



# Sustaining Biological Infrastructure

## Strategies for Success: Course Objectives

This course will provide you with the key business planning, marketing, and communication skills you need to meet your financial sustainability goals and ensure your project's success. Expert faculty will use lectures, group work, discussions, and case studies to:

- Provide tools and tips that you will use to assess your project and enhance its programmatic and financial sustainability;
- Introduce essential strategies for effective communication with stakeholders; and
- Provide guidance and best practices to help you succeed as you innovate and add value to your project or program.

## Strategies for Success: Agenda

### Monday, June 20, 2016

- 6:00 pm**      **Welcome Dinner and Introductions**  
*(All dinners are included in the accommodation package for overnight guests)*
- 7:00 pm**      **Adjourn**

### Tuesday, June 21, 2016

- 8:15 am**      **Session 1: Introduction**  
*Cliff Duke, Jon Anderson, and Jill Parsons*
- This session is about getting to know one another. We'll review the course structure, introduce the SBI Team, and give you each a chance to introduce yourselves.
- What you will learn and do:
- Give a mini-pitch to introduce yourself and your project
  - Discuss your goals and objectives for attending the course
  - Learn about your fellow participants and the expertise in the room



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**10:00 am**     **Break**

**10:15 am**     **Session 2: Evaluate Your Current Sustainability**

*Lynda Ramirez-Blust*

What is sustainability? How sustainable are your current activities? This session will help you determine where you are now and provide you with tools to assess your financial and programmatic sustainability.

What you will learn and do:

- Learn how to build a Matrix Map
- Identify your project's business lines and their profitability and mission impact

**12:15 pm**     **Lunch**

**1:15 pm**     **All About Session 10**

*Lynda Ramirez-Blust*

We will spend some time talking about the logistics and structure of Session 10: Make The Pitch, to ensure everyone knows what they need to prepare for the final day of the course.

What you will learn and do:

- Learn about the elements of a successful pitch
- Watch SBI Team Members perform a pitch and role-play as potential funders

**1:45 pm**     **Break**

**2:00 pm**     **Session 3: Finance 101**

*Lynda Ramirez-Blust*

In this session, we will delve deeper into aspects of financial sustainability and discuss how to analyze and communicate financial information to a variety of audiences.

What you will learn and do:

- Define a financially sustainable project
- Determine the financial health of your project or program and assess strengths and vulnerabilities

**4:00 pm**     **Break**



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**4:15 pm**      **Session 4:** Create Your Business Model Canvas

*Jon Anderson*

Being able to put together a solid business plan is key to sustaining biological infrastructure projects. This session will give you the tools you need to create an effective business plan for your project and to continue assessing your plan in the future.

What you will learn and do: (Session 4)

- Learn how to develop and assess business models
- Learn how to use the Business Model Canvas

**6:00 pm**      **Adjourn**

**Wednesday, June 22, 2016**

**8:15 am**      **Session 5:** Rethink Your Vision, Mission, and Future Activities

*Bill Michener*

Prioritization and good planning are important to sustainability. This session will introduce tools to help you do both as effectively and efficiently as possible.

What you will learn and do:

- Learn how to evaluate the vision and mission of your project or program
- Learn to use the Kellogg Logic Model as a planning and prioritization tool
- Plan out your project's future activities using the Kellogg Logic Model

**10:00 am**      **Break**

**10:15 am**      **Session 6:** Measure Your Success

*Bill Michener*

Measuring, documenting, and communicating success are vital to securing future funding. This session will help you demonstrate your resource's value — an important step in achieving sustainability.

What you will learn and do:

- Evaluate strategies to monitor and document project use
- Identify Key Performance Indicators (KPIs) for your project



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- Discuss ways to communicate project success effectively
- Learn to use the Success Equation

**12:15 pm**     **Lunch**

**1:15 pm**     **Session 7: Analyze Your Stakeholders**

*Jon Anderson*

The path to your success involves establishing effective communication and efficient cooperation among your stakeholders and your project team. This session will cover the first steps to help you accomplish these goals.

What you will learn and do:

- Learn how to identify stakeholders and assess how they may be affected by or may influence your project
- Use a framework to conduct a stakeholder and marketing analysis for your own project

**2:45 pm**     **Break**

**3:00 pm**     **Session 8: Communicate Effectively**

*Lynda Ramirez-Blust*

This session builds on the previous one and provides an overview of how to communicate with your varied stakeholders to enhance sustainability.

What you will learn and do:

- Learn how to communicate effectively with different stakeholders
- Learn the value and power of storytelling
- Develop and present an “elevator speech,” and receive feedback from other participants

**5:00 pm**     **Adjourn**

*We adjourn early so you have extra time to prepare your pitch for Session 10*



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Thursday, June 23, 2016

**8:15 am**      **Session 9: Harness Private Funds**

*Jon Anderson and Marilyn Hoyt*

For the foreseeable future, federal support will likely remain integral to sustaining biological infrastructure. As you've already learned, however, diversifying your funding base is an important way to enhance sustainability. This session aims to further your understanding of private funding possibilities for your resource.

What you will learn and do:

- Learn how to identify and analyze private philanthropy stakeholders
- Explore the idea of commercial partnerships, from identifying a good partner to making the relationship work
- Learn how to make federal grant proposals into private foundation proposals

**10:00 am**      **Break**

**10:15 am**      **Session 9: Harness Private Funds (Continued)**

*Marilyn Hoyt*

Successful fundraising requires networking and building healthy relationships with donors and funders. In this continued session you'll learn some tips and timeless strategies to ensure you are prepared to cultivate these important relationships.

**12:15 pm**      **Lunch**

**1:15 pm**      **Session 10: Make the Pitch**

*Lynda Ramirez-Blust*

This session gives you the opportunity to practice and apply what you've learned throughout the course in a safe environment. Think of it as a friendly *Dragon's Den* for the biological infrastructure community.

What you will learn and do:

- Develop a pitch and practice delivering it to a corporation, foundation, or wealthy donor
- Receive feedback and tips from fellow participants
- Role-play and provide feedback to fellow participants

**3:30 pm**      **Evaluations and Closing**

**4:30 pm**      **Adjourn**