

## What's the forecast? Budgeting and Planning for Conservation Funding

Session Host(s): Leigh Whelpton & Paul Hudnut

Description of Session: In this session, we will give an overview of budgeting and planning for conservation organizations. The participating panelists will discuss how their collaboratives have approached fundraising and financial management, and how they are connected. Topics we plan to cover include best practices, hurdles, target setting, and evaluating progress/results. The session will also capture ideas on how to develop and improve training and tools for these topics.

Outline the session: (the session is 60 minutes long- edit this suggested session format)

10 minutes: Introduction and Framing - PAUL

30 minutes: 2 Case Studies presented – PAUL introduces

15 minutes: Participant Questions and Comments/Discussion- LEIGH facilitates

*-A few questions from attendees for the case study presenters*

*-Rest of discussion to focus on tools, learning and next steps needed by attendees*

5 minutes: Session wrap up and instructions for index cards and display of flip charts- LEIGH facilitates

-What are the types of training and tools to conservation practitioners need?

-What are the next steps to expand practitioner's skills?

Case Studies (15 minutes each):

1. Courtney Gutman  
Acting Director/Project Manager  
Big Thompson Watershed Coalition  
(970) 800-1126  
[courtney.gutman@bigthompson.com](mailto:courtney.gutman@bigthompson.com)

2. John Geerdes  
CEO/Executive Director  
Coalition for Upper South Platte  
719-748-0033 (office)  
[johngeerdes@cusps.ws](mailto:johngeerdes@cusps.ws)

Brief intro to Coalition for the Upper South Platte (CUSP)

How do we approach financial management

Primary sources of revenue - what are the dominant sources

Secondary sources of revenue - are there other significant sources

Alternatives for long term sustainability  
How CUSP approaches fund raising  
How are progress and results measured  
Threats to CUSP long term financial sustainability  
Connectivity of financial management and fundraising

Questions for Panelists:

- Brief overview of the organization.
- How do you approach financial management for your organization? Best practices? Hurdles?
- How do you approach fundraising? How do you set targets- for types of funders? For amounts? How are progress and results measured?
- How are financial management and fundraising connected in your organization?

Question for Attendees (introduce at beginning of session/discuss at end of session):

- What resources, tools and training do you need to do better budgeting and financial planning?
- Discussion will be recorded on flip charts (and Leigh's computer).

Outputs:

Two charts: one with main discussion points and one with next steps. These will be set up in Ballroom B for rest of the meeting.

PowerPoint slide: top 3 discussion points and next steps will be shared out.

Attendees take index cards and record for themselves 3 next steps they will each take as a follow up to their learning session; one thing they will definitely do, one thing they might do, and one thing they'd like to do if they had time.

Bio of Host(s) and Case Study Presenters:



Leigh Whelpton leads the Conservation Finance Network's effort to accelerate land and resource conservation by increasing the capabilities of practitioners to use of innovative funding and financing strategies. Prior to this role, she managed trainings and initiatives at the Cheetah Conservation Fund in Namibia. Leigh serves on the advisory board of the Environmental Policy Innovation Center and volunteers with the Three Valley Conservation Trust.



Paul Hudnut taught entrepreneurship, strategy, finance and business law classes at Colorado State University and served as director of their Global Social & Sustainable Enterprise MBA program. Paul currently serves as an advisor or board member for the New Belgium Family Foundation, Bohemian Foundation, Factor [E] Ventures and Watsi.



John Geerdes is the new CEO/Executive Director of Coalition for the Upper South Platte. He retired in 2018 after 34 years of service with Colorado State Parks – later Colorado Parks and Wildlife (CPW). While with CPW he served as a Park Ranger, Region Trails Coordinator, Park Manager at two different State Parks and State Park Regional Manager out of Colorado Springs. As a Region Manager he was on the agency leadership team and over saw 11 state parks with an annual visitation of over 2 million people. He supervised 63 full time employees and \$6 million in park operating and capital construction budgets.



Courtney brings twelve years of habitat restoration, monitoring, community engagement, and outdoor education experience to the Big Thompson Watershed Coalition. She completed an M.S. with Colorado State University's Human Dimensions of Natural Resources department and joined BTWC as Project Manager in 2018 and accepted the role of Director in 2020. In overseeing the implementation of these projects and collaborating with various sectors, she has become fascinated with building habitat resilience into restoration and enhancing community-supported initiatives that prepare both wild and human communities for a changing environment.

