



Sustaining Biological Infrastructure

STRATEGIES FOR SUCCESS

A Short Course for Project Directors

June 9-11, 2015

The Conference Center at the Maritime Institute
Linthicum Heights, MD

Presented by the Ecological Society of America



Sponsored by the National Science Foundation





Sustaining Biological Infrastructure

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Sustaining Biological Infrastructure

Strategies for Success: Course Objectives

This course will provide you with the key financial planning, analytical, and communication skills you need to enhance your project or program's continuing development and financial sustainability. 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 8, 2015

6:00 pm **Welcome Dinner and Introductions**

Dinner available in the CCMIT dining room until 7:00 pm

(All dinners are included in the accommodation package for overnight guests)

7:00 pm **Adjourn**

Tuesday, June 9, 2015

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**

Served in the CCMIT Dining Room

1:15 pm **Guest Lecture**

Willie Wilson

Head of Science, Plymouth Marine Laboratory (PML), and former Director of the National Center for Marine Algae and Microbiota (NCMA)

2:15 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:

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

6:00 pm **Adjourn**

Dinner available in the CCMIT dining room until 7:00 pm

Wednesday, June 10, 2015

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.



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What you will learn and do:

- Evaluate strategies to monitor and document project use
- Identify Key Performance Indicators (KPIs) for your project
- Discuss ways to communicate project success effectively
- Learn to use the Success Equation

12:15 pm **Lunch**

Served in the CCMIT Dining Room

1:15 pm **Guest Lecture**

Helen Berman, Former Director of the Protein Data Bank (PDB)

2:15 pm **Session 7: Analyze Your Stakeholders**

Jon Anderson and Marilyn Hoyt

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
- Learn how to identify and analyze private philanthropy stakeholders

4:00 pm **Break**

4:15 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

6:00 pm **Adjourn**

Dinner available in the CCMIT dining room until 7:00 pm



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Thursday, June 11, 2015

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:

- 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 10: Next Steps**

Marilyn Hoyt

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

What you will learn and do:

- Learn tips on building relationships with prospects and funders
- Set up next steps for your project

12:15 pm **Lunch**

Served in the CCMIT Dining Room

1:15 pm **Session 11: 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.



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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**

4:15 pm **Adjourn**

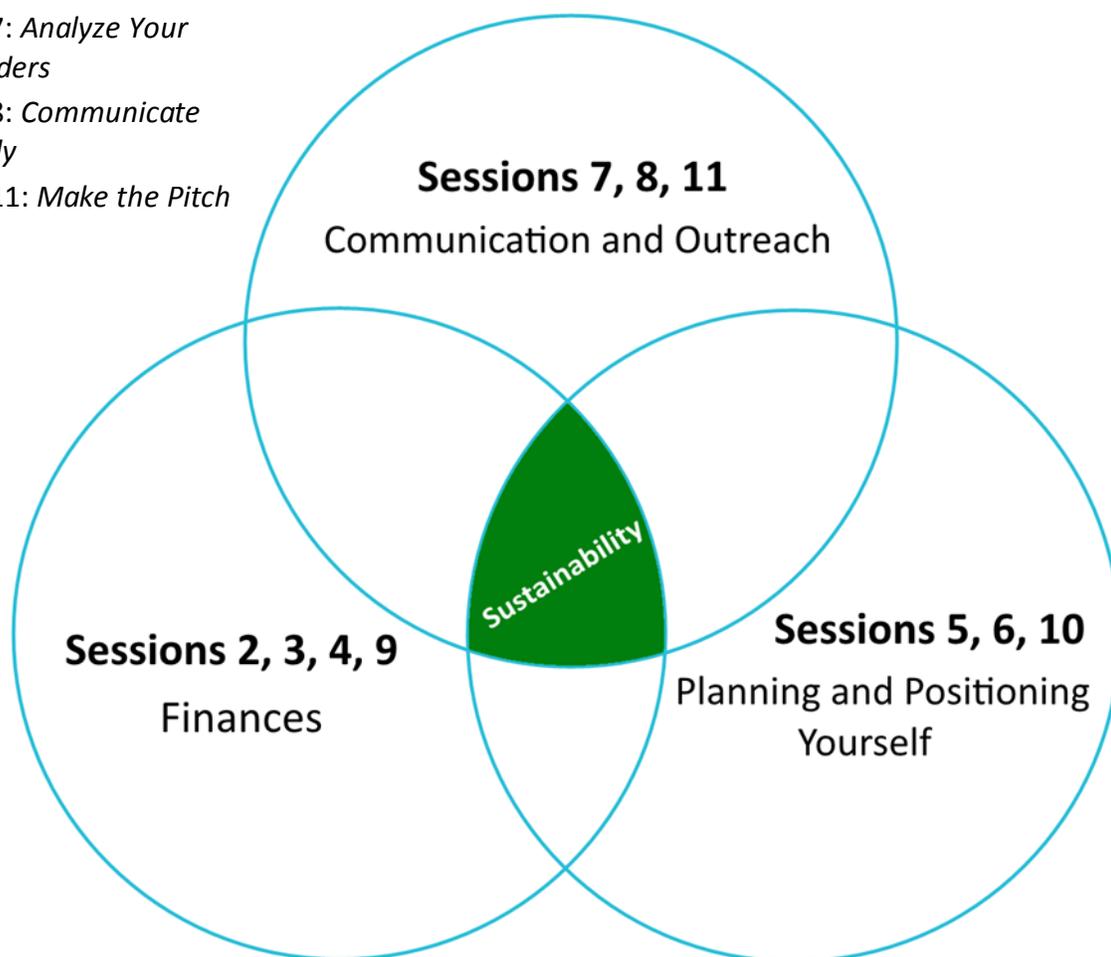
Session 1



Introduction

What do we mean by Sustaining Biological Infrastructure?

- Session 7: *Analyze Your Stakeholders*
- Session 8: *Communicate Effectively*
- Session 11: *Make the Pitch*



- Session 2: *Evaluate Your Current Sustainability*
- Session 3: *Finance 101*
- Session 4: *Create Your Business Model Canvas*
- Session 9: *Harness Private Funds*

- Session 5: *Rethink your Vision, Mission, and Future Activities*
- Session 6: *Measure Your Success*
- Session 10: *Next Steps*

Session 2



Evaluate Your Current Sustainability

In This Session...

- What is sustainability?
- How sustainable are your current activities?

Financial Sustainability

The ability to **generate resources** needed to meet the **needs of the present** without **compromising** the future.

(Bell, et al., 2010, page 13)

Programmatic Sustainability

The ability to **develop**, **mature**, and **cycle out** programs to be responsive to constituencies over **time**.

(Bell, et al., 2010, page 13)

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Individual Exercise: Your Project, Program, Organization

Using *Template 2-1*:

Time: 10 minutes

- Write down your core activities and revenue-generating vehicles.

Template 2-1: Mission and Revenue Strategies

Business Lines	Mission-Impact Strategy	Revenue-Generating Strategy
Core Activities		
Revenue-Generating Activities		

Individual Exercise: Your Project, Program, Organization

Using *Template 2-2*:

Time: 10 minutes

- Estimate your core activities and revenue-generating vehicles placement and size on the blank matrix map provided.
- Determine what additional information you might need to complete the matrix map.

Template 2-2: Matrix Map



Source: Bell, Jeanne, et al., *Nonprofit Sustainability: Making Strategic Decisions for Financial Viability*, San Francisco: Jossey-Bass, 2010

Session 3



Finance 101

In This Session...

- Discuss financial sustainability in depth
- Level set terminology
- Financial storytelling

What is Financial Sustainability?

- What you own and what you owe (**assets and liabilities**)
- When \$ is received and disbursed (**cash flow**)
- What you have saved (**reserves**)
- What you are obligated to pay for but haven't set money aside for (**unfunded liabilities**)
- Reliance on revenue sources (**diversification**)
- The sustainability of your funding sources
- The sustainability of your resources

Session 4



Create Your Business Model Canvas

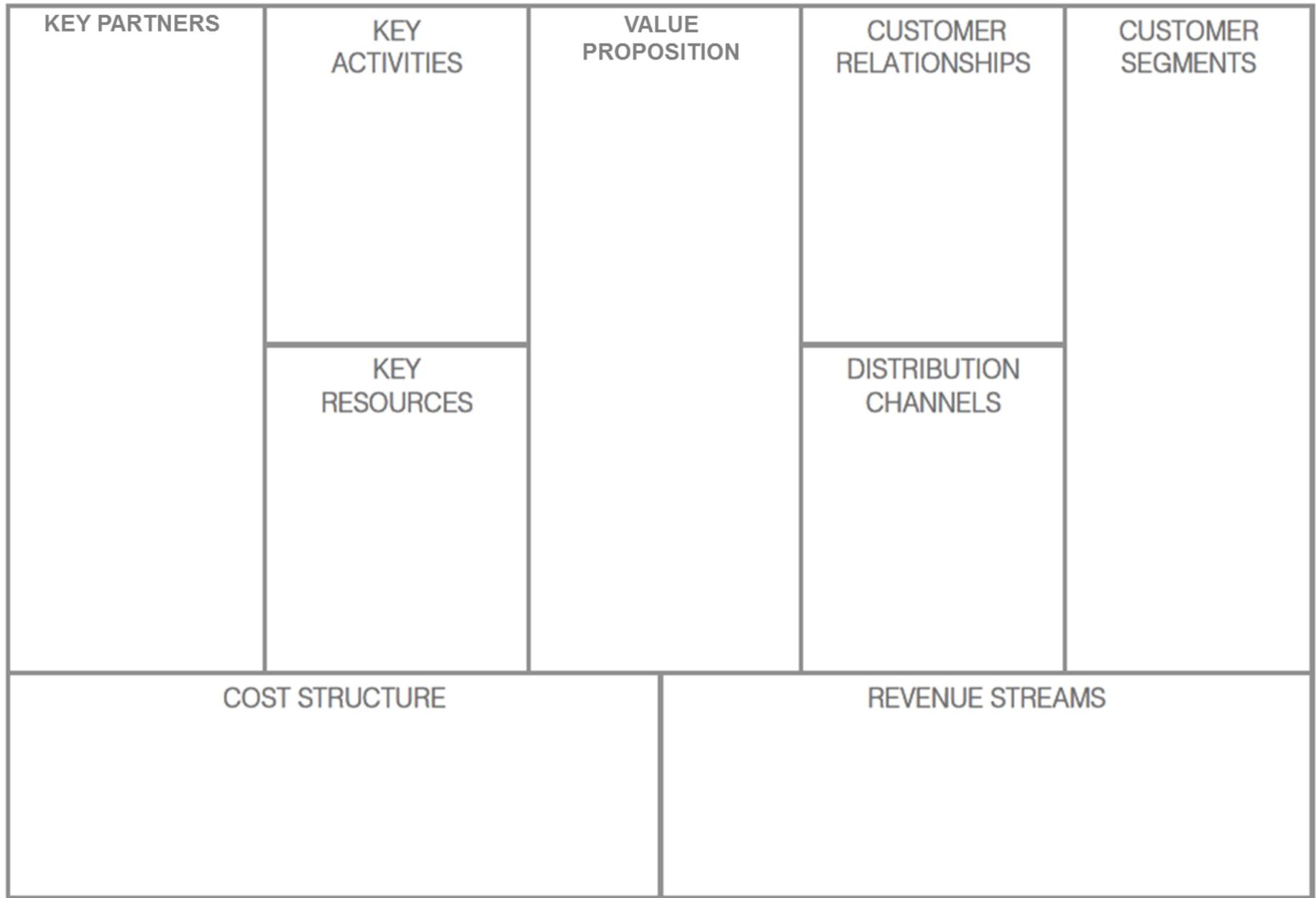
Goal

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

Business Plan



Business Model Canvas



Source: [Business Model Generation](#) by Alexander Osterwalder & Yves Pigneur.

Session 5



Rethink Your Vision, Mission, and Future Activities

In This Session...

- Evaluate vision and mission statements
- Plan future activities using strategic planning approaches and logic models

New Section: Evaluating Vision and Mission Statements

Context: Why Mission and Vision Statements are Useful

- Every business, project or program ideally starts with a destination in mind – i.e., *vision*
- Every business, project or program has a purpose or reason to exist – i.e., *mission*
- To achieve its vision and realize its mission, a *strategy* is needed:
 - a business model
 - a product road map
 - a point of view about partners and competitors
 - ideas about who the customers will be
 - A *product (or service)* is the end result of

From Eric Ries, 2011, *The Lean Startup*

Logic Model

Objective/Problem:

RESOURCES	ACTIVITIES	OUTPUTS	SHORT- AND LONG-TERM OUTCOMES	IMPACT
<p><i>In order to accomplish our set of activities we will need the following:</i></p>	<p><i>In order to address our problem we will accomplish the following activities:</i></p>	<p><i>We expect that once accomplished these activities will produce the following evidence or service delivery:</i></p>	<p><i>We expect that if accomplished these activities will lead to the following changes in 1-3 and then 4-6 years:</i></p>	<p><i>We expect that if accomplished these activities will lead to the following changes in 7-10 years:</i></p>
<ul style="list-style-type: none"> • _____ 	<ul style="list-style-type: none"> • _____ 	<ul style="list-style-type: none"> • _____ 	<ul style="list-style-type: none"> • _____ 	<ul style="list-style-type: none"> • _____

Session 6



Measure Your Success

In This Session...

- Examine project management tools to measure success
- Learn evaluation rules of thumb and how to develop Key Performance Indicators (KPIs)
- Demonstrate meaningful project impact
 - Use the Success Equation

Your Perspective

- How do you monitor and measure your project's success?

- What problems do you encounter when measuring success?

- “Good evaluation reflects clear thinking and responsible program management.”

from the W.K. Kellogg Foundation Logic Model Development Guide, 1998

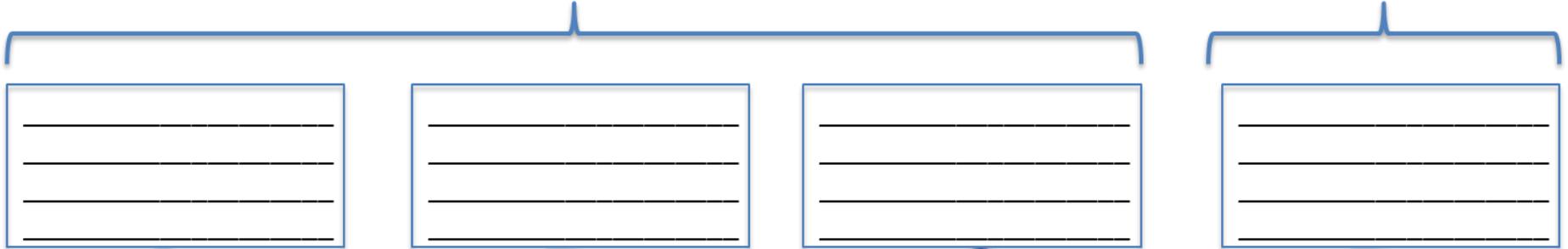
Success Equation

Jason Saul 7 Oct 2014, The Chronicle of Philanthropy

Project/Program: _____

2 Priority Outcomes

What changes in status, behavior or condition most directly influence "D"?



A

+

B

+

C

=

D

3

Performance Measures

How do we measure progress toward our outcomes?

Key Strategies

Which programs or activities will drive results?

↑

↑

↑

Session 7



Analyze Your Stakeholders

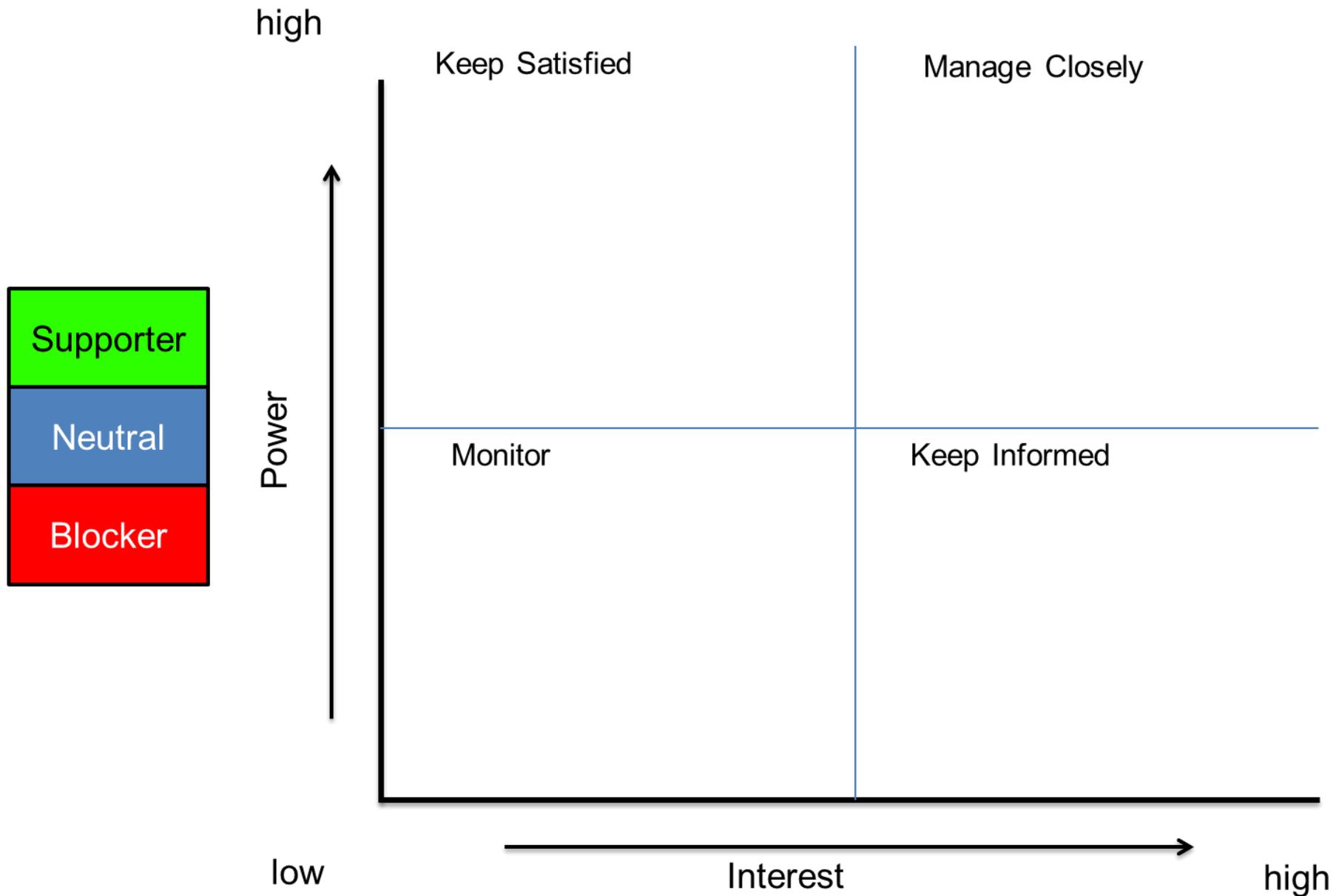
Goals

- Learn how to identify stakeholders and assess how they may be affected by or may influence your project or organization
- Project goal: Establish communication and cooperation between the stakeholders and the project team, increasing the odds of success

Stakeholders

- Any person or organization who can be **positively** or **negatively** impacted by, or cause an impact on the actions of a company.
- Any person group or organization that can place a claim on the organization's **attention**, **resources**, or **output**, or is affected by that output. - Freeman 1984
- Stakeholders can be both internal and external to the organization - Bryson 1995
 - Internal (employees, management, board of regents)
 - External (government, partners, suppliers, donors)

Power/Interest Stakeholder Mapping Worksheet



Session 8



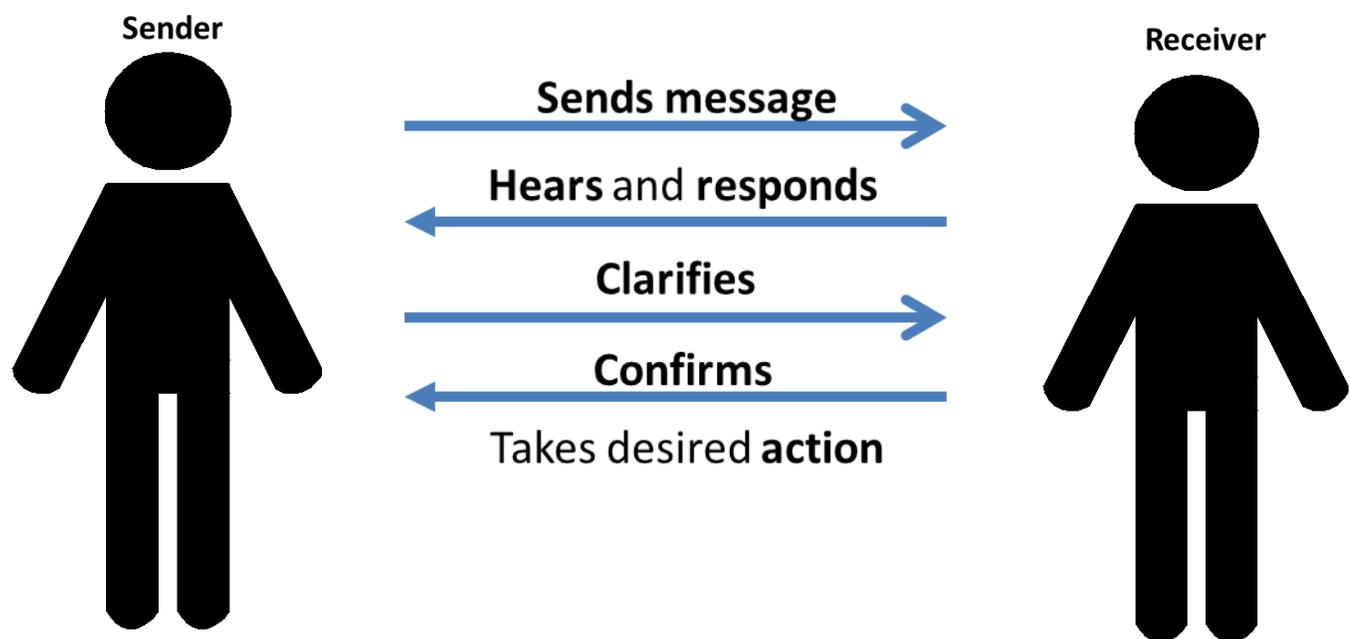
Communicate Effectively

In This Session...

- Challenges faced in communicating effectively
- The power of storytelling
- Identifying stakeholders and developing plans to communicate with those stakeholders

What does it mean to communicate effectively?

Communicate Effectively



Group Exercise: MECO

Time: 15 minutes

Working in your table group:

- Select a stakeholder from your Power/Interest grid completed in Session 7.
- Outline your story using *Template 8-1*.

Template 8-1: Story Outline

Who is your audience?
What's the meaning of the story? What do you want the audience to take away?
Who is the protagonist of your story? Whom will the audience follow or identify with through the narrative?
<i>From Invisible Ink: A Practical Guide to Building Stories that Resonate by Brian McDonald</i>
1. Once upon a time...
2. And every day...
3. Until one day...
4. And because of this...
5. And because of this...
6. Until finally...
7. And ever since that day...

Session 9



Harness Private Funds

Goal

- 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.

Key Elements of a Partnership

- Core **Values**
 - The disposition, character, or fundamental values particular to a specific person, people, culture, or movement
- Growth **Potential**
 - How will the partnership serve as a catalyst for growth of each organization?
- Shared **Vision**
 - What do the individual parties want to get out of the partnership?

Session 10



Next Steps

In This Session...

- Learn tips on building relationships with prospects and funders
- Determine next steps for your project

New Section: A Scaffold to Structure Private Grant Relationships

Build the Relationship | *Before Applying*

- Get to know your:
 - Development staff
 - Finance officer
 - Head of your department
- Funding Alert
- Phone call to the foundation
- List your funders in proposal appendices

Next Steps: Things to Consider

- Short-term: What can I start implementing now?

- What challenges might I encounter?

- How can I overcome these challenges?

- What is the first thing I'll do when I get back?

- Long-term: How can I work towards a more diverse funding model?

- What do I want to accomplish in the next year?

Session 11



Make the Pitch

In This Session...

- Apply what you've learned in a safe environment
- Get productive feedback to enhance learning

Group Role Play Structure

- The class will be divided into 3 Groups – 1, 2, and 3
- Within each group there will be 2-3 subgroups – A, B, C
- Each of you will make a pitch to an assigned audience:
 - Individual donor
 - Community Foundation
 - Corporation