



Coda Global Fellows Program  
Coda Files Dossier Vol. 1  
Measures Fellows  
Class of '12

Doug Shaw  
Alison Greenberg  
Steve Haase  
Leandro Baumgarten  
Karen Wong  
Margo Francis

Originally published in the *Science Chronicles*, the "Coda Files" highlight the experiences and lessons learned from Coda Global Fellows assigned to improve The Nature Conservancy's ability to assess our conservation impact in our global priorities.



# The Coda Files

## Doug Shaw

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Doug Shaw thought he was taking a break from management to go back to his freshwater ecology roots, but his stint as a Coda Global Fellow, developing a cutting-edge large-scale measures framework for the Colorado River Program (CRP) was full of surprises.

"We thought it would be important to have freshwater skills, but this ended up being much less important than senior management skills to help people decide what to measure and what not to measure," Doug says.

His host, Taylor Hawes, couldn't agree more: "We needed someone like Doug who could really think outside the box and be a big picture person and also understand what these plans meant for implementation."

In 2010-2011, Doug and the CRP conducted in-person workshops and virtual exchanges to hammer out a measures framework for this river basin that encompasses six U.S. states and part of Mexico. Mike Roberts continues the CRP's measures work where Doug left off.

This exchange of expertise advanced Conservancy science by discovering:

- Sites and the state programs need to understand how they fit into the whole system work, but the basin-wide program also needs its own measures for its effectiveness;

### Coda Fellow: Doug Shaw

**Day Job:** Assistant state director, The Nature Conservancy in Minnesota, South Dakota and North Dakota (current); director of conservation, The Nature Conservancy in Florida (at time of fellowship)

**Assignment:** Colorado River Program, June 2010-May 2011

**Task:** Develop basin-wide measures framework

**Take-Home Lesson:** "Finding the data needed to develop measures relevant at a scale of seven states and 250,000 square miles can be very challenging, even in such high profile and well-studied basins as the Colorado. We need to put as much thought and energy into strategies for developing meaningful data sets at that scale as into our conservation strategies themselves."



- Measures terminology varies wildly and terms should be boiled down to very simple words;
- Measures developments should be iterative, flexible and definitely non-linear.

Check out Doug and Mike's presentation at the [April 2010 Freshwater Conference](#), their [preliminary report](#) and [Mike and Taylor's Measures Brownbag WebEx](#) on Tuesday, November 1st at 1:00pm ET / 10:00am PT! **SC**

— **Jensen Montambault**, applied conservation scientist, Central Science, The Nature Conservancy

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### Alison Greenberg

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"Philanthropy staff are practicing anthropologists at heart," says Craig Leisher, TNC social scientist, TNC Poverty Alleviation team lead and one of Alison Greenberg's Coda Fellowship advisors. "They know how to study people, they are great listeners and can quickly relate to almost anyone even if cultural similarities are close to zero."

Alison exemplified these abilities in her first social science field experience with Craig. "During our study of the socioeconomic impacts of TNC's Niobrara Preserve [Nebraska], we noticed a trend in local ranchers' responses to our question, 'why won't you burn on your property?'" said Alison. "The answer was consistently, 'TNC hasn't shown me the benefit to my bottom line — in terms of the almighty dollar — of burning! I couldn't care less about habitat for Sandhill Cranes!'"

"Well, no one from the preserve had examined and quantified the economics of burning," adds Alison, "even though it's pretty clear that burning would make the grasses stronger and more nutritious for grazing, as well as manage the spread of the Eastern Red Cedar, which is causing significant economic and environmental harm to the grasslands. But it was never the preserve's goal to be a multiplier, to change ranchers' practices. Niobrara never had social or economic objectives; its role was to be a land-protection and research demonstration site. So the program hadn't invested in an economist to demonstrate the value of burning to our rancher neighbors...that was a huge wake-up call for me."

#### Coda Fellow: Alison Greenberg

**Day Job:** Senior principal gifts officer, The Nature Conservancy

**Assignment:** Social Science Integration Project

**Duration:** July 2011-December 2011

**Take-Home Lesson:** "It's become totally clear to me that, at the end of the day, human behavior and decisions will make or break TNC's goals."



The Niobrara field experience inspired Alison to undertake a Coda Fellowship to integrate social science into the Conservancy's robust biological scientific capacity because, as she put it, "we owe it to our staff, our partners and our donors to demonstrate the impact our work has on people, and to design our priority projects with people in mind." Alison has created a Social Science Task Force with Craig and her other advisor, TNC's senior social scientist Supin Wongbusarakum, to receive critical input and guidance from key Conservancy staff on how best to achieve this integration. Alison puts the likelihood of success at an all-time high.

"It's an exciting time to be doing this at TNC," she says. "Mark Tercek and our executive team are keenly aware that our conservation strategies must improve human well-being, and are enormously supportive of this effort to show how this can be done effectively."

Supin is thrilled and delighted with the experience, innovation and dedication Alison brings to her Coda Fellowship. "I had a dream that the Conservancy would strategically integrate human well-being into conservation. The dream that I had thought would take 10 years to bring to fruition is now beginning to blossom." **SC**

— [Jensen Montambault](#), applied conservation scientist, Central Science, The Nature Conservancy

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### Leandro Baumgarten

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“Connecting what is not naturally connected — that’s what the Coda Global Fellowship did for us,” says Mark Anderson, director of science for the Eastern Division of the North American Region, on his experience working with Leandro Baumgarten as a fellow. “When TNC hosts big meetings like All Science, we tend to reconnect with the people we already know. This fellowship was a conscious effort to forge a new relationship among science colleagues.” During his fellowship, Leandro shared his expertise in climate change vulnerability, whole systems, and connectivity assessments with the Eastern region staff, and he and Anderson also scheduled ample time for additional discussion in a PowerPoint-free zone.

For Leandro, the fellowship was also an opportunity to gain hands-on experience managing a science department, such as his growing team in Brazil. “I had the chance to work with Mark’s team when he wasn’t there and got candid feedback on his management. I see there is really no right way to manage. You have to be sensitive to different communication styles; some staff need more interaction and some just want to know what they have to do and then they go off on their own.”

The fellowship also yielded an unexpected epiphany on both sides about the function of Conservancy science across the globe. A two-hour discussion with Mark and his officemate, Andy Finton, director of science and conservation for TNC-Massachusetts, revealed that Leandro works primarily with pilots to leverage national

#### Coda Fellow: Leandro Baumgarten

**Day Job:** Science Manger, Atlantic Forest and Central Savannahs, Brazil

**Assignment:** Eastern U.S. Division Science

**Duration:** July – December 2011

**Task:** Share vegetation restoration and monitoring techniques and gain science department management skills.

**Most Important Lesson Learned:** “Many scientists across TNC think they will be working out on preserves, but many of us need to manage and collaborate with many people and we weren’t trained to do this; it has to be learned.”



and international policy, while Mark works to network science issues across 18 states and Andy tries to accomplish as much science as possible in cooperation with state agency partners.

“At that moment I realized how different what we call TNC ‘science support’ really is, depending on where you sit in the organization,” says Leandro.

Mark agrees, “It was eye-opening. Andy sits right down the hall and I hadn’t realized how differently he works. Each scientist at TNC has to figure out how to make science applicable.”

It is the conservation scientist, not science in and of itself, who makes the connection.

SC

— [Jensen Montambault](#), applied conservation scientist, Central Science, The Nature Conservancy

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"I help people look at their river with new eyes," is how Steve Haase characterizes his work for the Conservancy in the southern United States — and now, through a Coda Global Fellowship, in the Southern Hemisphere. Steve's fellowship is with Brazil's Water Producer program, part of a larger "water funds" strategy promoting sustainable finance mechanisms through which water users incentivize upstream landowners to conduct management that will result in improved water security.

A mix of 30 landowners and natural resources managers, including the government officials responsible for implementing water monitoring in six Brazilian states, attended Steve's training conducted jointly with the Conservancy's Latin American Region freshwater scientist Paulo Petry and conservation specialist Claudio Klemz. Water funds often pay for reforestation and other forms of riparian restoration, but there is a well-documented cycle of how a river responds to land-use change that determines if restoration will work.

"There are certain places in response cycle that you can intervene and other points where you can't do much and you just have to understand that the stream is going to make a new channel," says Haase. "So you ask yourself, 'How can I best to help the stream stabilize itself? Should I even do this restoration now? Or will the stream just tear it up during the next flood event.'"

#### Coda Fellow: Steve Haase

**Day Job:** Senior Biohydrologist, The Nature Conservancy in Louisiana; Fellow, Great Rivers Partnership

**Assignment:** Brazilian Water Funds

**Duration:** July 2011 – June 2012

**Task:** Conduct baseline geomorphologic survey to measure the impact of two Brazilian water funds and train land-owners and natural resource managers to conduct and analyze follow-up monitoring.

**Take-Home Lesson:** "Bad agricultural practices degrade streams the same in both the Southern and Northern Hemispheres. The good news is that we really can transfer lessons learned from a extensive body of practice among watersheds, regardless of where we are working."





Steve traveled throughout the water fund watersheds for illustrative training examples. One student was shocked to see a photo of what he thought was his property held up as a text-book negative response to dredging that the local government had ordered (it was a different site, but his section of stream had very similar problems). After class, Steve, Paulo and Claudio spent a few hours on the student's property. They didn't have much good news, but they did point to some alternative actions he could take because it was clear his tree planting would be taken out in the next high-water event.

"This fellowship gave us a new tool to measure the impact of water funds and everyone is very excited about it," said Anita Diederichsen, coordinator of the Brazilian Water Producers program. [SC](#)

— [Jensen Montambault](#), applied conservation scientist, Central Science, The Nature Conservancy

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Respect the qualitative. That was Karen Wong's life lesson working with senior social scientist Supin Wongbusarakum as a Coda Global Fellow.

"My academic background is chemistry and I was not aware of all that is included in social science and qualitative methodologies," says Wong of her fellowship experience. "I learned to revalue qualitative data as valid."

As part of her fellowship, Karen created a new web page of resources on the Conservation Gateway to guide conservation practitioners to consider the impact of their work on people. (The page is on the [Gateway's social science and conservation section](#).) This list includes the three recorded internet trainings Supin delivered on different aspects of integrating social science and conservation, which Karen help organize and support.

In addition, Karen assisted with and facilitated a field visit with Supin to a water fund site in an indigenous area of East Cauca, Columbia. "Without Karen, I would not be able to communicate effectively with anybody in the meeting and in the communities," says Supin.

And the trip also helped Karen, too, as she came through the experience to reassess her conservation values. "We like to think that conservation work always is good for

### Coda Fellow: Karen Wong

**Day Job:** Mexico Mosaics Coordinator

**Assignment:** Social Science

**Duration:** March – December 2011

**Task:** Support capacity building to integrate social science into conservation planning and impact measurement.

**Most Important Lesson Learned:** "Conservation is not just biological, but is itself a social and political process."



human wellbeing,” she says. “We have to realize this is not always true, there are trade-offs that must be recognized in order to minimize negative impacts... I strongly believe that TNC is working in many aspects of human wellbeing including income, opportunity, empowerment, and security, even if we don’t use the term explicitly.”

Karen has now moved into her new position as Mexico Mosaics coordinator and is actively using what she learned in her fellowship in her new job. “I am including human wellbeing goals along with ecological and management goals in our conservation business plan and theory of change. Our next step is to define indicators and start measuring.” This puts into practice the cardinal rule of integrating social science into conservation: set socioeconomic objectives first. Only then can you measure a given project’s impact on people. [SC](#)

— [Jensen Montambault](#), applied conservation scientist, Central Science, The Nature Conservancy

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## Margo Francis

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What happens when you get seven TNC state directors, two country programs, and their trustees in a room with a bunch of staff scientists and partners and ask them to debate what we want to do for conservation and how we'll know if we are getting there? Add TNC's new [whole systems approach](#) and [Planning Evolution Team \(PET\) recommendations](#) into the mix...and you'll find the initiative to create conservation measures for the Great Lakes Project was an experiment in more ways than one.

"I learned a lot about leadership: how do you get things done and move things forward, dealing with risk and change?" says Margo Francis of her Coda Global Fellowship for the Great Lakes Project, which was hosted by Great Lakes Project Board of Directors Chair Helen Taylor.

"We had been working off one version of planning guidance, and then the PET released their report in September [2011], which was when we were wrapping up the process," she adds. "While getting the new guidance earlier would have been great, it is only one of the challenges you face in implementing measures on a whole systems scale — we had no idea at the time the value and impact the measures initiative would have for our work in the Great Lakes. The conference spurred a rigorous scrubbing, honing and prioritization of strategies as well as measures, and a much stronger Great Lakes Project moving forward."

### Coda Fellow: Margo Francis

**Day Job:** Project Information Manager, Amazon Program, Latin American Region

**Assignment:** Great Lakes Project

**Duration:** March 2011 – July 2012

**Task:** Manage a major initiative to create conservation measures for the Great Lakes Project, including a 120+-person Great Lakes Measures Conference.

**Most Important Lesson Learned:** "Business planning and measures at a whole systems scale is challenging. Programs like the Great Lakes Project are boldly taking these challenges on to integrate measures and assure accountability at all levels of their work."



Most trustees, says Margo, “liked the sausage-making aspect of peer review.” And she urges future endeavors to be thoughtful about the way trustees may best contribute their skills to assist Conservation Business Planning, strategy development and measures.

Content-wise, “teams struggled with what good socioeconomic objectives are and how we integrate them more explicitly to our planning,” she says. “Everyone realizes how important they are, but we are still learning how to do it.” More guidance would help.

Margo’s fellowship has been extended to help integrate the constructive feedback the Great Lakes Project received from staff, trustees and partners into the next iteration of business plans. **SC**

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