Session 2: Project Initiation – Setting Goals & Engaging Stakeholders (10:45–12:00)

Objective

Learn how to initiate an agroforestry project correctly by formulating clear goals and identifying and engaging key stakeholders from the outset. Participants will practice defining SMART objectives and mapping stakeholders' interests and influence.

Key Topics

SMART Goals for Agroforestry

Introduce the SMART criteria – **S**pecific, **M**easurable, **A**chievable, **R**elevant, **T**ime-bound – as a gold standard for setting project goals. Give an agroforestry example: instead of a vague goal like "promote agroforestry in the region," a SMART goal would be *"Establish and integrating 50 hectares of silvopasture practices in XX farming systems in X region within 3 years, increasing farm income by 10% and biodiversity index by 20%."* Discuss why each element (S,M, A, R, T) matters. Ensure goals link to broader sustainable (economically viable, environment sound and socially acceptable) strategic aims (e.g., climate resilience, farmer livelihood).

Stakeholder Mapping & Engagement

Explain that stakeholders include anyone with interest or influence in the project: farmers, landowners, local community, government agencies, NGOs, researchers, buyers, consumers, processors etc. Introduce the **Stakeholder Analysis Matrix** tool https://www.fao.org/in-action/food-for-cities-programme/toolkit/define-the-crfs/stakeholder-mapping-analysis/fr/ to categorize stakeholders by their level of **interest** in the project and **influence** over its success. For example- a local farming cooperative might have a high interest and high influence; a distant policymaker might have high influence but low interest unless engaged.

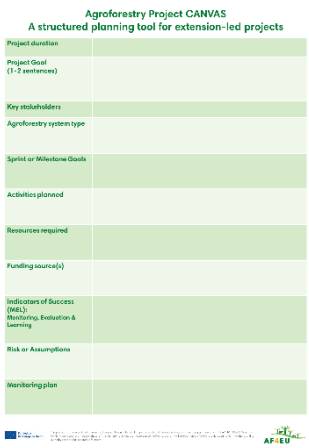
Stakeholder analysis matrix

- **Mapping Exercise (conceptual):** Show a simple 2x2 matrix (Interest vs. Influence) and plot a few stakeholder examples. Emphasize the need to tailor engagement strategies: *keep the highly interested informed, and actively manage those with high influence.*
- Discuss **engagement methods:** community meetings, surveys, participatory design workshops, demonstration plots, policy roundtables, etc. Highlight that early and authentic engagement builds buy-in and can prevent conflicts later.

Project Charter & Team Roles

Mention that during initiation, it is useful to create a brief **Project Charter** that documents the project's purpose, main goals, key stakeholders, high-level timeline, budget estimate, and team roles. This acts as a "constitution" for the project. If applicable, introduce the idea of defined roles (project manager, field coordinator, technical experts, etc.). You can also mention the RACI matrix (Responsible, Accountable, Consulted, Informed) as a tool to clarify who is doing what, even at this early stage (we will apply RACI more in planning).

Project charter


Agroforestry Project CANVAS
A structured planning tool for extension-led projects

Project duration	
Project Goal (1-2 sentences)	
Key stakeholders	
Agroforestry system type	
Sprint or Milestone Goals	
Activities planned	
Resources required	
Funding source(s)	
Indicators of Success (MEL): Monitoring, Evaluation & Learning	
Risk or Assumptions	
Monitoring plan	

*templates availables

Theory of Change (Intro)

Funded by the European Union

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Agroforestry projects often aim for long-term impacts (e.g., climate resilience, community benefits). A **Theory of Change** is a tool to map how project activities will lead to desired outcomes and impacts. Introduce the concept briefly: *if we do X activities, we expect Y outputs and Z outcomes.* This helps ensure the project design aligns with goals (A detailed exercise on this will follow in the next session).

CASE STUDY: Participatory Project Start – Grazed Firebreaks (Spain, Andalusia)

See AF4EU Factsheet: Campos-Galisteo, A. V., & Carbonell, L. M. (2025). The Andalusian network of pasture-firebreak areas. *AF4EU.* https://doi.org/10.5281/zenodo.18485582

The RAPCA programme is a large-scale initiative that integrates livestock grazing into wildfire prevention by maintaining vegetation in firebreak areas. A key element of the project's success was its participatory start. Instead of imposing a top-down land management plan, regional authorities worked closely with livestock farmers, pastoralist associations, and forestry technicians to co-design grazing plans. Farmers contributed their knowledge of terrain, vegetation, and herd behaviour, while technical experts defined fire-risk zones and management targets. Annual grazing plans were jointly agreed, specifying where, when, and how animals would graze to reduce biomass while maintaining ecosystem health.

Project Management Aspects:

- Early engagement of farmers as co-designers rather than beneficiaries
- Joint planning between public authorities, advisors, and livestock keepers
- Integration of local knowledge into technical management plans
- Clear agreements (contracts, grazing plans) defining roles and responsibilities

Key Takeaway:

Participatory project starts create stronger ownership and more practical solutions. When farmers are **involved from the beginning**, projects are better adapted to local conditions and more likely to succeed long term.

Activity - Stakeholder Role-Playing (30 min)

Break into small groups. Each group gets an agroforestry project scenario (e.g., introducing agrisilviculture or silvopasture in a new region). Assign each member a stakeholder role (farmer, extension advisor, local government, environmental NGO, etc.). Their task: spend 10 minutes individually thinking about their character's main interests and concerns regarding the project. Then, have a 15-minute group meeting role-play where they "negotiate" project priorities or voice concerns. As part of the Debrief, ask *"What did this reveal about how different stakeholders view agroforestry projects? How can we reconcile these perspectives in project planning?"* Emphasize the importance of finding common ground (e.g., focus on benefits that matter to each stakeholder).

Activity - Mapping a Theory of Change (15 min)

Using a flipchart, each group now quickly outlines a simple theory of change for their scenario. For example: *Activity:* train farmers in agrisilviculture; *Output:* 20 farmers implement woody perennials (trees or shrubs) rows in fields; *Outcome:* reduced soil erosion, diversified income; *Impact:* better climate resilience, higher rural income. They do not need full detail, just the logical flow. This helps connect stakeholders' desired outcomes to project activities. One group can present their chart.

Tip for Success: *"Engage local communities early to prevent resistance."* Many agroforestry projects fail when local stakeholders feel projects are imposed on them. **Early engagement and co-design** can turn would-be resistors into project champions.

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