation and high levels of abstentions in the voting processes point to some emerging concerns regarding the democratic health of the Union.

- 8) In spite of its size and complexity, the Barcelona World Conservation Congress has been singled out as the best organized IUCN Congress ever. The dedication and professionalism of the Congress management team were crucial to the success of the 2008 WCC and in overcoming the hurdles that limited the effectiveness of the management process.
- 9) Given the size and scope of this Congress, and the pressures exerted on the Secretariat in terms of staff time and effort, and unaccounted for opportunity costs, it appears as though the model used to organize and manage the WCC has reached its limits.
- 10) Based on the results of this evaluation and the performance criteria defined by Congress organizers for measuring success, this assessment indicates that the 2008 WCC represented a worthwhile investment for evaluation respondents.

## Conclusions and Recommendations

Overall, results of the 2008 World Conservation Congress evaluation point to successful event that confirmed IUCN's role as a leader in the global conservation movement. While the criteria used by IUCN to measure the performance of Congress tell of a highly relevant and effective international forum, the long-term viability of the existing Congress framework appears to be reaching its end. In the context of a rapidly evolving global environmental governance arena, a rationale based solely on the requirements of the Statutes may no longer suffice the growing needs of the Union. The objectives guiding its implementation are unclear and result expectations lacking. Linkages across all levels of Congress are weak, and the ability of Secretariat to deliver Congress along the existing business model no longer seems feasible. To amend this situation, the evaluation team identified eight major recommendations.

- 1) **Council should reaffirm the role of Congress in the global conservation arena**, and set a rationale that extends beyond requirements of the statutes.
- 2) **Council should set strategic objectives for the World Conservation Congress**. Objectives should cut across the Forum and Assembly and provide an overarching framework that supports the role of Congress within a rapidly evolving global environmental governance arena.
- 3) **IUCN Congress management should develop a performance management framework to guide the design and evaluation of Congress**. The WCC should be integrated as a key element of the Union's planning cycle and results framework and WCC objectives translated into measurable results at the output and outcome levels.
- 4) **IUCN Congress management should align the design of the WCC to planned objectives**.
- 5) **Council should reaffirm linkages between the Forum and the Assembly or consider the separation of the two**.
- 6) **IUCN should try to broaden its constituencies** to strengthen the importance of the WCC relative to the work of others in the environmental movement, civil society, business and industry leaders, and policy makers at the local, national, and regional levels.
- 7) **IUCN needs to review its management model** to alleviate the demands placed on the Secretariat and improve the processes supporting the delivery of future Congresses.
- 8) **Council should refine the motions process to ensure improved ownership and engagement** by reducing the number, improving the relevance, and broadening the accountability requirements of the motions presented before the Assembly.



## A c r o n y m s

CBD	Convention on Biological Diversity
CBO	Community-Based Organization
COP	Conference of the Parties
IIRSA	Initiative for the Integration of the Regional Infrastructure of South America
IPCC	Intergovernmental Panel on Climate Change
IUCN	International Union for the Conservation of Nature
LO	Learning Opportunities
MEA	Multilateral Environmental Agreements
NGO	Non-Governmental Organization
REDD	Reducing Emissions from Deforestation and Degradation
SPSS	Statistical Package for the Social Sciences
UNDP	United Nations Development Program
UNFCCC	United Nations Framework Convention on Climate Change
WCC	World Conservation Congress
WSSD	World Summit on Sustainable Development.



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## 1. Introduction

At the request of the Congress Preparatory Committee of Council, IUCN commissioned an external evaluation of the World Conservation Congress held in Barcelona, Spain in October 2008. After an international bidding process, Universalia Management Group, based in Montreal, was contracted to conduct the evaluation.

The evaluation of the WCC was designed to support the ongoing learning interests of IUCN and its accountability to key stakeholders. The specific objectives of this evaluation are outlined below in Section 3.1 of this report.

The Barcelona Congress evaluation was coordinated by Mr. Alex Moiseev, Senior Programme Officer, Programme Planning, Monitoring and Evaluation and led by Dr. Charles Lusthaus, with the support of Mr. Alain Fréchette, Ms. Katrina Rojas, and Ms. Mariane Arsenault from Universalia Management Group. It should be noted that the WCC evaluation is part of a broader effort designed to capture Congress related learning at a strategic, programmatic and operational level, which include: 1) *Congress and Forum Learning Capture* – aimed at capturing data on key issues related to Congress planning, management and implementation; and 2) *Forum Evaluation* – intended to answer the fundamental question about the merit or worth of the Congress Forum, both to the members and to the IUCN Programme.

The key audiences and uses for the evaluation results are:

- The IUCN Council – for whom the results will provide strategic guidance for decision making related to the next Congress;
- The IUCN management – for whom the results will assist in making strategic and operational improvements for the next Congress;
- Donors – to whom IUCN is accountable for funding support for the Congress;
- Congress participants – who actively participated in providing input for this evaluation.

After a context and a methodology section, the evaluation findings are presented as follows:

- 1) Relevance in strengthening the Union, in confirming IUCN value proposition, in highlighting IUCN programming to IUCN constituencies and to conservation issues;
- 2) Effectiveness of the Forum in meeting its objectives as a convening platform;
- 3) Effectiveness of the Members' Assembly;
- 4) Congress Management;
- 5) Areas for improvements and recommendations.

## 2. A Synopsis of the WCC

According to its Statutes, IUCN has the obligation to hold a World Conservation Congress every four years. Originally, and for 48 years since its creation, IUCN Held an Assembly of member organizations only. In 1996, the Members' Assembly grew to include a public Forum that would support the sharing of knowledge and experiences as well as offer opportunities to debate critical conservation issues and solutions.

The WCC is generally divided into two parts: 1) the Forum, which convenes a broad base of actors to discuss how best to conserve nature and ensure that natural resources are used equitably and sustainably; and 2) the Members' Assembly, which represents IUCN's highest governance organ.

As summarized below, the functions of the Assembly are to:

- 1) Approve IUCN's Intersessional Programme;
- 2) Debate and adopt motions establishing IUCN's policies;
- 3) Adopt the financial plan to carry out the agreed programme; and
- 4) Elect the President, Treasurer, Councilors, and Commission chairs to guide the work of the Union.

Commission meetings also take place prior and during the IUCN Congresses.

The first IUCN World Conservation Congress was held in Montreal, Canada in 1996. Over 3000 people from 130 countries attended this first Congress, whose theme was "Caring for the Earth." The second IUCN WCC was held in Amman, Jordan in 2000 with some 2000 participants representing some 140 different nationalities. The theme of the Amman Congress was "Eco-space" where transboundary approaches for managing ecologically connected landscapes were considered. The third IUCN Congress took place in Bangkok, Thailand in 2004. It convened nearly 5000 people to a three-day Forum, consisting of 300 events focused on the central theme of "People and Nature – Only One World" and a four-day Members' Assembly.

The fourth IUCN World Conservation Congress was recently held in Barcelona, Spain in 2008 under the following theme: "A Diverse and Sustainable World". The Barcelona WCC hosted a four-day Forum that was attended by nearly 7000 people from 183 countries. More than 900 events were held during the Forum (of which, roughly 10% were organized by the Secretariat), and some 145 motions were presented before the Members' Assembly for its consideration (a 30% increase since Bangkok).

### 2.1 Barcelona WCC Journeys

1)Energy, 2)Markets & Business, 3)Law & Governance, 4)Rights and Conservation, 5)Mediterranean, 6)Protected Areas, 7)Islands, 8)Marine, 9)Forest, 10)Species, 11)Water, 12)Biocultural Diversity and Indigenous People.

The Barcelona WCC was centered on three streams:

- 1) **A new climate for change:** explored the impact of climate change and environmental degradation from overexploitation of ecosystem services and human security;
- 2) **Healthy environment – healthy people:** examined the impact of over-use of natural resources on human health, security, cultures and equity;
- 3) **Safeguarding the diversity of life:** looked into the role protected areas, land and seascape management, and innovative governance structures can play to conserve these resources and prevent biodiversity loss in all countries.



Along with the Congress themes, 12 Journeys were created to further guide participants along core thematic areas. As highlighted in the adjacent textbox, the journeys were designed to give participants an overview of key issues within a topic.

Events during the Barcelona Forum were organized as follows:

- **Aliance Workshops:** sessions organized by members and partners to showcase their work on specific issues and foster greater understanding and knowledge sharing;
- **Global Thematic Workshops:** *Aliance* Workshop sessions managed by IUCN staff in collaboration with commissions, members and partners;
- **Knowledge Café:** roundtable discussions designed to share experiences and insights on key issues, identify common interests and explore possible partnerships;
- **UNDP Poble:** a venue for local, community and indigenous voices to share best practices, inform policy, celebrate successes, and tackle common challenges;
- **Sustainability Dialogues:** a series of debates between a panel of experts designed to explore innovations for a diverse and sustainable world;
- **Conservation Cinema:** wildlife and conservation movies;
- **Posters:** visual displays of the work of environmental specialists from around the world;
- **Learning Opportunities:** interactive, skills-building workshops put together by IUCN members, partners, and Secretariat staff.

A variety of other events and social gatherings took place throughout the Congress. For example, members had the opportunity to showcase their work in one of the 147 different **exhibition booths**<sup>1</sup>. The **International Fair for Women Entrepreneurs** was an opportunity to showcase green enterprises owned and run by women. The Women's Fair also demonstrated how sustainable resource use can contribute to environmental conservation and poverty alleviation. **Sailing to Barcelona** was a parade of boats from member organizations and partners raising awareness of marine and coastal conservation internationally.

The Barcelona Congress also served as a platform to test innovative ideas in the layout of the Congress venue. As such, thematic **Pavilions** were introduced to provide open spaces for networking or to hold informal events around specific subject areas. Located in the main entrance of the Congress venue, these Pavilions quickly became a key element of the Congress set-up. The Pavilions illustrated cutting edge thinking on several themes relating to conservation, the environment, and sustainable development (adjacent textbox provides a list of all the Pavilions featured in Barcelona).

#### 2.2 Barcelona WCC Pavilions

- 1) Catalonia
- 2) European Community / MEEDDAT
- 3) Forests
- 4) Futures
- 5) Oceans
- 6) Spain
- 7) Species
- 8) Water
- 9) World Business Council for Sustainable Development (WBCSD)

The Barcelona Congress was hosted by Spain, and in particular: the Ministry of Environment and Marine and Rural Affairs, the Government of Catalonia, the City Council of Barcelona, and the Provincial Government of Barcelona.

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<sup>1</sup> Of the 147 booths provided, 17 exhibitors used a double-booth platform to showcase their work, bringing the total number of exhibitors to 130.

## 3. Approach and Methodology

This section details the approach used to guide this evaluation and the methodology that supported data collection and analyses.

### 3.1 Approach and Purpose of the Evaluation

The evaluation of the WCC was commissioned by the Congress Preparatory Committee of the IUCN Council to obtain feedback on the relevance, efficiency, effectiveness, and impact of the Congress.

More precisely, the evaluation of the WCC had four objectives:

- 1) Assess the extent to which the Congress contributed to strengthening the Union's relevance, strategic position, responsiveness to conservation and development issues, and effectiveness as a convening platform;
- 2) Assess the extent to which the Congress and Forum were effective in generating specific conservation learning, knowledge sharing and capacity building;
- 3) Assess the effectiveness of Congress planning, management and implementation; and,
- 4) Assess the extent to which the Congress represents a good value for money, relative to the investment.

The study was designed to support institutional learning. As such, the evaluation team adopted a participatory approach that involved IUCN from the planning stage (with input on evaluation questions and data collection tools) to data analysis and the review of emerging findings and recommendations. These approaches helped to build a positive precedent for the evaluation, create a shared understanding of the emerging findings and recommendations, and strengthen the use and integration of the final evaluation results.

### 3.2 Evaluation Methodology

The methodology for evaluating the WCC was based on the evaluation matrix and key questions presented in the evaluation workplan approved by IUCN in September 2008 (see Volume II<sup>2</sup>, Appendix II). The methodology consisted of a mix of qualitative and quantitative techniques, including document reviews, stakeholder interviews, surveys and event observations. To improve validity, a variety of data collection methods was used both on and off site. The instruments developed for data collection (interview protocols and surveys) are presented in Volume II, Appendix III. Consistency in the responses received across the range of methods used, and constituencies solicited, gives us confidence in the results presented herein. Work planning was completed in the weeks leading up to Congress, while data collection and analyses covered the period between September 2008 and January 2009.

#### 3.2.1 Data Collection Tools

An overview of the methods used for gathering feedback from IUCN stakeholders and constituencies is provided in the table below (see Exhibit 3.1).

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<sup>2</sup> Volume II will be presented with the Final Report.

Exhibit 3.1 Overview of methods used to gather data.

Target Groups	Method	Number of Respondents
Congress participants – Members (including Commission Members) and Non-Members of IUCN	On-site survey about the Forum*	627
	On-site survey about the Members' Assembly*	282
	Post-Congress on-line survey*	1761
	<b>Subtotal</b>	<b>2670</b>
Participants in different types of events	Learning Opportunities assessment (day school)*	526
	Learning Opportunities assessment (night school)*	93
	Event assessments (approximately 70 events)*	628
	<b>Subtotal</b>	<b>1247</b>
Forum events	Event Observation Questionnaires	63
IUCN Secretariat staff interviewed	Individual interviews (a complete list of people interviewed is available in Appendix XX)	41
IUCN Council and Commission Heads	Individual interviews	7
Key informants (event organizers, host country and donors, other participants in the Journeys)	Individual interviews	13
<b>Total number of interviews</b>		<b>61</b>
<b>Total number of questionnaires collected</b>		<b>3917</b>

\* Questionnaires were constructed to reflect the structure and character of the WCC, such as the Forum, Assembly, Pavilions, and the factors that affected performance (overall success).

### 3.2.2 Document Review

The Evaluation Team analyzed a series of corporate documents including the IUCN Statutes, the 2009-2020 Intersessional Programme: Shaping a sustainable future, *A 2020 Vision for IUCN: A Global Union for Sustainability*, the Value Proposition, evaluation reports from previous Congresses, the Learning Capture Exercise, and the information available on the knowledge network. Congress-specific documents such as motions and other material provided at the Forum were also subject to review. More general reference documents were also reviewed in the course of the study. The team also reviewed quantitative data on disbursements, and expenditures provided by the IUCN. A complete list of documents reviewed is presented in Volume II, Appendix IV.

### 3.2.3 Data Collection in Barcelona

A Universalialia Evaluation Team composed of four members went to Barcelona from October 5<sup>th</sup> to 14, 2008, to collect data. The purpose of this mission was to collect data onsite through questionnaires and interviews, distribute surveys and attend events organized by the WCC. The team was joined by 12 IUCN staff (coordinated by Mr. Alex Moiseev), who provided additional evaluation support during the Forum through event observations and the distribution of event and Forum surveys. In this report, the term *Forum Evaluation Team* is used in reference to this extended group.

For the purpose of this evaluation, events were randomly chosen along pre-defined criteria<sup>3</sup> to ensure a balanced sample representative of the different types of events, journeys, and streams.

## 3.2.4 Data Analysis

The team used descriptive content and comparative analyses to analyze the data for this study. Validity was ensured through data triangulation (using convergence of multiple data sources) and compliance with standard evaluation practices.

Quantitative analysis using SPSS was conducted with the four on-site questionnaires and the online post-congress survey<sup>4</sup>. The evaluation team considered the statistical distribution of every item and is confident in the results presented herein. Based on the data analysis, the evaluation team developed findings and recommendations.

The evaluation's approach included the process of validating preliminary findings with Congress management at the end of January 2009. This helped to strengthen the operational relevance of the preliminary findings and core conclusions/recommendations.

Survey results reveal only minor differences in the way various constituencies interpreted Congress-related issues. While statistical analysis pointed to some 13 questions with significant differences in the way constituencies responded at levels of  $p < 0.1$  or smaller, consistency in the graphical distribution of actual responses gives us confidence that these differences are negligible in real terms. By and large, responses from each stakeholder group remain positive. Based on available data however, there is some indication that Academia tended to be less satisfied compared to other groups, that Secretariat staff rated pavilion issues more favorably and that Indigenous representatives had a more positive appreciation of the overall Congress. However, given the relatively low response rates from some constituencies (e.g. Indigenous stakeholders), such results should be interpreted with caution.

## 3.2.5 Limitations

Evaluating any event as large as the Barcelona Congress poses particular challenges. Large international forums such as the IUCN World Conservation Congress are becoming increasingly important platforms to consolidate stakeholder interests around shared priorities, facilitate knowledge sharing, stimulate the development of innovative ideas and solutions, build and strengthen partnerships for action, and define common sets of objectives to initiate change at multiple levels of intervention. Despite the significance of such gatherings, the relative

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<sup>3</sup> A purposeful sample of events were selected from a pool of pre-selected Journeys that demonstrated a coordinated efforts for achieving results at various levels, complemented by a smaller random sample of events from other Journeys not covered by the previous sample.

<sup>4</sup> Observations that emanate from the statistical tests conducted by the evaluation team are as follows:

- A factor analysis of quantitative sources of data reveal the integrity of the themes looked at;
- The evaluation team considered the statistical distribution of every item and in general, most items were sufficiently normally distributed. However, the highly positive slant of some of the results (skewed to positive) suggest that we are dealing with highly motivated audience;
- Several items indicated bifurcated distribution, which, through further analysis, revealed differences in population preferences between, e.g., member and non-member;
- One way ANOVA F-Test validated whether or not significant differences exist among the means; and,
- T-Test verified if significant differences exist between the means (Xs).

performance of large international forums and their respective contributions have so far received little attention from social scientists and evaluation scholars/practitioners more specifically. IUCN's effort to assess the overall performance of the WCC thus represents a noteworthy contribution to ongoing efforts to strengthen global environmental governance structures and institutions.

The limitations associated with the evaluation of the Barcelona Congress are summarized as follows:

- Large international fora cater to many different audiences (participants, presenters, key note speakers) with differing levels of capacity, resources, and influence. Since participants tend to bring their own agenda, objectives or priorities, seldom will evaluation respondents ever have common definitions of success or use similar criteria for assessing the relative performance of an event;
- Respondents to surveys conducted during the course of Congress may have a more limited perspective on relative value of different issues, compared with surveys conducted after the event;
- While more than 4000 surveys were distributed during the Forum and close to 1000 during the Members' Assembly, response rates were relatively low with 627 and 282 completed surveys respectively (see Exhibit 3.1);
- Certain concepts remained ambiguous, making interpretation of participants' comments uncertain in some instances. A number of terms were used interchangeably by evaluation respondents: "IUCN" and the "Secretariat", "motions" and "resolutions", and use of the word programme as a substitute for either the Intersessional Programme or the WCC Programme;
- The absence of clear objectives specifying the changes that IUCN would like to see occurring at the output and outcome levels rendered the definition of success less tangible and therefore more difficult to assess.

## 4. Evaluation Findings

This section presents the findings of the evaluation in the areas of relevance, effectiveness, management effectiveness, and value for money.

### 4.1 Relevance

This section focuses on the extent to which the WCC is consistent with the needs, interests, and priorities of 1) the Union as a whole, 2) its constituencies, and 3) key conservation/development issues. Retrospective consideration of the appropriateness of the WCC and its design, in the context of a rapidly evolving global environmental governance arena, is discussed in Section 6, Conclusions and Recommendations.

The relevance of the World Conservation Congress is discussed in terms of the extent to which Congress: 1) strengthens the Union's relevance and strategic position as a global conservation leader; 2) confirms IUCN's value proposition; 3) highlights the relevance of the IUCN Intersessional Programme; 4) is relevant to the Union's constituencies; and 5) is relevant to key conservation and development issues.

#### 4.1.1 Strengthening the Union's Relevance and Strategic Position

**Finding 1: The convening authority of IUCN and the adoption of a forward looking agenda considerably strengthened the Union's relevance as a strategic leader in the global conservation movement.**

On the basis of the criteria used to define the extent to which Congress strengthened the relevance of the Union, we find that the Barcelona Congress was highly successful in all regards, thus reinforcing IUCN's reputation as a leader in the global conservation movement. The 2008 WCC brought together the largest and most diverse group of participants ever to an IUCN Congress (183 countries were represented).

According to the results of the post-congress survey, more than 2/3 of respondents confirmed the notion that the WCC presented a forward looking venue, which in turn helped to better position IUCN as a global conservation leader and set an important milestone in the form of a global conservation agenda (see Exhibit 4.1 and Section 4.2 on Effectiveness below). The WCC helped to strengthen IUCN's leadership role in the conservation movement by highlighting a common vision for global conservation and sustainable development (2009-2012 Programme), and by facilitating the flow of multiple sources of information and knowledge for solving pressing socio-ecological problems.

#### 4.1 Comments on the relevance of IUCN as a convener:

"All the major players were present."

"It had a very strong recognition of traditional communities and indigenous knowledge. This sector is becoming very relevant in the face of climate challenge."

"The wonderful variety of people, including indigenous leaders and spiritual leaders to give completely new viewpoints and wisdom, and perhaps to change our whole way of looking at conservation."

"The demonstration that cultural diversity goes hand in hand with natural diversity."

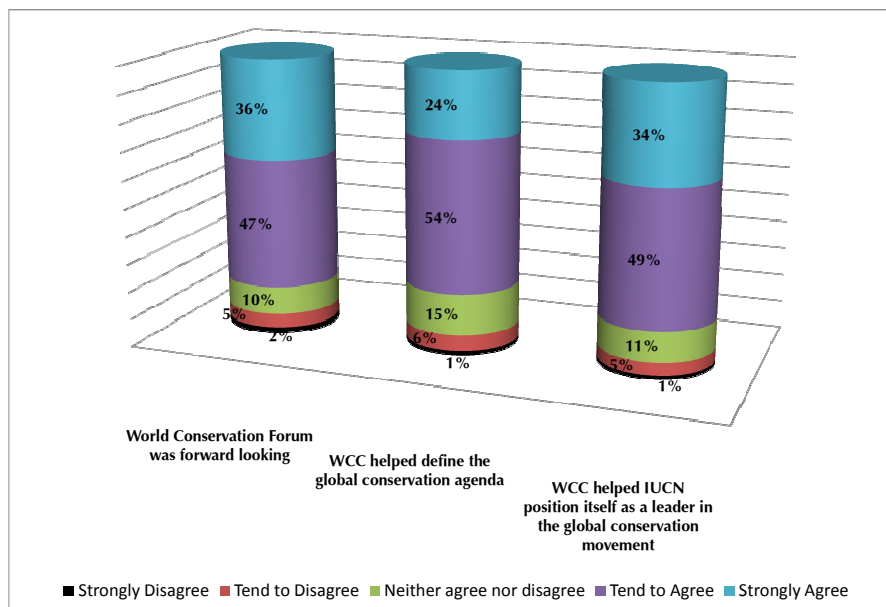
"La diversidad cultural, los intercambios entre las personas de todos los âges, géneros, nacionalidades."

Permitir la participación de actores locales comunitarios que cuentan con experiencias genuinas de conservación y restauración ambiental y no limitarse solo a científicos y profesionales con experiencia relevante a nivel mundial, también se debe conocer directamente las demandas y experiencias positivas que tienen los que utilizan y conservan los recursos naturales.

## Relevance of IUCN as convener

The WCC convened participants from 183 countries representing a wide range of interests including national and international NGOs, donor agencies, multilateral organizations, governments, the private sector, academia, indigenous groups, and youth, in addition to Secretariat staff and Commission members (see Section 4.2.2 on the Effectiveness of the Union’s Convening Platform). When asked to identify the major strength of the Congress, over a third of respondents underscored the relative importance of the Union’s ability to bring together a wide range of participants from around the world to address common concerns. However, some respondents also pointed to the need for better representation from the global South and involvement of youth (see textbox 4.1)<sup>5</sup>.

**Exhibit 4.1 Post-Congress survey perceptions of IUCN and WCC leadership**



## Confirm IUCN’s role as a leader in the conservation movement

Other sources of information such as media reports placed their emphasis more squarely on IUCN’s strategic position as a leader and convener of the global conservation movement. For example, an article from the *Associated Press* newswire described IUCN as “the world’s most prestigious organization in assessing the vulnerability of species”<sup>6</sup>, whereas the Japanese newspaper, *Shimotsuke Shimbun*, emphasized the convening ability of Congress stating that

<sup>5</sup> To its credit, it should be noted that for the first time ever, IUCN was able to sponsor 100% of the members from the South that were in good standing in terms of dues owed to the Union. As such, over 450 member organizations were fully sponsored.

<sup>6</sup> IUCN (2008). Media Measurement Report, p.5.

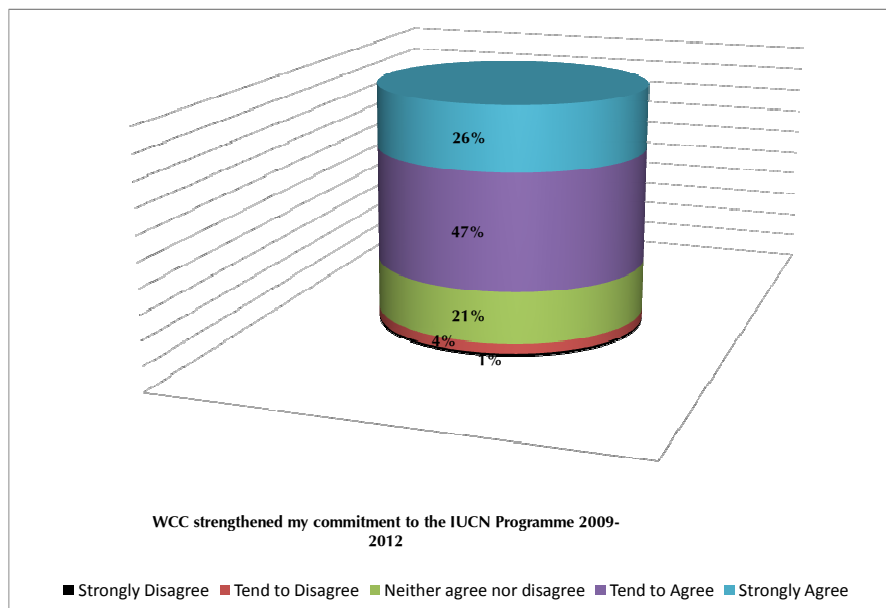
# Evaluation of the Barcelona World Conservation Congress – Final Report

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“IUCN brings together 111 governments agencies and 874 non-governmental organizations and about 10,000 scientists”.<sup>7</sup> In addition to the 1,600 articles that were published on or about the Congress between September 15<sup>th</sup> and October 15<sup>th</sup>, 68 press events were held during the Congress itself, thus reinforcing the Union’s presence as a global conservation leader.

The adoption of a forward looking programme for the 2009-2012 intersessional period helped to set an important precedent for IUCN and the conservation community as a whole. By bringing the issues of climate change, sustainable energy production and green economics front and center, the 2008 WCC provided IUCN and its members / partners with a unique opportunity to reinstate the relevance / importance of conservation and sustainable ecosystem management in relation to the major environmental and developmental challenges of the 21<sup>st</sup> century. Hence, according to Post-Congress Survey results, nearly three quarters of respondents felt that the WCC had helped to strengthen their commitment to the IUCN 2009-2012 Programme (see Exhibit 4.2). As the proposed Forum Evaluation of the WCC unfolds over the coming year, some effort will be invested in understanding how such influence plays out over the long term.

**Exhibit 4.2 Post-Congress survey perceived commitment to the 2009-2012 Programme**



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<sup>7</sup> IUCN (2008). Media Measurement Report, p.15.



#### 4.1.2 Confirming the Relevance of IUCN's Value Proposition

**Finding 2: Overall, the WCC confirmed IUCN's relevance as a purveyor of credible and trusted knowledge, a convener of partnerships for action, a catalyst for change at multiple levels, and a leader in setting conservation standards and practices.**

##### **Credible and Trusted Knowledge**

The WCC helped to strengthen IUCN via the dissemination of credible scientific knowledge (See Exhibit 4.3 below). Participants praised the educational content as well as the constructive approach used in the learning opportunity sessions. Similarly, the ability to access state of the art knowledge and be exposed to both competing and complementary perspectives greatly enhanced the value of Congress events. In addition to providing a unique venue for members and partners interested in sharing research findings or their experiences and lessons learned from the field, Global programming staff and Commission Chairs both underscored the exceptional visibility that the Barcelona Congress provided to their respective practices. The ability to access new tools and sources of information, share experiences with others and develop a more comprehensive understanding of the factors that affect conservation were among the most often cited benefits of Congress. These include examples such as obtaining the “most recent information on relevant topics”, developing a “better understanding of approaches being used by other organizations”, and “access to current knowledge and methodologies”.

##### **4.2 IUCN Value Proposition, as highlighted in the 2009-2012 Programme:**

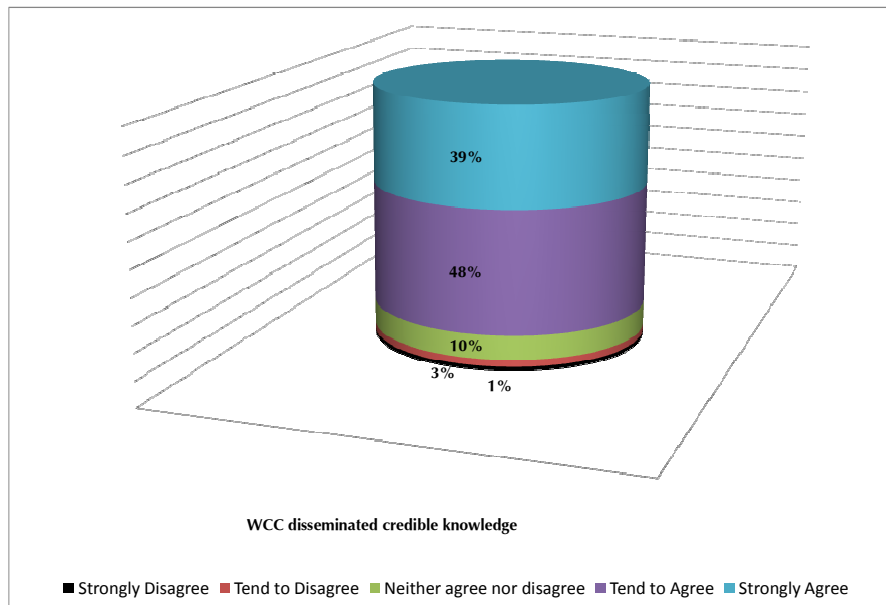
**Provide credible, trusted knowledge** – a value derived from trusted sources of knowledge including Commissions, members, partners and staff.

**Convene and build partnerships for action** – provides a link between businesses, NGOs, governments and science and engineering communities.

**Catalyze action from the global-to-local and local-to-global** – the credibility to influence national, regional and international policies and laws.

**Influence standards and practices** – such as the Red List of Threatened Species and the Protected Areas Category System.

**Exhibit 4.3 Post-Congress survey perceptions on the credibility of WCC knowledge**



## Partnerships for Action

By drawing on expertise, resources, and perspectives from the Union’s broad membership base and key partnerships, the WCC offered a wide range of perspectives that reaffirmed the Union’s inclusive approach to building partnerships for action at multiple scales of intervention. The WCC was successful in highlighting the need for greater private sector engagement and ways to engage military interests to minimize the loss of biodiversity during times of conflict. The wide range of actors attending the Congress allowed the Union to reinforce the notion that the challenges associated with conservation and sustainable development can only be dealt with effectively if all stakeholder groups are purposefully engaged in collective actions that resonate with their longer term shared interests.

While it remains too early to speculate on the long term effects or scope of the partnerships that were initiated during the Congress, the vast majority of evaluation respondents nevertheless tended to be in agreement with the notion that the WCC provided suitable conditions for such developments (see Finding 7, Section 4.2.2). Compared to previous Congresses, interviewed Heads of IUCN’s Global Thematic Programmes suggested that the 2008 WCC provided more structured opportunities to strengthen membership engagement and initiate or improve partnerships in alignment with IUCN’s revised business model (which emphasizes the need for more membership involvement in the delivery of its work programme). In Barcelona, the mix between Secretariat and Commission hosted events (e.g., global thematic workshops and events) and the Pavilion arrangements all helped to improve the visibility and convening strength of global programmes. As such, the Forest Conservation Programme reported being able to build on the synergistic effects of the Forest Journey and Pavilion to generate greater awareness on their work, actively engage participants to identify potential partners who could support for the implementation of its 2009-2012 programme and build constituency.

## Catalyze Action at Multiple Scales

Both the Forum and the Members' Assembly were relevant to different scales of intervention (see textbox 4.3). Forum events addressed concerns that were deemed relevant at different levels, including discreet subject matter (e.g., geographically confined species lost, the use of specific bio-indicators for assessing ecosystem health, or the introduction of specific conservation tools), national or regional concerns (e.g., protecting the Congo River Basin, maintaining the integrity of the greater Amazon forest ecosystem, strengthening the resilience of the Great Barrier Reef or dealing with environmental change in small island states), and global policy considerations (e.g., the use of market instruments to mitigate the impacts of climate change such as forest carbon credits and their respective impacts on the livelihoods of indigenous communities and the rural poor, or a global review of the law of the sea).

The different levels of intervention emphasized in the selected Forum events (see text box 4.4) revealed a careful consideration for feasible actions at different biogeographical and political scales (e.g., from strengthening adaptive measures and building ecosystem resilience at the local level to mitigate the impacts of climate change to the implementation of multilateral environmental agreements at the regional and international levels). Finally, a cursory overview of the motions presented before the Members' Assembly further underscores the importance of membership concerns over a wide range of issues that include the need for both local and global areas of intervention.

## Influence standards and practices

The WCC provided evidence of IUCN's capacity to influence standards and practices. Among a wide range of innovative areas, Congress gave visibility to the standards of the Red List of Species<sup>8</sup>, which is now endowed with better indicators for assessing the status of species and ecosystems, as

### 4.3 Major strengths of the WCC related to the issues of scale:

"Knowledge and innovative thinking exchanges on regional conservation and development issues related to global issues: some plenary sessions and workshops/Financial issues mechanisms at local, regional and global scale."

"Importance of several local issues, key for conservation was very well communicated to global/international community."

"La posibilidad de reunir a representantes de diferentes lugares del mundo para discutir problemas globales de expresión local."

"The convening power of linking local to global and policy with science."

"This congress is so significant in terms of soliciting information of local, national and global, building strong commitments, designing strategies, keep building networking and partnership for better improvement of protecting the world from nature."

### 4.4 Forum discussions on multiple scales of intervention

"We heard many examples of local and indigenous communities who are demonstrating how to adapt to climate change, and how much they have to contribute to conservation, if only we can join them in seeking solutions to our common interests."

"The Equator Initiative, a joint activity of many IUCN members and partners, led by UNDP, was especially eloquent in calling for more opportunities for the voices of local communities to be heard, and listened to. "

"IUCN served as a neutral convener of a dialogue on governing the high seas, beyond national jurisdiction."

\* Source: Conclusions from the WCC Forum, Reported by Jeffrey A. McNeely, IUCN Chief Scientist

<sup>8</sup> According to the Media Measurement Report commissioned by the IUCN Global Communications Group, the Red List was referenced by nearly 60% of all analyzed articles.

well as the development of more comprehensive frameworks for the economic valuation of biodiversity and ecosystem services. Congress advanced the debate on REDD (i.e., Reducing Emissions from Deforestation and forest Degradation) and the use of carbon credits to support protected areas and conservation efforts more broadly. It launched a new framework for improving high seas governance; demonstrated the use of powerful technologies such as the National Geographic and Google Earth partnership for mapping marine protected areas and biodiversity hotspots; and provided a window to The Nature Conservancy (TNC) to showcase its efforts to develop an international certification standard for sustainable watershed management.

### 4.1.3 Highlighting the Relevance of Intersessional Programme

**Finding 3: Congress helped to position the 2009-2012 Programme for adoption and support discussions on the achievements and lessons learned from the 2005-2008 Programme.**

Recognizing that establishing clear causal relationships between the Forum Programme and IUCN's Intersessional Work Programmes would require a much more in-depth analysis of relevant Forum events than what this evaluation could provide, a number of indicators suggest that such linkages were made in a variety of ways. More than 130 events were hosted by an IUCN global thematic programme, regional office or technical specialist group (e.g., Species Programme or Environmental Law Center), including 53 Global Thematic Workshops and 39 IUCN commission events. According to event observation forms completed by the Forum Evaluation Team (61 in all), linkages between relevant Forum events and IUCN Programme were specified in some workshops, but more often than not, one needed to know the Intersessional Programme components to be able to establish such linkages. Still, according to results from the event and learning opportunity surveys, respondents tended to rate the relevance of the sessions they attended to the IUCN Programme very highly (over 90% agreement). Whether or not such linkages were interpreted as evidence of relevance between events and the "Forum Programme" as opposed to the "IUCN Programme" remains unclear. However, several Secretariat staff observed that the Barcelona Congress was comparatively better than past Congresses at highlighting the work of IUCN. According to interviewed staff, the work of the Secretariat was generally perceived as having been better showcased in Barcelona than in Bangkok.

Despite limited on-site discussion of the 2009-2012 work programme during the Members' Assembly<sup>9</sup>, the key elements of IUCN's proposed intersessional agenda were nevertheless prominently featured during the Forum. In effect, climate change concerns, energy issues and the role of business and markets in mitigating the loss of biodiversity and improving conservation outcomes served as central Congress themes, thus providing the core subject matter of several Journeys and Sustainability Dialogues. While beneficial in highlighting the relevance and appropriateness of the 2009-2012 Programme, it is unclear if such linkages were systematically planned for. But according to interviewed staff, one of the underlying objectives of the Pavilions and Journey formats was to explicitly position the 2009-2012 Programme. Relevant activities conducted by Global Thematic Programme staff focused on outreach to strengthen their respective constituencies, improve membership engagement, and build partnerships in support of programme delivery.

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<sup>9</sup> As discussed further in this report (see Finding 14), it should be noted that the 2009-2012 Programme was developed over a year and a half process with more than 60 consultations with Members and partners, including several Members' Regional Fora.

#### 4.1.4 Relevance to the Union’s Constituencies

**Finding 4: The Barcelona Congress is widely perceived to have been successful in meeting the needs of the Union’s constituencies and in advancing their respective interests.**

According to available registration data, participants highlighted four primary reasons for attending the Congress. These included the opportunity to 1) showcase their work; 2) share knowledge with others; 3) learn about new tools and methodologies; and 4) network with others (see Exhibit 4.4 below). Results from the post-Congress Survey, the Forum Survey, Assembly Survey and Event/Learning opportunity questionnaires all strongly indicate that the WCC was successful in addressing the needs of participants<sup>10</sup>.

**Exhibit 4.4 Principal reason for attending the Congress**

REASON	FREQUENCY	PERCENT
No Answer	3741	45,80%
Identifying new partners	285	3,49%
Showcasing our/my work	480	5,88%
Exchanging knowledge	1553	19,01%
Learning (new tools and methodologies)	880	10,77%
Networking	698	8,55%
Influencing the governance of the Union	89	1,09%
Debating the 2009-2012 IUCN programme	77	0,94%
Promoting specific resolutions and/or recommendations	272	3,33%
Shaping the Barcelona commitments for Sustainability	93	1,14%
<b>Total</b>	<b>8168</b>	<b>100%</b>

\*Source: Congress registration form

According to the post-Congress survey, Congress was considered useful in advancing / showcasing the work of IUCN and its constituencies for more than 80% of respondents (see Exhibits 4.10 in Section 4.2.2 below and textbox 4.5). Of the 972 events held during Congress (including poster sessions, presentations, facilitated discussions, learning opportunities and interactive sessions), 790 events were sponsored by members, Commissions or partners. As evidenced by the most important

**4.5 Congress showcased the work of IUCN and its constituencies**

“Provided a platform to a diverse range of organizations to cover a wide range of issues.”

“La oportunidad que se brindó a todos los participantes de poder participar en eventos de su interés e incluso en la organización de sus propios eventos.”

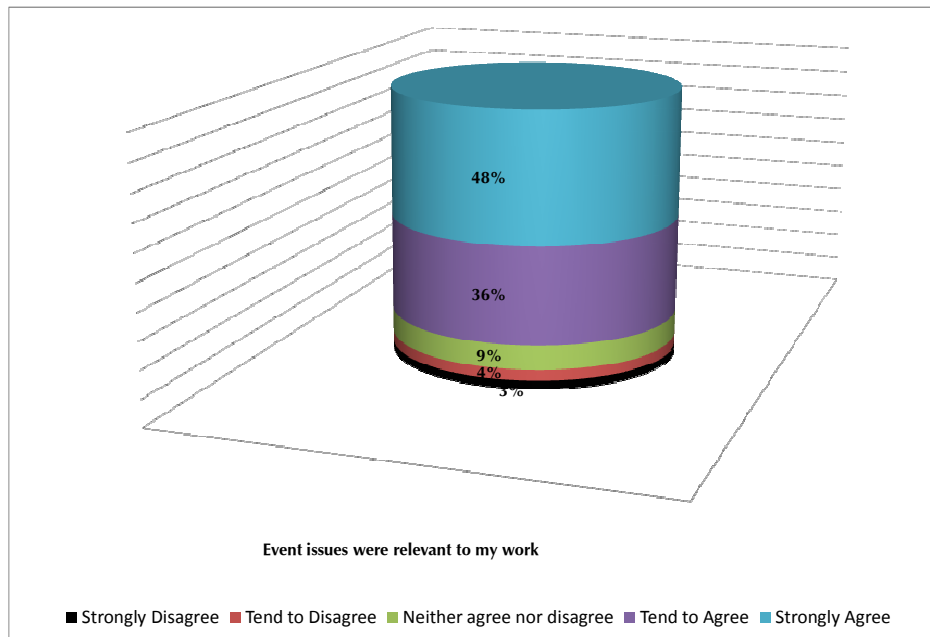
“Provide a platform for presentation of key subjects for members, Commissions and Secretariat, both from the point of view of 'what has been done' and 'what needs to be done'”

“The opportunity for all organizations (large/small, etc) to have equal time/space to present the issues that are important to them.”

<sup>10</sup> Statistical analysis of survey results found no discernable differences in the way different populations of IUCN’s constituency responded to the issues that support the relevance of the Congress.

benefits of Congress cited in the post-Congress survey, events were generally praised for their relevance to the work of participants (see Exhibit 4.5), for the range of topics presented, for the multiple levels of inquiry used to address issues and for providing access to new sources of information and knowledge.

**Exhibit 4.5 Relevance of Events to the Work of Participants**



For others, the opportunity to network and develop partnerships provided the main rationale for their participation, as evidenced by the frequency of such benefits in the post-Congress survey (see Finding 7, Section 4.2.2 for a more extensive analysis). For the most part, participants anticipated that they would be able to access the contacts and partnerships initiated during the Congress for use at the regional level. Finally, in spite of the record number of motions presented before the Assembly (145 motions), evidence highlighted in Section 4.3.2 (Factors Affecting the Effectiveness of the Assembly) suggests that participation in the motions process (and to some extent, even the adoption of the 2009-2012 Programme) was relevant to only a relatively small proportion of members. Yet, the fact that some members felt strongly enough about the need to debate some of the more controversial motions by participating, for instance, in one of the 32 different Contact groups<sup>11</sup> indicates that the democratic process of the Assembly was relevant to a number of dedicated members.

With respect to the Secretariat, the WCC was perceived as being relevant for a number of reasons: 1) strengthened membership outreach / constituency building; 2) improved visibility and media

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<sup>11</sup> Ad hoc group of delegates organized to review motions that are subject of proposed amendments. As per Resolution 56, the reports of such contact groups will ordinarily be considered by the Resolutions Committee prior to their presentation to the World Congress.

coverage; 3) opportunities to develop partnerships; 4) disseminate knowledge; and 5) identifying new sources of funding. While clear about the relevance of the WCC for advancing the cause of conservation and the work of the Secretariat more specifically, senior programming staff nevertheless expressed mixed feelings on the overall value of such congresses, given the professional opportunity costs and related human and financial investments needed to organize an event of this magnitude.

Finally, evidence drawn from survey (n=20) and interview (n=4) data indicates that Donors generally perceived Congress as relevant to their needs. They considered the event to be forward looking and useful for meeting new partners. The Congress met their expectations and, in some cases, provided opportunities to advance particular interests (such as the inclusion of local and regional governmental authorities in the structure of the Union). For host country donors, it also provided opportunities to showcase what they were doing in conservation, particularly through their pavilion.

#### 4.1.5 Relevance to Key Conservation and Development Issues

##### **Finding 5: The Congress addressed the key issues and concerns of the conservation and sustainable development movements in the world today.**

The WCC and the Forum in particular, provided a multi-tiered platform for discussing critical conservation issues and challenges. With more than 900 events to choose from, participants were given the opportunity to consider a wide range of pressing conservation and sustainable development issues from multiple perspectives and different scales of intervention<sup>12</sup>. From local to international issues, and from theory to implementation and lessons learned, the WCC covered a wide range of relevant topics (see textbox 4.6 for a partial list of key issues covered during the Congress). According to post-Congress survey results, more than three quarters of respondents believed that key conservation issues were adequately debated in the Forum events; that the WCC helped to define the global conservation agenda; and that it further strengthened the linkages between conservation and development issues (see Exhibit 4.6 below and Finding 6 in Section 4.2.1 for further analysis on these issues).

The discussions, tools, and solutions used to address the themes of Congress (i.e., Journeys and Streams) were generally considered to be inclusive of a much wider body of knowledge than in

#### **4.6 Issues covered during the WCC:**

- Healthy environment
- Invasive species
- Biodiversity and climate change
- Extreme climatic events
- Protected areas
- Water and climate change
- Forests and climate change
- Equity
- Land tenure/resource rights
- Marine issues
- Benefits sharing
- Ecosystem service valuation
- Role of cultural diversity in knowledge acquisition/sharing
- Marine governance

\* Source: Conclusions from the WCC Forum, Reported by Jeffrey A. McNeely, IUCN Chief Scientist

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<sup>12</sup> The number of events presented during the 2008 Congress is used here to support the claim underscored by survey respondents that a key strength or benefit of the Congress resided in the wealth of issues covered. Whether or not such a number of events was necessary to foster the diversity of issues highlighted by survey respondents is discussed in Section 4.2.4 dealing with the factors affecting effectiveness.

the past<sup>13</sup>. Based on available sources of data, the evaluation team finds that the span of conservation and development issues considered during the Barcelona Congress was relevant to the underlying drivers that affect ecosystem change today<sup>14</sup>. For example, participants could learn how various groups dealt with water access issues from the level of the individual to that of the multilateral organization, and this, under different biophysical regimes or socio-ecological conditions such as dry lands, disputed transboundary areas or human-induced water stressed landscapes.

Whether or not Congress was successful in pushing collective thinking on how to address the major environmental challenges we face is a topic that evoked mixed responses (please refer to Finding 6, under Section 4.2.1 for a more in-depth discussion on this). In spite of a generally positive assessment of the relevance of Congress to key conservation issues, some interview and survey respondents expressed reservations. A number of survey respondents commented that not enough emphasis was placed on climate change and its cross-cutting significance for every other conservation and development issues discussed at Congress. Others argued that more attention ought to be given to similar international events so as to avoid redundancy and contribute to ongoing discussions as opposed try to re-invent the wheel (see textbox 4.7). According to some senior Secretariat staff, the relevance of the issues being addressed is not the problem. Rather, it is the questions (or lack thereof) that are being used to guide discussions, which need to become sharper and more focused on soliciting deeper levels of inquiry and debate on key environmental issues.

#### **4.7 Post-Congress survey comments on the Congress relevance to key issues**

“Positioning the organization better to serve a fast changing world and new emerging economic / social paradigm for 21C”

“El haber logrado congregar a una gran diversidad de gente, organizaciones sociales no gubernamentales, académicos y representantes de instituciones gubernamentales de muchos países.”

“Greater appreciation of the multiple issues, including social, that are involved with conservation planning.”

“Better understanding of some social issues”

“Knowledge sharing on environmental, social, cultural, and spiritual dimensions of humanity and society.”

“Look at other global / international events and check their outcomes in order prevent repetition and talking about issues that have been discussed into deeper detail and in a more advanced way previously in other fora. Make linkages and co-organization of some of the panels with other international groups working in common issues, in particular: - UNFCCC& IPCC - Water and Oceans organizations”

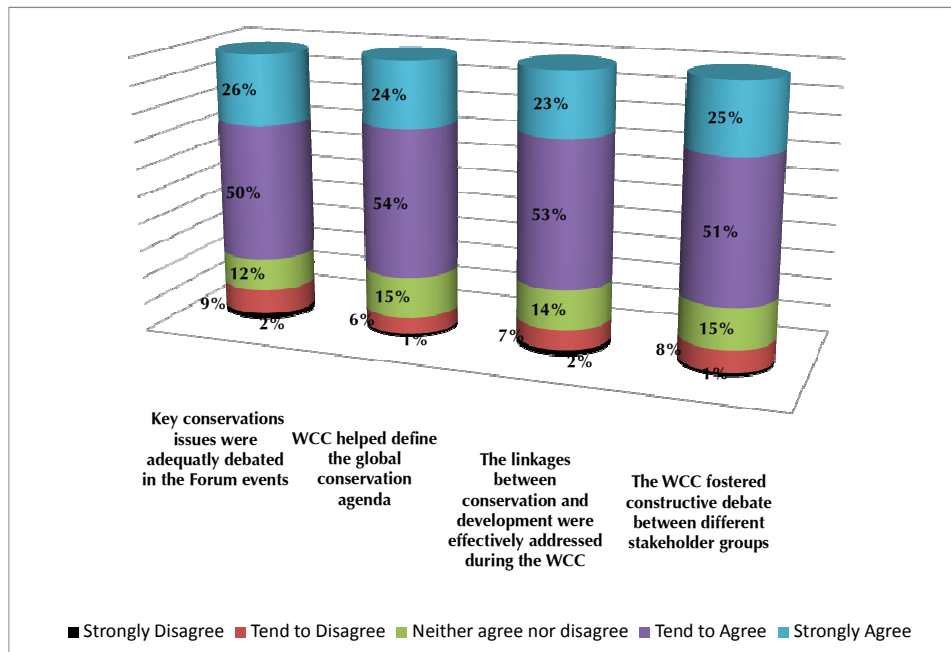
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<sup>13</sup> One could argue, however, that the contents of the events, and indeed the Congress more broadly, were more strongly informed by the experiences of attending organizations and individuals than the wealth of scholarship (including both theoretical and empirical research contributions) emanating from leading faculties and research institutions – this may help explain why Academia tended to be more reticent about the overall value of the Congress.

<sup>14</sup> By underlying drivers, we refer to both the direct and indirect drivers affecting ecosystems and biodiversity, as identified in the Millennium Ecosystem Assessment Conceptual Framework. Indirect drivers include demographic, social, political, cultural and economic dimensions of environmental change whereas direct drivers center around land use and land cover change, invasive species, climate change, technological change, rates of harvest or consumption, external inputs (e.g., fertilizer and pollution), and natural/bio-geophysical factors.



Exhibit 4.6 Post-Congress survey perceptions on the relevance of the WCC to key issues



## 4.2 Effectiveness of the World Conservation Congress

In the context of this evaluation, effectiveness is defined as the extent to which Congress objectives were successfully achieved. The section focuses on the overall effectiveness of the WCC and the Forum more specifically. Issues relating to the effectiveness of the Members' Assembly are addressed separately in Section 4.3. The topics covered in this section are as follows: 1) the extent to which Congress met its objectives; 2) the extent to which Congress strengthened the Union's effectiveness as a convening platform; 3) the extent to which the different events and formats aided in the delivery of Congress objectives; and 4) the factors affecting the effectiveness of Congress.

### 4.2.1 Meeting the Objectives of the Congress

As confirmed by IUCN senior management for the purposes of this evaluation, the objectives of the Barcelona WCC were as follows: 1) Set the global conservation agenda; 2) Facilitate the sharing of knowledge and experiences; 3) Showcase and debate critical conservation issues; and 4) Set IUCN's global policy and intersessional work programme. While the latter three objectives are specific in nature and not subject to interpretation, the proposition that the WCC would effectively set *the global conservation agenda* tended to elicit visible signs of ambiguity. On the basis of discussions with senior Secretariat staff and other key observers, the intent to *set the world conservation agenda* is interpreted herein as a figurative expression of the Union's willingness to consider the breadth of conservation issues facing the world today, facilitate and organize debate and the exchange of knowledge/information on the themes that emanate from this consolidated assessment, and seek approval of a common work programme that reflects the priorities of the Union as a whole.

## **Finding 6: The 2008 WCC was successful in convening a debate around an ambitious global conservation agenda.**

As operationalized for the purpose of this assessment, the Barcelona Congress is generally regarded as having been successful in its efforts to convene a debate around an ambitious global conservation agenda for the following reasons:

- Congress served an essential convening role that attracted a diverse community of stakeholders interested in sharing knowledge and experiences, and strengthening their capacity to affect change;
- Congress provided a unique platform for showcasing and debating critical conservation issues from around the world;
- Congress approved a forward thinking intersessional work programme that broadens the boundaries of the conservation movement, thus setting an important precedent for the future of conservation.

## **Critical conservation issues were showcased and debated during Congress**

According to results from the Post-Congress Survey, more than 75% of respondents indicated that key conservation issues were adequately debated in the Forum events; that the linkages between conservation and development were effectively addressed during the WCC; and that Congress fostered constructive debate between different stakeholder groups (see Exhibit 4.6). Further, of the 1,086 post-Congress survey respondents who commented on the major strength of the Forum, the most frequently noted items (other than networking) included the effectiveness of the venue for engaging others in constructive debates over a range of issues (130 comments); the critical nature of the issues discussed (150 comments); and the diversity of issues addressed (500 comments) (see textbox 4.8). Hence, more than 85% of Forum survey respondents indicated that the issues they were interested in were adequately covered in the Forum Programme. The opportunity to be immersed in a highly diverse community of professionals with differing interests, experiences, and insights on key conservation and sustainable development issues was considered by many to be the single most important element of the Barcelona Congress.

### **4.8 Comments from the post-Congress survey illustrating the diversity of issues**

“Que se cuenta con impresionante información, iniciativas y liderazgo.”

“New information and knowledge about current conservation ideas, suggestions to our new projects.”

“Exposure to practitioners in various fields, including stories of on the ground work will enhance my understanding of how conservation affects various peoples and fields.”

“Exposure to issues from various parts of the world.”

“A range of information that was unknown and could be applied in my region.”

However, opportunities to debate critical conservation issues were not evenly distributed across events. According to event observation forms completed on-site by the Forum Evaluation Team and comments drawn from the Forum and post-Congress surveys, event organizers were more prone to use the Congress venue to showcase their own work than to promote insightful and productive debate on substantive crosscutting issues. Debate on key issues was found to be more productive when presentations or host interventions were purposefully kept short and allowances were made to meaningfully engage participants on specific areas of concern; when topics for discussion focused on complex and multi-faceted issues that affected a wider range of constituencies or groups of interests; and when sessions were structured around the input of participants such as the knowledge cafés. Although all event formats succeeded in fostering

discussion, a number of survey and interview respondents indicated that workshop sessions were generally too short to adequately debate issues and that events tended to showcase too many speakers/presenters with presentations that were likewise considered too long.

The WCC was successfully used by some IUCN programmes to catalyze media attention for the launch of substantive commission and programme outputs (e.g., the Red List, the Livelihoods and Landscapes Initiative), and initiate or contribute to discussions tied to critical conservation issues such as climate change, bio-energy production, biodiversity protection, and poverty alleviation (including resource rights and sustainable livelihoods). While recognizing that there were a number of events that focused more strongly on the challenges facing conservation professionals, some Secretariat staff openly questioned the extent to which Congress was actually designed to further current thinking on key conservation and sustainable development issues, given the lack of directives to push event organizers towards such an end. This raises an important concern. Should the WCC become a conduit for more fundamental forms of inquiry, the pursuit of such interests would necessarily require a reframing of Congress objectives. Among other things, such a shift in focus would require more explicit terms of reference for event organizers, fewer thematic areas, fewer (and probably longer) workshop sessions that integrate more time for in-depth discussions. It would also be necessary for Congress organizers to make a more concerted effort to integrate contributions from leading environmental scholars and researchers (especially from the social science realm) into a format that until now has predominantly focused on showcasing the experiences of NGO members operating at the field level, and contributions from more disciplinary research in the natural sciences.

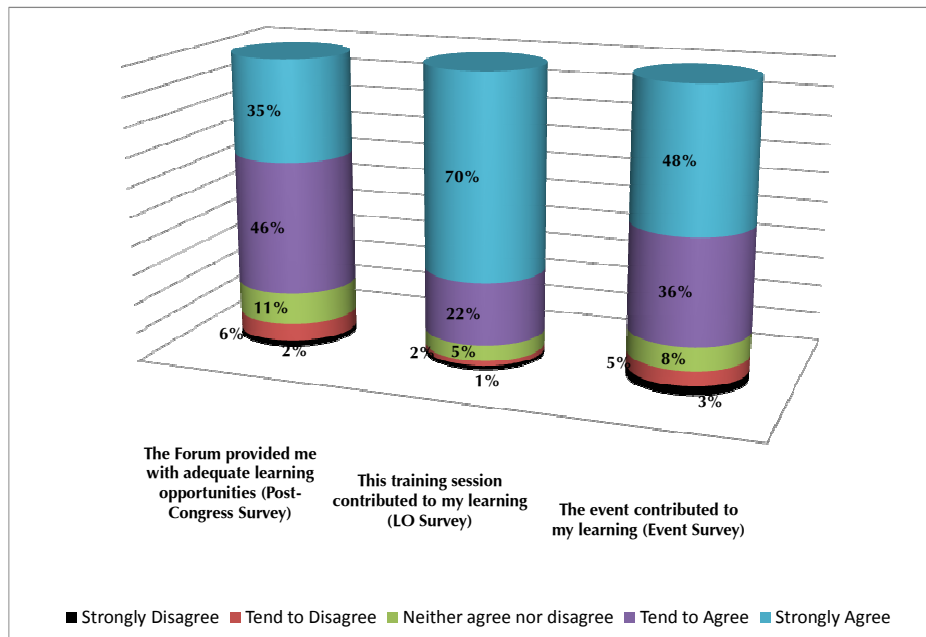
### **Congress generated conservation learning, knowledge sharing and capacity building**

The WCC provided enabling conditions for participants to share knowledge and experiences, attend events that were relevant to their needs and acquire tools and knowledge applicable to their work. Learning from the experiences of others and the innovative tools they used were some of the most commonly cited benefits for use or application at the regional level. As such, Event and Learning Opportunity survey respondents both strongly indicated (84% and 92% respectively) that the sessions they attended contributed to their learning<sup>15</sup>. Similarly, more than 80% of Post-Congress Survey respondents believed that adequate learning opportunities were provided during the Forum (see Exhibit 4.7).

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<sup>15</sup> See Finding 10 below for further details on the Learning Opportunity.

**Exhibit 4.7 WCC contributions to conservation learning**



Comments received from survey respondents were likewise consistent with these results. When asked to identify the two most important benefits of the Congress for use or application in their region, the vast majority of post-Congress survey respondents (more than 760 recorded comments) highlighted a wide range of learning and knowledge sharing benefits such as the opportunity to be exposed to new ideas, sources of information, lessons learned and best practices, as well as the occasion to become acquainted with a wide array of tools and methodologies (see textbox 4.9). While the diversity of issues covered in Forum events and the breadth of disciplinary and professional affiliations of Congress participants all contributed to the generation of useful knowledge, the Learning Opportunities were the most often cited contributor to learning and membership capacity building (see Finding 10 below).

#### 4.9 Comments on the learning benefits of the WCC

“Usually the major benefit of such events for me is networking. Here, however, I would say the major benefit was the opportunity to learn about issues and challenges that I have not been able to stay current with.”

“A great opportunity for learning and sharing of variety of perspectives on conservation and sustainable development.”

“Ability to learn up to date knowledge and opinions on a wide range of relevant issues- get myself up to date and be stimulated.”

“Some new ideas and approaches, particularly around climate change and ecosystem services.”

“New ideas and methodologies in sustainable development issues.”

“Increased knowledge resulting from participating in Learning Experiences relevant to my work.”

## Congress approved a forward- looking intersessional work programme<sup>16</sup>

Congress approved an Intersessional Programme for 2009-12 that seeks to address global conservation and sustainable development issues through a more holistic/ integrated approach that actively targets the underlying or indirect causes of environmental change as well as the proximate or direct drivers of these changes<sup>17</sup>. The Programme breaks with tradition by actively soliciting greater involvement of the private sector and the broader constituencies of the Union for the delivery of intended objectives. In doing so, it recognizes the changing face of environmental governance in the 21<sup>st</sup> century – where collaborative arrangements between states, civil society (including NGOs and CBOs) and the private sector offer an increasingly innovative range of solutions for the challenges we now face<sup>18</sup>.

### 4.2.2 Effectiveness of the WCC as a Convening Platform

#### **Finding 7: The Barcelona World Conservation Congress highlighted IUCN’s effectiveness as a convening platform.**

By serving the broader conservation and development communities as a conduit for interaction, trust building and collaboration, the 2008 Congress demonstrated IUCN ability to foster linkages across boundaries and expand the constituencies of the global conservation movement. Barcelona provided a meeting place for almost 7000 conservation and development professionals from 183 different countries interested in sharing ideas and experiences, and engaging others in productive debates and discussions. Participants were provided with a wide range of opportunities for meaningful involvement, including: organizing an event or intervening as a presenter; actively engaging in workshop debates and discussions; submitting motions or taking part in Assembly discussions; getting involved in Contact group sessions, and voting on motions and in the election of IUCN’s Council.

In addition to convening stakeholders from all backgrounds and levels of intervention (from the local to the international), the WCC provided a common platform for sharing ideas and best practice, debating controversial issues (e.g., private sector involvement), addressing salient concerns at multiple scales of intervention (e.g., resource rights, marine resource conservation) and developing partnerships or linkages around common interests. The WCC thus helped to reinforce IUCN’s role as a bridging organization<sup>19</sup> that provides an

#### **4.10 IUCN Press Release**

“What we have seen is a defining moment in bringing different perspectives together and, in some cases, developing consensus that will have an important and long-lasting impact,” Bill Jackson, Deputy Director General of IUCN. IUCN Press release, October 8, 2008

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<sup>16</sup> Procedural considerations regarding the levels of debate and discussions in the lead-up to the approval of the IUCN Programme are discussed further below in Finding 14 of Section 4.3 on the effectiveness of the Members’ Assembly.

<sup>17</sup> See Footnote 10 above for working definitions of direct and indirect drivers of ecosystem change.

<sup>18</sup> See Lemos and Agrawal for an in-depth discussion of these emerging trends. In Lemos, M. and A. Agrawal 2006. *Environmental Governance. Annual Review of Environment and Resources*. 31: 297-325

<sup>19</sup> See Galez et al., for further details on the social foundations of institutions for adaptive co-management and the organizational dimensions that support improved fit between governance and biophysical systems. In Young et al. (eds.) 2008. *Institutional and Environmental Change: Principal Findings, Applications, and Research Frontiers*. MIT Press.

arena for trust building, social learning, value identification, and collaborative thinking across multiple levels of interaction. When considered in this light, evidence drawn from this evaluation suggests that the WCC provides a unique environment for linking individuals and organizations across geographical, political, social, cultural, economic, and disciplinary boundaries. Barcelona served as a convening platform for a diverse range of ideas and actors, which in turn helped to highlight the full spectrum of the conservation movement at both the content and ideological levels.

Further, early reports from the Heads of Global Thematic Programmes underscored the value of the Barcelona Congress in terms of providing an effective venue for strengthening membership engagement and improving constituency outreach. In alignment with the 2009-2012 Programme, whose delivery calls for a much more concerted effort by the Union as a whole, Programme Heads expressed satisfaction over the opportunity Barcelona provided for strengthening their respective constituencies. By providing a platform for engaging directly with participants, the Pavilions were judged to have been especially useful in facilitating such outreach, whereas the Journeys were regarded as having been useful in highlighting key developments and contributions within Global Thematic areas.

Still, some observed that IUCN as a whole could strive to create an even more inclusive environment and further strengthen its outreach beyond the boundaries of the Union's existing constituencies. Specifically, comments on this issue express a need for greater involvement by youth groups, academics and scientists (especially from the social sciences), as well as State and private sector representatives.

## Congress facilitated networking and partnership building

As underscored in the adjacent box text, opportunities for networking and building or strengthening partnerships were widely regarded as major benefits of the 2008 Congress. Although the WCC was generally regarded as successful in fostering an environment that was conducive to networking and informal discussions in support of knowledge sharing and more formalized partnership agreements, there were also some critical voices calling for a much more structured approach to networking and partnership building (see textbox 4.11). Survey results however, were largely positive. Over 80% of Post-Congress Survey respondents felt that the WCC allowed them to strengthen existing partnerships and/or develop new ones. Similarly, more than three quarters of the respondents to the Forum Survey supported the notion that the Congress venue facilitated networking (see Exhibits 4.8 and 4.9).

### 4.11 Comments on networking cited by Post-Congress Survey respondents:

"Contacts with relevant experts and potential future partners"

"Opportunities to partner with stakeholders in developing nations"

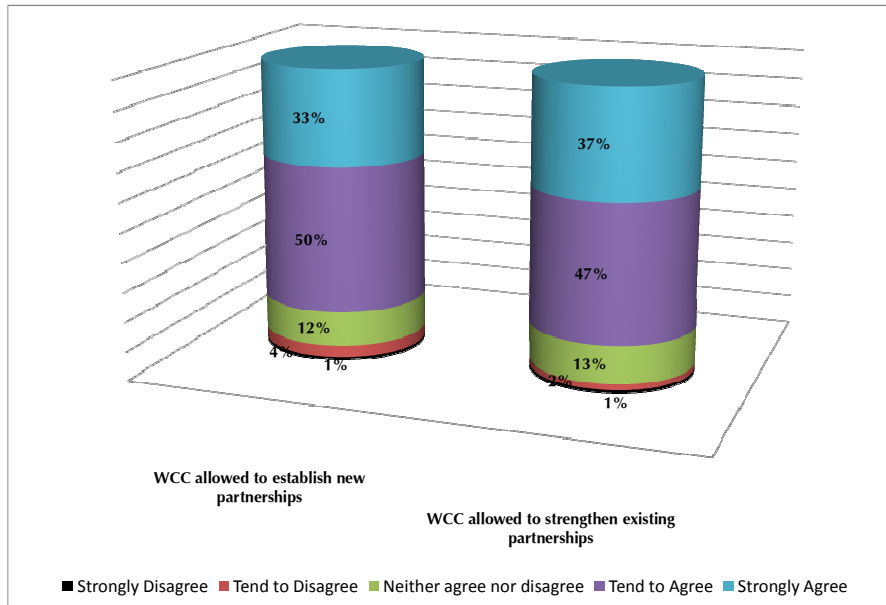
"New good contacts with both IUCN staff and members working in my field"

"Mayor Acercamiento con la Membresía de mi Región, me permitirá mejorar mi trabajo localmente"

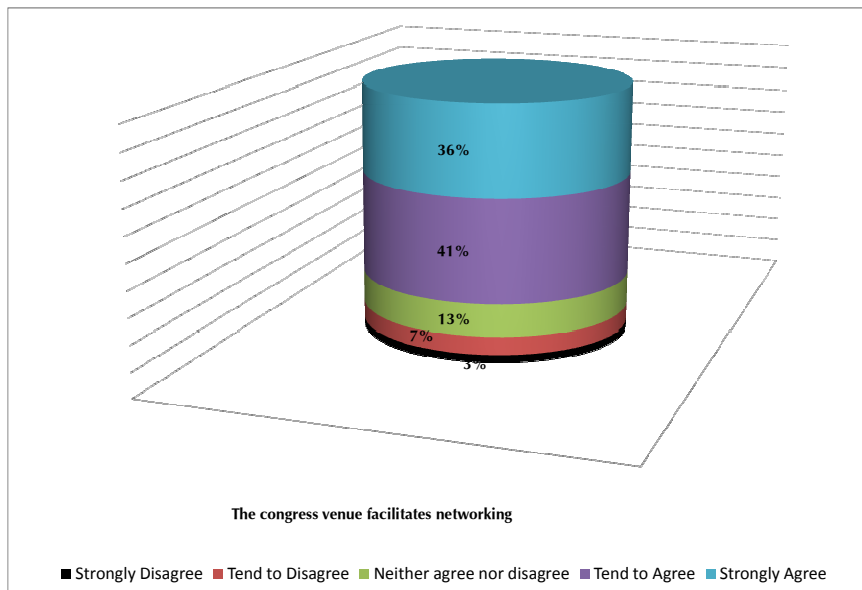
"I personally found networking very difficult - perhaps a more structured allowance for different fields of interest at forum level could help?"

"Better networking and sharing between different stakeholders who don't often meet face to face. How much of a bridging function was the forum? Not much i fear, i think similar interest groups stuck together and networked furiously within their comfort zones. But that could have been achieved at a fraction of the cost of the forum by supporting by more meeting spaces, cafe area, promoting the exhibition booth area above the IUCN pavilion area, more participatory workshops and use of participatory facilitation techniques in learning opportunities. Videos and exhibitions from communities involved in conservation."

**Exhibit 4.8 Post-Congress survey perceptions regarding partnership development**



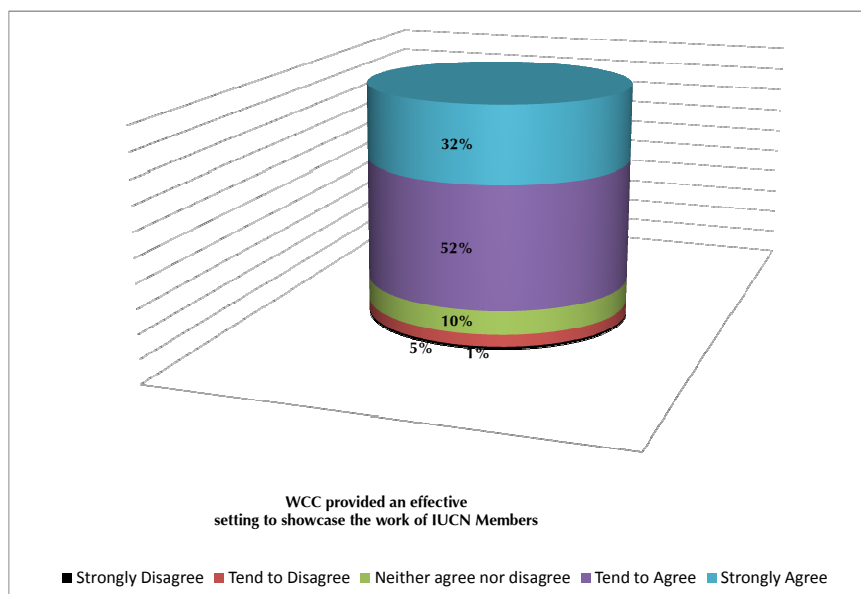
**Exhibit 4.9 Forum survey responses regarding networking**



## Congress was mostly successful in profiling / showcasing the work of members

By all accounts, the 2008 WCC has done more to showcase the work of members and participants than any other previous Congress. It featured an astounding 972 events, 9 Pavilions, 130 Exhibitors, a Conservation Cinema, and an International Fair for Women Entrepreneurs that exposed the work of 31 individuals. In all, more than 80% of Forum events were led by members or participants and many were credited as being forward thinking, with salient issues such as: payment mechanisms for ecosystem services, private sector involvement in conservation, the energy sector as a partner in mitigating the effects of climate change, the role of development in conservation, and pro-poor resource rights including indigenous land-rights issues. The Barcelona Congress provided members of the Union with an unbridled opportunity to present their work in a variety of formats, share their knowledge and experiences on a range of critical conservation and development issues, solicit constructive input from attending participants, highlight achievements and lessons learned, and otherwise use the Congress venue to strengthen their outreach to potential partners, communities of shared interests and even funders in a few isolated cases. As illustrated in Exhibit 4.10, the perception that the Barcelona Congress offered an effective setting for showcasing the work of IUCN members was widely shared by Post-congress Survey respondents.

**Exhibit 4.10 Perceived effectiveness of the WCC in showcasing the work of members**





While generally positive throughout, varying levels of dissatisfaction were expressed in regards to some of the walk-in venues. Apart from the Poster sessions, which were ideally located in a high traffic area, and the Pavilions, which played a key convening function during Congress (see Finding 9 below), most of the venues that relied on visibility to attract participant interest were located beyond the main gathering areas (see textbox 4.12). Many participants, as well as those who exposed their work felt that the walk-in exhibits had been marginalized by the venue layout. In particular, the exhibition booths, the International Fair for Women Entrepreneurs, and the boats that took part in the Sailing to Barcelona event were all housed outside of the main thoroughfares of the Congress, thus reducing their ability to profile their work or contributions. Congress organizers should give careful attention to such matters in the future (see comments in textbox 4.13).

#### 4.12 Selected Comments on the Exhibits

“The Exhibition area should be connected more closely to the Pavilions.”

“The exhibition area was completely hidden. VERY poor choice of location!!!”

“Exhibitors should be put in a more strategic location - the location of the stands limited the number of people who passed.”

“The sitting and access to the Exhibition area was poor. In Bangkok the setup was much more inviting, but in Barcelona the Exhibit area was in a room that had to be accessed by a hallway off the main pavilion area. This led to greatly reduced traffic through the exhibit area.”

“Exhibition area not very clearly defined/informed, very awkward entrance!”

“The last day i discovered the exhibition back there without advertising, what a pity they should be much more in first row.”

#### 4.13 Selected Comments on Women Entrepreneurs

“Give the women more space, to show their products at a more visible place and not in an underground corridor [...]. I visited the women exposition several times and it was always without people - the women were at events and there were no visitors. In fact, women & nature conservation should have more space at the next Forum”

“It is a pity that women Fair was set up bit aside of the Forum event, in the long, dark corridor!”

“We were part of the Women Entrepreneurs side event and were basically ignored during the entire conference, we were not ever given an opportunity to present our work to people working on neotropical wildlife conservation, yet our Entrepreneurial experience provides a very concrete solution to endangered wildlife...”

“The Women Entrepreneurs Fair was a dismal failure [...]. Members of IUCN's executive leadership did not take the time to visit the stalls themselves or to highlight women's issues and innovativeness [...]. We were placed in the basement of the congress, not on the first or second floors like everyone else, we felt like second class citizens. Why do women continue to put up with this kind of treatment? It was very shabby.”

Nevertheless, an informal sampling of 15 exhibitors revealed that all but one thought their presence at the Congress had been well worth their investment in terms of the exposure they received, and the networking and partnership building opportunities that their booths generated.

## 4.2.3 Events and Formats Supporting the Delivery of Congress Objectives

This section considers the extent to which different events and formats supported the effective delivery of Congress objectives.

### **Finding 8: Forum events and Pavilions provided enabling conditions for the effective delivery of the Congress objectives.**

The diversity of events and issues discussed during the Forum were amongst the most cited benefits of the 2008 WCC (see text box 4.14). For more than three quarters of respondents to the Post-Congress Survey, the mix of events gave participants the opportunity to consider issues of interest from a number of different perspectives. Events largely addressed issues that were of concern to participants (according to 85% of Forum Survey respondents), provided members and partners with unique opportunities to showcase their work, and supported the interests of participants by offering a wide range of learning and knowledge sharing opportunities. Along with the diversity of issues presented, the quality of the sessions, in terms of relevance of information and effectiveness of presentations, was identified by respondents as a key strength of the Forum.

#### **4.14 Comments from Post-Congress Survey (Strengths)**

“The high caliber of the speakers”

“The quality of Forum speakers and participants”

“The impressive quality of the panels and participants”

“In convening so many people and in offering such a diversity of content, resources, and perspectives.”

“Excellent presentations and discussion sessions.”

Results of the Event and Learning Opportunity (LO) Surveys point to some generalizable strengths and persistent weaknesses across the board<sup>20</sup>. Paradoxically, while daytime LOs were rated consistently higher than all other events, nighttime LOs generated the weakest results of all. As highlighted in Exhibit 4.11 below, Events and LOs tended to be rated strongly in terms of: the overall organization, the appropriateness of the facilities, the clarity of the objectives, their relevance to the IUCN Programme, the effectiveness of the instructor or facilitator, the relevance to individual needs, contributions to learning, and the degree to which individual expectations were met. Events and LOs generated comparatively weaker results in terms of: the adequacy of pre-event information, the usefulness of handouts or session materials, and the amount of time allocated to interaction or debate. Opportunities for networking were likewise rated more poorly in both the Event Survey and the Night-time LO Survey. Results outlined in Exhibit 4.11 suggest that overall, events and learning opportunities were relevant to the needs of participants, fairly well structured, and effectively delivered. The relatively weaker results for the adequacy of pre-event information and usefulness of session materials can generally be explained by the fact that event organizers were invited to post relevant resources on the web as opposed to offering paper handouts as part of the Green Congress initiative to make this a paperless event. Concern over the lack of time for interaction and debate was raised by a number of sources, including Event, Forum and Post-Congress Surveys and interviews with senior Secretariat staff. The sheer number of events

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<sup>20</sup> The Evaluation Team did not try to assess the relative strengths and weakness of each type of event. Two reasons guided this decision. First, the amount of data collected for each type of event (number of cases and number of respondents per case) is insufficient to allow for the formulation of generalizable statements. Second, given that people learn in different ways, individual judgment of event quality tends to be biased towards one’s preferred learning style.

to be integrated within the Forum caused considerable scheduling constraints. As a result, events were generally considered too short for substantive discussions or debates, and in many cases, presentations tended to be drawn out with too many speakers being invited to address the audience. While this may help explain why respondents felt that opportunities for networking were not as prevalent in the Congress events, the less than ideal timeslot of the night-time LOs might suggest why the latter were so poorly rated.

**Exhibit 4.11 Summary of Results for the Event and Learning Opportunity Surveys**

SURVEY STATEMENT	% OF RESPONDENTS IN AGREEMENT WITH THE SURVEY STATEMENT		
	EVENT SURVEY RESULTS (N=628)	DAY LO SURVEY RESULTS (N=527)	NIGHT LO SURVEY RESULTS (N=93)
The event was well organized	87%	93%	81%
Event facilities were appropriate	80%	91%	89%
<i>Pre-event information was adequate</i>	<u>72%</u>	<u>72%</u>	<u>48%</u>
<i>Event materials were useful (e.g. publication)</i>	<u>72%</u>	<u>74%</u>	<u>35%</u>
Use of audiovisual aids was effective	78%	N/A	N/A
Event objectives were clear	80%	92%	<u>63%</u>
Event objectives were relevant to the IUCN Programme	89%	91%	76%
The event was effectively chaired	83%	N/A	N/A
Event instructor/facilitator was effective	84%	93%	70%
<i>Sufficient time was provided for interaction</i>	<u>68%</u>	<u>79%</u>	<u>58%</u>
Event issues were relevant to my work	84%	87%	<u>64%</u>
The event contributed to my learning	84%	91%	<u>69%</u>
<i>The event provided a good opportunity to network with others</i>	<u>66%</u>	83%	<u>59%</u>
Overall, the event met my expectations	81%	87%	<u>57%</u>

Hence, evidence suggests that in spite of several shortcomings (see the Factors Affecting Effectiveness below), the variety and depth of Forum events were largely perceived to have been instrumental in the effective delivery of Congress objectives. Moreover, because people learn in different ways, the variety of event formats (e.g., knowledge cafes, Learning opportunities, sustainability dialogues and Aliances workshops) likely played a key role in supporting the different learning styles that one would expect to find in large heterogeneous populations such as the one that took part in the 2008 WCC (see Exhibit 4.12 below for a breakdown of the different types of events hosted by the Barcelona Congress). While the abundance and diversity of issues addressed in the events highlighted as a major strength of the Forum, participants were quick to point to the overwhelming number of events, and the relative implications for the lack of debate and discussion, as a key weakness of the Forum.

**Exhibit 4.12 Number and types of events: 972\***

TYPES OF EVENTS	NUMBER	TYPES OF EVENTS	NUMBER
Alliance workshops	165	Other	34
Combined workshops (including Marine Combined Events)	45	Pavilion events	126
Commission events	39	Posters	118
Conservation cinema	52	Press events	68
Donor events	6	Receptions & Social events	29
Global thematic workshops	53	Sailing to Barcelona	11
Host country events	12	Sustainability dialogues	7
Knowledge café	131	UNDP poble	27
Learning opportunities	49		

\*Source: Post WCC All Events IUCN Analysis by Type

**Finding 9: Pavilions provided an innovative design feature that supported outreach activities by various communities of practice within the Secretariat and the Union more broadly.**

Pavilions provided an effective setting to convene participants around shared interests while attracting the attention of those less familiar with the work of the pavilion host. By doing so, Pavilions facilitated knowledge sharing and information dissemination to a wider audience and helped to strengthen core constituencies in support of membership engagement and partnership development. They offered an innovative structure which enabled networking and provided a meeting place for various communities of practice to discuss relevant issues related to their fields of expertise. Moreover, because of their explicit linkages to the Journey’s and Forum Programme, Pavilions served a crucial orientation function in an otherwise challenging programme set-up. Participants could often find more in depth information on the contents of events at the Pavilions, with frequent updates on lessons learned and the key events to look forward to.

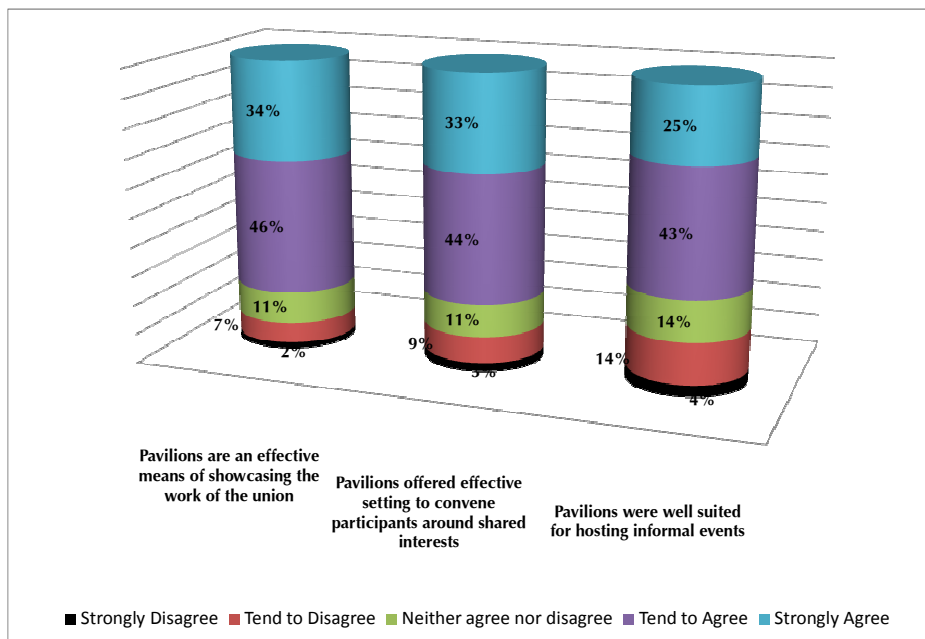
Survey results confirm the added value of Pavilions (see Exhibit 4.13 below). According to more than three quarters of Forum Survey respondents, Pavilions provided an effective setting to showcase the work of the Union and to learn more about the themes of the Congress. Similarly, 77% of Post-Congress Survey respondents indicated that Pavilions offered an effective setting to convene participants around shared interests, and 73% agreed with the proposition that Pavilions provided an ideal environment for meeting other professionals within one’s field of expertise. Comments received on the major strengths of the Pavilions further corroborate these results. According to respondents, Pavilions provided an informal setting that was conducive to networking and interaction with leading experts, and partnership development. The central location and innovative design features that facilitated access and movement across the Pavilions were also frequently mentioned, as were the quality, relevance and focus of the Pavilion themes, handouts, and organized discussions.

Survey respondents were slightly less enthusiastic about the suitability of the Pavilions for hosting informal events (68% of Post-Congress Survey respondents) or for fostering cross-disciplinary fertilization (65% of respondents thought that Pavilions provided a useful mechanism for learning about relevant contributions from other fields of expertise). In terms of areas for improvement, survey respondents made a wide range of suggestions, all pointing to the need to refine the organization and purpose of the concept. Specifically, the role and function (i.e., niche) of

Pavilions within the overall Congress architecture should be clarified so as to avoid creating structures that try to be everything to everyone (e.g., decide whether or not Pavilions should be used to showcase specific contributions and host events or if the focus should rest more squarely on networking and constituency outreach). Regardless of the strategy adopted, the structure and organization of the Pavilions should be streamlined to support the course of action that will guide future investments so that better seating arrangements and sound proofing are integrated if Pavilions intend to host events; staffing, amenities and informal areas are to be improved if networking, partnership building and outreach become the core mandate of the Pavilions; linkages across Pavilions and between Pavilions and the Forum, the Assembly and the themes of the Congress should be more clearly stated if Pavilions are used to guide participant interaction and involvement in the Congress; etc.

Beyond the need to better align certain organizational elements of the Pavilions with their intended purpose, most Secretariat staff involved in the planning, design and delivery of the Pavilions openly questioned the cost-benefit ratio of the concept. Whether or not the actual returns on investment are worth the time, energy, and substantial costs that Pavilions commanded is a question that certainly merits the careful attention of Congress organizers.

**Exhibit 4.13 Forum and post-Congress survey perceptions of the pavilions**



**Finding 10: The Learning Opportunities were highly regarded for their content, quality learning materials, skillful facilitation, and contribution to participant learning.**

In response to growing demands from IUCN’s membership base, and the Secretariat’s interest in strengthening the Union’s capacity building role, the 2008 World Conservation Congress provided a unique opportunity to test the value proposition of skill-building events as well as the need for further investments in this area. In all, 49 Learning Opportunities (LO) covering a wide range of topics were offered during the Forum to some 1089 pre-registered participants at no additional costs. The learning opportunities, offered through day school and night school sessions, were hosted by IUCN members with the support of the Secretariat.<sup>21</sup> Given the special status of the LO, within the broader context of IUCN’s capacity building strategy, the organizers of these events requested a separate evaluation, which is briefly summarized in this finding.

As illustrated in Exhibit 4.11 above (see Finding 8), Learning Opportunities were viewed as being well organized by the vast majority of participants. Survey respondents recognized the appropriateness of the facilities, the adequacy of the pre-session information and the usefulness of the learning materials. In addition, the event delivery also received very positive reviews. Participants particularly appreciated the effectiveness of the facilitators and instructors, which they singled out as the most significant strength of the events. Similarly, respondents underscored the participatory approach emphasized in most workshops, which contributed to the creation of dynamic and interactive sessions.

The content of the Learning Opportunities was considered relevant to the work of participants and as having contributed to their learning (see text box 4.15). Over 90% of participants in day school events agreed that the content of the LO contributed to their learning and, as evidenced in the adjacent textbox, many commented on the usefulness and value of the sessions within the context of the overall Congress.

When asked how workshops could be improved in the future, survey respondents generally pointed to time management concerns (such as the need for more time to address specific issues or allow for more interaction) and the need for still further investments in capacity building activities at Congress. For night school survey respondents, however, results were less positive (see Exhibit 4.11). The evening time slot, the distinct focus of the night school on business skills, and limited information provided about the level of the sessions in the night school appear to have affected participant perceptions about the events.

**4.15 General Comments on Learning Opportunities**

“The learning opportunities sessions should be longer. It’s a good way to pass information”;

“The learning opportunities were very useful”;

“The most interesting activities were the learning opportunities”;

« Avoir plus de "learning opportunities", elles sont super utiles aux membres »;

“The learning opportunities provided an excellent opportunity to address and learn about issues”;

“The Learning opportunities were particularly innovative -- and one of the highlights of the congress”.

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<sup>21</sup> In Bangkok, LOs were organized by one external group. In Barcelona, the events were coordinated by the Secretariat, working closely with the trainers and the sponsoring organizations to fine tune the design of skill building sessions. Given the importance of capacity building to the Union and its members, and the long term implications of such efforts, LOs in future congresses should continue to be organized by the Secretariat.

#### 4.2.4 Factors Affecting the Forum

While survey and interview respondents raised a wide range of issues or concerns regarding the Forum and its contents, the underlying cause was mostly attributable to the complex and heavy programming structure that emerged as a result of trying to fit too many things within a limited amount of time.

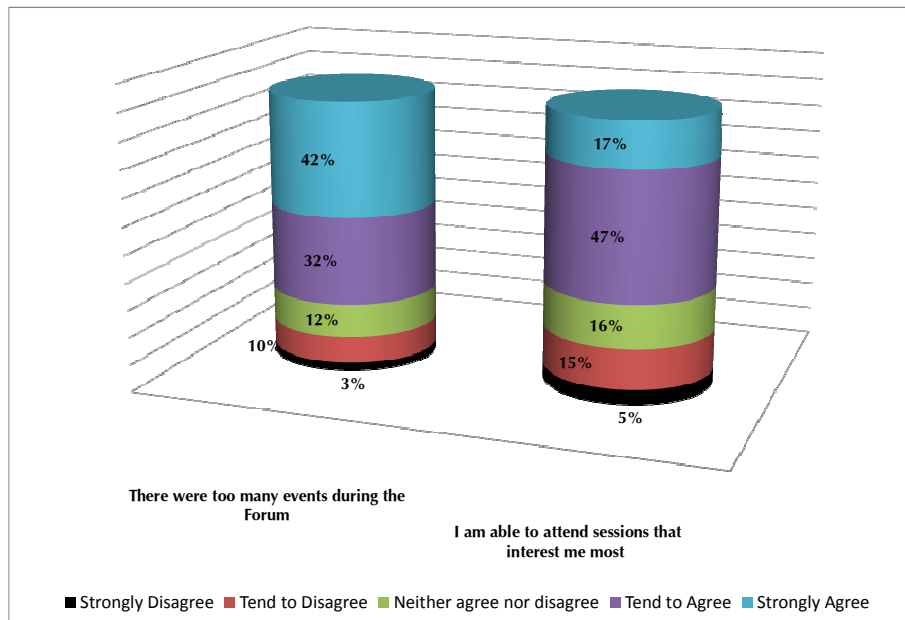
The other concern raised in this section relates to a more fundamental rationale issue that emanated from selected conversations with senior Secretariat staff and opinion leaders as well as the Evaluation Team's own assessment of the WCC within the broader context of global environmental governance structures.

**Finding 11: The large number of events, complex programming structure and lack of printed information made it difficult for participants to select where to go and make appropriate use of their time.**

The sheer number of events and thematic interests covered in the Barcelona Congress contributed to organizational and program planning challenges in terms of: scheduling, information dissemination, room allocations, simultaneous translation, staging of similar or related events, ensuring high rates of participation, and programme design. Simply put, the 2008 WCC tried integrating too many things into too short a timeframe without a coherent thematic framework and adequately detailed programming structure that would have helped participants make more efficient use of their time. Evaluation results suggest that beyond a certain point, the complexity engendered associated with high numbers of events makes it inherently difficult for participants to optimize their experience.

Survey results on these questions reveal a number of inconsistencies. While some 81% of Post-Congress Survey respondents felt that the Forum Programme provided enough information to identify events that were of interest to them, only half of those who responded to the Forum Survey believed that the programme was easy to navigate and 64% confirmed that they were able to attend sessions of interest. The diversity of issues covered was highlighted as a major strength of the Congress, and this, according to 79% of Post-Congress Survey respondents, helped to provide participants with a well-balanced perspective on the major issues of interest to them. None the less, nearly three quarters of post-Congress survey respondents believed that too many events were held during the Forum (see Exhibit 4.14).

**Exhibit 4.14 Survey perceptions on the number and accessibility of Forum events**



Because of the heavy programme set-up, frequent overlaps and lack of more detailed information, poor attendance have in some instances needlessly watered down the value of important events (e.g., sustainability dialogues) while overburdening the capacity of others with too many participants, inadequate seating or not enough headphones to hear translations.

With respect to the thematic structure of the Forum programme, some 73% of Forum Survey respondents believed that Journeys<sup>22</sup> provided an effective means of guiding their participation compared with 67% for Streams. Yet, evidence of linkages between events and Congress themes were seldom if ever explicit. As revealed in the sample of 61 event observations compiled by the Forum Evaluation Team, event organizers rarely tried to tie their presentations to the Congress themes associated with the Journeys and Streams or with other related components such as the Pavilions, motions or IUCN Programme. Global Thematic Workshops however, were more likely to specify such links. It should be stressed that Journeys were created after the proposals for presentation were received, making it impossible for most event organizers to tie their presentations to a Congress Journey. The decision to include an event into a journey was made by the Forum organizers based on the information available.

Suggestions on how the effectiveness of future Forums could be improved were consistent with the general observations made so far. Overall, survey respondents point to the need to: 1) reduce the number of events and improve their scheduling so as to limit the potential for overlap between sessions with similar topics; 2) lengthen the duration of events (or of the Forum) to improve opportunities for discussion and debate; 3) strengthen the quality, relevance and focus of the

<sup>22</sup> While the Evaluation Team recognizes that Journeys emerged relatively late in the planning process, they nevertheless played a key role in the delivery of the Forum Programme and are considered here as an organizing principle similar to that of the Stream idea.



events along with the overarching (thematic) framework of the Forum Programme; and 4) provide more in-depth programme information both prior to and during Congress to facilitate participant planning and involvement in the discussions that are of interest to them.

**Finding 12: The stated objectives of the WCC were not clearly defined and broadly disseminated.**

As defined by the revised Statutes and Regulations of 1996, the purpose of the WCC can generally be understood as twofold: 1) hold a public forum to discuss and debate emerging conservation issues and solutions; and 2) hold a Members' Assembly to address the statutory requirements of the Union<sup>23</sup>. Since 1996, Congress organizers have also identified broad central themes (e.g., a diverse and sustainable world) to capture the essence of each Congress along with more specific sub-themes (or streams) to guide Forum discussions along particular lines of inquiry (e.g., A new climate for change; Healthy environments – Healthy people; and Safeguarding the diversity of life). However, beyond the procedural requirements of the Statutes, and vague overarching thematic structures, the specific objectives and intended results of Congress, for any given intersessional period, have so far remained ill defined.

As invoked in Section 4.2.1, effectiveness was defined at the start of this evaluation by a series of four objectives<sup>24</sup>. However, apart from the need to set IUCN's global policy and intersessional work programme, none of the three other objectives were explicitly stated in Congress documents nor were they translated into actionable results that could be planned for, implemented and evaluated. The notion that Congress would somehow "set" the global conservation agenda also raised a fair amount of ambiguity in the responses received from senior Secretariat staff and opinion leaders. To make sense of the varying interpretations of this broad objective, the concept was operationalized as a construct of Congress' ability to share, debate, and adopt a forward looking conservation agenda.

The lack of clearly defined and broadly disseminated strategic objectives was evidenced by the absence of such language in the Forum Programme, the lack of directional value in the Congress streams, and the use of overly ambitious and/or unclear language in the formulation of objectives and outcomes in Congress documents (e.g., WCC Theme Framework<sup>25</sup>). The absence of clarity on results at the output and outcome levels was highlighted by both interview respondents and the Synthesis of Findings document of the Congress Learning Capture exercise (see pages 15, 16 and 27 of the November 2008 Draft). Others articulated the challenges differently, pointing to a "general lack of direction" and "sense of purpose". These observations may help explain why many felt that efforts to organize events into Streams and Journeys were not as successful as they could have been, or that events tended to "celebrate the past rather than discuss the future", and thus be more retrospective than forward looking.

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<sup>23</sup> Statutory requirements of the Members' Assembly include: the approval of IUCN's Intersessional Programme; the hearing and adoption of motions establishing IUCN's policies; the adoption of the financial guidelines and resources to carry out the agreed programme; and the election of officers, councillors, and Commission chairs to guide the work of the Union.

<sup>24</sup> 1) Set IUCN's global policy and work programme; 2) set the global conservation agenda; 3) share knowledge and experiences; and 4) debate critical conservation issues.

<sup>25</sup> Document available at: [http://cmsdata.iucn.org/downloads/congress\\_theme\\_paper\\_23\\_march\\_final.pdf](http://cmsdata.iucn.org/downloads/congress_theme_paper_23_march_final.pdf), consulted on February 15<sup>th</sup>, 2009. Some of the outcomes listed include such things as "A new vision for sustainability, supported by action-oriented policy, innovative and equitable solutions, and a renewed vitality in the global environmental movement".

And yet, there are some notable exceptions to these lines of thought. The Forest Conservation Programme, for instance, took advantage of the Journey and Pavilion set-up to develop its own set of objectives, priorities, and results. Similarly to the Global Marine Programme, the Forest Conservation Programme viewed the WCC as an opportunity to jump-start its own activities for the 2009-2012 intersessional period, identify key partners for the delivery of its programme, and select Journey events that were most in line with their internal needs.

In the absence of clearly stated objectives and measurable results, participants can be expected to assess the Congress' performance on the basis of their individual preferences and expectations. The more critical comments received from evaluation respondents do not revolve around the four implicit objectives of this Congress. Rather, they reflect perceived weaknesses of Congress in meeting individual/personal agendas.

Finally, in the context of an increasingly complex global governance arena, marked by a wide range of competing interests and growing numbers of multilateral environmental agreements, secretariats, implementation agencies and other administrative bodies, the role of Congress – beyond the Statutory Requirements – needs to be better defined and how it plans to affect the global conservation agenda, more clearly articulated.

### 4.3 Effectiveness of Members' Assembly

This section deals more specifically with the business of the Members' Assembly. Consideration is given to the overall effectiveness of the motions/resolutions process, evidence of linkages between the Forum and Assembly, the extent to which statutory requirements were satisfactorily met, and the extent to which the 2009-2012 Programme was adequately debated.

#### **Finding 13: The assembly met its statutory requirements in spite of a challenging process.**

Survey results on the extent to which Congress was successful in meeting its statutory requirements reveals a very mixed picture (see text box 4.16 for a breakdown of the statutory requirements). Although the Assembly of members was able to fulfill its obligations and deliver on the requirements of the statutes, it did so in spite of itself and within a relatively narrow margin of error. The 2008 Congress was marked by a 30% increase in the number of motions submitted for consideration, a restrictive timeframe within which the business of the Assembly needed to be addressed, a relatively progressive intersessional programme that attracted mixed responses, and a dedicated but overstretched team of Secretariat staff that was assigned to manage a complex governance process with little previous Congress

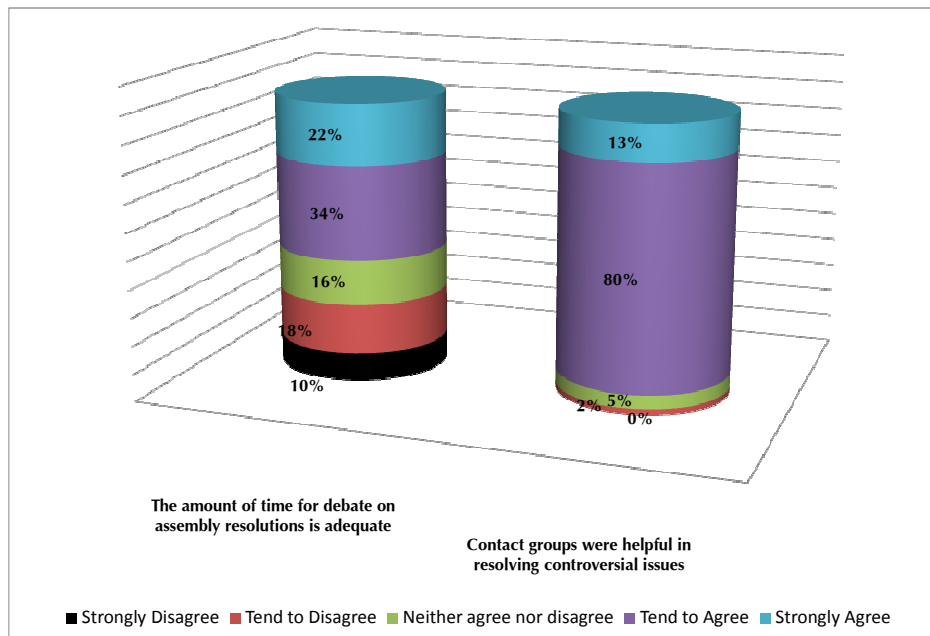
#### **4.16 Statutory requirements (functions) of Congress are as follows:**

- Define the general policy of IUCN;
- Make recommendations to governments on matters related to the objectives of IUCN;
- Receive the report of the DG, treasurer, chairs of the Commissions, regional Committees; and the auditor;
- Approve the program and financial plan;
- Determine the dues of members of IUCN;
- Determine the number of the Commissions and their mandates,
- Elect the president, treasurer, regional councilors and Chairs of Commissions;
- Provide a public forum for debate on conservation issues; and,
- Elect honorary officers, appoint auditors, decide the suspension of members, decide appeals, and perform other functions conferred by the Statutes.

experience to build on and no clear guidelines or set of procedures to follow<sup>26</sup>.

As detailed in the subsequent findings of this section, the high number of motions presented before Congress and the time constraints for carrying out the business of the Assembly led to dissatisfaction over the lack of opportunities for debate and constructive dialogue on the more controversial motions and the IUCN Intersessional Programme as a whole. As revealed by the Assembly survey, only 56% of respondents felt that the amount of time set aside to debate motions during the Plenary was adequate. Contact groups however, were seen by the vast majority of post-Congress survey respondents (93%) as being helpful for resolving controversial issues (see Exhibit 4.15). While the need for more opportunities to debate was one of the more prominent concerns raised by survey respondents, few if any questioned the relatively small proportion of members that actually participated in Assembly proceedings. Similarly, Assembly survey results reveal another contradiction in respondent perceptions regarding access to motion information. As per the requirements of the Statutes, accepted motions were posted on the IUCN website and circulated to all members sixty days in advance of Congress. However, even though more than 70% of Assembly survey respondents confirmed that they were able to use this information to better prepare themselves, less than 60% actually felt that they were given this information adequately in advance.

**Exhibit 4.15 Survey results on adequacy of plenary debates and contact group usefulness**

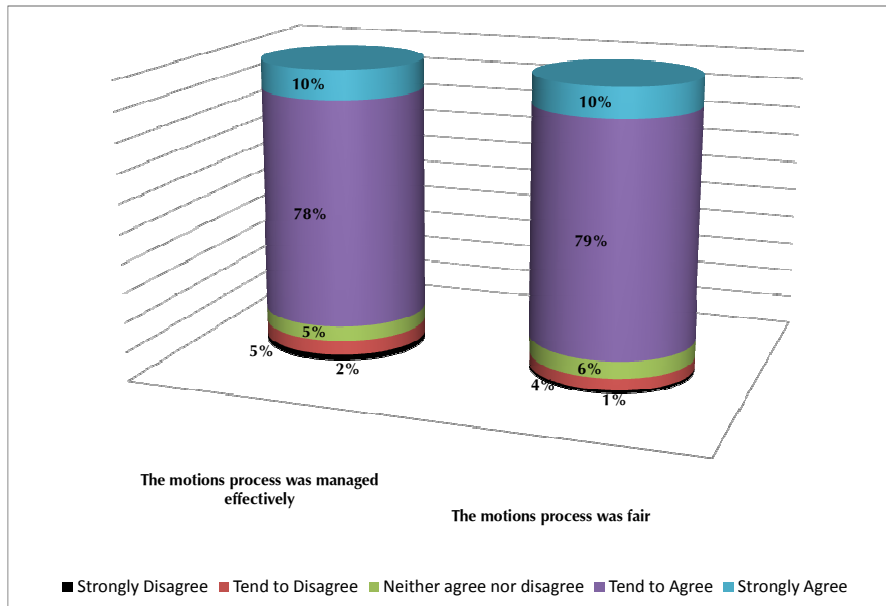


<sup>26</sup> The challenges faced by Secretariat staff in the management of the motions process have been well documented in the Learning Capture process organized in the lead-up to Congress.

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In spite of some criticisms regarding the motions process and missed opportunities for debate, the Members' Assembly was largely praised by senior officials, Secretariat staff and post-Congress survey respondents for being well organized, fairly conducted and effectively managed (over 88% of survey respondents agreed – see Exhibit 4.16). As one respondent summed it up: "To succeed in getting more than 150 motions through a rigorous voting process and to conduct all of the necessary elections in only a few short days, is a tremendous success in itself."

**Exhibit 4.16 Survey results on fairness and effectiveness of the motions process**



**Finding 14: The 2009-2012 Programme was developed through extensive consultations with the Union’s constituencies. However, on-site discussion of the Programme was limited.**

According to interviewed senior Secretariat staff and members of Council, the 2009-2012 Intersessional Programme was the most widely consulted programme ever to be submitted before Congress. It was submitted to members and the scrutiny of the regions in the early stages of its development and due consideration was given to all proposed amendments or suggestions. Yet, when asked whether or not the Programme was adequately debated, only 18% of post-Congress survey respondents agreed with the statement, while the majority (75%) remained ambivalent (i.e., neither agreed nor disagreed). Similarly, only 45% of Members’ Assembly survey respondents felt that they were able to contribute to the discussion on the IUCN Programme (see Exhibit 3.1).

In terms of comments, concern over the perceived absence of debate on the IUCN Programme during the Members’ Assembly was likewise raised by only a few post-Congress survey respondents (less than 20 responses out of a total of 524) and barely a handful in the Members’ Assembly survey (see textbox 4.17). The limited number but no less important comments received on the Programme and lowest approval ratings of all survey responses collectively raise some fundamental issues that warrant further investigation.

Based on the data at our disposal, it appears as though few members appreciate the importance of the Intersessional Programme relative to their activities and the work of the Union as a whole. Evidence suggests that approval of the Programme represents more of a procedural requirement than an effort to jointly validate a common conservation agenda. The question this raises for IUCN is whether members feel any sense of ownership over the Programme or see it as an important document to guide their work.

**4.17 Survey Comments on the 2009-2012 Programme**

“The 2009-2012 IUCN Programme is the most important aspect of the Assembly yet there was inadequate time for discussion on its implementation and no debate on how the various IUCN Commissions will be shifting their emphasis to deliver on the Programme's outcomes.”

“The programme was cut and dried before the General Assembly”

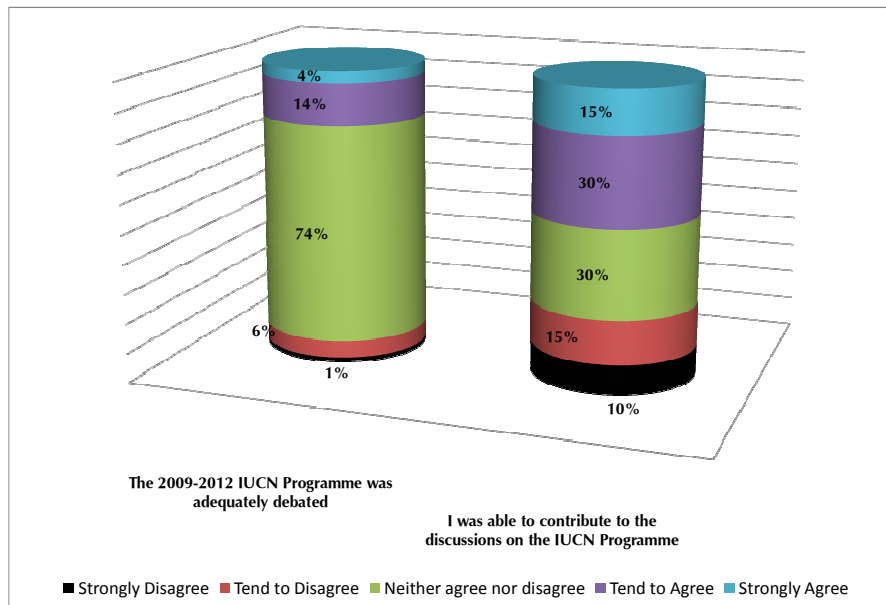
“La totalidad del plan de trabajo no estaba accesible a los miembros. Se pasó mucho tiempo con las mociones y la cuestión realmente estratégica de la UICN, su plan de trabajo, se votó rápidamente y con poca información por parte de los miembros. Resultaba difícil conocer a través de la web la totalidad del Plan de trabajo. Se votó algo a ciegas. Falta de transparencia.”

“Sería imprescindible establecer un procedimiento eficaz de discusión del programa 2009-2012, que en esta Asamblea fue imposible discutirlo y modificarlo.”

“The Programme hearings were a good start but no one really knew what they were doing in those hearings or where they were leading.”

“(a) The workplan was not discussed in any detail. The link between the workplan (which is primarily that of the Secretariat and Commissions) and the members is very unclear. Need to develop clear, transparent procedures and systems for this. Also, all the members are implementing actions that contribute hugely to IUCN's vision, goals, objectives workplan, etc. There seems to be no mechanism in place to capture and reflect this huge combined effort, the activities, impacts and outcomes as part of the larger IUCN process. The Secretariat should look at how this could be addressed in a cost-effective and bureaucratically efficient way. (b) Links between the recommendations from Forum events and the workplan, and uptake of new ideas and initiatives from the Forum into the workplan, are very unclear. We need to develop a clear procedure and system here. (c) Link between resolutions, workplan, uptake by IUCN Secretariat, Commissions and members are extremely woolly. In many ways, the resolution process is a parallel affair, largely decoupled from the workplan. Clear, efficient and effective mechanisms / systems need to be developed to (a) streamline the resolution process, and (b) make it pertinent to the workplan, the work of the Commissions and also the work of the members.”

Exhibit 4.17 Survey results on 2009-2012 Programme hearings



## Finding 15: The Barcelona Congress demonstrated how Forum knowledge can help inform the Members' Assembly.

There is some evidence that Forum events were helpful in informing aspects of the Members' Assembly, such as the motions process or discussion of the IUCN Programme. Some of the examples that were brought to the attention of the Evaluation Team include linkages between the two workshops on biofuels that were part of the Energy Journey to the motion dealing with sustainable biomass-based production and industrial agrofuels production; linkages between the two workshops on making REDD a viable proposition and the motion by the same name; Event #255 on Social and environmental impacts of IIRSA and other large infrastructure initiatives on integration; Event #2501 on the role of local administrations in the planning and execution of environmental policies - the example of Barcelona Provincial Council – was linked to a motion meant to include local and regional government authorities in the structure of the Union. These examples provide evidence of planned efforts to inform the Members' Assembly on relevant issues, but similarly strong corollary relationships to specific motions could be inferred from any number of Forum events. The potential for such cross-fertilization may help explain why two thirds of Assembly Survey respondents indicated that they had attended Forum events that were relevant to Assembly debates on key motions. Little more than half however, observed that the Forum had actually influenced their thinking.

However, given the fact that there are no actual guidelines, processes, or objectives in place to ensure that such linkages occur, further investigation into the possibility of such ties would unlikely yield evidence of more substantive results. The question that this raises is an important one for IUCN to consider: To what extent can Forum knowledge help improve the resolutions process and ultimately, strengthen the Union? As one example by a senior member of the

Secretariat suggests, efforts to improve Congress-wide linkages could eventually prove beneficial for IUCN: “The results of partnerships with the private sector could have been showcased during the Forum (but wasn’t). By having such a discussion in the Forum you are able to draw in a greater diversity of perspectives than you would in a Contact group at the Assembly. This could have been a daring thing to do.”

#### 4.3.2 Factors Affecting the Assembly

**Finding 16: The governance institutions regulating the overall motions process (from submission to resolution) is complex and needs to be overhauled.**

Motions are an essential element of IUCN’s participatory governance structure and generally regarded as the most important aspect of the Members’ Assembly. They provide members with a unique opportunity to affect the Union’s global policy and intersessional work programme. However, the motions process has become unruly and no longer supports the needs of the Union. According to interview and survey respondents, and results of the Learning Capture exercise, the rules and guidelines affecting the motions process need to be revised and corresponding statutes amended. While the Statutes are clear in term of the role of the Resolutions Working Group prior to Congress and of the Resolutions Committee during Congress, the process for handling submitted motions was not clearly documented, roles and responsibilities of appointed staff were not well defined, criteria for accepting or refusing motions were not strict enough, and the process for reviewing and amending motions during the Assembly was considered *ad hoc* by survey respondents. Perceived lack of detail and rigor led to some confusion and dissatisfaction.

In terms of the motions process during the Assembly, survey respondents tended to echo the concerns expressed by both Secretariat staff and key informants that the motions process should be revised so as to limit the number of issues that can be put before members for adoption (see textbox 4.18). Some expressed concern that in the absence of changes to rules affecting the range of motions submitted to Congress, the amount of time and energy dedicated to consideration of more local level issues (which could be better dealt with in regional fora) runs the risk of weakening the ability of Congress to address higher level concerns. Ultimately, the issue at hand is how best to allocate the scarce resources (including political influence) that the Union collectively possesses, while striking a balance between the roles it plays at different scales of intervention (i.e., from local to global).

**4.18 Post-Congress Survey comments on the need to review the motions process:**

“No new motions from the floor. This is an unfair process that does not permit proper consideration of the motions and their implications for IUCN and members.”

“It would make a huge difference if text changes to motions were not allowed to be raised in Plenary if the proposer of the motion had not been contacted about this in advance.”

“Somehow the motions process needs to be improved. As the only delegate from my organization, I had no time to keep my versions of the motions under debate up to date – I couldn’t get up from my desk (and interrupt the voting) to run to the back of the room to pick up the revised motions!”

“We need to seriously rethink the motion process. Motions were not properly debated (except a few), and many members have little idea of what they’re voting on.”

“IUCN could learn a good deal from MEAs on how to handle a resolutions process. It is still far too amateurish and subject to agenda manipulation by a radical fringe.”

Results of the Congress Learning Capture process instituted in the lead-up to Congress provides some helpful information for understanding some of the challenges associated with perceived

weaknesses in the motions process. The Resolution's Working Group responsible for processing the motions submitted to Congress mobilized the time and energy of more than 25 individuals, including staff and Council members. Yet, motions management at Congress was severely hindered by a lack of institutional memory. To do the work, the team had no record of how this had been done in the past, no document explaining the procedures to follow, and no guidelines outlining what they should try to do. As one respondent indicated, "We are making the rules as we go." The team basically had to track down individuals (who had since left the Secretariat) who had worked on motions during past congresses. Contradictory opinions were common and procedural gaps, such as how motions can be submitted during Congress, were interpreted in different ways (out of the 145 motions submitted before the Members' Assembly, 12 were received during Congress itself) (see textbox 2.19).

In addition, the motions team faced intense pressure to manage the flood of motions that was submitted in the last days before the statutory submission deadline 120 days prior to Congress. Given that each motion can take up to a week's worth of work to process and review and that only 60 days are available to process all motions (including translation into all three official languages), the stress and frustration that this caused is understandable. Moreover, because of the challenging demands of this review process and the time constraints that it created, there was often little time in the lead-up to Congress to consult with members to explain why their motion needed to be modified, which in some cases led to a fair amount of resentment (despite the team's best efforts to explain the reasons for such changes). While this hindsight knowledge is useful in understanding and interpreting the data generated by this assessment, the reality that transpired through Congress, was for many participants, less clear. As one respondent summarized: "The motions process gives the members a sense of ownership over the direction IUCN takes - however there were too many and the process was not transparent enough and too chaotic."

For the Secretariat, this all points to the need for capacity building to explain to members how they can participate and help them target their motions to be more efficient. The consensus is that there is a general lack of clarity on the purpose of motions and their implications. As underscored in the adjacent textbox, there is a need to better inform members about the motions process, along with the development of clearer guidelines (e.g., a motions manual and related capacity building activities).

#### **4.19 Post-Congress Survey comments on the need to restrict the number and scope of motions:**

"Less resolutions which call on the Secretariat to do things without concrete outputs. How long does one 'promote' for? When is one's 'support' considered supported? Asking the Secretariat for these ambiguous deliverables puts undue strain on the Secretariat, in turn diminishing its effectiveness."

"Be more selective about what motions are allowed to be proposed. There were far too many, many overlapped, and some were just not relevant enough. I would advise insisting on a far higher number of official supporters/seconders before a motion can be put forward - say 30-40 members rather than just a handful."

"Me parece que las mociones son excesivas y no tienen un impacto real sobre el trabajo de la UICN. Se mejoraría si todo el esfuerzo económico e intelectual de ese proceso se enfocara en 10-15 recomendaciones para la conservación en el mundo... y no 147."

"Only issues that are relevant for IUCN as a global organization should be allowed in the motions process."

"En lo personal me pareció que se careció de mociones de relevancia global y para temas de relevancia global y se redunda en mociones de interés específico a nivel de sitio para temas muy puntuales. Dado que este espacio tiene lugar solo cada 4 años y reúne a la cantidad de actores que reúne, considero que se debe mejorar la capacidad de visión más global y a futuro en temas claves para la conservación. "



A number of Post-Congress survey respondents suggested that the Union needs to clearly differentiate global from local issues so as to improve the focus of the motions on issues that are of concern to everyone. As is evidenced by the relatively low percentage of members who submit motions and take part in the voting process (80 members were primary sponsors and 240 were cosponsors of motions, meaning that only 20% of members are directly involved in the motions submission process), many senior interview respondents expressed concern that the Union's policy agenda is increasingly at the mercy of local issues that do little to strengthen the Union and its efforts to tackle higher cross-cutting issues. More should be done to further debate and discuss the business of the Union and efforts need to be put in place to reduce the number of motions and strengthen their overall relevance. In the end, the question that IUCN will need to grapple with is the extent to which motions are pertinent to the Union as a whole, are cross-cutting or add value to the work programme of the Union.

Finally, the Evaluation Team found little evidence to support member use of the regional processes in the lead-up to Congress. While results of the Assembly Survey indicate that only 41% were able to take part in useful or relevant regional processes, many commented on the need to further invest in this direction to alleviate Congress from the burden of localized issues, which in the end detract from the higher levels concerns that should command the attention of all members (see textbox 4.20).

**4.20 Survey comments on the need for regional processes:**

“Fewer and better prepared motions can be achieved by earlier involvement of National and Regional Committee”

« Organiser avant le congrès des assemblées régionales pour mettre les membres au même niveau de préparation par rapport aux projets de motions par exemple. »

“Country motions should be done at regional meetings within the framework of IUCN resolutions.

“Please [do] not admit local and regional matters to take the time from IUCN in a global perspective. We have regional offices and meetings for that.”

**Finding 17: The relatively low rates of participation and high levels of abstentions in the voting processes represent a concern for the democratic health of the Union.**

The ability to actively participate in the governance of the Union was highlighted by Assembly survey respondents as a major strength of Congress. The rights and privileges of membership provide a voice to all members of the Union, and thus the opportunity to affect the electoral outcomes of the organization as well as the global policy and intersessional framework that will guide its work. Perhaps more importantly however, is the fact that participants have great faith in the fairness of the democratic institutions that support the Union. The adoption of electronic voting technology was seen as a key factor in eliciting voter confidence in the transparency of the Assembly's democratic process. Hence, even though some 95% of post-Congress survey respondents felt that the election process in Barcelona was transparent<sup>27</sup>, some commented that electronic voting should be extended to all office bearers and monitored by third party observers.

Voting is regulated by the statutes and requires that Council designate an election officer who can represent the interests of members. Votes are weighed according to strict guidelines that are designed to guarantee a proper balance of votes along a gradient that extends from national non-governmental organizations (1 vote) to international NGOs (2 votes) and State members (3 votes with 1 vote assigned to government agencies, if applicable). Every IUCN member, in good standing (current in their dues), has the right to vote on motions or any other decision items of the Assembly once they have undergone the accreditation process. For a motion to pass, it must be approved by both governmental chamber and non-governmental chamber. However, survey results and interview responses from donor/government representatives suggest that members are not well informed about the mechanisms that have been established to ensure fairness in the distribution of votes (see textbox 4.21).

Perhaps the more critical concerns flagged by senior Secretariat staff, Council members and some survey respondents are the issues of low voter turnout and high abstention rates. On average, only 27% of eligible State/government members voted during the Assembly, compared with 23% for NGO members (see Exhibit 4.18 below). Further, abstention rates in both chambers averaged nearly 30%. Taken at face value, these numbers suggests that decisions made during Congress emanate from a relatively small fraction of the Union's actual membership base. While the Statutes do not specify a quorum for decisions to be adopted by the Members' Assembly, any decision taken where fewer than half of eligible members in either chambers actually participate (i.e., take part in the voting process) can be subjected to a mail confirmation ballot if a minimum of forty eligible members from at least three different regions make such a request within 90 days following Congress. The low voter turnout of the Barcelona Congress (see Exhibit 4.18 below)

**4.21 Post-Congress survey comments on NGOs/Governments votes:**

"Currently the NGO house and the Government house have equal footage. It would motivate more governments to actually be influenced by decisions if the weight of NGOs was reduced."

"Given the degree of support for particular motions it is clearly a problem of credibility and governance for some motions to be defeated by either government or NGO members. This may cost the organization government members, but I suspect a crisis point is coming when significant numbers of NGOs will let their membership lapse because their voices are not being heard or reflected in IUCN policy and practice."

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<sup>27</sup> The elections results in Barcelona achieved a 0.02% margin of error (2% is allowed). All votes were counted and checked twice.

implies that all resolutions, recommendations, elections results, and even approval of the 2009-2012 Programme could effectively be challenged.

**Exhibit 4.18 Potential vs. Actual Vote\***

	POTENTIAL VOTES	AVERAGE NUMBER OF VOTES*	AVERAGE % OF VOTES	AVERAGE % OF ABSTENTIONS
States and governments	280 votes	76 Votes	27%	30%
NGOs/INGOs	992 votes	228 votes	23%	28%

\*Source: [http://www.iucn.org/congress\\_08/assembly/policy/](http://www.iucn.org/congress_08/assembly/policy/)

During the 2008 WCC, the highest number of votes registered by states/governments was 126, and 328 votes for NGOs/INGOs (including abstentions). While a number of respondents pointed to the need to have “abstention” votes counted as “No”, the issue of poor voter turnout and low rates of participation during the Plenary by large NGO members and government members alike solicited only a handful of comments – all calling for greater involvement by government members. This data points to some serious concerns. In time, the inability of IUCN to solicit a critical mass of its membership to actively engage in the democratic proceedings of the highest governance organ of the Union risks bringing into question the legitimacy of its undertakings and the authority of its voice as the convener of the *global conservation movement* (see textbox 4.22).

**4.22 Post-Congress Survey Comments on Legitimacy of Voting Process**

« Finalement, le système de vote provoque dans beaucoup de cas une dérive vers la farce: en effet, comment faut-il interpréter l'adoption d'une motion largement soutenue par les ong avec une abstention massive de la part des représentants de gouvernement? »

“Get State members more engaged in voting. They tend to abstain too often.”

“When voting there need to be an additional rule that “yes” votes must be more than the sum of “no” and “abstain” - if there is no general support concluding with “ADOPTED” on a recommendation seem quite strange and not very serious. We had recommendations this time that only got support from 25% of the Gov. Caucus votes and still where registered “Adopted”. This does not urge the rest of the world to seriously consider the opinions coming from IUCN Members’ Assembly.”

“Further that something is done to the voting process, i.e. “abstained” could be counted as part of “no”. Of the 144 motions presented at the congress, only one was rejected.”

“It seems that if a Resolution survives to make it to the floor, its chance of passing is about 99%. They are NOT all that good, and it suggests the Assembly is a farce as a quality filer or a policy setter.”

**4.4 Congress Management**

This section is concerned with the extent to which the Barcelona WCC was effectively organized and managed. Thus, the following findings analyze:

- The extent to which Congress was well organized with respect to its design and delivery;
- The extent to which Congress was effectively managed in terms of the processes supporting its delivery; and
- The extent to which Congress was successful in delivering a green event.

**Finding 18: In spite of its size and complexity, the Barcelona World Conservation Congress has been singled out as the best organized IUCN Congress ever.**

The Barcelona WCC was largely touted by evaluation respondents as the best organized and smoothest running Congress ever, resolutely demonstrating IUCN's rising level of maturity in terms of successfully planning, organizing, and delivering large international forums. In spite of the size of the WCC in terms of the number of participants, events and motions presented before Congress, and the inherent complexity of orchestrating the many elements that conditioned its delivery, IUCN was able to meet the expectations of its constituencies and address the requirements of its statutes. A number of factors lead us to these conclusions.

According to post-Congress survey results, the WCC was considered to be well organized by nearly 90% of respondents while 85% of those who completed the survey felt that it met their overall expectations. As highlighted in textbox 4.23, the quality of the Barcelona Congress from an organizational perspective, was identified as one of the key strengths of the WCC.

Similarly, results from the Forum survey indicate that in terms of pre-congress information and registration, 85% of respondents appreciated the ease with which the on-line registration process could be completed, and over 75% appreciated the usefulness of the Congress-related on-line materials. With respect to on-site logistics and management, the confidence of participants in the professionalism of the Congress set-up was confirmed by a number of observations. Close to 95% of Forum survey respondents found that it was easy to obtain their identification badge. The majority of respondents (more than 80%) indicated that the Congress facilities were adequate, easy to navigate through, and provided access to sufficient services. The members' lounge was thought to provide a convenient space for informal meetings (82%) and nearly 90% of respondents found on-site staff helpful. Finally, the exceptional communication outreach, media coverage and visibility that IUCN generated from the Congress was noted by respondents in both the Forum and post-Congress surveys as well as by Secretariat staff, Commission members and Council.

Despite a generally positive review of the Congress venue and set-up, participant appreciation of the WCC organization was tempered by a number of concerns. In terms of services, concerns were expressed about the lack of on-site amenities (access to water and catering), the cost and accessibility of accommodations, the highly visible but seemingly ineffective security arrangements (several cases of stolen wallets, laptops and handbags within Congress facilities), and the variable accessibility to translation services during Forum events (especially from English to Spanish and French). Finally, a number of participants indicated that a centrally located message board or communication system would have been helpful for people to find each other or make arrangements.

At a higher level, a number of very senior members of Council and the Secretariat flagged important inadequacies in the treatment of VIPs and the protocols that were used to support their presence. Observations were made regarding the lack of up-front planning and on-site management of VIPs, and the consequent ineffective use and missed opportunities that resulted from this process. Respondents questioned whether more could have been done to amend this situation and whether or not more should be done to purposefully involve VIPs in future Congresses. All recognized that this is an area that required further attention.

Finally, the number and diversity of events, scheduling constraints and ambiguous thematic structure of the Forum resulted in a programme design that was unwieldy and difficult to navigate.

#### **4.23 Selected post-Congress survey responses on the major strengths of the WCC:**

"Incredible planning and organization by IUCN"

"Robust organization"

"Excellent organization with a highly dedicated team"

"Exceptionally well organized. Flowed very smoothly"

As evidenced by the results of the Forum Survey, barely 50% of respondents were able to use the Forum programme to easily orient themselves, which is one of the lowest ratings received on survey items related to the Congress organization. Yet, over 80% of post-Congress survey respondents indicated that they were nevertheless able to use the Forum programme to find the information they needed to identify the events that were of interest to them. The Journeys, which did not form part of the original organizing framework for the Forum, facilitated navigation to an extent, but were unable to compensate for a complex (Streams, Journeys) and extensive (sheer number of overlapping events) programme. Only about half of the respondents (Forum Survey) considered that either Streams or Journeys were an effective means of guiding their participation in the Forum.

Insufficient information in the Forum programme document and Journey handouts (speakers, topics, abstracts) made it difficult for participants to make choices about which events to attend. While efforts to produce a paperless Congress were commended, many commented that this should not result in an “informationless” Congress. Participants were either unaware of efforts to post more detailed event descriptions on the Congress website or were unable to access this alternative source of information.

**Finding 19: The dedication and professionalism of the Congress management team were crucial to the success of the 2008 WCC and in overcoming the numerous hurdles that limited the effectiveness of the management process.**

Compared to previous efforts, IUCN was much better prepared and organized to deliver the 2008 WCC. As reported in the Learning Capture exercise and corroborated by interviewed Secretariat staff, preparations for Barcelona were initiated early on in the process and included a number of key developments such as:

- a Congress management structure and Unit to coordinate Secretariat efforts;
- clearly defined roles and responsibilities, and reporting structure;
- involvement of the Human Resources Management Group to facilitate early planning, and staff recruitment and deployment;
- involvement of Regional Offices through staff secondments and regional consultations of the IUCN Programme;
- a monitoring framework to support management needs and strengthen institutional capacity;
- a comprehensive communications strategy and early media outreach; and
- a user-friendly online registration process.

To support the implementation of the WCC, IUCN relied on a complement of dedicated professionals with relatively little Congress experience to build on. The Forum Management Team was widely recognized for pulling off what was generally considered the best organized and most attended Forum to date. With limited human resources but strong leadership and thorough planning, the Forum Team was able to coordinate contributions from all of the Union’s constituencies, and deliver a coherent programme structure that met the expectations of Congress participants. Similarly, Journey leaders and Global Thematic Programme Heads praised their respective teams, and the time and effort they put into the development of Journeys and Pavilions, both of which were entirely new initiatives. With respect to the management of the Members’ Assembly, the Resolution Working Group was successful in handling a 30% increase in the

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number of motions since Bangkok with little or no guidance or set of procedures to follow. Such conditions were also experienced by the onsite Motions/Resolutions Team who, in spite of numerous calls for amendments and a voting process that considered all 145 motions individually, was able to pull it all together, coordinate with Contact Groups, Friends-of-the-Chair<sup>28</sup> and document translations under very tight timelines. As one interview respondent put it, “they did an extremely good job under the circumstances.”

Finally, on-site management of the Barcelona Congress was singled out by Secretariat staff, Councilors, Commission Heads, and opinion leaders as instrumental to the success of the overall Congress. The calming and responsive demeanor of the Congress Manager helped to reassure staff, handle emerging issues effectively, and provide the leadership that was essential to the delivery of such a large and complex event.

While evidence suggests that overall, IUCN did a remarkable job, it also makes it clear that the management process leading up to Congress was not as effective as it could have been.

- Because of the absence of clearly defined objectives, the Forum planning process emerged as an overly complex and close to unmanageable organization with inadequate coordination between the Forum Team and logistical support.
- The lack of experience, poor teamwork, inadequate management oversight and interpersonal communications, and unclear roles and responsibilities were used to qualify the experience of the motions team in the Learning Capture exercise.
- To make things worse, there was little in the way of clear guidelines and procedures to direct the motions process. Each segment of the Members’ Assembly (i.e., Motions team, Documentation center, Resolutions Committee, Programme Committee) more or less followed independent strategies, further aggravating tensions and coordination problems in what was already a complex process.
- Staff working on the motions process had to contend with a dysfunctional IT system (SharePoint), an unsystematized (i.e., undocumented) process, and heavy disproportionate workloads tied to the technical review process.
- A few senior Secretariat staff commented that the Congress management structure was well documented but not as effective as it could have been, pointing to roles and responsibilities that were clear on paper but not always in practice.
- Staffing levels were generally considered inadequate to handle the excessive amount of work that Congress brought to bear on the Secretariat, and almost everyone questioned whether or not it makes sense to ask conservation professionals to take on responsibilities for which most have little or no training (i.e., organizing a Congress) while also doing their actual day job (see Finding 21 for further discussion on this).

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<sup>28</sup> Ad-hoc mechanism used in place of a formal contact group to discuss a minor amendment to a motion or programme related issue or resolve differences when views are intractable.

**Finding 20: Efforts to make the 2008 WCC a green event were perceived as a positive first step.**

While efforts to make the Barcelona WCC a “Green Congress” were considered successful by over two thirds of respondents (Post-Congress Survey), only a handful of individuals (9) observed that “attempts” to host a sustainable event represented a key strength of this Congress. Survey respondents note that substantial improvements can still be made, both on the part of the organizers and the participants (see text box 4.24). Specifically, respondents raise the need to reduce the amount of paper (publications, handouts, documents, etc) distributed during Congress and favor electronic sources instead; reduce the need for plastic bottled water by providing fountains or water jars with glasses; cut down on the number of people flying by thinking of innovative ways to engage participants through online approaches; and require the use of catering services that can provide fair trade/sustainable foods.

**4.24 Comments on Green Congress**

“Excellent effort to minimize the excess paper and other products that are the usual byproducts of conferences.”

“It was not clear at ALL how this was a "green" conference other than offsetting carbon emissions. If IUCN is serious about greening then the level of commitment needs to be greater and clearer and cover energy, water and paper use.”

“[Nécessite] une forte amélioration sur la diminution de l'empreinte du Congrès sur l'environnement ; y-a-t-il un réel travail de réflexion exploratoire pour ... diminuer l'empreinte écologique des prochains WCC...?”

“Stronger effort to making this a green congress, particularly around catering (vegetarian food, less packaging, less disposable materials).”

“Try to find a way to reduce the number of flights taken. Perhaps innovative new ways of communicating at a distance or restricting the numbers of people who come from a long distance or who take short haul flights...”

#### 4.4.2 Factors Affecting Management

**Finding 21: Given the size and scope of this Congress, and the difficulties expressed by Secretariat staff, the model used to manage the overall Congress appears to have reached its limits.**

IUCN has now hosted four World Conservation Congresses and the costs associated with the production of such large international events have only increased with each reiteration. Moreover, additional costs incurred by IUCN are not tabulated by the organization. In the months leading up to Congress, much of the Secretariat staff are either asked to perform two jobs (in the case of more senior staff) or pulled away from their existing assignments to support the process, which relatively few are actually skilled to deliver. During this time, staff are subjected to considerable work overload, undue levels of stress, fatigue, and increased susceptibility to interpersonal conflicts and animosities that stand to affect future working relations. And since few staff are actually able to attend any of the events during the Forum, payoffs in terms of improved content specific knowledge or capacity tend to be rare. Further, anecdotal evidence from previous congresses suggests that programme funding tends to decrease in the months following Congress, as project and programme officers or programming Heads are unable to pursue new sources of funding due to the heavy workloads associated with the requirements of Congress. As one interviewee aptly summed it up: “The opportunity costs of Congress are simply massive.”

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More than half of those spoken to questioned the rationale of the Congress beyond the immediacy of the statutory requirements. In the context of poorly defined benefits and indirectly reckoned positive externalities, many senior managers and staff privately wondered whether or not Congress is actually worth the actual costs it entails – a question that remains difficult to answer in the absence of full cost accounting mechanisms. Whether or not the additionality of Congress outweighs the benefits that could be attained through less costly alternatives is a question that preoccupied many. Perspectives on these issues tended to vary greatly, even within a given programme. Discordant views between some of the positive assessments by Global programme Heads and the more nuanced perspectives of their project / programme officers were observed in several instances.

The issues raised in this finding point to the now widely accepted maxim of the inherent limits to growth. In considering the rising costs of Congress and the negative externalities associated with its production, the question that Council and the Secretariat will eventually need to address is not if IUCN can continue to operate within the parameters of the existing self-sufficiency management model, it is whether or not it makes sense to continue along this path.



## 5. Value for Money

**Finding 22: Based on the results of this evaluation and the performance criteria defined by Congress organizers for measuring success, this assessment indicates that the 2008 WCC represented a worthwhile investment for the Union's respondents.**

As supported by the results of the post-Congress survey, 90% of respondents believed that the 2008 WCC represented a good investment of their time and resources. As highlighted in numerous instances throughout this report, the reasons supporting the success of Congress are summarized by the substantive gains identified by survey respondents in terms of 1) acquiring useful knowledge and skills 2) strengthened partnerships, the establishment of new ones, and opportunities for networking, and 3) the perception that pressing conservation and sustainable development issues were addressed at different levels of intervention. However, as detailed in the preceding finding, the overall value of Congress evoked much skepticism within the Secretariat. For many staff interviewed, the investment of time, financial resources, and opportunity costs of organizing Congress far outweigh benefits from a programmatic or even personal perspective. The justifications underlying such perceptions should be critically considered by Council and the Union as a whole. Even in cases where senior programming staff actively coordinated their efforts to maximize both direct and indirect payoffs from Congress and the Forum in particular, the cost-benefit ratio of such efforts remains a lingering concern, with few if any convincing indicators on which to benchmark success. Arguably, such perceptions are symptomatic of the crossroads at which the WCC now finds itself. Given the growth of the Forum with each reiteration, the absence of clearly defined objectives for the WCC, the relatively low rates of participation in the Members' Assembly, and the Secretariat's role in fulfilling a work programme that is largely independent of its obligations to members, staff skepticism regarding the value of the WCC should be viewed as an opportunity to reassess the rationale of Congress and how it can better support the work of the Union as a whole.

## 6. Conclusion and Recommendations

Overall, results of the 2008 World Conservation Congress evaluation point to a successful event that confirmed IUCN's role as a leader in the global conservation movement. The Barcelona Congress convened the largest and most diverse group of participants ever; provided a rich and diverse programme that effectively showcased the work of the Union and of members more specifically; and fulfilled the requirements of the Statutes in spite of a dense Assembly agenda. Through this Congress, IUCN was able to further the global conservation agenda and strengthen the alliances, partnerships, and capacities that will support the work of members over the next four years and aid in the delivery of an ambitious intersessional programme.

While the criteria used by IUCN to measure the performance of Congress tell of a highly relevant and effective international forum, the long-term viability of the existing Congress framework appears to be reaching its end. In the context of a rapidly evolving global environmental governance arena, a rationale based solely on the requirements of the Statutes may no longer suffice the growing needs of the Union. The objectives guiding its implementation are unclear and result expectations lacking. Linkages across all levels of Congress (i.e., between the Forum and the Assembly, between the Congress theme and streams and Forum events, etc.) are weaker than they could be, and there are limits to the capacity of the Secretariat to continue to deliver Congress within the current model. It should be made clear that in no way do these concerns negate the success of the 2008 WCC. Rather, these meta-findings emanate from a deeper level consideration of the ongoing relevance and effectiveness of Congress, as revealed by the thoughts and concerns raised by interview and survey respondents.

The recommendations that follow are hierarchically organized to facilitate the flow of logic and to highlight the nested interdependencies that link them together into a coherent whole. Minor issues pertaining to such concerns as the need for more networking opportunities were purposefully excluded from this set of recommendations so that the emphasis of this report is placed on the issues that matter most for the Union and its members. Summaries of all suggested improvements given by survey respondents are provided in Volume II.

### **Recommendation 1: Council should reaffirm the role of Congress in the global conservation arena.**

With respect to the Statutory Requirements of IUCN, the role of the World Conservation Congress is clear. Chiefly, the highest governance organ of the Union must convene a public forum to discuss emerging conservation issues and solutions, and set IUCN's global policy framework through the adoption of the Intersessional Work Programme and the resolutions submitted by members. The statutes help to frame the functional relevance of Congress to the broader constituencies of the Union. They define the specific tasks that need to be completed and provide the legal framework for doing so. However, the role that Congress plays within the global conservation or environmental arena is less clear. This recommendation calls on Council to clarify or reaffirm the purpose of Congress in the global conservation movement and its implications for the Union.

In supporting the mission of the Union, Congress can engage the global conservation movement in a variety of ways. It can, among other things, convene a discussion on the global

#### **6.1 Role of IUCN in a changing global context**

"More focus should be given to debating the future of IUCN, i.e. its role in a context of global environmental organizations. This is a crucial issue for the future of IUCN, if it wishes to continue to attract attention of its members and in order to strengthen its role on the global political agenda."

Post-Congress survey respondent

conservation agenda; set the global conservation agenda; serve as an implementation framework for global environmental agreements of relevance to the Union<sup>29</sup>; establish binding agreements on member-driven priorities or in support of existing multilateral environmental agreements; forge new international agreements, etc. Each of these suggestions has benefits and drawbacks that warrant careful consideration. At present however, there is much confusion on the role of Congress beyond the requirements of the statutes, and the use of broad terminology such as “setting the global conservation agenda” or “shaping the Barcelona commitments for Sustainability” without any actionable objective or measurable result only exacerbates this ambiguity.

As highlighted under section 4.2.4, “Factors Affecting Effectiveness”, the need for a clearer sense of direction was voiced by a wide range of stakeholders. While there is agreement that Congress should espouse a rationale that extends beyond the procedural prerogatives of the Statutes, consensus on what this should constitute is weak. However, given IUCN’s key role as convener within the broader conservation community, this function of Congress itself could serve as a starting point for further discussion. If greater weight is given to the concept of *setting a global conservation agenda*, then Council will likewise need to define what this means and its implications for Congress and key constituencies. In either case, the Congress rationale should specify how the WCC relates to existing global environmental governance mechanisms and bodies<sup>30</sup> and the IUCN Intersessional Programme itself. This should necessarily build on the unique characteristics of the WCC in relation to other global fora (e.g. no side events).

The successful outcome of such a high level change will necessarily depend on the purpose that is assigned to Congress. Success could mean that the WCC plays an edifying role in setting medium and long term global conservation goals; becomes a coordination mechanism for guiding actions at multiple scales (from local to international); and/or becomes a global environmental governance arena designed to improve policy coherence across the complex and often contradictory web of global institutional arrangements (i.e., support the harmonization of existing multilateral environmental agreements and market institutions, strengthen national and regional policy coherence, etc.). Implementation would likewise reflect the depth and scope of changes considered by Council. This could be as simple as a decision by Council followed by the design of a robust and results-oriented action plan. More substantive changes to the Congress rationale may require widespread consultations with the Union’s constituencies and an iterative or staged approach to change with specific target dates and clearly articulated deliverables to ensure progress and resolution of the change process.

**Recommendation 2: Council should set strategic objectives for the World Conservation Congress.**

In accordance with supporting arguments provided under Findings 11, 12, 16 and 17, Council should define overarching objectives for Congress that extend beyond the requirements of the

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<sup>29</sup> The WCC could serve as a platform to forge commitments across both member and non-member constituencies on specific conservation targets. Building on its value proposition, IUCN could use its standing as a source of credible and trusted knowledge, capacity to intervene at multiple scales, and ability to convene partnerships for action to strengthen policy coherence across its constituencies, set targets for action on key conservation priorities and build capacity for implementation.

<sup>30</sup> For example, the Conference of the Parties (COPs) process that supports the Convention on Biological Diversity (CBD); the Intergovernmental Panel on Climate Change supporting the United Nations Framework Convention on Climate Change (UNFCCC); or even the World Summit on Sustainable Development.

Statutes. Currently, Congress is guided by a set of objectives that have no clear strategic value in terms of actionable results at the outcome level. This lack of direction on the changes that IUCN wants to achieve through Congress makes it difficult to set stricter guidelines for selecting Forum events, accepting motions, or for creating stronger linkages between the Forum and the Assembly. As such, the role of the WCC within the context of a rapidly evolving global environmental governance arena needs to be better defined. Given the sizeable investment of time and resources needed to deliver a Congress<sup>31</sup>, the absence of higher level objectives that cut across the Forum and Assembly appear as a considerable lost opportunity.

Council has a key role to play in setting the objectives that will define the strategic intent of Congress, and in doing so, provide a clear sense of direction to the Union and its partners. Recognizing that preparations for the 2012 WCC are slighted to begin shortly, this represents an opportune time to start thinking about what IUCN wants to get out of Congress in addition to meeting the Statutes. To do so, Council will need to determine how the existing statutory framework can accommodate such changes, and further assess implications for members and the Intersessional Work Programme. By defining the strategic objectives of Congress, Council would essentially be *setting the agenda of the WCC*, thus affecting the existing rights and privileges of members by directing their input (motions, recommendations and Forum events) towards specific ends. Council may decide to set up a committee to investigate the implications of such a change for the Union and its constituencies that will be tasked with making recommendations on an appropriate course of action. Other committees at the national or regional level could be involved but overall, this process should be dealt with in a relatively timely manner so as to support planning for the 2012 Congress. Objectives should be tied to intersessional periods and be congruent with the governance function of Congress (i.e., elections, setting IUCN's global policy and intersessional programme) as well as other reasons why participants attend Congress (i.e., networking, learning, and the sharing of knowledge and experiences).

### **Recommendation 3: IUCN Congress management should develop a performance management framework to guide the design and evaluation of Congress.**

IUCN has gone to great lengths to integrate results-based performance management into its programme planning and budgetary cycles. Yet in spite of its strategic importance and considerable cost (with some estimates ranging as high as \$25 million US in direct and indirect costs), performance criteria for Congress remain largely ill defined, if not absent altogether. An event of such global significance should command a more strategic approach to the Congress. As such, Council needs to seriously consider what it wants to get out of this process and fully integrate the WCC as a key element of the Union's planning cycle and results framework. In response, IUCN Congress management should translate WCC objectives into measurable results at the output and outcome levels.

IUCN needs to be able to have some basis for judging the success of the Forum and the Assembly against some understanding of the behavioral changes that should occur as a result of Congress. By drawing close to ten thousand environmental professionals and concerned political, social and economic leaders to discuss critical conservation and sustainable development issues, what

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<sup>31</sup> Given the cost of organizing a Congress and highly subsidized registration fees (estimated by Congress management to be in the realm of 75-80%), the production of Congress can be compared to a public good. In the absence of clear rules on what the WCC ought to achieve, members can be expected to use Congress to further their own interests (i.e., private benefits) and avoid contributing to its production (i.e., public costs).

changes does IUCN want to see emanating from Congress? The WCC provides a unique window of opportunity to affect change but to become feasible, it requires a performance management framework and operational design that will actually support such ends. Performance criteria should provide the basis for judging the success of the Forum and Members' Assembly, and serve as a justification for the magnitude of investment it requires. Management should be held accountable for setting in place a process that will support intended results.

**Recommendation 4: IUCN Congress management should align the design of the WCC to planned objectives.**

The recommendations contained in this report are ambitious. If Council chooses to follow through with a redefinition of the underlying rationale, objectives, and performance criteria of the WCC, then so will it need to reconsider how the design of Congress supports such ends. Presently, the linkages between the purpose of the Forum and the decision-making functions of the Assembly are unclear. The current open ended format of the Forum is not congruent with the need to coordinate efforts towards specific changes at the output and outcome levels and there are no guidelines in place to enable the use of Forum knowledge in support of Assembly decisions regarding both the motions and the intersessional programme.

Under the guidance of Council and the decisions it will take in light of this report, Congress management should align the design of the WCC to the objectives that will guide future congresses. In doing so, Congress management will need to consider:

- 1) how the Forum links to the Assembly (see Recommendation 5) and motions process in particular;
- 2) how the Intersessional Programme links to the Forum Programme and Assembly;
- 3) how adopted objectives affect the different Forum formats (i.e., Pavilions, event types and learning opportunities) and the selection of event topics;
- 4) how changes to the design of Congress stand to affect membership interests and ability to showcase their work;
- 5) how IUCN will ensure that event organizers manage towards expected outcomes; and
- 6) how a revised Congress design will affect the venue selection process.

Based on the success of the Learning Opportunities revealed in this evaluation, consideration should also be given to how skill development can become an integral part of the Congress process (capacity building linked to objectives).

**Recommendation 5: Council should reaffirm linkages between the Forum and the Assembly or consider the separation of the two.**

Opinions on the need to hold the Forum and Assembly together differed considerably. While there are obvious practical reasons why the two should be carried out jointly, there is no dominant rationale for doing so. Some argued the need for more regional processes that could address local concerns directly, some highlighted the cost-effectiveness of the current model (i.e., only one big event to organize, resulting in economies of scale), and others observed that to build synergy between Forum discussions and Assembly decisions, there needs to be a reaction time between the two to allow further consideration of Forum results and their implications for the decisions that will need to be taken. Proponents of this view suggested the need for a Forum midway between

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Congresses (a “*world environment or conservation forum*”) with a synthesis forum just before the Members’ Assembly.

Given the current global environmental governance context, and the need to substantially increase membership involvement, ownership, and engagement in the Assembly, there are considerable grounds for pursuing a staggered strategy in the delivery of the WCC. Currently, the role Congress plays beyond the boundaries of the Union and the effect it has on the behavior of both member and non-member constituencies are unclear. Beyond the obligations imposed onto the Secretariat, motions have no legal and relatively little moral bearing on the work of members, and few are those who seem to consider the relevance of the intersessional programme to the pursuit of their own prerogatives. By separating the Forum from the Assembly, the former could be used to:

- 1) showcase the work and contributions of members and leading conservation experts;
- 2) direct participant inquiry towards the major issues or challenges facing the conservation community;
- 3) consolidate priorities for the next IUCN intersessional work programme; and,
- 4) define the parameters of the agenda that will guide discussions during the next Assembly.

Such an approach would leave time to develop an Intersessional Programme (for the following Assembly) that is consistent with Forum discussions and prepare motions that are aligned with the key issues emerging from the Forum.

In turn, holding the Assembly as a standalone event – a policy arena for negotiating conservation and sustainable development issues of global significance to both member and non-member constituencies – would inevitably increase IUCN’s prominence as a leader in the global conservation movement. By consolidating the full weight of the Union onto an event of global significance that sets the standards and priorities for conservation worldwide, IUCN will be able to:

- 1) reaffirm the relevance of the Members’ Assembly within the broader environmental governance arena;
- 2) strengthen the impetus for membership involvement in the decision-making functions of the Assembly;
- 3) reduce the number of motions that can be considered; and
- 4) lend greater importance to the Intersessional Programme by demonstrating its value as an essential implementation instrument of the IUCN global policy.

While holding the Forum and Members’ Assembly separately would ultimately require changes in the statutes, IUCN has already established a number of precedents that could help inform how such a structure could operate. As part of their respective results frameworks, IUCN sponsored events such as regional assemblies, the World Parks Congress or the up-coming Species Congress could potentially submit a series of propositions (motions) for ratification by the Assembly and implementation by the signatories of the conservation agenda emanating from Assembly proceedings.

Although views on how the Forum could better inform the Assembly differed, most respondents were adamant about the need to strengthen the relationship between Forum knowledge and the decisions made during the Assembly. Council should set-up a committee to assess the relative merits of holding the Forum and Assembly together or staging them separately. This process should be informed by the higher level rationale of the World Conservation Congress and the objectives

guiding its implementation (see Recommendations 1 and 2 above). The committee should consider how linkages between the Forum and Assembly can support the role of Congress, address stated objectives, and deliver expected results.

**Recommendation 6: IUCN should try to broaden its constituencies.**

If IUCN wishes to engage the broader international community in defining the global conservation and sustainable development agenda that sets the priorities of both member and non-member constituencies at each intersessional period, then it will likewise need to consider how it can improve the participation of non-traditional actors. Given the boundary-less nature of the environmental challenges we face, the solutions envisioned by the conservation movement stand to have little chance of succeeding if the arena for collective action on these issues does not fully integrate all segments of society, including the private sector, multilateral organizations, State and regional governing bodies, and civil society.

Since the Montreal Congress, IUCN has continued to open up Congress to other sectors. The appropriateness of this shift has allowed IUCN to expand its reach to non-traditional groups in order to have impact on conservation issues (e.g. private sector). Now, there is agreement that private sector is an important player, but widespread disagreement on the nature of the relationship that IUCN should maintain with the sector. IUCN will need to define those terms of engagement in the near future and assess the implications of such changes. While a more meaningful participation of the private sector may require, among other things, a new tier of membership, changes to the existing statutes, and a substantial shift in the attitudes of some members, other less threatening changes such as the creation of a “partner” category with graduated rights and obligations could also be considered<sup>32</sup>. Likewise, convening a discussion on the global conservation agenda cannot be achieved in the absence of all the major players who are already engaged in this process through other governance institutions or mechanisms. With over 500 multilateral environmental agreements in existence and several dozen governing bodies, secretariats and multilateral organizations charged with their implementation, IUCN needs to be more realistic about the scope of its efforts and the limitations of its influence within the existing constituency of the Union. Establishing a “public partner” category with limited rights and obligations could provide an incentive to existing multilateral development banks, UN agencies, or convention secretariats to take part in such proceedings.

**Recommendation 7: IUCN needs to revise its management model for the Congress.**

As discussed under Finding 21, the model used by IUCN to manage the overall Congress appears to have reached its limits. Reliance on unspecialized staff to coordinate such a large international event imposes significant costs to the Secretariat. In general, interviewed Secretariat staff considered the demands placed on them for organising the Congress to be simply unrealistic. Every four years, a significant portion of the Secretariat staff is asked to engage in a process for which few have received formal training, resulting in unreasonable workloads, high levels of stress and fatigue. Because of their involvement in the planning and delivery of Congress, many Secretariat staff indicated that they were largely unable to take part in any of the substantive discussions that were of interest to them or attend sessions on topics they wanted to learn more about. The demands placed on staff have also been highlighted as key reasons for the

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<sup>32</sup> By graduated rights and obligations, we refer to a “staged” attribution of rights and obligations that partners acquire along a predetermined sustainability continuum that measures a firm’s commitment to an existing set of social and environmental standards and practices.

communication failures reported in the Learning Capture exercise, and inconsistencies in the handling of VIPs.

With respect to the pressures exerted on Secretariat staff who are involved in the set-up and delivery of Congress, the implications associated with the option of separating the Forum and Assembly functions of Congress into two distinct events should be fully investigated. However, assuming that the linkages between the Forum and the Intersessional Programme planning cycle are more clearly established, and that debate during the Members' Assembly is more closely tied to actual programming needs of the Secretariat, the returns on investment may become more tangible and justification for the time, energy and resources invested in the lead-up to the Forum and Members' Assembly could become a self-reinforcing rationale.

This evaluation supports the need for a professionalized unit that would be responsible for coordinating and delivering the WWC as well as other, more focused or regionalized fora. Assignment of a permanent Congress management unit should be based on a reasonable business case detailing how its work will be sustained over the long term – taking into consideration the potential for organizing other large events as outlined above. While many functions will still need to be carried out by staff (ex.: motions process and designing the Forum Programme), IUCN should consider outsourcing those functions that have less content-related requirements such as logistics, communications, and on-site venue arrangements. To this end, Congress management should, in coordination with the Secretariat, identify all relevant tasks that could effectively be handled externally and finalize the proposed Congress manual while remaining attentive to ongoing lessons learned that could be of use in future editions.

## **Recommendation 8: Council should refine the motions process to ensure improved ownership and engagement**

As experienced in Barcelona and previous Congresses, the motions process is persistently regarded as an inefficient and ineffective process. Evidence drawn from this evaluation (Findings 13 and 16) point to the need for major changes to the requirements regulating the motions process and to the administrative procedures used by Secretariat for handling motions. Specifically, the rules and procedures for handling and processing motions from start to finish (i.e., from the development and acceptance of motions to their presentation and clarification before the Assembly and final voting) are largely recognized as the source of a systemic problem that requires immediate attention from Council. In light of the very dense agenda of the Members' Assembly, results from this evaluation point to the need to substantially reduce the number and to strengthen the relevance of motions presented before the Assembly. Council should therefore revise the rules governing motions:

- 1) increase the number and qualifications of sponsors needed to support a motion (i.e., more diverse regional representation);
- 2) restrict the scope of motions to global interests and critical concerns;
- 3) revise statutes to strengthen quorum requirements such as a simple majority of the total vote potential per Chamber (this may require a need to stimulate voter turnout or find innovative ways of supporting absentee votes through regional offices or secure electronic means);
- 4) expand accountability of passed resolutions to the Union as a whole through more explicit member ownership requirements of the motions presented before the Assembly; and



- 5) require proponents to provide an estimate of the costs of implementing the motion and identify real sources of funds.

Presently, members bear no obligations regarding the motions they submit. Motions are cast in an open access system in which no one, except for the Secretariat, is accountable, thus providing substantial political gains for relatively little cost<sup>33</sup>. For the Secretariat however, transaction costs for handling each motion from submission to resolution are high and opportunity costs for responding to resolutions that have no direct bearing on the priorities of an intersessional period are likely much greater. If the motions process was more rigorous, and responsibility for delivery equally distributed amongst the Union's constituencies (e.g., sponsors and supporters), the system would likely tend towards self-regulation and the perceived seriousness of the process would likewise raise the value of those motions that are adopted (i.e., reduce the number of motions that are purely interest driven)

## 6.2 Other recommendations

While the main recommendations of this report purposefully focus on the strategic concerns that emanate from the results of this evaluation, the findings contained in this report point to a number of second tier recommendations that are worth reiterating. These could be implemented regardless of the strategic choices that will emerge from Council's deliberations on the Recommendations 1 – 8 listed above. They are as follows:

- 1) **Support the need for debate in the Forum.** As highlighted in Finding 6, Congress management should support the need for debate on key conservation and sustainable development issues by setting stricter guidelines and selection criteria for Forum events (i.e., limit the number of events that can take place) and by actively soliciting contributions from leading environmental scholars and researchers (especially from the social science realm). Further, event organizers should be encouraged to:
  - keep presentations short and/or minimizing the number of speakers;
  - solicit participant input on emerging issues and problematic areas that are proving resistant to solutions;
  - focus discussions on complex issues that affect a wide range of stakeholders; and
  - structure sessions around the input of participants.
- 2) **Strengthen capacity to deliver green congresses.** In alignment with its mission and ethical foundations, IUCN should maintain efforts to deliver "green" events and congresses. To do so, Congress management should align its green congress initiative with existing best practice, seek the advise of recognized experts and submit itself to a third party certification process and/or sustainability audit<sup>34</sup>. Technologies that facilitate participation and active involvement

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<sup>33</sup> In Barcelona, 30-40 members dominated the motions process and some 80 members swere primary sponsors and 240 were co sponsors (out of 1100 members). Stated differently, more than 80% of members don't get involved in the process.

<sup>34</sup> There are a number of sources IUCN may which to investigate to learn more about how to host sustainable events. Green Events Source ([www.greeneventsource.com](http://www.greeneventsource.com)), Smart Meetings ([www.Smartmeetings.com](http://www.Smartmeetings.com)), and the Ocean Blue Foundation ([www.bluegreenmeetings.org](http://www.bluegreenmeetings.org)) provide a wide range of web-based resources, including comprehensive information, checklists and tools, along with case studies and links for event planners and suppliers. Third-party certification for green events can be obtained

of members and partners (during the Forum and the Members' Assembly – with secure online voting mechanisms) who choose to reduce their carbon footprint by not travelling to Congress should be encouraged and experimented with. Online repositories of information, documents, publications, papers, leaflets should be clearly identified and made accessible. Financial incentives to members and partners (including Commissions and Global Programmes) who purposefully refrain from the distribution of printed materials should be considered<sup>35</sup>. A sustainability index (using recognized benchmarks), green audit report or certification results should be reported in the months following Congress. Regardless of the technological changes that are adopted for the next congresses, detailed Forum and Assembly programming notes detailing the schedule, titles, and summaries of planned events, sessions, hearings or plenary debates should be provided in both electronic and printed formats to support ease of use.

- 3) **Strengthen the use of Pavilions.** The structure and organization of the Pavilions should be streamlined to support the course of action that will guide future investments:
  - better seating arrangements and sound proofing are provided if Pavilions intend to host events;
  - staffing, amenities and informal areas are improved if networking, partnership building and outreach become the core mandate of the Pavilions;
  - linkages across Pavilions and between Pavilions and the Forum, the Assembly and the themes of the Congress should be more clearly stated if Pavilions are used to guide participant interaction and involvement in the Congress.
- 4) **Maintain and strengthen the Secretariat's capacity to host, organize and deliver Learning Opportunities.** Given special status of the Learning Opportunities (LOs) within the broader context of IUCN's capacity building strategy and the importance of capacity building to the Union and its constituencies as a whole, LOs in future congresses should continue to be organized by the Secretariat.
- 5) **Strengthen Member participation in the Assembly.** In coordination with Congress management, the Secretariat should strive to strengthen member capacity on how to effectively participate in the Members' Assembly and how to develop more efficient motions that are less onerous to process and vote on. Members should be better informed about the motions process, as well as the purpose and implications of motions. Clear guidelines (e.g., a motions manual and related capacity building activities) should be developed. And as discussed above, Congress management should investigate, and take advantage of, technological tools that could facilitate participation and voting by members who are unable to send delegates to Congress proceedings.

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through the Green Seal, an independent, not-for-profit organization that develops environmental standards and provides products and services used in commercial and residential settings ([www.greenseal.org](http://www.greenseal.org)).

<sup>35</sup> This could either take the form of a reduction on the cost of participation, setting-up an exhibition booth or occupying a pavilion, or be administered via a premium on the regular Congress set-up costs if an organization still wishes to provide handouts.

## Appendix I List of Findings

- Finding 1: The convening authority of IUCN and the adoption of a forward looking agenda considerably strengthened the Union's relevance as a strategic leader in the global conservation movement.
- Finding 2: Overall, the WCC confirmed IUCN's relevance as a purveyor of credible and trusted knowledge, a convener of partnerships for action, a catalyst for change at multiple levels, and a leader in setting conservation standards and practices.
- Finding 3: Congress helped to position the 2009-2012 Programme for adoption and support discussions on the achievements and lessons learned from the 2005-2008 Programme.
- Finding 4: The Barcelona Congress is widely perceived to have been successful in meeting the needs of the Union's constituencies and in advancing their respective interests.
- Finding 5: The Congress addressed the key issues and concerns of the conservation and sustainable development movements in the world today.
- Finding 6: The 2008 WCC was successful in convening a debate around an ambitious global conservation agenda.
- Finding 7: The Barcelona World Conservation Congress highlighted IUCN's effectiveness as a convening platform.
- Finding 8: Forum events and Pavilions provided enabling conditions for the effective delivery of the Congress objectives.
- Finding 9: Pavilions provided an innovative design feature that supported outreach activities by various communities of practice within the Secretariat and the Union more broadly.
- Finding 10: The Learning Opportunities were highly regarded for their content, quality learning materials, skillful facilitation, and contribution to participant learning.
- Finding 11: The large number of events, complex programming structure and lack of printed information made it difficult for participants to select where to go and make appropriate use of their time.
- Finding 12: The stated objectives of the WCC were not clearly defined and broadly disseminated.
- Finding 13: The assembly met its statutory requirements in spite of a challenging process.
- Finding 14: The 2009-2012 Programme was developed through extensive consultations with the Union's constituencies. However, on-site discussion of the Programme was limited.
- Finding 15: The Barcelona Congress demonstrated how Forum knowledge can help inform the Members' Assembly.

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- Finding 16: The governance institutions regulating the overall motions process (from submission to resolution) is complex and needs to be overhauled.
- Finding 17: The relatively low rates of participation and high levels of abstentions in the voting processes represent a concern for the democratic health of the Union.
- Finding 18: In spite of its size and complexity, the Barcelona World Conservation Congress has been singled out as the best organized IUCN Congress ever.
- Finding 19: The dedication and professionalism of the Congress management team were crucial to the success of the 2008 WCC and in overcoming the numerous hurdles that limited the effectiveness of the management process.
- Finding 20: Efforts to make the 2008 WCC a green event were perceived as a positive first step.
- Finding 21: Given the size and scope of this Congress, and the difficulties expressed by Secretariat staff, the model used to manage the overall Congress appears to have reached its limits.
- Finding 22: Based on the results of this evaluation and the performance criteria defined by Congress organizers for measuring success, this assessment indicates that the 2008 WCC represented a worthwhile investment for the Union's respondents.

## Appendix II List of Recommendations

Recommendation 1: Council should reaffirm the role of Congress in the global conservation arena.

Recommendation 2: Council should set strategic objectives for the World Conservation Congress.

Recommendation 3: IUCN Congress management should develop a performance management framework to guide the design and evaluation of Congress.

Recommendation 4: IUCN Congress management should align the design of the WCC to planned objectives.

Recommendation 5: Council should reaffirm linkages between the Forum and the Assembly or consider the separation of the two.

Recommendation 6: IUCN should try to broaden its constituencies.

Recommendation 7: IUCN needs to revise its management model for the Congress.

Recommendation 8: Council should refine the motions process to ensure improved ownership and engagement