HUMAN INFRASTRUCTURE FOR CONSERVATION PLANNING

Scott Johnston

**Introduction**

The audience for Business Planning must be considered before beginning – this is critical because developing a business plan is a time-consuming and costly venture. The development of a business plan usually is requested or required by a funder, as more and more funding entities want specific outcomes for their contribution. This is as true in the federal sector as is in the private sector. Ensure that you fully understand what your target audience requires for a successful business plan.

True business planning with a flyway approach means the process is just as, if not more, important than publishing the business plan. Experience has shown that the engagement and buy-in of the key leaders and practitioner within a particular flyway is extremely valuable to a potential funder. That is, a Board likes to know that they are funding work that is developed and supported by the experts within their field and have broad geographic representation.

**Working group established with active leaders – both north and south groups**

The engagement of individuals throughout the flyway is critical to ensure there is an accurate inventory of conservation actions and buy-in from all the countries involved. Merging existing priorities (e.g., Brazilian Shorebird Plan with the Atlantic Flyway Shorebird Initiative) takes significant time and resources to accomplish. Representative leaders can help fill the gap if travel funds are lacking to ensure full engagement. Requests for participation should be made through as many channels as possible, and participation is voluntary and open. Identification of co-leads that include countries outside of North America is crucial.

**Lead Author(s) of Editorial Committee established**

The development of a Steering Committee, Executive Committee, etc. is crucial to manage the components of the Business Plan, particularly if using the Open Standards process. These leaders can be self-appointed or requested, but must have considerable expertise and acceptance from a wide variety of partners. Terms of reference for how a Steering Committee will be adopted and managed is recommended.

**Working subgroups to address and develop key strategies**

Working subgroups can be arranged geographically, particularly at the beginning of the business plan development, but then can be managed by topic (predation, habitat development on wintering grounds). These groups serve two primary purposes: to ensure the development of priority projects in the business plan, and the coordination and implementation of those projects once the plan is published. Resources for travel is required to ensure active engagement

**Regular communication and meetings – virtual and in-person**

Hosting regular meetings, while time consuming and costly, are key steps in the fulfillment of all the priority actions that need to be developed and to ensure engagement and buy-in. Particularly early on in the development of the business plan, in-person meetings are critical, especially if a Steering Committee will be set up to help lead the work in between meetings as they act on behalf of the full group. Effective facilitation is critical for the meetings and ensuring exact outcomes are specified and linked to the audience of the business plan. Having the audience for the business plan attend meetings and explain their objectives are also critical to ensure engagement of attendees.

**Regular project reviews and identification of top projects, gaps and next steps**

Business planning should be considered iterative and always able to take on new priorities and actions, as long as the Steering Committee or members of Committee can agree to additions. Regular review of priority actions is critical if a request for proposals is conducted regularly so that the granting entity can use the business plan for evaluating proposals. Using a tiering system (1-3) can by very useful in helping to identify the true shovel-ready, high priority, big bang-for-the-buck projects. Tier 2 can be considered a priority but perhaps not as urgent. Tier 3 can be considered still under development or otherwise not able to implement in the near future

**Regular review of implementation progress, evaluation of results and adaptation of the plan**

Consistently and regularly showing completed actions is critical to funding entities to show that work is being accomplished and the business plan works. It is also important to attract new partners and retain existing partners so that everyone involved can see that business planning works. While it may be difficult to link specifically an action to the business plan, if there is a connection (business plan highlighted in proposal, specific action listed in the business plan, etc.) is should be identified as such.

**Regular minutes and updates to all interested parties**

Regular updates, conference call, in-person meetings are all important methods to keep a partnership coordinated and all entities understanding progress and accomplishments. Ensuring that Steering Committee members are also conducting their own communication is important as well. Whether this is through websites, email or other forms of communication lack of information for partners is can inhibit their participating and engagement. Understanding and adapting to the members of a partnership and their individual needs for communication is important.