Pathway from Philanthropy to Business

INTERNAL AUDIT AND ACTION PLAN FOR NONPROFIT EXPANSION

Beth Mara, PhD
February, 2023

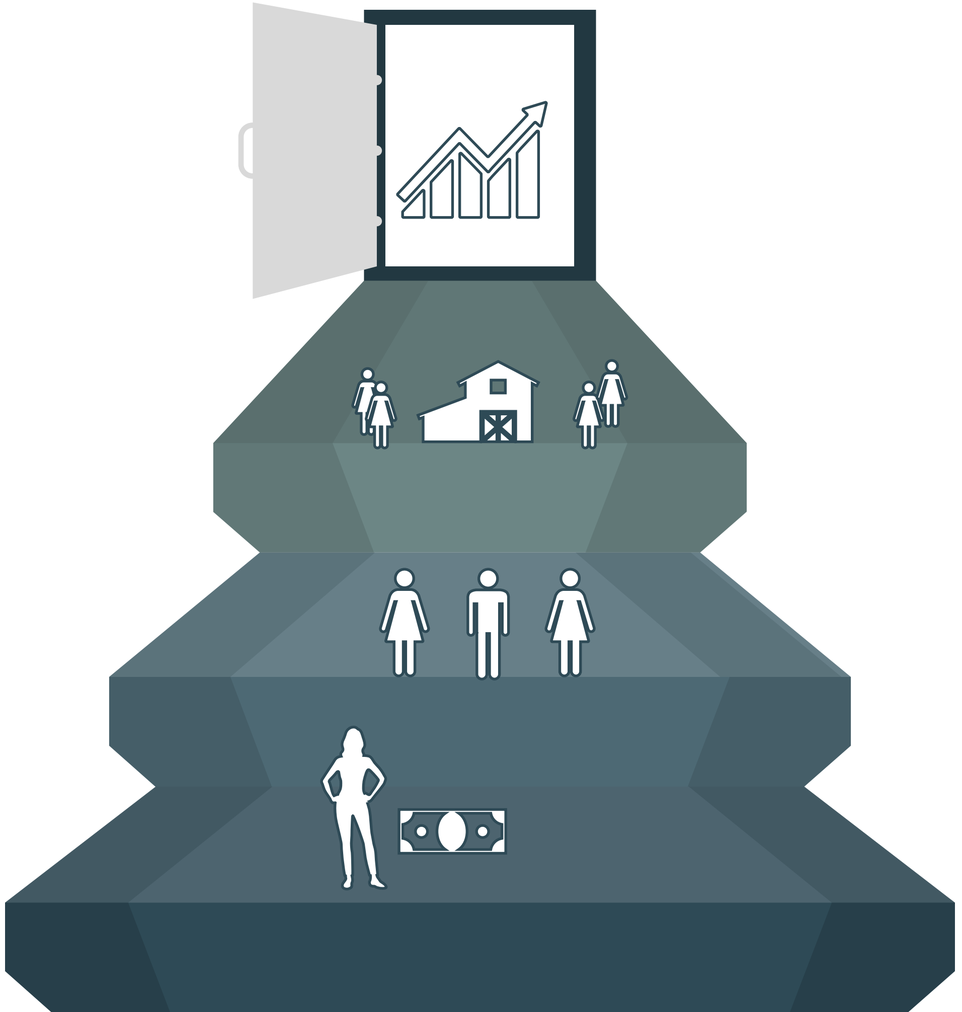
Pathway from Philanthropy to Business

Social Enterprise

Achieve measurable social, environmental and educational impact. 50-70% of investment is recouped and reinvested (eg KIVA micro loans)

Individual Philanthropy/Foundation

100% individual donor driven. Purely charitable funding from Dr Lenz investment in land, animal care, agricultural and economic growth.



Traditional Business

Primary outcome is financial success. Wholly independent. Owned and operated by local providers

Non Profit Charity

20-50% of investments outside of primary donor. Partnerships with UNESCO, government, educational institutions, granting agencies

Strengths

Integrity
Committed
Passionate
Reliability
Humble
Results
Believe
Potential
Inspiring
Optimistic
Other's
Honesty
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Mission Statement

Improving Lives Through Animal Wellness, Food Security, Soil Health and Local Economic Development

‘Homegrown Prosperity’

Values of Leadership

Committed Mentoring

Identify and recruit high integrity local and international mentors. Develop community needs into self sustaining enterprise.

Foster Cultural and Biodiversity Preservation

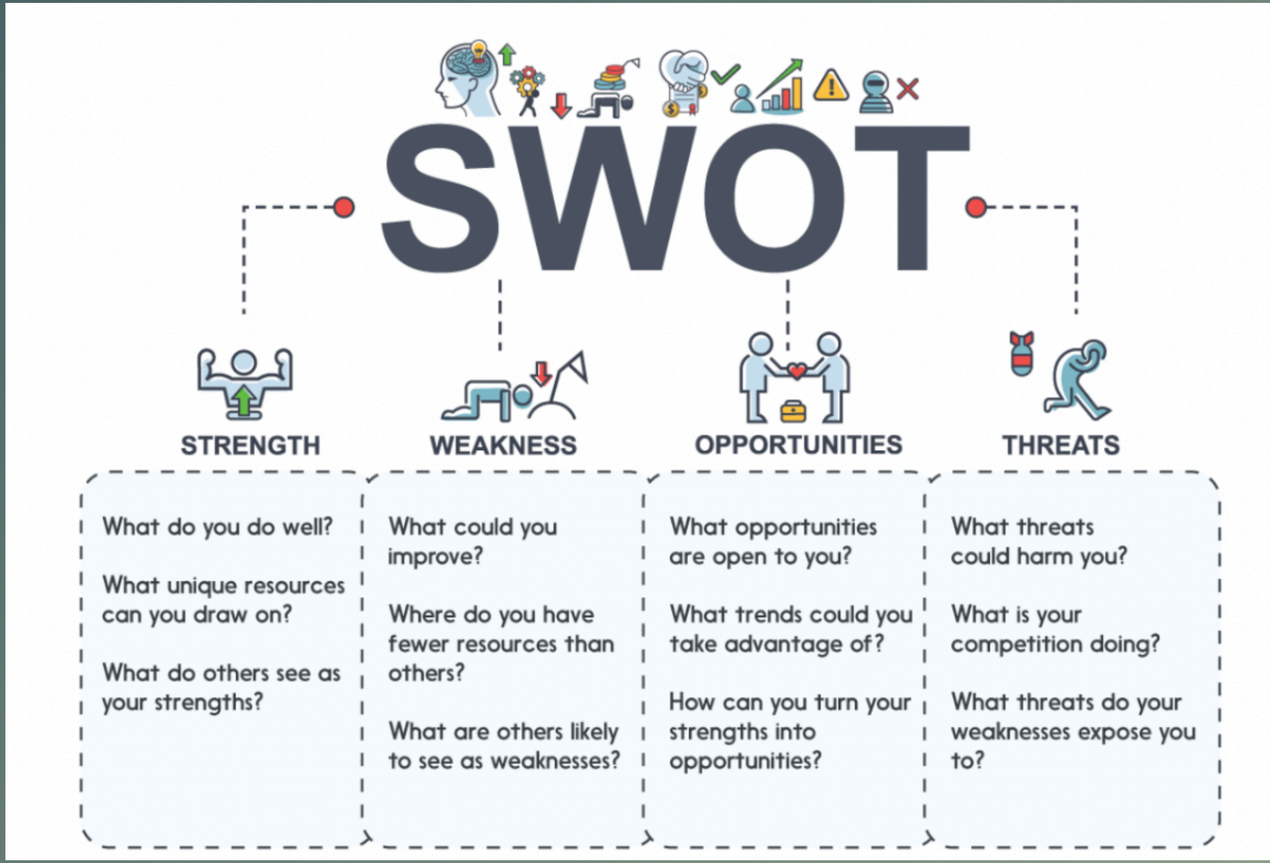
Expand community and identify vulnerable aspects of culture/ ecosphere and develop sound interventions and preservation metrics.

Promote Sustainable Growth

Transition individuals from ‘grant recipients’ to loan holders then to fully private businesses

SWOT

STRENGTHS, WEAKNESSES, OPPORTUNITIES, THREATS



SWOT ANALYSIS

Internal Factors

Strength

Diligent work by founder.
$500K+ investment
Trusted onsite collaborators and supervisors
Outstanding professional resources

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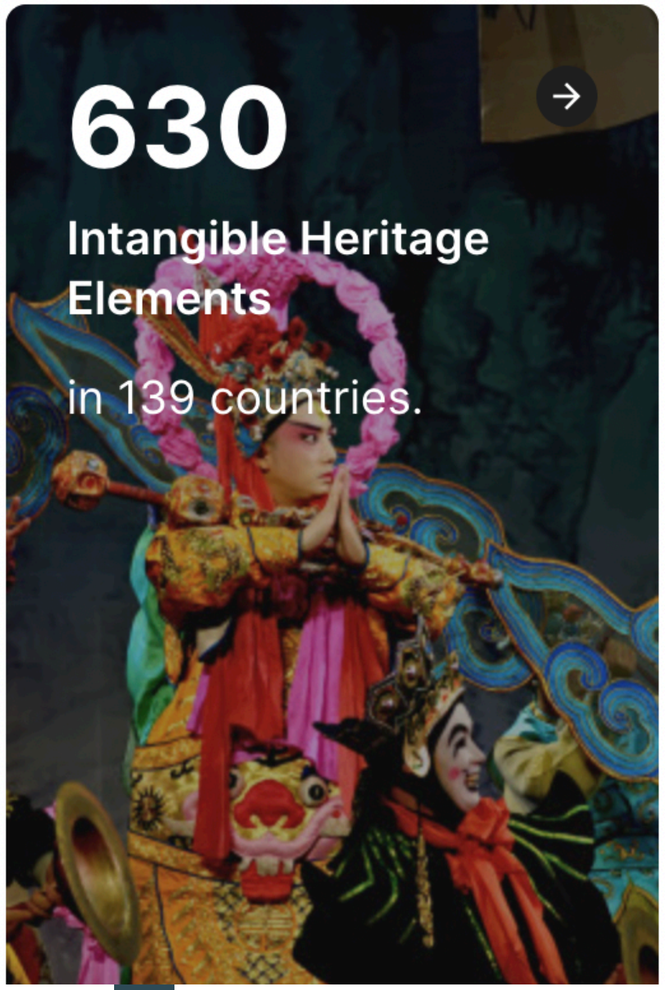
Opportunities

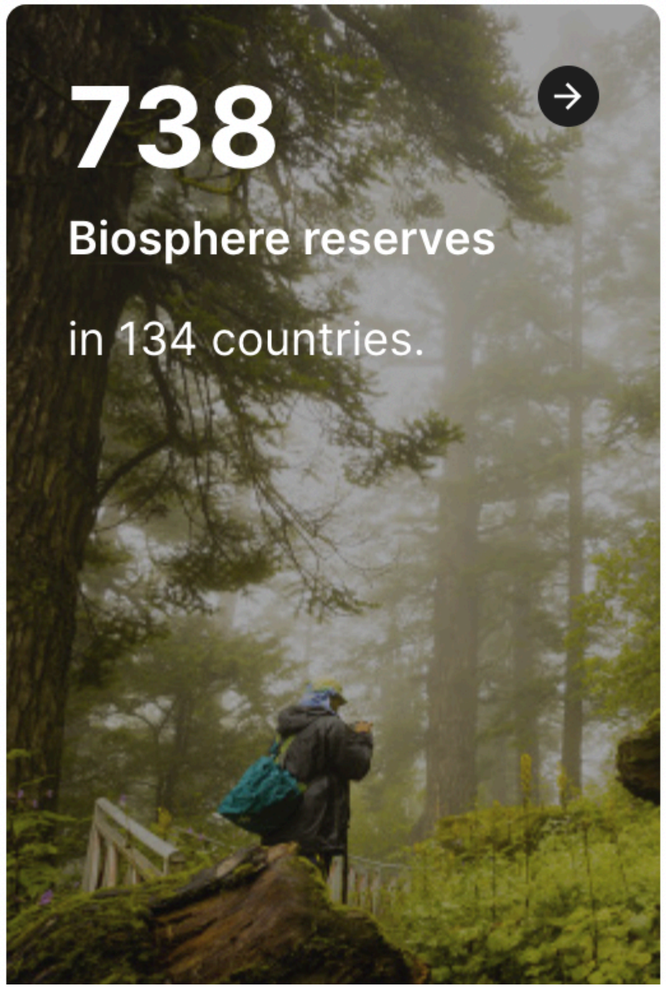
Ecotourism increasingly present
Natural resources are exceptional
Many educational opportunities exist to explore economic, social and health outcomes

External Factors

SWOT: Example of Underutilized Opportunity

United Nations Educational, Scientific and Cultural Organization





Biodiversity Reserves

Audrey Azoulay

UNESCO Director

“These sites are laboratories of harmonious interaction between people and nature, allowing for advances in the sciences and in traditional knowledge. They facilitate the sharing of knowledge, promote the interaction between science and society and help bring concrete improvements to the lives of local populations”

Messaging Weaknesses

Organizational Weaknesses

SWOT ANALYSIS

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Weakness

Branding/Mission Drift
Fundraising
Lack of Staff
New Board Members Needed
Generational Hopelessness

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Action Plan (1 of 5)

Branding/Mission Drift Recommendations:

1. **New Project Name** with Clearer Messaging of Community Successes that Reinforce Mission and Values
2. New Branding:
    1. **New Logo**
    2. Revamp Website (make available in English and Spanish)
3. All Projects Align with Revamped Mission and Values Statements
4. Invest in Social Media Manager
5. **Outreach at Academia/Conferences**

Project Branding

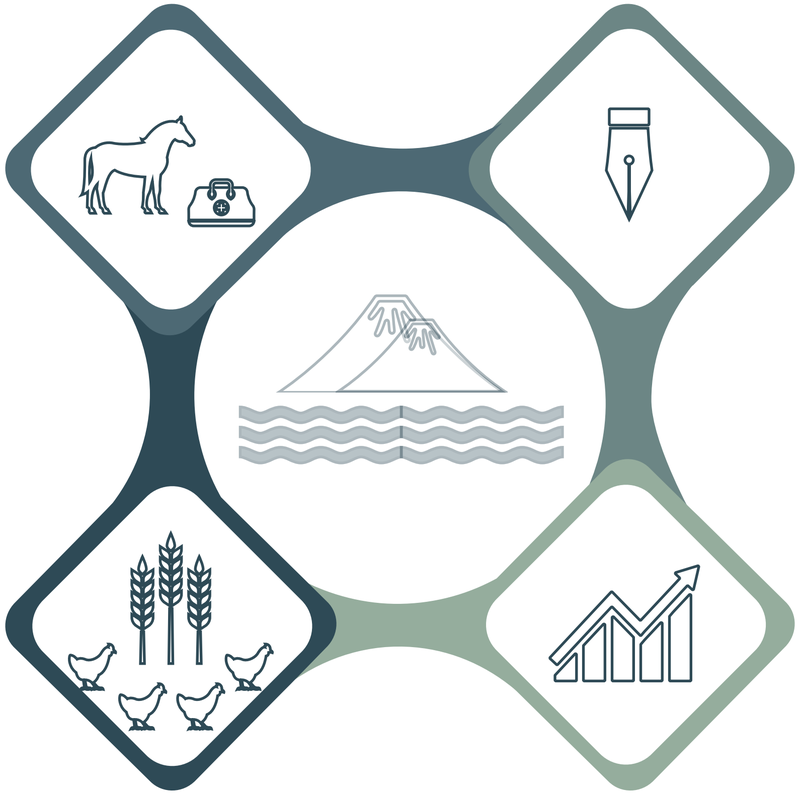
An Economic Opportunity Program

Veterinary Care

Internationally recognized excellence in working animal care.

Food Security

Commitment to sustainable crops, animal products and best practices in land management



Mentorship

In business, philanthropy, education, economics, business development and wellness

Opportunity

Financial, personal and professional commitment to reciprocal growth and training.

Opportunity

November 2022 UNESCO BIOSPHERE RESERVE DAY AND SYMPOSIUM

UNESCO Building peace in the minds of men and women

ENGLISH

First celebration of the International Day for Biosphere Reserves

When, Local Time From Nov 3, 2022, 10:00 AM To Nov 3, 2022, 4:00 PM

Contact: Sima Taheri-Gauter

Event Type: Cat VIII - Symposia

Where: --

The 3 November 2022 will be the first International Day for Biosphere Reserves. An event showcasing the contribution of the biosphere reserves to sustainable development will be organised at UNESCO Headquarters in collaboration with all the regions of the World Network of Biosphere Reserves. This will also mark the end of the two years celebration of the 50th anniversary of Man and the Biosphere (MAB) Programme.

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Internal Factors	Strength	Weakness
	Diligent work by Founder. $500K+ investment Trusted onsite collaborators and supervisors Outstanding professional resources	Branding/Mission Drift Fundraising Lack of Staff New Board Members Needed Generational Hopelessness

Action Plan (2 of 5)

Fundraising Recommendations:

1. Commitment to Fundraise by all Board Stakeholders
2. Establish Relationship with KIVA and other Microgrant Agencies to Graduate Grant Recipients to Independence
3. Executive Director (FT/PT/Contract) to Assemble Donor Database/Surveys and Oversee Grants/Fundraising
4. Identify Businesses/Ecotourism/UNESCO/Conservation Grants
5. Register with national nonprofit databases

KIVA

Microgrants

Women	Men
Individual	Group

Keywords

Search borrower story

Location

Country or US city/state

Select countries

Sectors

Type of business or activity the loan supports.

- [ ] Agriculture (32)
- [ ] Arts (1)
- [ ] Clothing (30)
- [ ] Construction (2)
- [ ] Education
- [ ] Entertainment
- [ ] Food (73)

Each Kiva loan helps people build a better future for themselves and their families.

Filters

Sort: Trending now

211 loans

× Nicaragua

Clear all

Rey David Group

Nicaragua

A loan of $2,750 helps a member to buy rice, oil, soap, sugar.

Danny Joel

Nicaragua

A loan of $1,500 helps to buy shirts, blouses, pants, dresses, skirts, shorts, and t-shirts.

Silvia Elena

Nicaragua

A loan of $1,500 helps to pay her workers, and to buy clay, dyes, sand, and cement.

SWOT ANALYSIS

Internal Factors	Strength	Weakness
	Diligent Work by Founder. $500K+ Investment Trusted Onsite Collaborators and Supervisors Outstanding Professional Resources	Branding Fundraising Mission Drift Lack of Staff New Board Members Needed Generational Hopelessness

Action Plan (3 of 5)

Board

1. Solicit Stakeholders for Professional Contacts, Academic Collaborators Focused on:

   Social Work
   Accounting/MBA
   Agriculture/Soil Science
   Climate Change
   Anthropology
   Economics
   Linguistics

2. Allow for Emeritus Status for Board Members

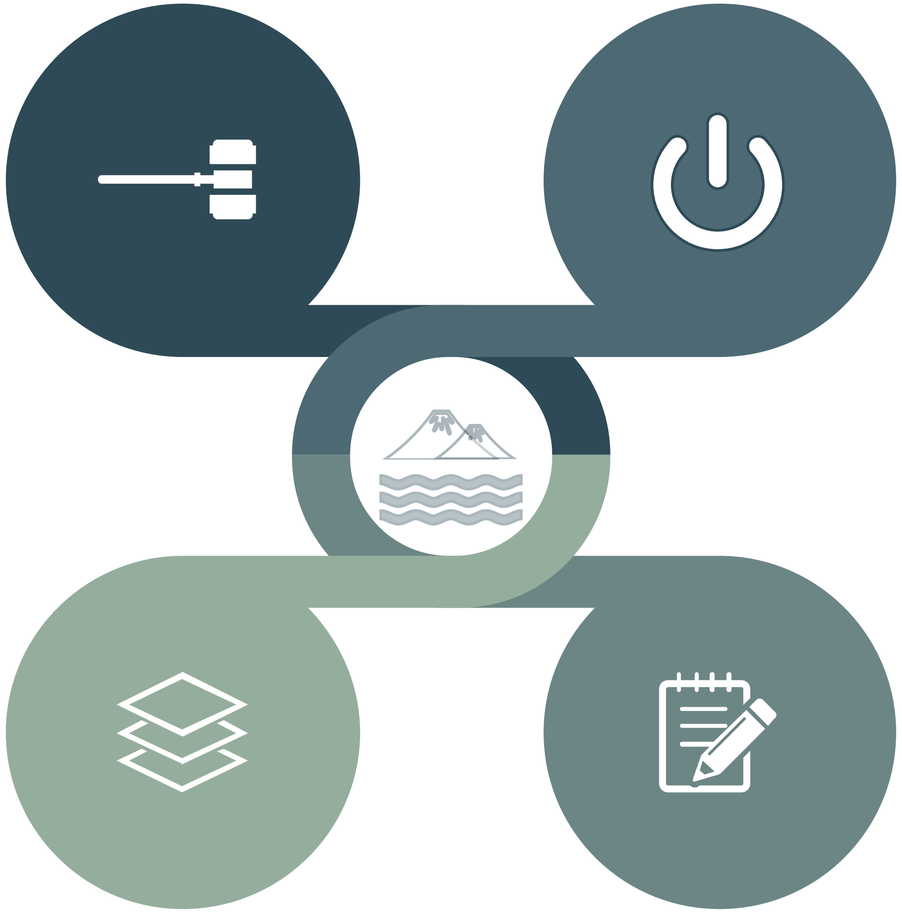
3. Add New Stakeholders: **Local Leadership, Program Advisory Council, Working Groups**

New Governance Model: Leadership Teams

Board of Directors

Lead individual working groups, serve as community ambassadors, foster new growth, friend and fundraising

Need to add Junior Board Members



Local Liaisons

Identify goals, opportunities, individuals and needs assessment.

There is a pressing need to populate the Board of Directors with Local Liaisons

Working Groups

Education, Veterinary Care, Mentoring, Fundraising etc

Program Advisory Council

Expert Level Consultation with Academia and Business. Development, Business, Cultural Awareness, Climate Change Mitigation

Program Advisory Council

Health and Educational Empowerment

Develop mentorships and pathways to success for women and children and vocational training for all. Identify clear metrics of success.

Cultural Stewardship

Identify vulnerable aspects of community culture and ecosphere and develop preservation metrics.

Economic Growth

Transition individuals from ‘grant recipients’ to loan holders then to fully private businesses

Local Leaders

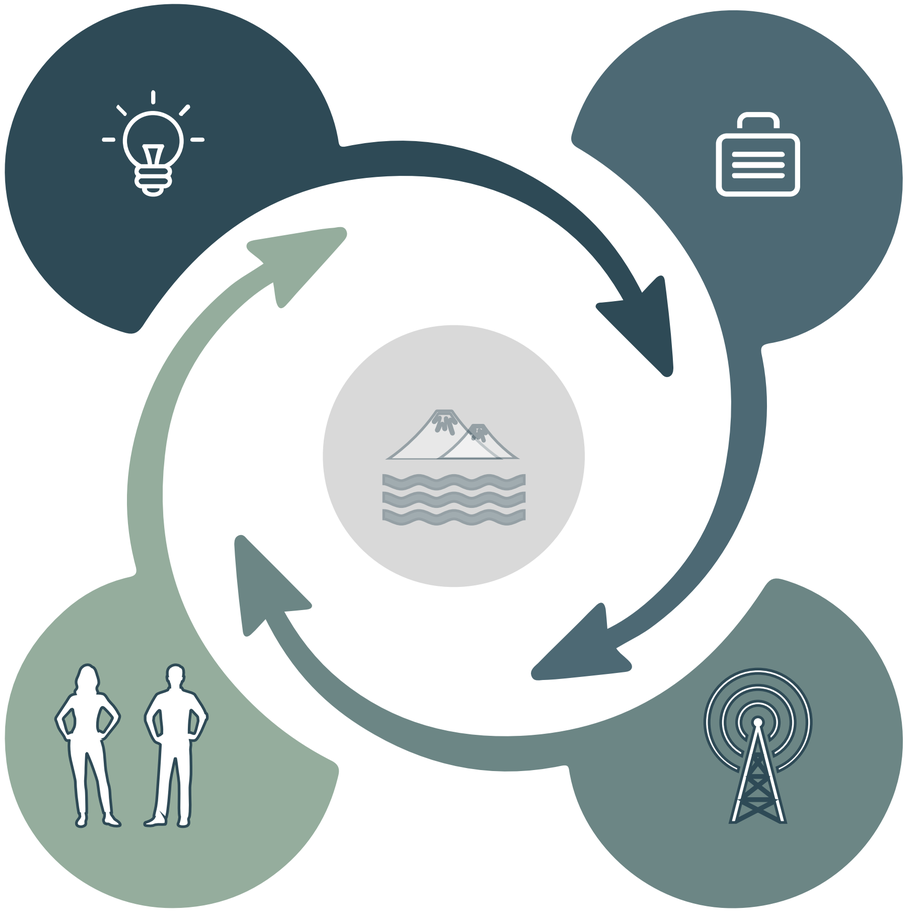
Managers and Community Champions

Identify Community Needs

Open forums, business meetings, personal relationships to identify projects that align with organizational objectives

Perform Audit

KPI
Budget
Environmental and Cultural Impacts
Milestones



Mentor and Empower

Work with outstanding individuals from community to develop new projects they can lead and develop

Community Call to Involvement

Meet Goals
Identify individuals actively engaged in project success

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Action Plan (4 of 5)

Empowers Board Members/Working Groups/Advisors/Local Leaders with Goals and Tools

- Clear messaging and regular communication
- Cohesive social media campaigns on Instagram, Facebook reinforcing Values, Mission, Growth and Hope
- Informational brochures, business cards, donor envelopes and ongoing communication with donor community

Meet with local tourist entrepreneurs and discuss goals, empowerment and stewardship plans

Form a local ‘BBB’ with government, business and nonprofit groups on site to improve communication and deescalate tensions.

Reach out to Board adjacent vet and professional (economics, public health, sociology, agriculture and climate change) schools to discuss interns and Board adjacent growth

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Action Plan (5 of 5)

Staffing and Board Recommendations:

1. Take on Paid Interns
2. Hire Executive Director (FT/PT/Contract) to Assemble Donor Database/Surveys and Oversee Grants/Fundraising
    1. Identify Businesses/Ecotourism/UNESCO/Conservation Grants
    2. Resister with Nonprofit Databases
3. Hire Social Media Lead (PT/Contract)
4. Hire Local Staffer to Photograph Projects

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Opportunities

Site's status as World Heritage Protected space
Ecotourism increasingly present
Natural resources are exceptional
Many educational opportunities exist to explore economic, social and health outcomes

Threats

Political Instability
Uncertain Local Development Influences
Financial Uncertainty
Failure to Develop Local Council
Failure to Collaborate with Local Business/ Ecotourism

External Factors

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Financial Uncertainty
Failure to Develop Local Council
Failure to Collaborate with Local Ecotourism

External Factors

By Addressing the Things We Can Control, our Internal Threats, We Mitigate the Potential Damage of External Threats

Working Group:

First Meeting Objectives

History:

Write One Paragraph History of Services Focused on Mission and Values Statements

Identify the Money, Time and Professional Services Rendered

Both of these things are needed for grant writing and recruiting new members

Data /Story Capture Plan :

Identify Metrics You Can Capture (also called "Key Performance Indicators: KPI")

- Health
- Economic
- Quality of Life
- New Leaders Identified
- New Projects Developed
- Others

- Develop Strategy to Capture Data and Stories of Success (eg "I'll make a worksheet to record how many eggs were collected and a way for that information to be passed back to us")
- Identify Fields of Expertise You Would Like to Recruit (eg "We don't have a lot of depth in agricultural work, let me look at who the experts and report back")
- **Second Meeting Homework:** Show Example of Data Capture, Come with Ideas on Making Professional Contacts and Use the History Information to draft Solicitation Letters

Everyone Comes with a Solution and Willingness to Do the Work