Project Management in Agroforestry

- **Description:**
  A practical 2-day training module that equips advisors with the skills to plan, manage, and scale agroforestry projects effectively.
- **What you will gain:**

  Understanding of key project management frameworks and tools

  Skills to plan timelines, budgets, and stakeholder engagement

  Ability to manage risks and adapt projects over time

  Confidence to design and deliver impactful agroforestry projects
- **Includes:**

  Planning tools (WBS, Gantt charts, SMART goals)

  Case studies from across Europe

  Templates for monitoring, evaluation, and funding
- **For:**
  Agroforestry extension advisors, project coordinators, and rural development professionals

Funded by the European Union

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Introduction

Agroforestry – integrating woody perennials with crops and livestock – is emerging as a key solution for climate adaptation, carbon sequestration, biodiversity enhancement, and rural resilience across Europe. Fulfilling the EU Green Deal aims with policy support from the Common Agricultural Policy (CAP) eco-schemes and rural development programmes, interest in agroforestry is growing since 1997. However, adoption on the ground remains fragmented, in part because agroforestry projects are complex, long-term, lack of appropriate value chains that should involve many stakeholders. Extension services, acting as the bridge among research, policy, and farmers, can play a pivotal role in scaling up agroforestry by applying structured **project management** approaches. Embedding sound project management into agroforestry initiatives helps coordinate diverse actors, manage long timelines, and ensure efficient use of resources.

FIGURE 1. Species biodiversity in a pasture managed trough silvopasture in Slovakia. Source: Couso-Viana, A.

This training module is designed to equip agroforestry **advisors** and project coordinators with practical project management skills tailored to European contexts. It combines strategic concepts with hands-on tools and case studies, so advisors can lead projects that are **efficient, scalable, and impactful**. We will draw on both classical frameworks (like PRINCE2 or the EU's PM^2) and adaptive Agile methods to handle the dynamic, ecological nature of agroforestry projects. By the end, participants will be able to turn agroforestry ideas into well-managed projects that deliver lasting environmental and social benefits.

Learning Objectives

By the end of this 2-day training, participants will be able to:

- **Understand core project management principles** and why they are critical for successful agroforestry initiatives.
- **Define clear project goals** (using SMART criteria) and **apply agile principles** (e.g. sprint planning) to break long-term agroforestry visions into achievable steps.
- **Use key project planning tools** – Work Breakdown Structures (WBS), Gantt charts, and responsibility matrices – to plan timelines, tasks, and resources for agroforestry projects.
- **Engage stakeholders effectively**, mapping their interests/influence, and establish strong governance and communication strategies for multi-actor projects.
- **Identify and mitigate risks** (e.g. climate, financial, policy risks) using risk assessment matrices, and developing adaptive strategies to ensure project resilience.
- **Explore financing options** for agroforestry (EU programs like CAP ecoschemes, Pillar II (agri-environment, investments and operational groups), LIFE, Horizon Europe, private and national public funding) and practice pitching projects to secure funding.
- **Monitor and evaluate project progress** using relevant indicators (biophysical, socio-economic) and digital tools, and report impacts to stakeholders and funders.

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- **Develop a practical project plan** for an agroforestry initiative that can be implemented in their advisory work, including timeline, budget, stakeholder plan, and MEL (Monitoring, Evaluation & Learning) framework.

Training Structure Overview

This module is structured as a two-day workshop (approximately 6–7 hours per day, including breaks) that balances short presentations with participatory activities, role-plays, and group exercises. Day 1 focuses on foundational skills in facilitation and group management, ensuring advisors to understand key principles and group dynamics. Day 2 builds on these skills to tackle more advanced topics such as conflict resolution and the facilitation of multi-stakeholder networks. Participants will engage in simulations and planning exercises to apply techniques in realistic agroforestry scenarios. Each session outlined below includes the session's objectives, content, suggested facilitation methods, and timing. Trainer tips are provided throughout for guidance on what to emphasize or common pitfalls to avoid. A toolkit of resources (e.g. sample ground rules, stakeholder mapping templates, and facilitation checklists) is referenced for use during training and in future real-world applications. The workshop is interactive and learner-centred – just as we expect advisors to facilitate farmer-centred learning, the training itself models participatory techniques.

Audience & Format

This training is designed for agroforestry extension advisors to facilitate group learning or multi-actor meetings. It assumes a basic familiarity with agroforestry concepts but does not require prior formal training in facilitation. The format is an in-person workshop with 10–25 participants, though it can be adapted for online or hybrid delivery. The room should be arranged flexibly (e.g. semi-circle or groups) to encourage interaction. Flipcharts, markers, post-it notes, and an LCD projector are the main materials needed. A co-facilitator or assistant is useful for helping with breakout groups and time management, especially for the interactive exercises.

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Day 1: Foundations of Project Management in Agroforestry

Day 1 introduces the fundamental concepts and tools of project management, framed in the context of agroforestry. Participants learn how to initiate a project properly – defining clear goals, engaging stakeholders, and planning tasks and timelines. The focus is on building a strong foundation before execution. By the end of Day 1, attendees will have drafted a basic project plan and be aware of common pitfalls and success tips for agroforestry projects.

Schedule at a Glance (Day 1)

09:00–09:30	Welcome & Introductions
09:30–10:45	Session 1: Introduction to Project Management in Agroforestry
10:45–11:00	Break
11:00–12:30	Session 2: Project Initiation: Goals & Stakeholder Engagement
12:30–13:30	Lunch
13:30–15:00	Session 3: Work Planning and SMART Goals (Projects & Sprints)
15:00–15:15	Break
15:15–16:30	Session 4: Detailed Project Planning: WBS, Timeline & Resources
16:30	Day 1 Wrap-Up & Reflection Assignment

(Note: Timing can be adjusted based on participant number and interaction level. Each session includes interactive components as detailed below.)

Welcome & Introductions (09:00–09:30)

The training kicks off with a welcome and an introduction of facilitators and participants. Start with a brief overview of the training purpose and agenda. Then engage everyone with a quick icebreaker:

Icebreaker – "Your Agroforestry Project in One Sentence": Each participant introduces themselves and describes an agroforestry project they are involved in (or a concept) in just one sentence. This fun challenge sets a collaborative tone and surfaces the diversity of projects in the room (e.g., *"Connecting hedgerows with pasture to improve biodiversity on our family farm"*).

Use this session to establish a positive learning atmosphere. Emphasize that no question is too basic – the goal is to share experiences and learn new management approaches together. Also, highlight any housekeeping (break times, materials provided, etc.). By 09:30, everyone should feel acquainted and ready to dive into content.

FIGURE 2. Co-creation activity during AF4EU workshop.

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Session 1: Introduction to Project Management (PM) in Agroforestry (09:30–10:30)

Objective

Understand what defines a project and how general project management principles apply to agroforestry initiatives. Recognize the unique challenges but also the barriers of agroforestry projects and the importance of a structured approach.

Key Topics

What is a Project?

Distinguish projects from routine work (a project is a temporary endeavor with specific objectives). Use an agroforestry example, such as establishing a new plot or farm silvopasture pilot, to illustrate the definition. Emphasize that projects have a lifecycle (start and end) and milestones and deliverables at the end.

Project Management Basics

Introduce the concept of managing knowledge, skills, tools, and techniques to meet project objectives. Outline key phases (initiation, planning, execution, monitoring, closure) which will be explored in depth later.

Why Project Management in Agroforestry?

Discuss how agroforestry projects benefit from good management:

- **Long timelines (**woody perennials (trees/shrubs) growth meaning ecological frame change) that requires sustained and sustainable planning and adaptation from the beginning to the end.
- **Multi-disciplinary scope** (ecosystem services delivery, agriculture, community) needs coordination of expertise.
- **Multiple stakeholders** (farmers, researchers, policymakers, retailers, processors, community groups, etc..) must collaborate over time.
- **Funding** often comes from competitive grants or public programs, requiring clear proposals and accountability, but also from private funds.

In short, applying Agroforestry Project Management (PM) frameworks improves efficiency, minimizes risks, and increases impact of agroforestry in the farm business.

Challenges Unique to Agroforestry: Brainstorm or present common challenges

- Long project horizons (woody perennials including trees and shrubs take years to mature) implying managing tame over time.
- Multiple-goals (productive, ecosystem services, social outcomes) that can lead to scope creep if not clearly defined.
- Environmental uncertainties (weather variability, climate change, pests) and policy changes that can derail plans.
- Stakeholder cooperation– e.g., balancing farmer needs with conservation goals and regulations.

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- **Common PM Methodologies:** Briefly mention that there are established methodologies like **Waterfall (linear stages)**, **Agile (iterative cycles)**, and **Hybrid approaches**, as well as formal frameworks like **PRINCE2** or **PM²** (used in EU institutions). Assure participants that the training will touch on the best of each, without heavy theory.

CASE STUDY: Upfront Planning & Support – Silvopasture Establishment (France)

See AF4EU Factsheet: Archambaud, C. (2025). Presentation Of Silvopasture Systems. *AF4EU*. https://doi.org/10.5281/zenodo.19235008

This AF4EU factsheet presents silvopastoral systems where livestock (cattle, sheep, poultry) are integrated with trees and hedgerows. The success of these systems depends heavily on early planning decisions, including tree placement, livestock rotation, and harvest timing. For example, farmers must plan grazing exclusion periods to prevent damage to fruit or soil and coordinate rotations across multiple plots to maintain productivity. The system also requires aligning species choice, soil conditions, and farm objectives from the outset.

Project Management Aspects:

- Detailed upfront system design (tree–livestock interactions, rotation schedules)
- Planning for seasonal constraints (grazing vs. harvest timing)
- Integration with farm operations and long-term productivity goals
- Advisory support to guide complex system setup

Key Takeaway:

Silvopasture systems succeed when carefully planned from the beginning. **Upfront design and advisory support** reduce **management conflicts** and ensure **long-term productivity and sustainability.**

Ask participants if they have seen similar initiatives or what initial impressions they have on why some projects succeed versus fail.

Interactive Exercise – Past Project Reflections (15 min): Each participant (or small groups) reflects on a previous agroforestry, agricultural or forest project they were involved in and identifies **one key challenge** they faced. It could be unclear goals, stakeholder conflict, delays, etc. Invite a few to share. Prompt the group to consider *"What project management tools or practices might have helped address those challenges?"*. Got some answers on a flipchart (e.g., "clearer objectives," "better task planning," "risk planning"). This creates a needs awareness that the upcoming sessions will tackle.

Tip for Success: *"Well-defined objectives prevent scope creep."* – Reinforce that a project without clear goals can easily drift off-course. Throughout the training, we will emphasize setting and sticking to clear objectives.

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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)

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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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Session 3: Work Planning and Setting SMART/Sprint Goals (13:00–14:30)

Objective

Translate big-picture ideas into concrete plans. Learn to break down an agroforestry project into manageable components and set both long-term and short-term (Agile "sprint") goals. Participants practice developing a Work Breakdown Structure (WBS) and formulating short-term objectives from a long-term vision linked to the theory or change.

Key Topics

Project Phases Overview

Begin by revisiting the standard project lifecycle phases – Initiation, Planning, Execution, Monitoring & Control, Closure – and map them to agroforestry. For example-

Initiation: site selection & stakeholder signup;

Planning: designing the agroforestry system & schedule;

Execution: planting trees, training farmers;

Monitoring: tracking tree growth and community feedback;

Closure: final reports and handover.

This reinforces where we are in the process (we are moving from Initiation into Planning now). You can illustrate this with a simple timeline on a slide or flipchart.

Work Breakdown Structure (WBS)

Introduce the WBS as a critical planning tool for organizing work. A **WBS** https://www.mindmeister.com is a hierarchical breakdown of the project into **phases → deliverables → tasks**. Explain how it helps **"chunk"** a multi-faceted project into smaller, actionable pieces so nothing is overlooked. Use an agroforestry example to demonstrate:

- *Phase 1:* Project Initiation (deliverables: stakeholder map, project charter)
- *Phase 2:* Site Preparation (deliverables: site survey, land prep)
- *Phase 3:* Planting or seeding (deliverables: seedlings sourced, planting completed)
- *Phase 4:* Monitoring & Maintenance (deliverables: quarterly reports, maintenance runs). Each deliverable can be broken into milestones following specific tasks. For instance, *Planting* might include tasks: "Train planting team," "Dig planting holes," "Plant trees/shrubs," "Install fencing." Mention that each task will later be assigned to someone and given a timeline. The WBS focuses on *what* has to be done, not when or by whom (that comes next).

Creating a WBS: Best done as a tree diagram or outline. Note that there are templates and mind-mapping tools (e.g. **Mind Meister**) that help create WBS diagrams easily. The key is to be comprehensive but not over-detailed; typically 3-4 levels deep is enough for small projects.

Gantt Charts & Timelines

Once tasks are identified via WBS, a **Gantt Chart** https://www.ganttproject.biz/ is used to schedule them over time. Show or draw a simplified Gantt chart: a calendar view with bars representing task durations, possibly overlapping. Explain elements: tasks, start/end dates, durations, dependencies (e.g., " tree protectors or fencing

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must happen after planting"). Gantt charts help visualize the timeline and ensure a realistic schedule. Mention free tools like **Gantt Project** (open-source software) or even Excel/Google Sheets that can be used to create simple Gantt charts.

Agile Planning – Sprints

Contrast the above "waterfall" style planning with an **Agile** approach. Agile is iterative, instead of planning everything in detail upfront, the project is executed in short cycles or **sprints** (e.g., 2-week or 1-month cycles) with continuous learning. In agroforestry, agile can be useful during implementation when adapting to new information (for example, if a certain tree species is not thriving, adjust in next sprint). Introduce the idea of a **sprint goal** – a short-term objective that contributes to the longer project goal. For example, a sprint goal could be "In the next 2 weeks, prepare 5 hectares and plant 500 saplings of species X." Agile does not replace long-term planning but complements it by encouraging flexibility.

- Use an analogy: The **SMART long-term goal** sets our destination, and **sprint goals** define the next steps on the path. We need both – a compass and a map that we update as we go.

Linking to Theory of Change

Ensure participants see how the breakdown of tasks and short-term goals still ties back to the Theory of Change and ultimate outcomes. Each task or sprint should ideally link to an outcome in the theory of change (e.g., planting trees leads to increased carbon sequestration).

Activity – Building a WBS and Timeline (45 min)

Now let teams apply these concepts. This exercise can be done in small groups (4-6 people each) with flipcharts or using a laptop with a template:

1. **Define the Project:** Assign each group a sample agroforestry project (or let them choose one they are interested in). For example: *"Establish a community food forest on 10 hectares"*, or *"Integrate an agrisilviculture practice alley cropping (trees + crops) on a 50 ha arable farm"*, or even use one of the earlier case examples like the Netherlands living lab.
2. **Create a WBS:** Give groups 15-20 minutes to draft a Work Breakdown Structure for their project on paper. They should identify 3-4 major phases and then break down a few key tasks under each phase. Trainers should circulate to assist. Encourage them to think of all critical tasks (obtaining permits, training farmers, site prep, etc.).
3. **Develop a Timeline:** Next, have them draw a simple timeline (e.g., a horizontal line divided by months or quarters) and place their tasks/phases along it (~10 minutes). They should estimate what happens in sequence and what can happen in parallel. If possible, identify any dependencies (e.g., "must finish site prep before planting starts in spring"). They do not need software – rough hand-drawn Gantt-style timeline is fine. Alternatively, if a projector and a prepared Excel/Gantt chart template are available, one group could demo populating it live.
4. **Set a Sprint Goal:** Now ask each group to imagine they are following an Agile approach during execution. What would be a sensible 2-week "sprint goal" at some point in their project? (5 min) For instance, in the forest farming such as food forest project, a sprint goal could be "Organize community volunteer day to plant 100 fruit trees in Plot A and install drip irrigation." They should ensure it's Specific and Achievable in that short time frame.

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5. **Group Presentations:** Give time to each group to briefly presentone aspect of their plan – either their WBS outline or their timeline and sprint goal (each group 2-3 minutes). Encourage others to ask questions or offer suggestions.

Debrief Discussion: Highlight how breaking the work down made the projects feel more manageable. Did they recall any tasks they might have forgotten without a systematic approach? Also, discuss how setting a short sprint goal can help motivate the team and reveal issues early (e.g., "We realized we needed more volunteers to meet our 2-week planting target – better to know that early!").

Tips for Success:

"Use free online tools to simplify planning." For instance, Trello https://trello.com/ can serve as a simple task board, and Gantt Project or Google Sheets can help track timelines. Demonstrate or describe Trello: tasks as cards that move from *To-Do* to *Doing* to *Done*, which is great for Agile workflows.

Develop a Resource Allocation Matrix alongside the plan (a table listing each task with required resources: people, materials, budget). This helps ensure you have the right resources at the right time. (Note: A RACI chart could also be introduced here to assign Responsible/Accountable persons to tasks in the WBS, but it might be advanced for some. If participants are comfortable, discuss how a RACI matrix would assign roles for each major task in their WBS). https://www.teamgantt.com/blog/raci-chart-definition-tips-and-example

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Session 4: Detailed Project Planning – Budgets, Risk & Sustainability (14:45–16:30)

Objective

Strengthen planning by addressing the practical aspects of executing agroforestry projects: budgeting and resource management, risk assessment, and planning for long-term sustainability beyond the project's initial funding. Participants will identify common risks and mitigation strategies and consider how to maintain project benefits over time. For this the DST provided by AF4EU may be helpful (https://platform.af4eu.eu/afi-bus-dss).

Key Topics

Budgeting & Resource Management

Every project needs a budget and resource plan. Discuss typical cost components in agroforestry projects: seedlings or saplings, fencing, tools, labor (planting, maintenance), training workshops, monitoring equipment (e.g., soil test kits, drones for monitoring), admin/coordination costs, etc. Emphasize **financial planning**: allocating costs to tasks/phases identified in the WBS. Mention creating a simple budget table (cost item, quantity, unit cost, total) and ensuring it aligns with timeline (cash flow over project years).

- Also discuss **human and material resources**: e.g., scheduling farm labour when it's off-peak season, ensuring nursery stock availability, or aligning with tree planting seasons. **Resource management in agroforestry** can be tricky due to seasonal windows (planting season) and long-term maintenance needs.
- Share tips: build in a contingency (e.g., +10% of budget for unexpected costs), and consider in-kind contributions (e.g., a farmer contributing land or labour). For European advisors, note that some budgets need to consider co-funding or matching funds depending on funding source.

Risk Management

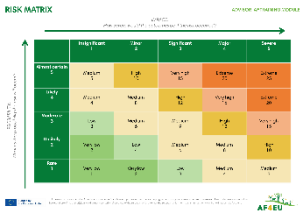
Agroforestry projects face various risks. Introduce the process of **Risk Management**:

1. **Identify Risks:** Brainstorm potential risks in categories: *Environmental* (droughts, floods, fires, pests/disease outbreaks in trees), *Financial* (funding shortfall, price fluctuations for products), *Social/Stakeholder* (farmer drop-out, land tenure issues, community opposition), *Operational* (delay in getting permits, supply chain issues for seedlings), *Policy* (changes in subsidy programs, new regulations). Use examples: a severe drought could kill young trees; a key partner might lose interest.

2. **Assess Risks:** For each risk, estimate its **Likelihood** (Low/Medium/High) and **Impact** (Low/Medium/High) on the specific local project economic, environment and social frame. For instance, drought in a Mediterranean region might be High likelihood and High impact; a policy change might be lower likelihood but high impact. This helps prioritize which risks need most attention.

3. **Mitigation Strategies:** For high or medium risks, plan what you can do to reduce the chance or impact. E.g., for drought risk – choose drought-resistant species, plan irrigation, or schedule planting in wetter season. For stakeholder risk – have regular meetings, Memorandums of Understanding (MOUs) with partners. For funding risk – diversify funding sources or have a modest start that can scale if more funds come.

4. **Risk Matrix Tool:** Show a simple **Risk Matrix** (a table with risks as rows and columns for likelihood, impact, mitigation) https://safetyculture.com/checklists/5x5-risk-matrix-template/. For example:



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- **Risk:** *Drought* – Likelihood: High; Impact: High; Mitigation: *Select drought-resistant species and mulch for moisture.*
- **Risk:** *Policy change* (e.g., subsidy removed) – Likelihood: Medium; Impact: High; Mitigation: *Engage policymakers, align project with current policy goals (like CAP priorities).*
- **Risk:** *Market price drop for products* – Likelihood: High; Impact: Medium; Mitigation: *Diversify farm products or income (e.g., also produce timber or use agro-tourism).*

This systematic approach is often documented in a **Risk Register** The idea is to regularly review and update it during the project.

Ensuring Sustainability

Many projects end when initial funding ends, causing good practices to fade. Discuss how to plan for **project sustainability** and no-harm environment farm goals exit strategy from the start:

- Encourage **local ownership**: train farmers and local extension advisors to continue activities; form farmer groups or cooperatives for mutual support.
- **Policy integration**: if the project can inform policy or be integrated into government programs (like getting agroforestry recognized in local land-use plans or subsidy schemes), it gains longevity.
- **Financial sustainability**: explore options like carbon credits for agroforestry (e.g., through voluntary carbon markets such as Gold Standard), payments for ecosystem services, or integrating profitable enterprises (mushroom cultivation, fruit, or animal integration) so that the system finances itself after the project.
- **Scaling up**: design the project as a pilot that can be replicated. If it's successful, have documentation and business case ready to pitch to other funders or communities. Mention that many EU projects (LIFE, Horizon) expect a replication/scaling plan as part of the project outputs.

CASE STUDY: Project Risk Management – Common Land Silvopastoral Systems (Portugal)

See AF4EU Factsheet: Castro, M. (2025). The role of sheep and goat herding in forest fire risk management. AF4EU. https://doi.org/10.5281/zenodo.19235164

In Portugal's mountainous regions, traditional silvopastoral systems based on common land ("baldios") provide a practical example of project risk management in agroforestry. These systems integrate trees, pasture, and grazing livestock under collective governance, enabling the use of fragmented and marginal land resources.

From a risk management perspective, the system proactively addresses key threats including land abandonment, wildfire risk, low farm profitability, and climate stress. Grazing reduces fuel loads and fire risk, while diversified land use maintains productivity in otherwise unviable areas. The use of locally adapted sheep and goat breeds lowers input requirements and reduces exposure to climate variability. Community-based management and informal agreements (compascuum) further distribute risk across multiple stakeholders, improving system stability and continuity.

Project Risk Management Aspects:

• Risk identification: land abandonment, fire hazard, low productivity, climate variability

• Risk mitigation: continuous grazing, vegetation management, use of adapted livestock

• Risk sharing: collective land governance and community-based management

• Cost risk reduction: low-input system design and reduced dependency on external inputs

• Adaptive capacity: reliance on local knowledge and flexible, informal arrangements

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Key Takeaway:

Effective project risk management in agroforestry combines ecological practices with social organisation. By identifying key risks early and embedding mitigation measures into system design, these traditional systems deliver long-term sustainability and resilience.

Activity – Risk Assessment Matrix (30 min):

Teams will apply risk planning to their project from Session 3:

1. **List Risks:** Each team lists 3-5 major risks for their project. (5 min brainstorming) Encourage them to cover different categories (one environmental, one social, etc.).
2. **Rate and Prioritize:** For each risk, have them mark Likelihood and Impact as Low/Med/High. Then identify the top 2 risks (e.g., anything with High-High, or High impact). (5 min)
3. **Plan Mitigation:** For those top risks, the team writes down at least one mitigation strategy or contingency plan. (5-10 min)
4. **Share:** Each team shares one top risk and their plan with the room (each in ~1 minute). For example, *"Risk: Cattle might damage young trees (Likelihood: Medium, Impact: High). Mitigation: We plan to install tree protectors and test fast-growing nurse shrubs as a barrier."* Another team or the trainer might chime in with additional ideas (e.g., secure additional grazing control funding, involve herders in monitoring). This way, participants learn from each other's risk strategies.

Discussion: Acknowledge that not all risks can be eliminated, but having a plan makes the project more resilient. Also, point out how some strategies (like diversifying income sources or engaging policymakers) appeared multiple times – these are general best practices. Connect back to sustainability: many mitigation strategies (like diversifying income or securing policy support) also contribute to long-term viability.

Tip for Success: *"Diversify income and support – don't put all your eggs in one basket."* For instance, a project that taps multiple funding sources (public grants, private sponsors, farm revenue) is less likely to collapse if one source dries up. Similarly, an agroforestry system with diverse products (timber, fruit, livestock) can better withstand market or climate shocks.

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Wrap-Up & Day 1 Assignment (16:30)

Spend the last few minutes of Day 1 consolidating what was learned:

Recap Key Points

Ask participants for one takeaway from the day. You can list on a board: e.g., "clear goals," "stakeholder mapping," "planning tools like WBS/Gantt," "risk matrix," etc. This reinforces the learning objectives of Day 1.

Preview Day 2

Briefly mention that tomorrow will cover **execution techniques (Agile), funding and scaling strategies, monitoring and evaluation, and a final project simulation**. This gets them excited for how it all comes together.

Assignment (Evening Homework)

Instruct participants to **draft a brief project plan** for an agroforestry project of their choice (real or hypothetical) to discuss tomorrow. It can be something they are working on or even an imaginary ideal project. It should include:

- A short **goal statement** (what they aim to achieve, SMART if possible).
- A list of **key stakeholders** and a note on how they'd engage them.
- A rough **WBS or task list** (major phases and tasks).
- One or two **risks** and planned responses.
- They can use 1 page or a few slides – whatever format is comfortable (some will write paragraphs, others might sketch a timeline). The point is to apply today's concepts to flesh out an idea. Emphasize this is not graded – it's for their own benefit and will be used in a peer feedback session in the morning.

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Day 2: Advanced Project Management & Scaling Up Agroforestry

Day 2 builds on the foundations to tackle execution, scaling, and evaluation of agroforestry projects. Participants will learn to manage projects adaptively using Agile methods and digital tools, explore strategies to secure funding and scale successful models, and design monitoring and evaluation plans to measure impact. The day concludes with a realistic problem-solving simulation and reflection on how to apply these skills in their work. Day 2 is about turning plans into action and ensuring lasting impact.

Schedule at a Glance (Day 2)

09:00–09:30	Recap of Day 1 and Peer Feedback on Project Plans
09:30–11:00:	Session 1 – Agile Project Execution & Digital Tools
11:00–11:15	Break
11:15–12:45	Session 2 – Scaling Projects & Securing Funding
12:45–13:45	Lunch
13:45–15:15	Session 3– Monitoring, Evaluation & Learning (MEL)
15:15–15:30	Break
15:15–16:30	Session 4– Problem-Solving Simulation & Conclusion
16:30	Final Discussion, Closing Remarks & Evaluations

Morning Recap & Peer Feedback (09:00–09:30)

Start Day 2 by revisiting the previous day's learning and building a bridge to today's topics:

- **Quick Recap Quiz:** Pose a few quick questions to the group to refresh key concepts (e.g., "*What does WBS stand for and why is it useful?*", "*Name one risk and one mitigation from yesterday's exercise.*"). This light quiz can be done by throwing a soft ball around – whoever catches answers and then throws to the next person. Ensure core ideas are recalled.
- **Peer Review of Assignments:** Organize a brief feedback session for the project plan homework:
    - Have participants pair up (or form small groups of 3) and exchange their one-page project plans. Give ~10 minutes for them to explain their plan to each other and receive feedback or suggestions. Encourage the listeners to identify one strength of the plan and one area to clarify or strengthen (e.g., "*Your goal is very clear, I wonder if you considered X stakeholder as well?*").
    - If time permits (especially if groups are small), use a **"fishbowl"** method for a couple of volunteers: One participant shares their project idea with the whole room in 2 minutes, then others chip in constructive feedback or questions for another 2-3 minutes. This is done in a supportive spirit.
- **Lessons from Plans:** Ask, *"What common challenges or questions came up in your discussions?"* Perhaps some struggled with making goals measurable, or unsure about stakeholder influence. Address one or two as a group, reinforcing best practices (for example: if measurable goals were tough, reiterate examples of quantitative targets).
- Congratulate them on applying the concepts. Emphasize that today we will add more tools (agile methods, funding, MEL) that they can incorporate into those plans to make them even stronger.

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Session 1: Agile Project Execution & Digital Collaboration Tools (09:30–11:00)

Objective

Enhance project execution skills by comparing Agile vs. traditional management and discovering digital tools that support effective teamwork and adaptive management in agroforestry projects. Participants will experience an Agile-style simulation to practice responding to changes during project implementation.

Key Topics

Agile vs. Traditional (Waterfall) Management

Description	Traditional (waterfall) **Well-suited for projects with clearly defined steps and outcomes (we plan everything, then execute).**	Agile **Suited for projects where learning and change are expected (we plan in smaller increments, deliver in iterations, and adjust as we go).**
Pros	Thorough upfront planning Clear sequence	Flexible High stakeholder involvement Continuous improvement
Cons	Inflexible to change May be slow to adjust	Needs disciplined communication Not all tasks can be easily iterative *(e.g., tree planting is seasonal – you can't iterate planting off-season!)*

- **Application to Agroforestry:** Many agroforestry projects benefit from a *hybrid approach*. For example, overall design and planting schedule might be planned (waterfall), but how training is delivered or how maintenance is adapted might use agile cycles (learn and adapt each season). Emphasize that we can use agile principles (like regular reflections, iterative improvements) even within a long-term project.

- Introduce the concept of the **Agile Sprint Cycle:** Plan → Execute → Review → Improve. In agroforestry, a "sprint" could be a growing season or a quarter. After each, the team reviews progress (e.g., survival rate of trees, community feedback) and tweaks the plan for the next season. This is analogous to adaptive management in ecological projects.

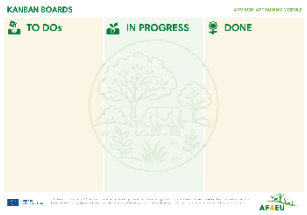
Team Communication & Cadence

Agile emphasizes frequent communication (daily stand-ups, bi-weekly sprint reviews). While daily meetings may not be feasible in extension work, the idea of regular check-ins is valuable. Recommend establishing a consistent meeting schedule for the project team (e.g., monthly coordination calls, weekly brief updates). This keeps everyone aligned and issues surfaced early. **"Regular check-ins help resolve issues early."** (Tip).

- Also mention communication tools: for example, WhatsApp or Signal groups for quick team updates in rural projects, or an email newsletter for stakeholders. The key is transparency and frequent touch-points.

Kanban Boards & Trello

Introduce **Kanban** as a visual workflow management method, often implemented with tools like **Trello** or **Asana**. Show a simple Kanban board: columns labeled *To Do, In Progress, Done* (and maybe *Blocked*). Each task from the WBS is a card that moves across as work progresses. This provides at-a-glance status.



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Trello Demo: If internet or a projector is available, quickly demonstrate a Trello board https://trello.com/ for an agroforestry project. For example, *To Do:* "Buy seedlings," "Prepare training materials"; *In Progress:* "Fence construction"; *Done:* "Site survey completed." Team members can be assigned to cards with due dates, and you can attach files (like a field report PDF) or checklists to each task.

- Emphasize how this encourages an Agile mindset: the board is updated continuously, and in weekly meetings the team can review what's stuck (cards not moving) and adjust.
- Mention Trello is free for basic use and accessible via phone – useful for field teams. Asana is similar, and both integrate with calendars, etc.

GIS and Mapping Tools

Highlight that agroforestry projects also benefit from spatial planning tools. A quick mention of **GIS (Geographic Information Systems)** for mapping project sites (e.g., QGIS, or simpler tools like Google Earth). GIS can be used to plan tree layouts, monitor land-use changes, and communicate visually with stakeholders. Also, remote sensing or drones can provide data for monitoring (which ties to MEL session later, but worth foreshadowing as a digital tool).

- If relevant, mention specialized tools like the **FarmTree** tool (an online tool to design agroforestry scenarios and project outcomes) as emerging digital support for agroforestry planning. FarmTree Tool - Reforest project

Adaptive Management

Stress that no matter how good the plan, reality will bring surprises (weather events, new ideas from farmers, etc.). Agile execution means being willing to **pivot** – change project tactics while staying true to overall goals. Cultivate a mindset in the team of continuous learning: treat your project as a "living process" that you periodically adjust. This might mean re-scoping some tasks or adding new ones based on feedback.

Activity – Agile Project Simulation (45 min)

This interactive game lets participants practice responding to project changes:

1. **Setup:** Each group from yesterday continues with their project scenario (or you can shuffle groups for variety). Tell them we fast-forward to the **execution phase** of their agroforestry project. They have a project plan, and now things are happening.
2. **Sprint Planning:** Ask each team to identify what their focus would be for the **first 1-2 months** of implementation – i.e., set a short-term milestone (sprint goal). For example, "*complete site preparation on two farms and plant 1000 trees by end of Month 2.*" (They mostly did this in Session 3, so it is a quick recap.)
3. **Inject a Challenge:** Hand each team a card or paper with a surprise scenario (prepared in advance). For example:
    - "Unseasonal drought hits early – water sources are low."
    - "Half of the required tree seedlings are delayed due to a nursery issue."
    - "A key stakeholder (e.g., a village leader or a funding agency rep) suddenly opposes part of the project."
    - "Community interest is higher than expected – 20 new farmers want to join the project (but budget is fixed)."
    - Each scenario should pose a problem or an opportunity requiring a change in plan.

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4. **Team Discussion:** Give teams ~15 minutes to discuss how they will adapt their project for the next sprint given this development:
    - What immediate steps will they take in the next 2 weeks? (e.g., find emergency water trucking, reschedule planting, hold a community meeting to address concerns, prioritize who gets resources, etc.)
    - What changes to their project plan or timeline will they make if this persists? (Reallocate budget, seek extra funding, adjust targets?)
    - Emphasize they should keep the overall goal in mind but be flexible on methods. They should write down their revised short-term plan or draw adjustments on their Kanban/Gantt if they had one.
5. **Review:** Each team shares their scenario and response (about 3 minutes each). Encourage quick, focused reports: *"Our challenge: drought. Our adaptation: we decided to delay planting to next season and instead focus this sprint on training farmers in water conservation. Also, we are securing water tanks as a contingency."*

Discuss as a group: Do these reactions embody good project management? Are they being **proactive** and **solution-oriented**? Offer praise for creative solutions, and add any additional ideas. For instance, if a group did not mention it, you might add "*Perhaps also document the drought impact to inform future grant proposals for water infrastructure – turning a crisis into a learning.*"

Tip for Success: *"Be prepared to pivot – adaptation is key."* Plans are guidelines, not gospel. Encourage a culture where the team is not afraid to say "this isn't working, let's try something else". The best project managers monitor conditions closely and adjust course **proactively** rather than waiting for failures.

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Session 2: Scaling Up & Securing Funding for Agroforestry Projects (11:15–12:45)

Objective

Explore strategies to expand successful agroforestry initiatives and navigate the funding landscape at local, regional, national and European scales. Participants will learn about major funding sources (EU and others) and practice pitching a project idea convincingly to potential funders.

Key Topics

Scaling Strategies

When a project demonstrates positive results on a small scale, how can it grow? Discuss different dimensions of scaling:

- *Scaling Out:* Replicating the project in new locations or with more participants (e.g., from 5 pilot farms to 50 farms). This may require creating toolkits or manuals (like this one!) so others can adopt the model, and training additional facilitators.
- *Scaling Up:* Integrating the project approach into broader programs or policy. For example, after a successful pilot, working with government to include agroforestry in national extension packages or grant schemes. Another angle is reaching higher levels of institutions – turning a local project into a regional or national initiative.
- *Scaling Deep:* Increasing impact by changing mindsets or social norms (harder to quantify, but e.g., making agroforestry an accepted standard practice in a community). Often involves education and policy advocacy.
- Emphasize that not all projects need to become huge; sometimes integrating into existing frameworks (like a co-op or a school curriculum) ensures longevity and growth in impact.
- **Case of AFINET, AGFORWARD or AF4EU (EU projects):** Briefly mention that EU networks like AFINET (agroecosystems) and AF4EU (value chains) connected agroforestry pilots across countries, effectively scaling out by sharing knowledge, and scaling up by informing EU policy recommendations. This shows advisors they are part of a bigger movement and can leverage European networks.

Funding Landscape in Europe:

Give an overview of key funding sources for agroforestry projects:

- **CAP (Common Agricultural Policy) – Pillar I (ecoschemes) and Pillar II (Rural Development Programs):** Many countries have measures supporting agroforestry (e.g., grants for planting trees on farms, eco-scheme payments, agri-environment payments, operational gropus). Advisors should check their national/regional RDP for measures that can be used to implement agroforestry in a direct or indirect way. CAP funding linked to the development of operational groups often requires writing a proposal to the local managing authority or helping farmers apply for support, those associated with agri-environment or eco-scheme payments need to fill an application form **EU LIFE Programme:** Focused on environment and climate. Agroforestry fits LIFE projects because of biodiversity and climate adaptation benefits. These are competitive but can fund demonstration projects and capacity building with substantial budgets. If applicable, mention a successful LIFE agroforestry project (like LIFE Montado-Adapt, LIFE-SILFORE, LIFE-VAIA in Spain/Portugal/Italy/France) that got EU support.
- **Horizon Europe:** Research and innovation funding. Agroforestry projects can be part of multi-actor research consortia (e.g., a Horizon project may pilot new agroforestry techniques in living labs). These involve

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international partnerships and typically a research institution lead; advisors can partner or benefit via case study sites or as stakeholders.

- **EIP-AGRI Operational Groups:** At country level, funding for innovative on-farm projects (often shorter term) linked to the Rural Development programmes. Agroforestry fits well if farmers and researchers team up.
- **National/Regional Grants:** Some governments or NGOs have climate action funds, landscape restoration grants, or innovation prizes that agroforestry could access.
- **Private Sector & Carbon Finance:** Emerging opportunities where companies fund tree planting for carbon offsets or CSR (Corporate Social Responsibility). Standards like the **Gold Standard** or **Verra** have methodologies for agroforestry to earn carbon credits (though the process can be complex). Impact investors or social enterprises might fund agroforestry if a revenue model is present (e.g., selling high-value fruits or timber).

List these on a slide or flipchart for visibility. Encourage participants to share if they know of specific grants in their country. For instance, maybe "*Ireland has a climate farm fund that supported me*" etc.

Crafting a Funding Pitch

Securing funding is part substance (having a good project) and part communication. Share tips on how to **pitch an agroforestry project**:

- **Align with Funder Priorities:** Research what the funder cares about and use their language. E.g., if pitching to an environmental fund, emphasize biodiversity and carbon benefits; if to a rural development fund, emphasize farmer incomes and community benefits. *"Align proposals with donor priorities to increase success"* (Tip).
- **Problem and Solution:** Clearly state the problem or challenge (e.g., "degraded soils and low farm income in region X") and how agroforestry provides a solution, backed by a simple theory of change.
- **What's innovative or impactful:** Funders hear many proposals; highlight what's special: e.g., "first demonstration of agroforestry in this region," or "unique coalition of farmers and scientists," or "leverages new carbon finance mechanism."
- **Plan & Team credibility:** Mention key elements of your plan (timeline, how you will manage it – they will like hearing you use professional PM methods). Also why your team/organisation is capable (experience, partnerships, farmer support).
- **Budget ask and value:** State how much funding is needed and what impact it will buy (for example: "*With €200,000 we will establish 100 ha of agroforestry, train 50 farmers, and increase farm income by 15% while sequestering 500 tons CO_2 per year.*"). Having numbers like these shows that you have done homework.
- Use a simple **pitch template**: *Problem → Solution (your project) → Impact → Ask (funding needed & what for).* For a short pitch, this structure works well.

Activity – Funding Pitch Challenge (45 min):

Participants now practice pitching a project, honing both content and presentation:

1. **Form Teams:** Keep the same project teams or mix new ones for variety. Each team will prepare a **5-minute pitch** for a hypothetical funder of their choice. If teams have their project from Day 1, they can use that as the basis. If not, give a prompt (e.g., "an agroforestry youth training project" or let them invent).

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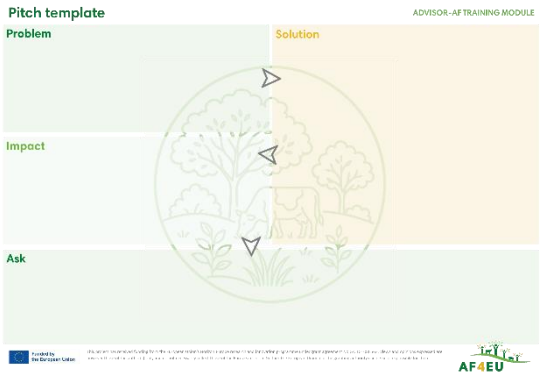
2. **Choose a Funder:** Each team should decide who they are pitching to, as this will shape their angle. For example- *an EU LIFE program committee, a panel of local government officials, a private impact investor, or a community bank*. This can be fictional but should be plausible.

3. **Prepare the Pitch:** Give teams approximately 20 minutes to outline their pitch. Recommend they allocate roles if multiple people will speak (e.g., one does introduction/problem, one does solution, etc.). They can write bullet points or a mini script. If materials are available, they could even draw one illustrative slide or poster (but not required, template available). Key is to cover the basics: **What, Why, How, How much, and Impact.** Remind them to integrate at least one thing learned in training (like mention a risk plan, or stakeholder support, to show funders they are well prepared).



4. **Pitch Presentations:** Each team gets up to 5 minutes to present as if the trainers/audience are the funders. To keep it fun and interactive, the training facilitators or a selected jury of participants can act as the "funding panel". Encourage pitchers to be clear and passionate. After each pitch, allow 2 minutes of **Q&A** from the "funders" – typical questions could be "How will you maintain this after our funding ends?" or "What if farmers are not interested?" etc. (The trainers can pose these to ensure crucial points are addressed.)

5. **Feedback:** Applaud each team. Provide constructive feedback focusing on content (Did they align with priorities? Was the objective clear and compelling? Did they quantify benefits?) and delivery (Were they convincing? Did they stay within time?). Peer feedback is welcome too.

Learning Points: Conclude that **packaging the project for funders is as important as the project idea itself**. Advisors often help farmers or local groups write proposals; using these pitching skills and the tools from Day 1 (clear goals, risk management plans, etc.) can significantly improve funding success rates.

Tip for Success: *"Use a logic model to communicate impact to funders."* (Recommendation). In proposals or pitches, a simple diagram or table that links *inputs → activities → outputs → outcomes → impact* shows the funder exactly how their money will create change. It is essentially a condensed theory of change, and funders appreciate that clarity.

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Session 3: Monitoring, Evaluation & Impact Reporting (13:45–15:15)

Objective

Learn how to track project progress and measure the outcomes of agroforestry projects using Monitoring and Evaluation (M&E) frameworks. Participants will identify key performance indicators (KPIs) for agroforestry and explore tools for data collection and analysis to report on project impact convincingly. Powerpoint slides are available.

Key Topics

Purpose of M&E

Define **Monitoring** as the ongoing tracking of project activities and outputs (are we doing what we said, on time, on budget?) and **Evaluation** as the periodic assessment of outcomes and impacts (are we achieving the desired effect? what have we learned?). Emphasize how M&E closes the project management loop – feeding back into project adaptation (learning) and accountability to stakeholders/funders. In agroforestry, this is crucial given long-term ecological changes; even short-term projects need a plan to measure later outcomes (possibly by handing over to local institutions for continued monitoring).

Key Performance Indicators (KPIs)

Suggest meaningful KPIs for agroforestry projects in three categories:

- **Environmental/Biophysical:** e.g., Tree survival rate (% of planted trees surviving after 1, 2, 5 years), Biodiversity counts (number of bird/insect species observed, pollinator counts), Soil health metrics (soil organic matter %, erosion rate, moisture retention), Carbon sequestration (tons C per ha, could be modelled over time).
- **Social/Economic**: e.g., Farmer income change (additional revenue from agroforestry products, savings from reduced inputs), Crop yields in agroforestry vs. control plots, New jobs or businesses created (like beekeeping, nursery), Participation metrics (number of farmers adopting, number of trainings held, attendance). Also stakeholder satisfaction (via surveys) or capacity built (knowledge gain assessments).
- **Project Management/Process**: e.g., Milestones achieved on schedule (yes/no for key deliverables), Budget variance (% over/under budget), Stakeholder engagement (e.g., number of meetings, feedback score). These are more internal but important for the team to self-evaluate efficiency.
- Encourage **participants to suggest indicators** from their experience. Write a list and note that indicators should be specific and measurable. Not everything can be measured easily, so pick a few that best demonstrate success. Often, funding proposals will require a logical framework or log-frame or indicators table – being prepared with these helps.

Developing an M&E Plan

Outline steps:

1. **Select Indicators:** as above, maybe 5-10 total covering key objectives.
2. **Set Targets:** if you set a baseline (e.g., current average income, current biodiversity level), set targets for each indicator if possible (e.g., "by year 3, 30% increase in income, 10% more bird species"). Targets can be tricky (don't over-promise) but useful.
3. **Data Collection Methods:** decide how to get the data. Options:
    i. **Field surveys & observations:** e.g., measuring tree growth, surveying farmers about yields.

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ii. **Remote sensing:** using satellite images or drones to assess tree cover or vegetation health over time (some projects use annual drone imagery to document growth).

iii. **Farmer record-keeping:** training farmers to log yields, labour, costs which you compile (requires literacy/trust, but participatory monitoring is powerful).

iv. **Interviews/Focus groups:** to capture qualitative outcomes (like how attitudes changed, or stories of success).

v. **Digital tools:** Introduce tools like **KoboToolbox** (a free, open-source mobile data collection app ideal for field surveys in rural areas) https://www.kobotoolbox.org/, or **Google Forms** for simple surveys. KoboToolbox is great because you can design a form (tree survival count, etc.), load it on a smartphone, and data uploads when there is connectivity. **Open Data Kit (ODK)** or **Survey123** are similar tools.

vi. For environmental data, mention open platforms like **Open Foris Collect** (by FAO) for forest data collection or even simple Excel sheets.

4. **Assign Responsibilities:** Decide who will collect data and how often. Perhaps extension advisors do quarterly monitoring visits; farmers might do monthly logs; a student might do a before/after biodiversity study; an external evaluator might be hired for final evaluation. Also plan training if needed (e.g., teaching farmers to measure tree height).

5. **Analyze and Report:** Plan how data will be analyzed (simple stats, GIS mapping for spatial data, etc.) and how you will report it. Reporting could include mid-term and final reports to funders, presentations to the community, academic papers if research oriented, and media releases for general public. Stress the value of **visualizing data** – graphs of growth, maps, infographics – to tell the impact story clearly.

Adaptive Management and Learning

Tie back to agile – M&E is not just for funders, it is for the team to learn and adapt. For instance, monitoring might show that one tree species is outperforming others – so the team might decide to focus on that species in the next phase. An evaluation might reveal that women in the community weren't benefiting as much – prompting a change in approach to be more inclusive in future. Establish a practice of reflective meetings (after a season or year, review data and discuss "*what should we do differently?*"). Many projects have a "Lessons Learned" write-up at the end; encourage participants to contribute to such knowledge for the broader community of practice.

CASE STUDY: Monitoring & Evaluation – the Agroforestry Knowledge Platform

See AF4EU Factsheet: https://platform.af4eu.eu/

In Germany and across Europe, AF4EU partners use structured monitoring approaches within Regional Agroforestry Innovation Networks to assess system performance. The Knowledge Platform collects and shares data on soil health, biodiversity, productivity, and economic outcomes. These insights are used to refine agroforestry practices and inform decision-making. The German RAIN (ZALF) also demonstrates how data and case studies support knowledge transfer and policy engagement, strengthening the evidence base for agroforestry adoption.

Project Management Aspects:

- Use of indicators (environmental, economic, social)
- Data collection through networks and digital platforms
- Knowledge sharing across regions

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- Adaptive management based on results

Key Takeaway:

Monitoring and evaluation enable continuous improvement. Projects that track and share results build **credibility, improve practices,** and **support wider adoption.**

Activity – Designing an M&E Plan (30 min)

Have participants sketch an M&E approach for the projects they have been working on:

1. **Select Indicators:** Each team picks 3 key indicators for their project (one environmental, one socioeconomic, one project performance, for example). Write them down.
2. **Method & Responsibility:** For each indicator, have them decide *how* they would collect the data and *who* would do it. Encourage specificity: e.g., "*Extension officer will measure tree heights and diameters in sample plots every 6 months; use KoboToolbox to record data*" or "*Community facilitators will survey farmers yearly on income changes using a standard questionnaire.*"
3. **Target & Use:** If time, also jot a target (if applicable) and how they will use the information (e.g., "*If tree survival < 70%, we will investigate causes and replant where needed*").
4. **Share One Plan:** Ask one group to volunteer and present one indicator and their plan for it. Then ask others if they chose something different – try to cover a variety (one group might share an environmental indicator, another a social one). Provide feedback or additional ideas for making data collection easier or more robust.

Tools Demo: If possible, show the interface of **KoboToolbox** or a **Google Sheet template** that automatically graphs input data. If not, perhaps display a simple example of an M&E dashboard (could be a slide with a mock-up: e.g., a table of indicators with baseline and current values, or a bar chart of "area afforested vs target"). This can inspire participants to create simple visuals when reporting.

Tips For Success: "Use tech to save time on M&E." Tools like **KoboToolbox** streamline field data collection and reduce errors. Even WhatsApp can be used – farmers send geotagged photos of their fields to monitor growth progress informally.

Emphasize data management: decide on a system early (even if just a shared Excel file) and keep it updated. Data lost or compiled at the last minute is a common issue that weakens evaluations.

Ensure participants see M&E not as a burden but as the way to showcase their hard work. Good M&E means when someone ask "*So what did this project achieve?*", they can answer with confidence and evidence.

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Session 4: Real-World Problem Solving & Final Wrap-Up (15:30–17:00)

Objective

Apply the skills from the training in a realistic, high-pressure scenario to test problem-solving abilities. Then consolidate all lessons and discuss next steps to implement these project management practices in participants' work. This session reinforces teamwork, adaptability, and creative thinking in the face of project crises or conflicts.

Activity – "Project in Crisis" Simulation (45 min):

This is a capstone exercise that brings everything together:

1. **Scenario Setup:** Present a detailed scenario of an agroforestry project encountering serious trouble. For example:
    - *Project:* A community silvopastoral project (woody perennials + livestock) halfway through its 3-year timeline.
    - *Crisis:* A combination of issues hits at once – a funding cut (the second tranche of funding was reduced), a pest outbreak affecting newly planted trees, and a conflict has arisen among stakeholders (some community members complain the project favors certain farmers).
    - Provide specific data points: e.g., "*Budget shortfall: 20% less money than planned for year 2&3; Pest: beetle infestation killing 30% of young trees; Stakeholder conflict: local grazing association filed a complaint that the project's fenced areas limit their cattle's access.*"
    - Write these on a handout or slide. Each team gets the same scenario (or you can have different scenarios for each team if desired).
2. **Team Emergency Meeting:** Each project team (with 4-6 members) acts as the project management unit. They have 30 minutes to develop an **Emergency Action Plan** to address the crisis. They should consider:
    - How to reallocate or find funds (could they cut non-critical activities, approach another sponsor, crowdfund, or scale down expectations?).
    - How to handle the pest (technical solution: seek expert help, switch species, apply treatments, mobilize community for replanting?).
    - How to resolve the stakeholder conflict (hold an urgent meeting with the grazing association to negotiate a solution, involve a mediator, adjust project plans to accommodate grazing needs?).
    - They should also think about communication: what to tell the funder (to reassure them) and the public, and documentation (record what is happening and decisions). Essentially, they are doing rapid risk management and stakeholder engagement under pressure.
    - Encourage them to assign roles like in real life: one focuses on budget solution, one on technical pest fix, one on stakeholder handling, then bring it together.
    - Remind them of tools/approaches: maybe quickly revising their risk matrix (these risks happened – what now?), using stakeholder influence mapping to deal with the grazing group (maybe find an ally or higher authority to help?), agile thinking (reprioritize tasks given new constraints).
3. **Report Back:** Each team gives a **brief crisis response briefing** (5 minutes each). They should state the immediate actions and any changes to the project plan going forward. Example format-

"Our plan:

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1) Finance: We will apply for an emergency grant from X and cut the less critical workshop to save funds, focusing on maintaining core planting activities.

2) Pest: Coordinate with the local extension entomologist to treat infested trees, and start a nursery for resistant species to replace losses in the next planting season.

3) Stakeholders: Convene a meeting with the grazing association and community leaders within a week; propose creating controlled grazing strips within the agroforestry plots as a compromise so cattle can graze certain times. Also engage the mayor to mediate.

4) We will communicate to our main funder a realistic revised target (maybe 80 ha instead of 100 ha) citing these unforeseen issues, emphasizing our proactive steps, and ask for a 6-month no-cost extension to fully meet objectives."

As each team presents, simulate a bit of real pressure: the trainer or other participants can pose one challenging question to each presenting team, such as "What if the funder says no to extension?" or "How will you ensure the pest doesn't return next year?" This forces them to think on their feet, just like a real crisis.

4. **Debrief:** Praise their problem solving and highlight particularly innovative or sound strategies. Discuss common responses and differences. Underscore principles:
    - **Proactivity:** Do not hide problems – address them head-on and communicate with stakeholders/funders honestly, coupled with a solution. This often earns respect and possibly support (sometimes funders give extra help if you show competence in handling issues).
    - **Teamwork in crisis:** How did they organize themselves? In real crises, having clear roles (who talks to funder, who manages field response, etc.) is vital. If not mentioned, note the importance of documenting everything during a crisis for later learning (lessons learned report).
    - **Adaptability:** Sometimes projects have to change scope; that is fine if the core goal is preserved. It is better to adjust objectives than to continue a plan that's no longer feasible.
    - **Emotional resilience:** Acknowledge that crises are stressful. A good project manager keeps the team motivated (perhaps by focusing on small wins, or reminding everyone of the project's importance to the community to rally morale). Support networks (like calling on an experienced colleague or mentor for advice) can help.

Final Key Messages

To wrap up the content portion, summarize a few **key success factors** for managing agroforestry projects, tying back to what was learned:

- *Start Right:* Clearly define your project's **scope and objectives**, and secure stakeholder buy-in from the beginning. Clarity at start = fewer problems later.
- *Plan & Adapt:* **Plan in detail** (tasks, timelines, budgets) but **stay flexible**. Use tools like WBS and Gantt for structure, and Agile methods to adapt to change.
- *Engage People:* **Communicate continuously** – with your team, farmers andh funders. Transparency builds trust. Use stakeholder maps and do not neglect anyone influential.
- *Anticipate Risks:* Always ask "*What could go wrong?*" and have mitigation ready. It is easier to secure support for a plan that acknowledges and manages risks than one that ignores them.

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- *Leverage Tools & Knowledge:* Use the **digital tools** and templates available (many are free or low-cost). They save time and improve coordination. Learn from others – case studies and networks (like the ones shared) shorten your learning curve.
- *Focus on Impact:* Remember the "*Why*" of your project – the positive change you seek. Let that guide decisions. Measure it and shout about it when achieved. Success stories and data will attract more support for agroforestry in future.

Closing & Evaluation (16:30–17:00)

Thank the participants for their active engagement. In this final part, take a few steps to conclude the training:

- **Participant Feedback:** Distribute a quick evaluation form or do a round-robin feedback: *"One thing you found most useful, and one suggestion or question you still have."* This helps gauge impact and gather ideas for improvement. Alternatively, use a flipchart with two columns (👍 Useful, ❓ Questions) and have them stick notes. Address any pressing questions if time.
- **Certificates & Group Photo:** If applicable, hand out certificates of completion (participants love these as recognition). Take a group photo (especially if this is part of a larger program or just for camaraderie).
- **Post-Training Resources:** Inform participants how they can access the materials from the training:
    - Provide a link or folder (e.g., Google Drive or printed copies) for the **templates and toolkits** mentioned (WBS template, stakeholder matrix, risk register, project charter sample, etc.). Share the case study write-ups and any slide decks.
    - Encourage them to stay in touch via an email list or WhatsApp group for this cohort, to continue exchanging experiences as they apply the training in real projects. They could perhaps meet again in a few months for a follow-up webinar to share progress.
    - Highlight any upcoming events or networks: e.g., "The European Agroforestry Federation (EURAF) has a conference next year, consider submitting a poster about your project," or "Join the AF4EU Agroforestry discussion forum online to keep learning."
- **Encouragement:** End on an inspiring note. Reiterate the strategic importance of what they do: *"As extension advisors, you are key drivers in Europe's transition to sustainable land use. By managing projects well, you ensure that good ideas actually take root (literally, in the case of trees!) and grow into impactful initiatives. Agroforestry can transform landscapes and communities, and with the skills you've sharpened here, you can transform agroforestry from isolated experiments into mainstream practice across Europe."*
- Perhaps quote a success: *"Remember the example from France – because of a well-run project, agroforestry is now part of policy. That's the ripple effect you can create."* Encourage them to be champions who **lead by example** – organizing their work using these principles so others in their organizations see the value of project management.
- **Thank You and Contact:** Thank everyone again and provide contact info for follow-up questions or support.

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Conclusion for Extension Advisors

- Project management may sound technical, but at its heart it is about **good preparation, good communication, and proactive problem-solving** – principles that are already familiar to effective extension work. By framing agroforestry initiatives within a project management approach, extension advisors can bridge the gap among visionary ideas and on-the-ground action. A well-managed project means woody perennials get planted on time, farmers stay engaged and informed, risks are anticipated (if not avoided), and funders and stakeholders see real results.

- This training module has provided a comprehensive journey through initiating, planning, executing, and sustaining agroforestry projects. We have seen how a clear goal can guide a complex project, how a simple chart can bring order to many tasks, and how engaging people early prevents issues later on. We have also seen that flexibility and learning are as important as planning – especially when working with nature and communities. European case studies demonstrated that whether it is silvopasture in France, grazed firebreaks in Spain or mitigating climate vulnerability of cork oak systems in Portugal, success hinges not just on what is done, but **how** it is done.

- As you return to your work, you are encouraged to apply these tools and approaches to your next agroforestry project, no matter how small or large. Start a stakeholder map for that new hedgerow initiative; draft a quick project charter for your farmer field school plan; try using a risk matrix before launching that orchard program. Small steps in structured planning can yield big improvements in outcomes and less stress in implementation. And when challenges do arise – because they will –hopefully you will feel equipped to handle them, rally your team, and adapt with confidence.

- Finally, remember that you are not alone. A growing network of practitioners across Europe is also pushing forward agroforestry innovations and learning how to manage them effectively. Stay connected – through professional networks, online forums, or informal contacts. Share your successes and lessons learned (perhaps in the next training you might even present a case study of your own). In this way, we can all collectively advance the practice of agroforestry and its integration into mainstream farming, for a more sustainable and resilient future.

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Case Studies from Europe

To further illustrate the concepts in this manual, here are three real-world European agroforestry project case studies. These can be used as extended examples during sessions or as additional reading for participants. Each showcases how project management practices contributed to their outcomes, and each is accompanied by a suggested exercise or discussion prompt. More information about agroforestry can be found in: www.agroforestrynet.eu

Case Study 1: Silvopasture Restoration in Dehesa/Montado Systems (Spain & Portugal)

Project Name: LIFE Regenerate (EU LIFE Programme)

Location: Southwestern Spain & Southern Portugal (Dehesa and Montado rangeland systems)

Focus: Revitalizing traditional silvopastoral systems – integrating oak trees, pasture, and livestock – to enhance biodiversity, soil health, and farm profitability.

- Project Summary: LIFE Regenerate Official Website (Archived)
- Final Report and Publications: LIFE REGENERATE Results (LIFE Database)
- Overview in LIFE Brochure (p. 26): LIFE and Agroforestry – European Commission PDF

Project Summary

The Dehesa (in Spain) and Montado (in Portugal) landscapes are historic agroforestry systems with scattered oak trees (cork and holm oaks) shading grazing lands. These systems were degrading due to neglect, overgrazing, and climate stress. The LIFE Regenerate project aimed to restore them by introducing regenerative grazing, soil improvements, and new business models. Over 5 years, the project worked with local farmers to test practices like rotational grazing, seeding legumes in pastures, and producing biochar from pruned wood to enrich soils. Demonstration sites were set up on several farms, with scientific monitoring alongside.

Project Management Aspects

- **Stakeholder Engagement:** The project actively involved farmers from design to implementation. Local farmers' associations and ranchers were partners, ensuring the practices tested were relevant. Researchers (from universities) and extension agents collaborated, bridging science and practice. Policymakers were invited to field days to witness results, building support for policy incentives. Regular meetings (every 6 months) were held to get feedback from farmers – an Agile-like iteration approach, adjusting techniques based on farmer input.
- **Planning & Implementation:** A detailed work plan (WBS) was developed: Year 1 focused on baseline studies and training farmers; Years 2-4 on field implementation and iterative improvements; Year 5 on evaluation and dissemination. Gantt charts were used to schedule grazing rotations and monitoring activities seasonally. The team divided tasks among technical leads: one team handled **soil restoration** (biochar experiments, soil sampling), another handled **grazing management** (fencing, rotation plan), etc. They coordinated via monthly calls and a shared Trello board to track tasks across countries.
- **Risk Management:** Key risks identified were drought (could ruin pasture regeneration), farmer adoption (risk that farmers would not maintain new practices), and market fluctuations (price of beef and cork). Mitigation steps: for drought, they selected hardy pasture species and set up water points; for farmer adoption, they provided small financial incentives and constant on-farm support to build confidence; for

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market issues, they helped develop a niche label for "sustainably raised Dehesa products" to potentially receive higher prices. Indeed, during a dry spell in year 3, they activated a contingency to purchase supplemental feed to keep livestock healthy – this was budgeted as an emergency fund.

- **Scaling & Impact:** As the project progressed, results were tangible – improved weight gain in livestock, richer soil, more birds and pollinators observed. They documented these in reports and videos. The lessons were shared through farmer field schools and exchanges to neighbouring areas. By the project's end, an **Agroforestry Implementation Handbook** was published in Spanish/Portuguese for dissemination such as the AF4EU agroforestry handbook. Several farmers outside the project replicated the techniques after seeing neighbours' success. Policymakers in the region launched a new grant scheme for rotational grazing based on the project's outcomes. The project thus had a legacy beyond its life, influencing practice and policy across the Iberian Peninsula.

Project Takeaway: Effective stakeholder engagement and adaptive management were crucial. By treating farmers as co-creators and being willing to adjust practices (some seed mixtures or grazing timings were adjusted each year), the project achieved robust results that earned wide buy-in. It showcased that blending traditional knowledge with modern techniques and solid project management can regenerate iconic agroforestry landscapes.

Exercise Suggestion: *Analyze the Project Plan* – Have participants outline what the WBS for LIFE Regenerate might look like (phases and key tasks) based on the summary. Identify one risk and ask how it was mitigated. Discuss how they would engage policymakers if they were running this project. Alternatively, role-play a negotiation: one group as farmers, one as policymakers – the farmers request continued support post-project, policymakers want evidence; practice making the case using the project's results.

Case Study 2: RAPCA- Andalusian Network of Pasture–Firebreak Areas (Spain)

Project Name: RAPCA–Andalusian Network of Pasture–Firebreak Areas

Location: Andalusia, Southern Spain

Focus: Integrating livestock grazing into forest fire prevention and sustainable land management.

Project Summary: https://af4eu.eu/wp-content/uploads/2025/03/AF4EU-Factsheet-RAPCA.pdf

Project Summary

RAPCA (Red Andaluza de Áreas Pastoreadas para Cortafuegos – Andalusian Network of Pasture–Firebreak Areas) is an initiative of the Andalusian Regional Government that combines sustainable forest management with wildfire prevention. Its core idea is simple yet powerful: use controlled grazing by local livestock to maintain vegetation in strategic firebreak zones, thereby reducing wildfire risk while sustaining traditional pastoral livelihoods.

RAPCA operates across all Andalusian provinces, currently managing about 14,000 ha of public forests through contracts with hundreds of livestock farmers. Each participating shepherd or farmer grazes assigned areas following annual technical plans drawn up by forestry specialists. These plans regulate grazing intensity, timing, and livestock species according to vegetation type and terrain. Goats and mixed sheep–goat herds are especially valuable for browsing woody scrub, the primary wildfire fuel in Mediterranean landscapes.

Project Management Aspects

- **Stakeholder Engagement:** The programme hinges on cooperation between the Regional Ministry for Sustainability and Environment, the Agency for the Management of Agriculture and Fisheries of Andalusia,

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and pastoralists' associations. Farmers are treated as key project partners and receive both grazing rights and financial compensation for the service they provide in reducing biomass accumulation.

- **Planning & Execution:** Annual grazing plans are co-designed by forestry technicians and livestock keepers, specifying target areas, grazing periods, and vegetation-reduction objectives. GPS collars are often used to track herd movements and verify effective coverage of firebreak strips.
- **Monitoring & Evaluation:** Success indicators include hectares maintained, vegetation reduction levels, and wildfire-risk mitigation in high-priority zones. RAPCA's inclusion in the Andalusian Forest Fire Prevention Plan provides institutional monitoring and integration into broader regional disaster-prevention frameworks.
- **Socio-Economic Benefits:** Farmers gain an additional income stream, reduced feed costs, and formal recognition for their environmental services. The presence of shepherds year-round also aids in early fire detection, contributing indirectly to community safety and rural employment.

Results & Impact: RAPCA demonstrates that traditional grazing can be an effective ecological service. The programme not only maintains firebreaks and prevents catastrophic fires but also strengthens rural resilience, preserves biodiversity, and recovers long-standing cultural land-use practices. It is now referenced as a model of agroforestry-based fire prevention within European innovation networks such as AF4EU.

Project Takeaway: RAPCA's success lies in aligning environmental goals with viable livelihoods. By integrating pastoral activity into official fire-management policy, Andalusia achieved sustained landscape stewardship, measurable risk reduction, and stronger rural communities — all through an agroforestry lens.

Exercise Suggestion: Ask participants to map a similar "Grazed Firebreak Network" concept for their own region. What partners would need to be involved (forestry agencies, livestock associations, local authorities)? How could contracts and monitoring be managed? Design a short project charter and a stakeholder matrix for such an initiative.

Case Study 3: Urban Agroforestry for Community Resilience (Germany)

Project Name: Edible Cities Network (EdiCitNet)**Location:** Berlin, Germany (with sister projects in Oslo, Rotterdam, Barcelona, etc.) https://www.edicitnet.com/

Focus: Developing **urban agroforestry and food forests** in cities to enhance local food security, green spaces, and social cohesion.

Project Summary

EdiCitNet is an EU-funded project (Horizon 2020) that created a network of cities implementing "Edible City Solutions." In Berlin, the project established community-run forest farming (food forests) on underutilized city land. These are essentially small-scale agroforestry systems in urban areas: fruit and nut trees, berry shrubs, and vegetables grown collectively by residents in parks or near housing estates. The goals were to increase urban resilience to climate change (more green cover, reduced heat islands), provide fresh produce to residents, and create educational and social engagement opportunities. The Berlin pilot, in the neighbourhood of Tempelhof, turned a vacant lot into a lush edible landscape over 3 years.

Project Management Aspects

- **Stakeholder Co-Design:** In an urban setting, stakeholders included local community members (of various ages and backgrounds), city government (parks department, city planners), NGOs focused on urban agriculture, and even local businesses (like cafes interested in sourcing local herbs). The project held numerous co-design workshops where neighbours could voice their needs and ideas – what to plant, how to manage the space, accessibility features, etc. This participatory approach was crucial to gain community

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buy-in and to prevent vandalism or misuse (common risks in city projects). A local steering committee was formed, comprising residents and officials, to guide the project – effectively a stakeholder governance structure.

- **Planning & Implementation:** Urban land is often contested and regulated. The project had to work closely with municipal authorities to secure land use permissions. A formal **Memorandum of Understanding** was signed between the project and the city, outlining responsibilities (the city allowed use of land and maybe provided soil/compost; the project would manage installation and maintenance, etc.). Planning also had to account for infrastructure: bringing in healthy soil, planting in a way that does not damage underground utilities, ensuring public safety (no poisonous plants, sightlines maintained for security). They developed site plans using GIS, mapping sun/shade patterns from buildings to place the right plants in the right spots. A Gantt chart scheduled the sequence: site cleanup, soil preparation, planting events, and creation of pathways and signage. Volunteers from the community were organized for planting days – essentially turning implementation into a series of well-managed community events (with clear task lists, tool provision, refreshment breaks, etc., which the project team coordinated).
- **Risk & Adaptive Management:** Some risks: *land-use conflict* (what if neighbours complain or someone wants the land for development?), *plant failure* (urban soil or microclimate might cause some species to fail), *volunteer burnout* (community projects often start strong then participation fades). Mitigations: The project engaged urban planners early to incorporate the forest farming (food forest) concept into city plans (so it was not seen as temporary or in conflict). They also made the space multi-functional (including open paths, seating, play areas) to ensure broad community value – reducing risk of conflict by making it a park for all, not just a fenced garden. For plant success, they chose hardy, locally adapted varieties and built raised beds where soil contamination was an issue. They also set up a water catchment system (rain barrels) to address dry spells, and arranged with the fire department that, in extreme drought, they would help water the trees (leveraging city resources). To maintain volunteer engagement, the project partnered with a local NGO that continued to organize regular community events (harvest festivals, gardening workshops) – keeping people involved and attached to the project. By project's end, a formal community group took over management, with support from the city's parks department – an exit strategy for sustainability.
- **Scaling:** EdiCitNet was not just Berlin – it linked cities. The Berlin team regularly exchanged experiences with counterparts in other cities (virtually and through exchange visits). This network effect meant successful practices (like the stakeholder committee model, or a digital app they used for volunteers to sign up for watering shifts) were replicated in other cities. Additionally, Berlin's success led to interest from other districts to create their own forest farming (food forests). The project team compiled a toolkit "How to start an Edible City initiative" which included project management tips and was distributed via the network's website. Thus, the project scaled horizontally through knowledge sharing.
- **Impact & M&E:** They tracked fun indicators: number of fruit trees planted, kilos of produce harvested by the community, number of participants (and demographics to ensure inclusivity), green area increase, and qualitative feedback from neighbours. Surveys showed improved community cohesion (people met neighbours through the project) and educational impact (students from a nearby school used the forest farming (food forest) for ecology lessons). On the environmental side, even a small forest patch had noticeable cooling effects in summer and provided habitat (bird counts went up). This data was reported back to city officials, strengthening the case for more such projects. It also fed into policy recommendations for integrating edible landscapes in urban design.

Project Takeaway: Even in dense urban environments, agroforestry projects can thrive if **community involvement and cross-sector collaboration** are prioritised. The Edible Cities project highlights that project management in a city context means navigating bureaucracy, ensuring inclusivity, and continuously engaging volunteers. When

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done well, the outcome is a self-sustaining community asset that can be replicated in other cities. Essentially, they turned an idea into a movement by careful planning, stakeholder engagement, and sharing of experiences.

Discussion Prompt: *Urban vs. Rural Project Management* – Ask participants to compare the challenges in the urban case to rural agroforestry cases. What tools or approaches were the same (stakeholder mapping, etc.) and what were different (more focus on city permits, volunteer management)? This can reinforce that the core principles apply broadly, with context-specific tweaks.

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Toolkits and Templates for Project Management

Throughout the training, we mentioned several tools and templates that can greatly assist in managing agroforestry projects. Below is a consolidated list of **recommended resources**, categorized by their use. Extension advisors and trainers can use these to plan and execute projects more efficiently. Many are available online for free –explore them and adapt to your needs.

Project Planning & Management:

- **Work Breakdown Structure (WBS) Templates:** Tools like MindMeister offer mind-mapping templates that can be adapted as WBS outlines for projects. Breaking down tasks in a visual mind map can help brainstorm all necessary activities.
- **Gantt Chart Software – GanttProject:** GanttProject is a free, open-source desktop application to create Gantt timelines easily. It is user-friendly for those new to project scheduling. You can also use Excel or Google Sheets to create simple Gantt charts if software is not available.
- **PM4SD (Project Management for Sustainable Development):** PM4SD is a specialized framework for managing sustainability projects (like rural development, conservation). It provides guidelines and templates (project charters, risk logs, etc.) tailored to sustainable projects. Look up the PM4SD manual for structured approaches that might be relevant to agroforestry programs.

Links

- GanttProject (Free Software): https://www.ganttproject.biz/
- Work Breakdown Structure (WBS) Mind Mapping (MindMeister): https://www.mindmeister.com
- PM4SD – Project Management for Sustainable Development: https://www.pm4sd.org/
- AF4EU Alive handbook (www.agroforestrynet.eu)
- AF4EU DST (https://platform.af4eu.eu/knowledge_cloud)
- AF4EU knowledge cloud (https://platform.af4eu.eu/knowledge_cloud)
- AF4EU MOOC (https://platform.af4eu.eu/online-courses)

Stakeholder Engagement:

- **Stakeholder Mapping Guide (MindTools):** The MindTools website has a guide on performing stakeholder analysis (search for "MindTools Stakeholder Analysis"). It includes templates for Influence/Interest matrices and tips on managing stakeholders at each quadrant.
- **Community Engagement Toolkit (IFAD):** The International Fund for Agricultural Development (IFAD) has a community engagement toolkit (available on IFAD's website) which provides participatory methods for working with rural communities – many ideas can be applied to involving communities in agroforestry initiatives (like how to run community meetings, use of village theater for education, etc.).
- **Stakeholder Engagement Checklist:** Remember to: identify all key decision-makers, assess their influence and interest, and involve them early. Use a simple checklist to ensure you have not missed any group (men/women, youth, local authorities, etc.). Engaged stakeholders = smoother projects.

Links

- MindTools Stakeholder Mapping Guide: https://www.mindtools.com/pages/article/newPPM_07.htm

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- IFAD Community Engagement Toolkit: https://www.ifad.org/en/community-driven-development
- FAO Stakeholder Analysis Guidelines (PDF): http://www.fao.org/3/i8655en/I8655EN.pdf

Funding & Scaling Resources:

- **EU Funding Programs:**
  - *Horizon Europe:* Check the European Commission's Horizon Europe portal for calls related to agroecology or climate adaptation – these often fund multi-actor projects (keyword search "agroforestry" in the funding & tenders portal).
  - *LIFE Programme:* The LIFE program website lists ongoing and past projects – a good place to see examples of funded agroforestry projects and find contacts. They also publish calls for proposals annually in areas of environment and climate.
  - *EIP-AGRI Operational Groups:* Each EU country has a section on the EIP-AGRI site listing Operational Group projects – many have done agroforestry. It's a good inspiration and network resource.
  - AF4EU web page with the alive handbook, the knowledge cloud and the business model DST
- **Carbon Financing – Gold Standard:** The Gold Standard is a certification for carbon offset projects. They have methodologies for agroforestry and afforestation. If looking to design a project that could earn carbon credits, their site and manuals are a must-read. (They ensure projects have high environmental integrity and also community benefits.)
- **FAO Agroforestry & Finance Resources:** FAO has publications on innovative financing for agroforestry (search FAO site for "*Agroforestry financing mechanisms*"). These discuss case studies like payment for ecosystem services, microfinance for farmers, etc. that could inspire hybrid funding models.
- **Logic Model Templates:** When planning scaling or writing proposals, a logic model can be helpful. Websites like USAID's MEASURE Evaluation (if still available) have templates for developing logic models and M&E plans for agricultural projects.

Links

- Horizon Europe Calls & Portal: https://ec.europa.eu/info/funding-tenders/opportunities/portal/
- EU LIFE Programme Calls & Database: https://cinea.ec.europa.eu/life_en
- Gold Standard for Agroforestry Carbon Credits: https://www.goldstandard.org/
- FAO Agroforestry Financing & Carbon Tools: https://www.fao.org/forestry/agroforestry/finance

Risk Assessment & Adaptive Management:

- **Risk Matrix Template (SafetyCulture):** SafetyCulture's 5x5 Risk Matrix Template is a free resource that provides a framework to assess and rate risks. It is a generic template (often used in workplace safety) but can be tailored for agroforestry by defining project-specific risks. You can download it as PDF/Excel and modify the risk factors and mitigation sections.
- **Climate Risk Tools (FAO):** FAO's Climate-Smart Agriculture toolkit includes tools for climate risk screening and management. They have guides on assessing drought risk, selecting climate-resilient crop varieties, etc., which are very relevant when planning agroforestry in the face of climate change.

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- **Risk Register (Excel):** A simple Excel sheet can serve as a Risk Register – list risks, likelihood, impact, mitigation, owner, and status. Update it quarterly with any new risks or changes in status (e.g., "*Drought risk – occurred in July, mitigated by irrigation tanks, impact reduced*").

Links

- SafetyCulture 5x5 Risk Matrix Template: https://safetyculture.com/checklists/5x5-risk-matrix-template/
- FAO Climate-Smart Agriculture Tools: https://www.fao.org/climate-smart-agriculture/knowledge/toolbox/en/

Monitoring & Evaluation (M&E):

- **M&E Frameworks for Agroforestry (MEASURE Evaluation):** The now-concluded USAID MEASURE Evaluation project had toolkits for agriculture and natural resource project M&E. Their resources on developing indicators and data collection methods can be very insightful (even though not agroforestry-specific, they cover agro-environmental projects).
- **KoboToolbox:** KoboToolbox – This free platform lets you create forms for data collection (surveys, monitoring forms) and deploy them to mobile devices. Data can be viewed online and downloaded. It's excellent for field teams who need to gather data offline (like on farms) and then sync when back online. For example, you can create a Kobo form for annual tree monitoring (height, health, etc.) with GPS coordinates and photos.
- **GIS & Remote Sensing:** Tools like QGIS (open source GIS) or Google Earth Engine (for satellite data analysis) can greatly enhance monitoring. You can use NDVI (vegetation index) from satellite images to see if vegetation cover is increasing. There are also specific tools like Collect Earth (by FAO) for monitoring tree cover through satellite imagery, which might be useful for large-scale projects.
- **Dashboard Tools:** Consider using Google Sheets or Excel to create simple dashboards (with charts) of your project metrics that update as you input data. There are also online platforms like PowerBI or Tableau for more sophisticated analysis if you have the skills, but those may be overkill for most extension projects. Simpler is often better – even a Word document with a table of "Indicator – baseline – current – target – status" updated quarterly is great for tracking and reporting.

Links

- KoboToolbox (Free mobile data collection): https://www.kobotoolbox.org/
- MEASURE Evaluation M&E Templates: https://www.measureevaluation.org/resources/tools
- Open Foris Collect (Forest/Agro data): https://www.openforis.org/tools/collect.html
- Google Earth Engine (for satellite monitoring): https://earthengine.google.com/

Team Collaboration:

- **Trello / Asana:** Reiterating from earlier, these online platforms are fantastic for keeping teams on the same page. Trello's interface is very intuitive. Asana offers more structure (like timeline view, subtasks, etc.) and is free for small teams. Use these to assign tasks, set deadlines, and comment on progress in one place. This reduces endless email chains.
- **Communication Apps:** For quick communication, consider WhatsApp groups for the project team or stakeholder groups (almost everyone uses WhatsApp in Europe). Telegram or Signal are alternatives. Just set

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some basic rules (e.g., use for quick updates/emergencies, but official decisions go in email/minutes). Slack is another popular tool for teams, offering organized channels for different topics (could have #field-reports, #admin, #general for a project). It's free for basic use.

- **File Sharing:** Make sure the team has a shared repository for documents – Google Drive, Dropbox, or a project management system. This way, templates and working documents are accessible and not lost on one person's laptop. Structure the folders by category (Plans, Reports, Data, etc.). This also helps immensely in closure phase when compiling outputs and handing over knowledge.

Links

- Trello for Project Boards: https://trello.com/
- Asana for Project Management: https://asana.com/
- Slack for Communication (free plan): https://slack.com/
- Google Workspace (Docs, Sheets, Drive): https://workspace.google.com/

By leveraging these toolkits and resources, agroforestry advisors can save time and avoid reinventing the wheel. Each project will still need the human touch – leadership, negotiation, creativity – but these tools provide a strong backbone for efficiency and consistency. We encourage you to explore them, and in true agroforestry spirit, **share with the community** any new tools or templates you develop.

OUTCOMES OF THE COURSE MODULE

Understanding of key project management frameworks and tools

Skills to plan timelines, budgets, and stakeholder engagement

Ability to manage risks and adapt projects over time

Confidence to design and deliver impactful agroforestry projects

Get to know more!

www.af4eu.eu

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