

Nonprofit planning & management 101 for conservation collaboratives

Confluence 2020 Peer-to-Peer Learning Session Notes

The session was organized to utilize an Open Space technique for discussion. Because only four people attended the session, the Session Organizers scrapped the original plan for the open space forum technique and held a group discussion about four key elements of a nonprofit: People, Planning, Systems, and Money/Funding.

Key Points of Discussion: bold the top three)

- **Systems – there are many virtual tools/technology available for managing various aspects of nonprofits. Group discussed that its best to focus on simple, yet effective tools.**
 - Tools can include Dropbox, Zoom, etc, and some may work at a small level, but need to consider what will work when your organization grows and how best to manage technology and systems as your grow
 - Systems needed can include file management, internal communication, project management, knowledge management, volunteer management, donors (some have used Airtable app for this) infrastructure (vehicles, buildings, shared equipment); sharing and integrating data across non-profits, taking \$\$ (payments online, some use Stripe for this); also have to consider how systems integrate
- **Funding – group was interested in discussing how we create a broader funding base for conservation and non-profits that goes beyond the more traditional charitable donation/foundation model?**
 - Group discussed that is hard to cover costs for funding and capacity, as donors often want to pay for projects and not people
 - A diverse set of funding is needed and often private foundations have the most flexible type of funds for non-profits
 - It is difficult to find funds that can be used for ongoing maintenance and stewardship of natural resource projects
 - There is a need to educate foundations about different ways for non-profits to effectively use funds
 - There is a gap between the different values that conservation generates and the funds generated to support conservation
- **People – we lack diversity and sense of inclusion in the conservation field, in this session, this conference, and in general. Without more diversity, the group wondered how we can be sure that the conservation field and organizations are addressing key issues into the future?**
 - Group discussed needing to better understand how you know who is missing and how to be more inclusive”
 - Group discussed “enjoying the resource” you are there for and getting your group outside for meetings

- Partnering is important, and it is helpful to consolidate efforts if groups are working on similar objectives; partnership requires clear ideas or projects and shared goals, which can be challenging

- Planning – the group discussed the different levels of planning needed including identifying vision and goals, determining how you know when you reach your goal, implementing the strategy around your goals and identifying metrics tied to goals that are measurable.
- Planning – group discussed components of strategic planning, including vision (where you get when have completed your mission) mission, values, and strategies for accomplishing mission. Also discussed how you drill down from strategic plan into yearly and monthly priorities, and that clear communication about where you are and where you are going is needed
- Planning - It's also important to track who is doing what in your region, in order to make sure that your organization is filling a need that others are not covering

Key Next Steps: (bold the top three)

- **Learn availability of mgmt. tools in a concise way (one pager to shared different apps/tech options/tools) and look to learn from other sectors and entities who use effective tools**
- **Training on effective strategies for how we get more diversity and inclusion and address suite of conservation issues**
- **More discussion/training session on building broader funding models for nonprofits**