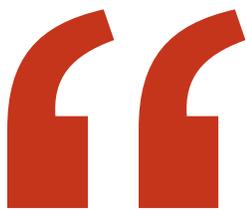




# Whole Measures for Urban Conservation

2017



**There is no power for change greater than a community discovering what it cares about.**

— Margaret J. Wheatley

*Whole Measures for Urban Conservation (WMUC)*, based on Center for Whole Communities' Whole Measures, was produced in partnership with The Nature Conservancy as part of the launch of the North America Cities Network. Led by Center for Whole Communities, a team of Conservancy staff from the Cities Network developed the rubric and provided key input for the guidance portion of the document. *WMUC* includes four primary areas of measurement and is a reference point for leaders interested in prioritizing benefits to low-income communities and advancing justice and equity in their work. While this document serves as a primary appendix to the *Field Guide to Conservation in Cities*, it is designed as a stand-alone document that may be used and reproduced independently.



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## INTRODUCTION

# Whole Measures for Urban Conservation

The complex layers of community, infrastructure and natural systems in cities present new challenges and opportunities for conservation work. Focusing on the human impacts of conservation strategies must be central to how we define success in conservation work in cities. The *Whole Measures for Urban Conservation (WMUC)* framework presented here provides a foundation for a highly integrated, whole-systems approach to urban conservation. It is intended to guide planning and evaluation of urban conservation projects and programs through the lens of socioeconomic impacts and equitable outcomes. It dedicates special attention to the social impact areas of justice and fairness, economic vitality, community engagement and community resilience.

## What Is Whole Measures?

What organizations and communities measure reflects what they value and determines what they pay attention to. Traditionally, conservation practitioners measure success in dollars, acres and biological diversity, and do not often consider factors related to community well-being. *Whole Measures for Urban Conservation (WMUC)* seeks to broaden the definition of success for urban conservation to include support for equitable outcomes that improve human well-being in cities. The framework offers a flexible approach to planning, implementing and measuring the changes we seek in our communities and organizations. The Whole Measures framework comprises a set of scoring guides or rubrics that apply across different areas of socioeconomic impact. *WMUC* is also intended to support a participatory process in which conservation practitioners work in partnership with diverse constituencies to plan and evaluate urban conservation work.

*The process of working with Whole Measures is often just as valuable to community impact and organizational learning as the conservation project outcome.*

## Benefits of Using the Whole Measures Framework

Whole Measures supports holistic planning and evaluation efforts in a manner that is participatory and empowering for both project leaders and stakeholders. Here are some major benefits of using Whole Measures:

### Supporting collaboration and creating alignment:

- Whole Measures provides a structure and format for engaging dialogue between different organizations and the communities in which they work.
- Conversations guided by Whole Measures can foster more effective, reciprocal and collaborative relationships.
- Engaging internal and external stakeholders with the rubric creates a structure for discussions that center on key potential socioeconomic impacts of urban conservation strategies.



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**Planning for and measuring impact:**

- Whole Measures helps organizations align their program priorities, decision-making, resources and activities with their overall vision and values.
- Using participatory methods to develop program objectives and scaled measures of success related to urban conservation and equity can support both planning and evaluation.
- Stakeholders can use the rubric to qualitatively evaluate the impacts on a scale from negative to highest positive impact at different phases of project or program cycles.

**Entry points:**

Once a decision has been made to use the Whole Measures framework, the next step is to determine the appropriate entry point, given the nature of the project. You can focus on program planning, community engagement or program evaluation, or a combination of the three. These are outlined in Figure 1.

**Figure 1.** Three Entry Points for Using Whole Measures

Program Planning	Community Engagement	Program Evaluation
Identify priorities Engage internal organizational dialogue Engage stakeholder dialogue Support collaboration and alignment	Identify priorities Create alignment Engage dialogue (external) Invite collaboration	Guide selection of priority areas for evaluation Create shared language for measures of success Measure impacts

## When to Use Whole Measures in the Program Cycle

What we pay attention to in our work is usually what grows. Therefore, the ideal entry point for Whole Measures is as early as possible in the project cycle. This allows the planning benefits of Whole Measures to help define the project cycle from the beginning. In The Nature Conservancy’s Conservation by Design process, when we do a full mapping/situation analysis we consider all potential avenues and then focus our energies strategically. Similarly, with Whole Measures, we take time up front to identify the full spectrum of potential benefits and objectives, which allows us to be more strategic in using our resources. It also acknowledges areas that we hope to grow into—which then prepares us to recognize opportunities that may emerge during the implementation phase.

If it’s not possible to start Whole Measures at the beginning of a process, it can still be used effectively at various points in a program’s life span: at the beginning, after program activities have begun, and after they have been completed. Depending on where you are in the project cycle, you can use Whole Measures to look at program planning or evaluation needs. At any stage in the process, it can be a useful framework for evaluation and meaningful community dialogue.

## How Whole Measures Works

Whole Measures refers to both a process and a set of rubrics. The process involves meeting with stakeholders to have a dialogue about impacts on communities. The rubrics identify criteria for success and describe various levels of performance along a spectrum from negative to highest impact. Rubrics are often a focal point of a Whole Measures process.

For example, a rubric created for this Whole Measures guidance document, shown in Figure 2, would include an **objective** and a **spectrum of impacts** describing a scale of possible outcomes.

**Figure 2.** Example of a Rubric

<b>Objective:</b> Clearly and effectively explain how to use Whole Measures in a way that supports its use and implementation.
<b>Negative</b> – Guidance is unclear and unhelpful and results in confusion that discourages people from using Whole Measures.
<b>Neutral</b> – Guidance does not affect the readers’ understanding of how to use Whole Measures.
<b>Modest</b> – Guidance gives readers a general sense of how to use Whole Measures, sparks their interest, and affects their thinking, but they do not use it as a community engagement or planning tool.
<b>Strong</b> – Guidance is clear, compelling and helpful enough that readers use the framework for planning, evaluation or community engagement.
<b>Highest Impact</b> – Guidance is clear and helpful enough that readers implement Whole Measures with confidence and success and create effective case studies demonstrating the effectiveness and utility of Whole Measures to other practitioners of urban conservation.

This spectrum of impacts is used to score how well the objective was achieved. It can also be used by the rubric developers to have a discussion with a potential implementer about her perspective on Whole Measures, what she needs out of this guidance, and what she thinks the objective should be. This discussion could help the developers to have a better understanding of the needs of their stakeholders. For example, in order to maximize stakeholder participation in the WMUC rubric development process and prior to writing the steps, the rubric developers had a dialogue with working group members about their values and needs in relation to this project.



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## Using Whole Measures

Working with the rubrics within Whole Measures creates an opportunity to have substantive dialogue with stakeholders that explores values, priorities, objectives and impacts. These rubrics can be used as is, but they will work best if you *adapt and customize them to reflect your program or project*. Ideally, you will identify the objectives that are most important to your program, and then define different levels of performance against which to measure your performance. In other cases, you will write your own objectives, using the ones in the template as a reference point or for inspiration.

The amount of time and resources you have to invest in a Whole Measures process will determine how you use the

framework in your planning and evaluation work. Some general options, ranging from a limited level to a higher level of engagement, are presented here:

**1. Use Whole Measures as a program planning tool.**

- a. Initial framing and thinking—use concepts and framework to engage internally.

**EXAMPLE:** When having an internal meeting or planning session, refer to the Whole Measures rubric to see where your ideas for conservation projects fall on the spectrum, or fill in objectives that are important to your program.

- b. Initial framing and thinking—use concepts and framework to engage externally with partners, community or stakeholders.

**EXAMPLE:** In a multistakeholder planning process in Atlanta, Urban Conservation Program Associate Myriam Dormer convened a diverse group of stakeholders around water quality issues in the city. She included a presentation on Whole Measures in the kickoff to frame the process's intentional focus on equitable impacts.

**2. Use Whole Measures to get stakeholder feedback about your conservation plan.**

- a. After your plan has already been drafted, you can use the rubric as a reference point in dialogue with stakeholders.

**EXAMPLE:** Convene community stakeholders to a meeting where you use the rubric as a reference point to discuss your conservation plan and how it might engage the community or meet community needs, and ask for feedback from participants.

**3. Use Whole Measures to qualitatively evaluate your program impacts internally and/or with stakeholders.**

- a. Use the rubric as a launching point for community engagement for planning or evaluation.

- b. Customize the rubric by writing objectives specific to your program needs. Use them to plan for engagement or evaluation, either internally or with external stakeholders.

**EXAMPLE:** In Chicago, Director of Urban Conservation John Legge and Director of Urban Stewardship and Engagement Karen Tharp created two separate sets of Whole Measures rubrics that outlined the program objectives for two of their programs. They then hosted half-day meetings for each project facilitated by Center for Whole Communities with stakeholder groups to discuss the rubrics and to obtain stakeholder feedback, evaluate the programs and strengthen relationships.

**4. Form a diverse stakeholder Working Group to develop Whole Measures for the program as a partnership with shared leadership.**

- a. Engage with the community from the beginning of the project, including the framing and early steps.
- b. Use Whole Measures as a process to convene partners and to collectively design the process and plan and evaluate the work as part of a participatory stakeholder process that is co-led in partnership with other groups.

## Understanding the Whole Measures Rubrics

Each rubric focuses on one of four socioeconomic impact areas: Justice and Fairness, Economic Vitality, Community Engagement, and Community Resilience. The last rubric is a blank worksheet for developing original objectives and is available at [nature.org/wholemeasures](http://nature.org/wholemeasures).

Each impact area has a general statement of intent and several objectives, which were developed by a multidisciplinary group of people working to articulate what equitable outcomes in urban conservation can look like.

For each objective, a spectrum of impacts is defined, describing a range of outcomes that includes negative, neutral, modest, strong and highest impact. At the end of each spectrum of impacts is a column for numerical ratings.



# Justice and Fairness

CONSERVATION FOR ALL

OBJECTIVES		MEASURES (OF SUCCESS) OR METRICS	
		NEGATIVE (-3)	NEUTRAL (0)
1.1	Consider and prioritize conservation projects that provide conservation benefits for underresourced communities (e.g., improved air or water quality, tree canopy cover, stormwater management, reduction of heat island effect).	Conservation projects that are likely to have negative impacts on underresourced communities are given high priority despite knowledge of negative impacts (e.g., decrease in access to public transportation, job loss, loss of housing or increased flood impacts). Strategies to avoid, reduce or mitigate negative impacts are not considered.	The potential impact of conservation projects on underresourced community members is considered, but projects that provide benefits to those communities are not prioritized.
1.2	Provide equitable and ready access to natural areas for urban dwellers (e.g., parks, waterfronts, trails and preserves).	All programming is envisioned outside urban areas and continues the trend of "fortress ecology," restricting people's access or stewardship opportunities. Urban natural areas or natural infrastructure are not stewarded appropriately, resulting in exclusion of urban residents, loss of community pride, increase in crime and/or loss of biodiversity.	Program protects high-biodiversity urban natural areas, or develops green infrastructure or programs, but does not increase access for urban dwellers. Motivated volunteers are welcomed but no outreach is done to welcome others.
1.3	Acknowledge urban communities' relationships to nature, past and present, in framing and communicating urban conservation projects.	Framing and communication around urban conservation projects explicitly deny urban communities' relationships to nature, both past and present.	Project makes no mention of existing relationships between urban communities and nature. Communication and framing of the project emphasize that urban conservation projects will bring nature to the urban community—thereby implying that outside experts must bring environmental benefits to urban communities.
1.4	Demonstrate accountability to the community for creating community benefits through urban conservation projects.	Urban conservation projects are detrimental to the community and have no accountability to the community for negative impacts.	Potential opportunities to provide community benefits are identified or considered, but not selected. There is no accountability to the community for doing so.

“Peace cannot exist without justice, justice cannot exist without fairness, fairness cannot exist without development, development cannot exist without democracy, democracy cannot exist without respect for the identity and worth of cultures and peoples.”

—Rigoberta Menchu

**Statement of Intent:** Prioritize conservation initiatives that foster equitable outcomes for historically underrepresented and underresourced communities.

MEASURES (OF SUCCESS) OR METRICS			RATING
MODEST (+3)	STRONG (+5)	HIGHEST IMPACT (+10)	
Conservation projects that result in some direct quality-of-life improvements for underresourced communities are given additional weight when prioritizing strategies. Siting conservation projects in underresourced communities is considered alongside projects with remotely generated benefits.	Conservation projects that are likely to result in clear, measurable, positive impacts on health and other components of well-being in underresourced communities are prioritized. Conservation projects are implemented in underresourced communities that result in quality-of-life improvements for community members.	Highest priority is given to conservation projects targeting problems in underresourced communities. Projects are designed and implemented in response to the community's self-identified needs, problems and priorities. Projects successfully create measurable improvements in human well-being.	
Program protects high-biodiversity urban natural areas and/or begins to introduce natural resources amenities and programming. These opportunities provide access for a wide range of urban dwellers to connect, steward, and/or find meaning in the spaces, while also fully protecting biodiversity values. Other ecosystem services (e.g., air quality benefits from tree canopy) are considered in project development.	In addition to achieving modest indicators, program also protects or develops natural areas or aspects of natural infrastructure that are especially well-situated to increase access for urban dwellers to connect with nature while also supporting biodiversity in the area. Invites urban dwellers to connect to these natural areas.	In addition to achieving strong indicators, program seeks and uses input from surrounding urban communities in identifying priority projects and actions for increasing local access and connection to nature and other benefits, with particular emphasis on community members who have historically had low levels of access to natural areas.	
Framing and communication acknowledge existing relationship between urban communities and their environment, but ignore a history of community disenfranchisement, dispossession, or disconnection from the environment, i.e., the project acknowledges the positive connections between nature and people (environmental benefits), but not the history of injustice or exclusion (environmental harms).	Framing and communication acknowledge existing and historical relationships between urban communities and their environment. Urban conservation project leadership and communication describe the history of dispossession for urban communities, as well as expressing visions and strategies of connection and restoration that reflect community thinking and experience.	Framing and communication acknowledge existing and historical relationship between urban communities and the land. Urban conservation project leadership and communications describe the history of dispossession and loss for urban communities, as well as sharing elevating visions and strategies of connection and restoration. These visions are representative of the community itself and counter the dynamic of dispossession and loss.	
Urban conservationists actively engage in discussion with communities about what types of benefits the community desires from the urban conservation project.	Based on discussion with community leaders and organizations, community benefits agreements are developed. These agreements detail the benefits that the conservation project will provide for the community.	Based on discussion with community leaders and organizations, community benefits agreements that include a formal accountability mechanism are developed and adopted.	



**DEFINITIONS**

**Underresourced:** lacking in financial or infrastructural resources. Underresourced communities include communities facing poverty and many communities of color. Many communities are underresourced because of historic patterns of marginalization.

**Well-being:** a state of existence that is good and satisfactory, associated with health and happiness. Components of human well-being that can be positively or negatively impacted by conservation initiatives include living standards, health, education, work and leisure, governance, social cohesion, security and equity.



# Economic Vitality

OBJECTIVES		MEASURES (OF SUCCESS) OR METRICS	
		NEGATIVE (-3)	NEUTRAL (0)
2.1	Project supports long-term economic vitality through the preservation or creation of green jobs, the support of sustainable economic activity, or the provision of ecosystem services.	Project creates significant negative economic consequences (e.g., loss of jobs from the community or region).	Produces little or no effect on job creation or economic activity.
2.2	Connect job opportunities generated through urban conservation projects with historically underrepresented job-seekers from the region where projects are sited.	Project results in a net decrease in access to jobs in the local community. No efforts are made to hire local job-seekers through outreach, recruitment or training. All capacity to plan and implement the project is sourced from outside the region or community.	Some intention to hire locally may be expressed during project planning, but no effort is made to connect community members with job opportunities created by urban conservation projects.
2.3	Quantify and communicate the economic value of the ecosystem benefits of natural systems and conservation projects to communities.	Project creates the impression that conserving natural systems is harmful to local economic vitality.	No understanding is developed of the economic value of the ecosystem that has been created, conserved or restored.
2.4	Create new opportunities for local community members to expand or start businesses in or near the conservation project.	Project does not create any business opportunities and has a negative effect on business retention and development.	Project only creates employment related to its own implementation. It has no effect on business retention and development.

“The surest path to safe streets and peaceful communities is ... ecologically sound economic development. And that same path can lift us to a new, green economy—one with the power to lift people out of poverty while respecting and repairing the environment.”

—Van Jones

Statement of Intent: Contribute to the economic vitality of cities through conservation initiatives.

MEASURES (OF SUCCESS) OR METRICS			RATING
MODEST (+3)	STRONG (+5)	HIGHEST IMPACT (+10)	
Stimulates the local or regional economy to some degree through green job creation, attraction of economic activity to the area, or the provision of cost-beneficial ecosystem services.	Measurably stimulates the local or regional economy through green job creation or attraction of economic activity to the area and is recognized by the public for doing so. Increases awareness that urban conservation/restoration can strengthen the economy. Provides economic services (such as stormwater management) that reduce municipal and business costs and therefore support the economy.	Measurably stimulates the local or regional economy through green job creation, attraction of economic activity to the area, and/or provision of ecosystem services and is recognized by the public for doing so. Increases public awareness that urban conservation/restoration can strengthen the economy. Creates community partnerships that plan and advocate for projects that meet both economic and conservation needs; contributes to an increase in the flow and equitable distribution of financial resources in the community.	
Urban conservation leaders partner with other organizations to do local outreach to recruit and hire members of low-income or historically underrepresented communities.	In partnership with other organizations, training is provided to local job seekers from historically underrepresented or underresourced communities. Hiring efforts include effective outreach, and jobs are made available to members of the community that pay at least a living wage.	Through training and outreach, quality jobs are made accessible to historically underrepresented and underresourced members of the community to people from the region at or above the living wage. A community workforce standard is adopted to guarantee that a certain percentage of jobs will be filled by local people from the region for urban conservation projects.	
Information about the value of ecosystem services created, restored or conserved in the project is quantified and made available to the public.	The links between the project and economic vitality are identified, quantified and presented to the community in a clear, understandable and compelling manner.	Awareness and education work results in increased and widespread public understanding about the economic values of the project, thereby building a better understanding of the value of conserving natural systems to the economic vitality of the city.	
Project creates short-term opportunities for existing businesses during project implementation, improves economic vitality of existing businesses in vicinity of project, and has a positive impact on business retention and development.	Project creates short-term opportunities for existing local businesses during project implementation, improves economic vitality of existing businesses; has a positive impact on business retention and development, and attracts new businesses in vicinity of project in a way that stimulates the local economy.	Project increases vitality of region in vicinity of project and spurs creation of new businesses that directly support the health of the local economy. The project has a measurable positive causal effect on business retention and development.	





# Community Engagement

OBJECTIVES		MEASURES (OF SUCCESS) OR METRICS	
		NEGATIVE (-3)	NEUTRAL (0)
3.1	Cultivate reciprocal and supportive relationships with community-based organizations.	Program staff disregard and do not engage with existing community-based organizations. Project weakens relationships with public partners and/or communities served. Project competes with and/or takes away resources from existing community-based organizations or networks.	Relationships and trust with community-based organizations are not positively or negatively affected.
3.2	Engage authentically and respectfully with diverse community stakeholders.	Program staff do not engage with stakeholders. Work results in stakeholder exclusion and causes the community to distrust the program staff.	Some demographic research and stakeholder analysis is conducted. The engagement strategy does not look at history or contextual dynamics and only the usual/easy stakeholders are consulted. There is no time, or there are insufficient resources, to engage meaningfully. Barriers for some groups to engage are not acknowledged. If conflict emerges or excluded parties request access to the project, the need may be acknowledged but not corrected.
3.3	Share decision-making process and authority with the community.	Program staff make no effort to inform or involve community members, leaving them unaware and uninvolved in the decision-making process.	Program staff make some effort to inform community members about the process and engage them in the work but are not influenced by their opinions.



**Statement of Intent: Work with communities to design and implement responsive conservation projects that address community needs.**

MEASURES (OF SUCCESS) OR METRICS			RATING
MODEST (+3)	STRONG (+5)	HIGHEST IMPACT (+10)	
<p>Collaborative relationships are developed and maintained with community-based organizations. Funding relationships and capacity are leveraged to direct new and increased funding to community organizations.</p>	<p>Project develops strong and respectful relationships, based on mutuality, trust and respect, with community-based organizations that serve underresourced or historically marginalized communities. Funding relationships and capacity are leveraged to direct new and increased funding to community organizations.</p>	<p>Relationships between underresourced or historically marginalized community members and urban conservation groups are developed. Thought and effort are given to sustaining these relationships over time, and these relationships are leveraged to support both social justice and conservation outcomes. Funding relationships and capacity are leveraged to direct new and increased funding to community organizations.</p>	
<p>Stakeholders are consulted but there is little to no information sharing, or only a one-way communication strategy that does not incorporate stakeholder input. The project includes good intentions to perform history and social impact indicator research, but the work is not completed. Linguistic and other barriers to engage or get involved are recognized but adequate resources are not dedicated to provide access and understanding. Conflict may arise and is not addressed.</p>	<p>Stakeholders participate and get involved. There is good communication of program intentions with a diversity of stakeholders, including those who have been historically marginalized. Engagement plan harvests information but does not significantly impact the course of work or include groups in key areas of decision-making. Marketing and communication efforts are translated and diversified but not democratic in vision or messaging. Conflict is addressed. History is researched and incorporated into programming.</p>	<p>Those historically marginalized and most highly impacted by lack of access to nature or the impacts of structural inequality are central in dialogue and decision-making. Communication, opinions and proposals flow in both directions and there are ample resources to invest time and translate materials in a way that acknowledges cultural differences. Collaboration includes mutual support and transparency—the organization is willing to change as a result of engagement. Marketing and outreach allow communities and stakeholders to speak for themselves in formats that are relevant to their community. Resources are allocated to enhance and sustain leadership for those traditionally underrepresented. If conflict arises, it is addressed in productive ways.</p>	
<p>Project informs and engages some members of the community and helps them play a more active role in developing, implementing and stewarding urban conservation projects.</p>	<p>Project informs and engages diverse cross-sections of community members and shares decision-making with them. Helps community members play a more active role in developing, implementing and stewarding urban conservation projects. Makes the results of community discussions public and readily available.</p>	<p>Project engages fully with one or more community organizations as well as a diverse cross-section of community members to make project decisions through a structural mechanism, such as an advisory board with power to affect the director of the project. Helps community members play a more active role in urban conservation initiatives along with ongoing stewardship. Makes results of community discussions public and readily available.</p>	

**“If you have come to help me, you are wasting your time. But if you have come because your liberation is bound up with mine, then let us work together.”**

—Lilla Watson



# Community Resilience

OBJECTIVES		MEASURES (OF SUCCESS) OR METRICS	
		NEGATIVE (-3)	NEUTRAL (0)
4.1	Support social cohesion and community social goals (e.g., decreasing crime; improving public safety, public health, or education) through urban conservation projects.	Urban conservation project results in diminished social cohesion or connectivity and has a negative impact on community social goals such as public safety or public health (e.g., the conservation project causes a traditional community gathering space to be replaced with a conservation project that reduces opportunities for the community to gather).	Project has no impact on social cohesion or connectivity. Does not consider relationship of urban conservation to social needs in communities.
4.2	Address potential climate change and/or disaster impacts in the design or planning of urban conservation projects (e.g., floods, droughts, heat events, storms).	Project exacerbates existing conditions or creates new ones, leading to increased climate change or disaster vulnerability.	Project reviews some risk assessment data but does not attempt to address potential climate and disaster impacts in its design or planning.
4.3	Foster community co-benefits that support human well-being in conservation projects.	Natural resource management or conservation project decisions have negative impacts on human well-being in the surrounding area.	There are no links or correlations between conservation work and human well-being in the surrounding area.
4.4	Implement conservation projects that support accessible community housing for underresourced individuals.	Project diminishes access to affordable housing in the community (e.g., decreases condition or availability of housing, increases property value to displace low-income community members, deters construction of affordable housing).	Project does not consider the community's affordable housing needs. However, conservation efforts do not reduce existing affordable housing.
4.5	Implement conservation projects that support improved transportation options or maintain existing alternative transportation options that are accessible to underresourced communities.	Project results in diminished sustainable transportation opportunities within the community (e.g., conservation project results in the loss of bus stops in a neighborhood).	Project planning does not consider the community's transportation needs.

“Ecologists and biologists know that systems achieve stability and health through diversity, not uniformity.” —Paul Hawken

**Statement of Intent: Implement conservation projects that support and improve community social, physical, and ecological resilience and well-being.**

MEASURES (OF SUCCESS) OR METRICS			RATING
MODEST (+3)	STRONG (+5)	HIGHEST IMPACT (+10)	
Project considers the social cohesion and social goals of the community during planning. Builds relationships to explore how social needs such as public health and public safety might be served by conservation work.	Project identifies and acts on opportunities to incorporate community social goals such as public safety, education or public health into conservation projects, drawing on existing community social networks to do so.	Project creates active community partnerships to plan and advocate for projects that meet the community's social and urban conservation goals (e.g., partnerships between conservationists and social activists in public health or education).	
Project reviews relevant risk assessment data and addresses at least one potential climate or disaster impact in the design and planning stage.	Project reviews relevant risk assessment data. Identifies and acts on opportunities to engage communities in addressing past and potential disaster and climate impacts through urban conservation projects in their neighborhoods. Creates active community partnerships to strengthen and maintain community climate change and disaster-resilient design and planning efforts.	Project reviews relevant risk assessment data, including community knowledge. Creates active community partnerships to address past and potential disaster and climate impacts. Uses these partnerships to strengthen and maintain community climate change and disaster-resilient design and planning efforts that focus on the needs of historically underrepresented communities. Implements urban conservation measures that improve community resilience to climate change and disasters.	
Co-benefits are identified within a natural resource management plan or conservation program.	The urban conservation plan results in improved human well-being. A direct positive correlation between the health of the ecosystem and the well-being of humans can be demonstrated as a result (e.g., the more diverse and robust the tree canopy, the greater the cardiovascular health of the community).	Research and evaluation documents the positive relationship between human well-being and ecological outcomes. Inclusive process design and implementation results in a binding agreement to ensure community co-benefits. Outreach and education buttress the lessons learned. Stewardship relationships and capacity are built to sustain the co-benefits beyond one organization's involvement or program cycle.	
Project considers and identifies opportunities to support affordable housing goals. Increases the awareness that natural system creation/restoration and affordable housing can be mutually supportive.	Project increases awareness within the conservation field that conservation and affordable housing are not mutually exclusive. Identifies and acts on opportunities to incorporate community housing goals into specific conservation projects, bringing in partners with such expertise as needed. Does not threaten the presence of affordable housing in communities that have received urban conservation benefits. Takes the risks of gentrification into account and supports measures to protect affordable housing access in these areas.	Project creates active community partnerships to advocate, plan for and implement projects to meet both housing and conservation goals of the community. Improves the affordable housing options in communities that have received urban conservation benefits. Natural systems are used to provide ecosystem services that benefit affordable community housing. Conservation measures contribute to the aesthetic and environmental quality of the community. Partnerships that support the development and implementation of community land trusts in these neighborhoods protect the availability of affordable housing.	
Project considers the transportation needs and goals of the community. Builds relationships to explore how urban conservation work can support transportation needs.	Project identifies and acts on opportunities to incorporate more energy-efficient, affordable, pedestrian-friendly and accessible transport options into conservation projects, bringing in partners with such expertise as needed.	Project creates more opportunities for the creation of alternative transportation options and increases quality of existing alternative transportation options. Leverages active community partnerships to plan, advocate for and implement projects that meet both the transportation and conservation goals of the community.	

**DEFINITIONS**

**Resilience:** an ability to recover from or adjust easily to misfortune or change.

**Social cohesion:** the willingness of members of a community to work together for survival and prosperity. Co-benefits in this context refer to additional community or social benefits above and beyond the traditionally defined conservation impacts of an urban conservation project.

**NOTE:** Housing and transportation are highlighted in this rubric as two key examples to consider in planning urban conservation projects in support of community resilience and well-being in cities. While it may not be the work of each and every urban conservation project to directly address community housing and transportation needs, these projects can—at the very least—consider negative impacts, and—at best—engage in active partnerships that collectively create the conditions to meet community housing and transportation goals.

# Impact Area: \_\_\_\_\_

(Examples of socioeconomic impact areas used include: Justice and Fairness, Community Resilience, Economic Vitality and Community Engagement.)

OBJECTIVES		MEASURES (OF SUCCESS) OR METRICS	
		NEGATIVE (-3)	NEUTRAL (0)
____.1			
____.2			
____.3			
____.4			
____.5			

This blank rubric is a space for collaboratively identifying an area of measurement and serves a reference point for prioritizing benefits to low-income communities and advancing justice and equity in conservation. For more information about Whole Measures, please visit the Center for Whole Communities website at [wholecommunities.org](http://wholecommunities.org).

Statement of Intent: \_\_\_\_\_

\_\_\_\_\_

MEASURES (OF SUCCESS) OR METRICS			RATING
MODEST (+3)	STRONG (+5)	HIGHEST IMPACT (+10)	

DEFINITIONS

NOTES

# Whole Measures Process Guidelines

Figuring out how to get started with Whole Measures is sometimes the hardest step. To make it easier, this section gives general guidelines for the various steps to engage in a Whole Measures process. It is important to remember that Whole Measures can be customized to the needs of each program’s specific context. You can tailor this process to the specific capacity, goals and objectives of your program. With Whole Measures, process is of utmost importance because it is a way of building reciprocal and collaborative relationships with stakeholders.

## STEP 1: FORM A DESIGN TEAM.

Enlist a small design team of three to eight people who bring different perspectives. If the team is internal to your organization, it might include members from different departments, areas of expertise, gender, tenure, ethnicity, etc. If your team includes members from outside your organization—which we encourage—you will also want to look for people who bring complementary perspectives, such as members of community-based organizations, municipal leaders, and environmental justice organizers. This initial step may require some relationship building and outreach.

## STEP 2: CHOOSE AND MAP YOUR STRATEGY.

We recommend doing this step in collaboration with your design team.

- Read through the general guidelines and review the rubric source materials carefully.
- Determine your strategy for using Whole Measures. Do you want to use it for program planning and/or evaluation, community engagement, to collect information for a situation analysis, or some combination of all of these?
- Develop a process timeline.
- Conduct an initial analysis of important stakeholders, with special attention to groups that have been underrepresented in conservation work in the past.
- Develop a plan for stakeholder levels of involvement (both internal and external). What do you have the capacity to effectively do? Do you have resources and stakeholder commitment to a more robust participation throughout the process? Are you willing and able to share decision-making with the group? In addition, be sure to establish the level of engagement in which your partners and stakeholders are interested, and which they have time and financial capacity to support. We encourage a moderate to intensive level of engagement wherever possible. Often this may mean taking more time and seeking funding to support your efforts.

Limited Community Engagement	Moderate Community Engagement	Intensive Community Engagement
<ul style="list-style-type: none"> <li>• Design process internally.</li> <li>• Create initial draft internally.</li> <li>• Get stakeholder feedback.</li> <li>• Refine and finalize internally.</li> </ul>	<ul style="list-style-type: none"> <li>• Design process internally.</li> <li>• Create initial draft internally or externally.</li> <li>• Collaborate with stakeholders to refine the rubric.</li> <li>• Finalize internally.</li> </ul>	<ul style="list-style-type: none"> <li>• Include community members in design team.</li> <li>• Draft rubric collaboratively with community stakeholders.</li> <li>• Refine and finalize with community stakeholder input.</li> </ul>

## STEP 3: FORM A WHOLE MEASURES WORKING GROUP.

Use the following guidelines with either a Moderate or Intensive level of community engagement.

- Invite a diverse set of project stakeholders (6-12 people) with an array of perspectives and experiences who will work together to engage with Whole Measures. It is important to ensure that different perspectives are brought into the dialogue (different ages, socioeconomic backgrounds, ethnicities, races).
- Share timeline and define outcomes and scope of the work of the Whole Measures Group, such as gathering feedback, collaborating on developing objectives, performing evaluation and/or co-creating a process and program.

## STEP 4: CONVENE WORKING GROUP.

Limited Community Engagement	Moderate Community Engagement	Intensive Community Engagement
N/A	<ul style="list-style-type: none"> <li>Make the rubric template and guidance available for review before convening the group. All members should spend time familiarizing themselves with the framework of Whole Measures.</li> <li>Share examples of rubrics that have been developed for other programs.</li> <li>Develop initial working draft rubric with a focus on your program strategy. This could be the full rubric or a streamlined version, depending on the level of engagement you have agreed on with your stakeholders and partners.</li> </ul>	<ul style="list-style-type: none"> <li>Make the rubric template and guidance available for review before the group meets. All members spend time familiarizing themselves with the framework of Whole Measures.</li> <li>Share examples of rubrics that have been developed for other programs.</li> <li>Engage working group in small group/large group discussion of the rubric, its purpose, relevance, benefits and limitations.</li> </ul>

## STEP 5: REFINE AND FINALIZE THE RUBRIC.

Limited Community Engagement	Moderate Community Engagement	Intensive Community Engagement
<ul style="list-style-type: none"> <li>With your design team, develop your rubric. Use <i>WMUC</i> as a guide and select objectives and definitions of success that are based on your conservation strategies and goals.</li> <li>Share drafts with stakeholders and gather input along the way.</li> <li>Finalize your rubric internally and prepare to select performance ratings.</li> </ul>	<ul style="list-style-type: none"> <li>Engage working group in small group/large group discussion of the rubric, its purpose, relevance, benefits and limitations.</li> <li>Using the objectives in the initial draft document, engage in small groups to refine the rubric so that it fits the project, organization or community.</li> <li>Be willing to change and adapt based on stakeholder perspectives, evidence and input.</li> <li>Integrate outcomes and input from working group sessions and finalize the rubric internally.</li> </ul>	<ul style="list-style-type: none"> <li>Select proposed fields of measurement (e.g., Justice and Fairness, Economic Vitality) and engage the group in the development of objectives and definitions of levels of impact from negative to highest.</li> <li>Be willing to change and adapt based on stakeholder perspectives, evidence and input.</li> <li>Iterate over 2-3 meetings, drafting and testing group-wide.</li> <li>The design team takes the results of iterative process and finalizes rubric by consensus if possible. Be sure to agree on a timeline for decisions and a fallback decision-making process just in case consensus is not reached by the agreed-on deadline (e.g., by vote, or select two to three members of the design team to decide).</li> </ul>

## STEP 6. COLLECT AND UTILIZE RESULTS.

- If using rubrics for evaluation, let each member of the evaluation team rate the overall level of impact for this objective and associated outcomes. Narrative ratings may also be used.
- Work through the rubrics to assess the collective judgment of the project's performance across each socioeconomic impact area. Seeking to understand the perspectives and judgment that different people bring to their assessments will open up new understanding and learning and form a more effective basis for moving ahead as a group.
- Summarize and share results with all who have contributed to the rubric development process. Based on the collective understanding of the project's outcomes, create a plan to respond to the current degree of impact in a way that will move the project closer to the highest degree of intended impact.

Possible uses for results:

- Program and organizational learning
- Reports and fundraising
- Community education and outreach
- Contributing to the body of knowledge
- Developing objectives for program improvement

# Process Tools and Tips for Whole Measures

## Facilitating Group Discussions

**Use the “Dialogue” process to enhance engagement.**

- In the Dialogue process, each person in the group has an opportunity to express his or her perspective while the remainder of the group gives their full attention, without immediate interruption or feedback. Using Dialogue can invite the engagement of the whole group and incorporate the perspectives of people who tend to speak up less often.

**Invite differing perspectives.**

- It is helpful to encourage and invite differing perspectives in Whole Measures processes. In discussions, it can often be more comfortable to spend time on areas of natural alignment. Take time instead to explore those areas where there is a wide range of individual responses for any given practice or field of practices. In ranking objectives, averages are less interesting and perhaps less useful than exploring widely divergent responses. Keep in mind that information about the differences in responses across people and groups may be very important and useful.

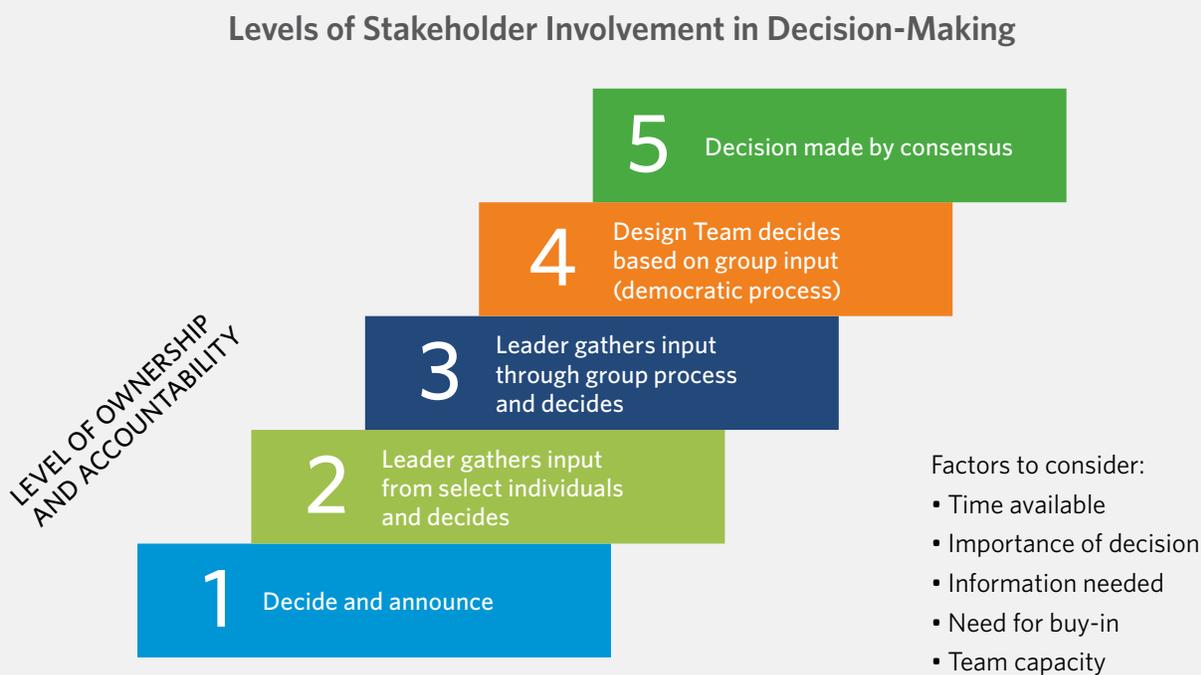
**Build agreement during the discussion.**

- Structure group discussions of the rubric to promote learning; develop a stronger shared understanding of the project's outcomes, strengths and weaknesses; and point to opportunities for improvement. Come to explicit agreement on key themes and lessons learned. It is helpful to explore those areas where there is a wide range of individual responses for any given practice.
- Ask questions about why participants in the process hold different views regarding the program or project. Seeking to explore the perspectives and judgment that different people bring to their assessment will open up new understanding and learning and form a more effective basis for moving ahead as a group.

## Determining Your Decision-Making Strategy

When determining how to engage in a Whole Measures process, it is important to consider the level of stakeholder involvement that you would like to have in your decision-making process. Figure 3 shows a progression of methods that range in level of ownership and accountability and stakeholder involvement.

**Figure 3.** Levels of Stakeholder Involvement in Decision-Making



*Figure 3. Level of Stakeholder Involvement*

Using this chart as you plan your Whole Measures process can help you choose a strategy that best fits your objectives and resources. You can choose a higher level of stakeholder engagement, such as steps 4 and 5, if your timeline is flexible, you are making an important decision, you need information from the community, or you have the capacity on your team. If you are working alone, must move quickly, and it's a decision that does not need much community input, you can choose to limit your decision-making strategies to levels 1 and 2.

### Conclusion

Whole Measures for Urban Conservation was designed to help practitioners of urban conservation include considerations of justice and fairness, economic vitality, community engagement and community resilience in their work. The Whole Measures framework and the rubrics represent an opportunity for meaningful engagement with communities, to collaboratively create goals and objectives, and to evaluate our successes. Whole Measures is a starting point and can be adapted and customized because every process, community and project has its own distinct circumstances and considerations. Whole Measures is by its very nature a collaborative process. If you know others in your network who have used Whole Measures, reach out to learn about their experiences, and share your ideas, challenges and successes.

If you are interested in viewing additional resources about Whole Measures, visit the Center for Whole Communities website at [wholecommunities.org](http://wholecommunities.org) to find a guidebook for Whole Measures. This guidebook contains valuable guidance and diverse rubrics that were collaboratively developed to reflect the values and needs in different fields of practice.