

Nonprofit Planning and Management 101 for Conservation Collaboratives

Session Host(s): Shayna Jones and Jan Engert

Description of Session:

The basics of managing a nonprofit as an effective organization requires good planning, the right human resources, systems and structures in place that enable success and commitment & structures to build capacity.

This session will use an Open Space Forum Technique. Session attendees will agree on four of the most important key management elements of an effective nonprofit organization. Attendees will work in self-organized groups to bring their experiences together to develop what works for each element.

Outline the session: (60 minutes total)

15 minutes: Introduction & Session Framing

- introductions
- purpose of the session
- explanation of open space forum technique
- agreement on are the most important management elements of an effective nonprofit organization
- setup stations

20 minutes: Activity using Open Space Forum Technique (see details below)

15 minutes: Stations report out to the whole group and host asks attendees for takeaways and key next steps for this session-record those on the 2 summary flip charts

5 minutes: Session wrap up by hosts, confirming top 3 key takeaways and key next steps and give instructions for index cards

At the end of the session, hosts translate the top 3 takeaways and 3 top next steps into the template PPT slide

Activity: Using Open Space Forum Technique

1. Establish four stations around the room-one for each of the four most important elements any nonprofit organization needs to be effective. Suggest the titles: Planning, People, Systems and Money.
2. Ask the participants to visit all the stations and write down for each station what they know that works very well in that category. They may work individually, in ad hoc groups or any way they choose, but contribute as they can to all four stations. Before letting the participants loose, explain

that a volunteer will be needed for each station, to report out in summary to the whole group at the end of the activity.

Note: There aren't four groups. There is one room full of participants expected to contribute to all stations as each individual chooses.

3. Volunteers report out to the whole group, summarizing information gathered from each of the 4 stations.

Technology & Materials:

5 Flip charts and 5 sets of pens

PPT template slide

Index cards and pens

Bio of Host(s) and Case Study Presenters:



Shayna Jones is currently a Project Manager for Larimer County Department of Natural Resources in Loveland Colorado. Shayna previously served as the Director of the Big Thompson Watershed Coalition from 2015-2019, leading collaborative watershed improvement efforts. Shayna has worked on a variety of natural resource issues across the Western US, including endangered species, stream and wetland restoration, and conservation finance, and has worked in the public, private and non-profit sectors. She has a M.S. in Conservation Leadership/Human Dimensions of Natural Resources from Colorado State University, and a B.S. in Business from the University of Maryland.



Jan Engert retired in September 2019 as Assistant Station Director for Science Application and Communication at the USDA Forest Service Rocky Mountain Research Station, Fort Collins, CO. Jan led a program to bring scientists and land managers together to co-produce knowledge, integrate natural resource science findings into land management policy and decisions, and communicate science findings across the western U.S. Before coming to Fort Collins in 2010, she was the charter Director of the Forest Service National Partnership Office in Washington, DC. Jan lived and worked in northern Costa Rica for two years as part of her graduate work in natural resource planning. She spent 8 years with Forest Service International Programs, managing a portfolio of technical assistance, research and training activities in Latin America. Jan has a Bachelor of Science in Forest Management from Oregon State University, and a Masters in Public Policy and Administration from Rutgers, the State University of New Jersey.