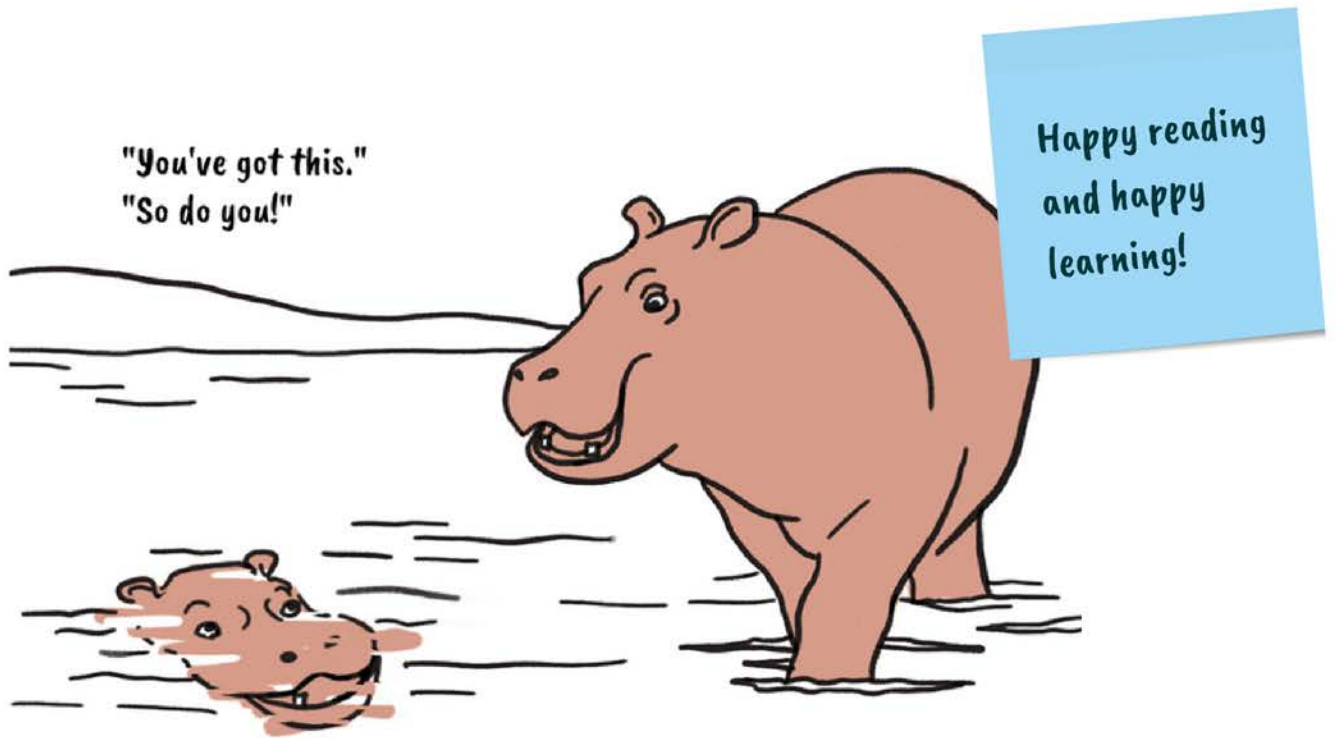# The Maliasili Toolbox

Your guide to building a stronger organization

HONEY

"You've got this."
"So do you!"

Happy reading and happy learning!

Dear Reader,

At Maliasili, we understand that leading an organization can be challenging. It calls for compassion, unwavering commitment, and continuous learning to improve your knowledge and skills. In light of this, we're excited to share this resource with you that provides practical tools and insights to make things easier for you as you navigate the daily challenges of leadership.

Inside this document, you will find practical guidance on strategic planning, theory of change, work planning, management routines, fundraising, budgeting, communications, and more. These are the very tools we ourselves use, and have honed over the years while supporting organizations on their journeys towards excellence. We encourage you to dive in, apply what you find, and continue to achieve great things!

Sincerely,

The Maliasili Team

# Contents

You can access strategic planning tools here: maliasili.org/tips-and-tools



If you'd like to see the strategic plans we've helped partners develop over the years, visit this link: maliasili.org/partner-strategic-plans

# STRATEGIC PLANNING THE FOUNDATIONS

Mission

A strategic plan articulates an organization's purpose, direction, ambitions, key assets, and plans for growth.

Goal 4

Goal 3

Goal 2

Goal 1

Resources we need:
- ☑ Money (food, equipment, etc.)
- ☑ Team (the right skills and people)
- ☑ Plan (timeline, actions)

## What makes a good strategic plan?

**Inclusive and owned:** The strategic planning process should consider a range of stakeholder interests, and decisions must be owned by the entire organization, including staff, board and leadership.

**Informed:** Making informed decisions requires having a solid understanding of the context in which an organization works as well as about the organization itself.

**Realistic and ambitious:** Strategic plans should strike a balance between an organization's past track record and its future plans. An organization that never changes what it does or tries to change too much too quickly risks affecting its performance.

**Clear and concise:** Strategic plans are guiding tools, which means they need to be accessible and clear, and used to make practical decisions on a regular basis.

**Focused:** Great organizations are able to maintain focus on the most important things. A good strategy forces an organization to make tough decisions and be clear about what they want and need to achieve and specifically how they will do that.

**Flexible and 'living':** Organizations must be ready to adapt and to revise their strategies as needed in order to always be as effective and efficient as possible.

# Developing a great Strategic Plan

A strategic plan is an overarching description of how your organization will deliver on its core purpose and goal(s).

## 1. Design the Process

Strategic plans set the direction for an organization, thus investing time and resources into the process is critical. At the outset you need to design what the process should look like, which includes identifying who should be involved and consulted, what information you need to collect, what questions you must answer, and your timeline.

**Identify key stakeholders:** you'll want input from key partners, constituents, board, and team members – identify the different stakeholders that matter to your organization.

**Reflect and plan:** Set aside adequate time to work through an effective and consultative team process of reflection and analysis that will guide the choices you make about your process.

## 2. Analyze your Context

To make hard choices and decisions an organization must understand the broader context in which it works.

What are you great at doing and what opportunities can you leverage for greater impact? On the other hand, where do you struggle and what potential risks stand in your way?

"You can't read the label when you're in the jar."

Reflect on your past work: What did you achieve, and where did you fall short?

Reflect on your organization: What are you great at doing, where do you struggle?

Look at the context: What social, political, and environmental factors are changing where you operate ? These changes may create new opportunities or new threats that you need to consider when planning the way forward.

### Situational Analysis - SWOT

A SWOT analysis is a useful framework to help an organization gather information that will help it make informed decisions during a strategic planning process.

**Strengths**
What is your organization good at?

**Weaknesses**
Where does your organization have challenges?

**Opportunities**
What external factors offer opportunities for your organization?

**Threats**
What are potential threats that could put your work at risk?

## 3. Articulate the problem you need to solve

You can't bring about lasting change unless you know what problem you are trying to solve. A key element of strategic planning is identifying the problem your organization is working to solve.

Ask yourself: To be successful, what problem must we overcome? Once you've identified that, you can then figure out what's needed to solve the problem (hint: that's what your strategy is all about).

**Problem Statement:**
a simple description of the problem an organization is working to solve.
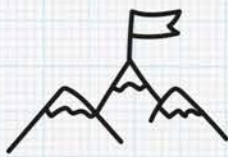
## 4. Clarify your purpose

The core foundations of an organization are its vision for the future, its mission in bringing about positive change, and the unique capabilities it lends to its work and the wider field.
All of this is basically about an organization's core purpose and reason for existing, which should guide everything else that you do.
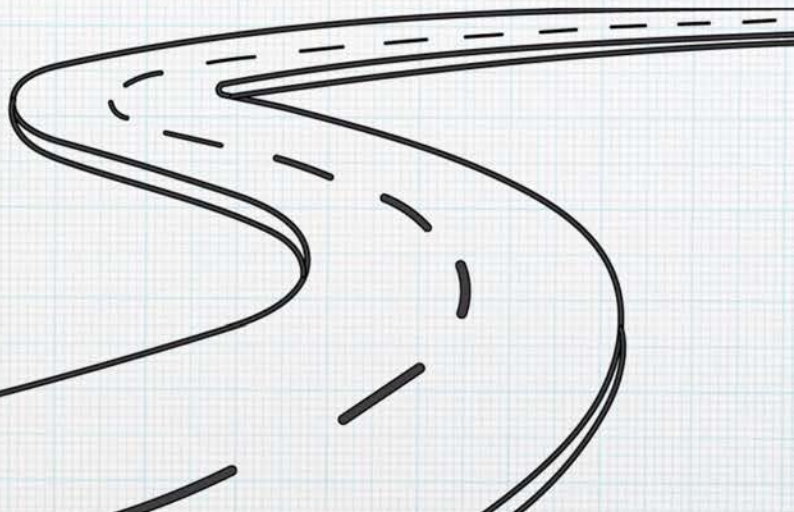
**Vision:** The ideal future state your organization wishes to see take shape — it's your ultimate 'dream' of the future. A vision is achieved by many working together and will not result solely from the work of your organization alone.

**Mission:** What an organization is trying to accomplish in order to bring about its vision of the future.

**Value proposition:** The assets, capabilities, and approach that makes your organization unique. It describes how and why you are able to create impact differently from other organizations.

## 5. Explain your logic and thinking

How will your organization bring about the key changes needed to achieve your mission? What do you believe you must do to deliver results and bring about change? An organizational 'theory of change' is the articulation of this logic and of your beliefs.

It captures and articulates your organization's formula for impact and provides guidance for all programs and projects.

### Theory of Change

Describes how an organization believes it will achieve its mission. In its simplest form, theory of change is an explanation of how the work of an organization brings about the future they want to create.

## 6. Identify your goals and priorities

Your mission and theory of change are put into practice by developing a key set of organizational goals and objectives. Goals and objectives outline the most important work that an organization needs to achieve in order to deliver on its mission. What are the major achievements you need to work towards, often over multiple years, to be successful? These are your goals.

Objectives are shorter-term, more specific components of a goal. Developing your goals and objectives is all about prioritizing time and resources so you focus on the most critical areas, opportunities, and interventions. Focused, concrete, and important goals will drive an organization towards success, and guide all your plans.

### Goal:

A significant and often complex envisioned end-state that may take multiple years to achieve. An organization usually has multiple goals that contribute towards their mission.

**Objectives:** Components of a goal, simpler in scope and shorter in time to achieve than a goal; each goal may have several component objectives. This is how the organization will achieve its mission.

## 7. Build an organization that can deliver

A good strategy needs to clearly set out the internal organizational capabilities and resources you will need to deliver on your goals and mission. This can include things like the funding you'll need or the communications support that will get your messages out; the team composition and structure; board governance; management systems; technology; and infrastructure.

If you have a clear picture of what you want to achieve, what success looks like, and what resources you need to be successful, then you'll be on your way to achieving great things.
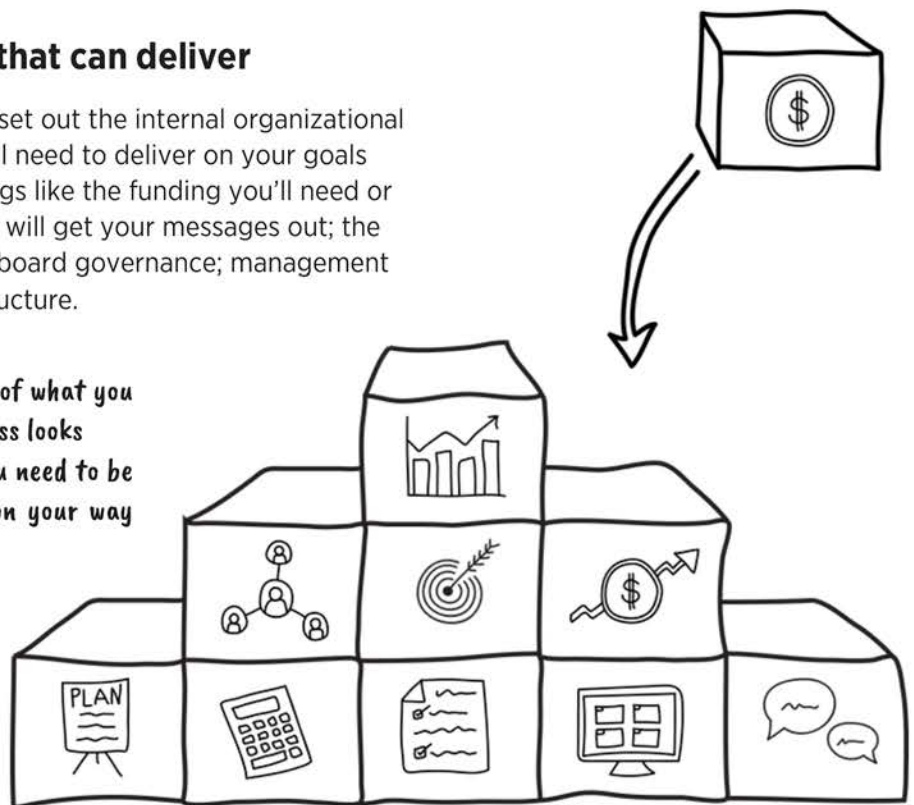
## 8. Make it beautiful

A strategic plan should guide everyone's work in an organization, thus it needs to be accessible, clear, and useful. Basically, it's a document you want people to want to pick up and read. It is also an important tool to share with donors, partners, and your constituents to ensure they understand your work and purpose and can get behind it. Take the time and resources needed to craft a well-written and beautifully designed strategic plan.

Learn more: maliasili.org/strategic-planning

Analyze your context

Know your problem

Articulate your Value Proposition

Develop or refine your Vision & Mission

Craft your major goals
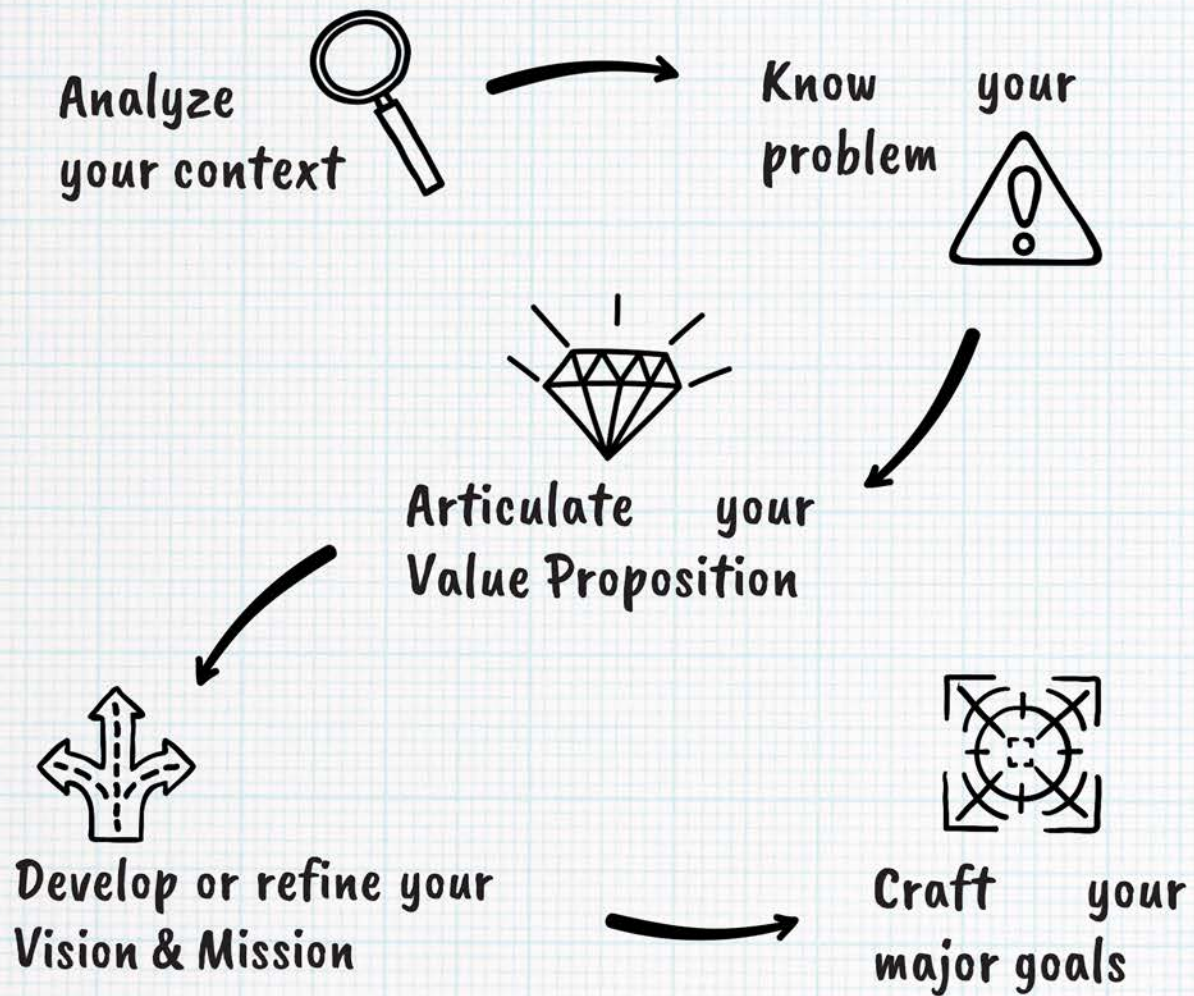
# Strategic Planning Workbook

**There's no set formula for strategic planning.**
However, a great strategy includes some foundational elements.

This workbook is designed to help you get started in thinking through some of these core elements. While it's best to have someone help you facilitate your strategic planning process, these worksheets can give you a head start and help you practice your 'strategic thinking' about your organization's work.

This workbook contains exercises covering the above key elements of a strategic plan. You can complete one or all of the exercises.

# Exercise 1: Internal Reflection

Before you look forward, take some time to look back and reflect on what your organization has done, what you've achieved and where you've fallen short. Start out by answering the following questions:
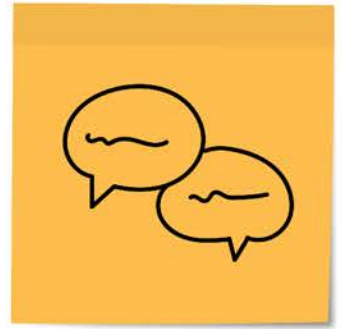
**What do you think were your top 3 achievements in the last 2–3 years?**

**What do you think enabled these successes?**

**What do you think were your top 3 major challenges/failures?**

**What do you think caused you to struggle?**

# Exercise 2: Analyze Your Context

**Situational Analysis - SWOT**

A SWOT is a useful framework to help your organization analyze internal strengths and weaknesses, and external risks and opportunities. Provide answers in bullet format in the boxes below. To get these answers you might consider the following: talking to members of your team or your board; reviewing reports or data from your organization or from others in your field or working in your area.

**Strengths - What is your organization great at? What do you do best?**

**Weaknesses - Where does your organization have challenges? Where do you need to get better in order to be successful?**

**Threats - What are potential external threats that could put your work at risk? What changes or trends are creating new risks to your work?**

**Opportunities - What external factors are creating the greatest opportunities for your organization to achieve more? What external changes or trends are creating important new opportunities?**

# Exercise 3: Problem Analysis

What is your organization working to change, what problem must it solve? Before you identify solutions - i.e. the work your organization will do to bring about change - you must first know what the problem is that you're working to solve.

NOTE: In the following sections you will work on your vision and mission. When you solve your problem, it will help you arrive at your vision. Then your mission will be the main action you take to solve your problem. Your goals will be the big results you need to achieve to address your problem and move towards your mission. Therefore, keep your problem top of mind as you move through the strategic planning process.

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

1) What is the problem your organization is trying to solve in the next 5 years?

Tip: It is okay if you come up with multiple problems as you brainstorm, but it is extremely helpful to identify the single biggest problem YOU exist to solve. There might be other smaller problems you will partner with others to address.

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

2) How do you know it is the problem? Tip: What evidence do you have for this?

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

3) What are the drivers and causes of the problem? Tip: Ask yourself what is behind the problem? Why is the problem happening?

# Exercise 4: Value Proposition

Your value proposition hones in on your organization's unique role and advantages. It describes what makes your organization special and stand out and where you can achieve the greatest impact.

To develop your value proposition, reflect on the two core questions and the diagram below. After reflecting you can craft a statement in a sentence or two, or even just a set of bullet points, that describes your organization's unique strengths and its niche.

---

**Question 1: Where are the greatest needs or opportunities for your organization's work and purpose?**

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**Question 2: What are your organization's unique strengths and role relative to others?**

*Tip: When thinking about the above questions you might ask yourself: Why would others want to work with us? What would they think we bring that another organization might not?

What the world needs

What our organization can do

Where we can achieve the most impact

---

**Value Proposition:**

# Exercise 5: Vision

Your organizational vision describes the world you want to create through your work. It is the ideal future state your organization wishes to see take shape – your ultimate 'dream' of the future. A vision is achieved by many working together and will not result solely from the work of your organization alone.

To develop your vision, think about the world you want to work towards through your organization's work. Think about what is different or will change as a result of your organization's work.

In the space below draw your vision of your ultimate 'dream' of the future. Be creative and use whatever artistic tools you prefer (if writing is your most creative form of expression, then feel free to include some words too). Dream big and bright!

# Exercise 6: Mission

Building from your vision, your mission describes what you do to create the changes that you want to see happen. The mission describes your core purpose and what outcomes you are working to create in order to bring about your vision of the future.
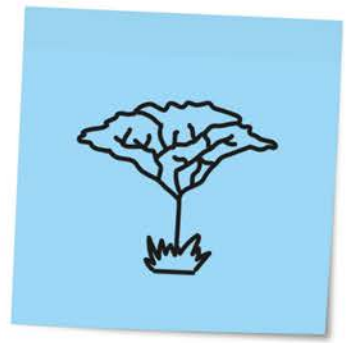
**Mission statements often include:**

• Who/what you are targeting to help/impact

• What are you doing to/for your target group or beneficiaries

• The basic outcome you are working towards

• Geographic detail relevant to your organization's focus

Good mission statements are clear and brief and avoid confusing jargon or too many modifying statements. You don't want to explain too much about how you'll do something, rather what you will do. Here are some examples from conservation organizations:

> *We rebuild tropical fisheries with coastal communities.*

> *To maintain a healthy connected landscape for people and wildlife in Kenya's South Rift.*

> *To conserve and grow the Grevy's Zebra population in northern Kenya.*

> *To promote sustainable coexistence between people and lions by using cultural values,*

> *community participation and science.*

- - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -

Follow these instructions to develop a clear mission statement:

Try to limit yourself to 10 words or less.
Include a verb; a key outcome; and a specific target population or setting.

| Verb | Outcome | Target population or place |
|------|---------|----------------------------|
| (List out possible verbs here, e.g. 'conserve,' 'grow,' 'restore') | (List possible outcomes here, e.g. 'healthy,' 'educated,' 'better off,' 'stronger rights') | (List the population or place, e.g. 'Malagasy fisher communities,' 'northern Zambia,' etc.) |

# Exercise 7: Goals

Goals describe the key outcomes you are working towards, that will enable you to achieve key steps towards delivering on your mission. Goals describe what success looks like over a given time frame and focus your energies on tangible outcomes critical to your mission.

Setting good and clear goals is critical to making progress and setting priorities.

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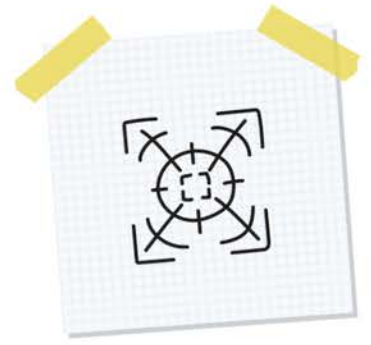
Imagine you are in the future, writing a report to capture your major achievements and results over the past several years.

What are the major achievements you would want to see highlighted in your report? (Remember - your key achievements are helping you tackle the problem you need to solve and advance you closer towards your mission.)

Use these achievements to now craft the first draft of your Goals.

Aim for 3-5 Goals.

Example goals:

Secure and strengthen community rights to land through strong and effective local governance institutions.

Increase access and use of family planning.
Raise $5 million in additional funding to allow for geographic expansion of our work.

**Don't let your strategy collect dust,**

**make it useful, make it simple.**

# What makes a good strategic plan?

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**Informed** → To make informed decisions, it is essential to have a solid understanding of the context in which an organization works as well as the organization itself.

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**Flexible and 'living'** → Organizations must be ready to adapt and to revise their strategies as needed in order to always be as effective and efficient as possible.
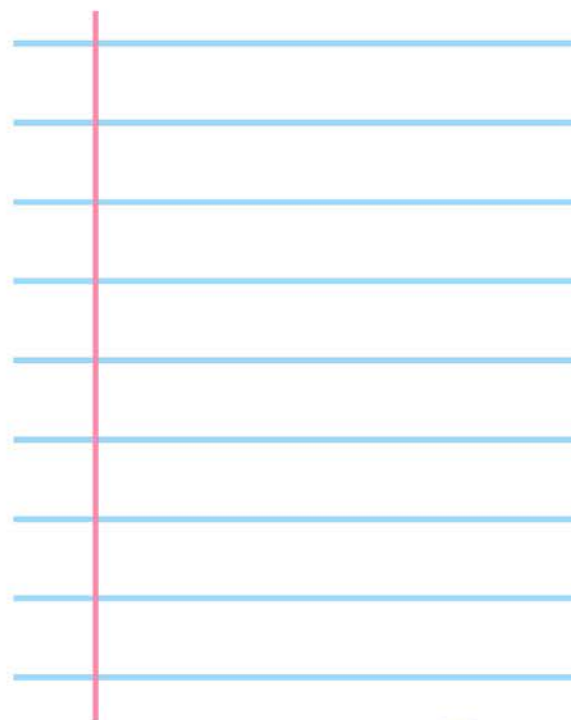
# Strategic planning pitfalls to watch for!

**They lack focus** → Making hard choices is, well, hard. We've seen many organizations wrestle with this during strategic planning; often they want to "keep options open" so that they aren't limited in what they can do, or so they can be 'holistic.' But such approaches do not lead to high performance; they lead to lack of focus, chronic overstretch, and a watered-down organizational identity.

**The Project Trap** → Sometimes strategies get caught in 'the project trap,' where they focus on a lot of activities and actions through projects and programs, but lack a clear sense of overall purpose and impact. Don't get too granular with your plan - projects and programs should be planned to support your strategic goals but not as your goals.

**They don't prioritize** → Relatedly, organizations need to be able to articulate the most critical and important things that they need to achieve, both operationally and organizationally. This can be difficult, but it is central to being able to achieve goals with limited resources and make tangible progress.

**They aren't adapted and 'living'** → We live in a fast-paced world where things are changing all the time - strategic plans need to help an organization keep up. Strategic plans must be used as living documents, reviewed and changed in a constant cycle of learning. If they aren't they will not be useful.

**They're too dense and detailed** → The function of a strategic plan is to examine and clearly express an organization's core value proposition and objectives; they should have headline goals and targets but do not need to provide detailed programming or work plans; too much detail on things that will change over time is unnecessary and often detracts from the broader key strategic questions and issues.

**They don't balance big dreams with realities** → While dreaming big is an important part of the strategic planning process, it's equally as important to ground those dreams in reality. Organizations that have big dreams but lack the capacity and plans to deliver will struggle to achieve impact. Thinking through what implementation will require is a critical step in strategic planning.

**They're not inclusive** → It's not uncommon for strategic plans to be done through a single workshop or meeting, with only a few people in the room. Such truncated processes, without sufficient stakeholder participation, tend to result in strategic plans that do not truly address an organization's needs and may not be implemented because there is a lack of ownership from across the organization.

**They don't make sense** → If aspects of a strategic plan aren't making sense to you, then it's likely they just don't make sense. Our field is prone to jargon and complexity and a strategic plan is meant to help an organization find its clear path within that.
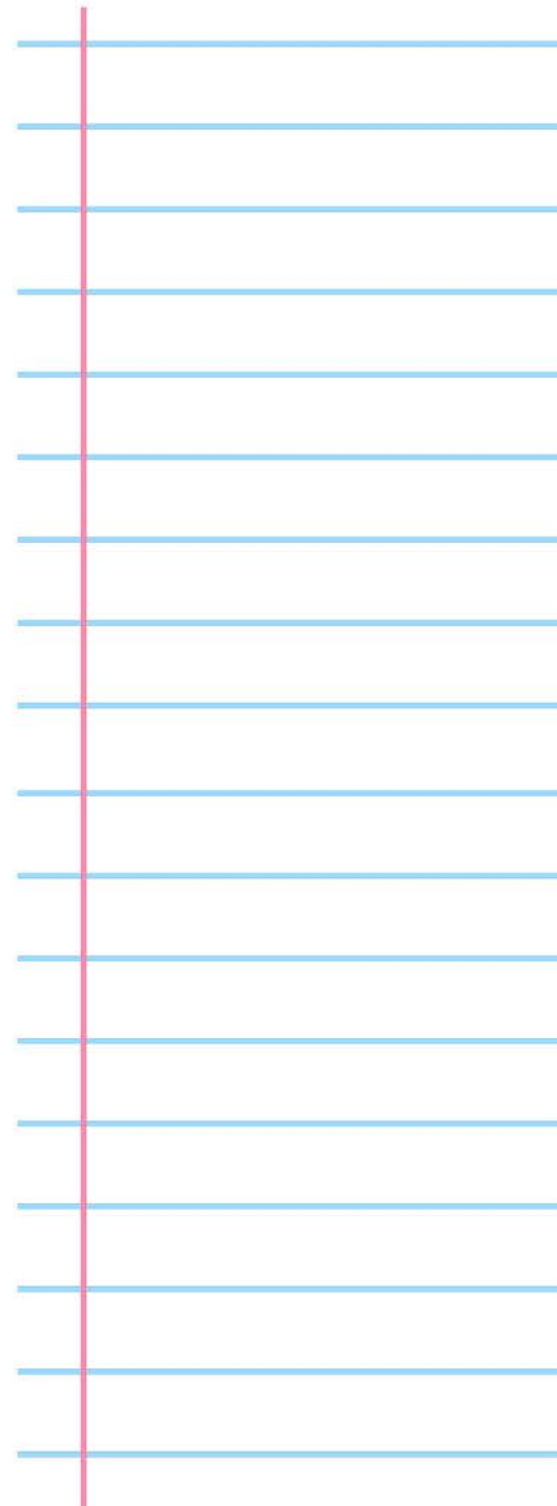
# The Strategic Planning Journey

Key questions for a great strategic plan

**Where are we starting from?**

**Situational analysis:**
To inform the decisions you'll make you need to look inwards to know what your organization does well and where you struggle, and look outwards to understand the broader context in which you work.

"You can't read the label when you're in the jar."
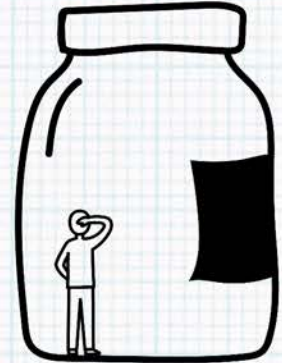
**What is the problem we need to solve?**

**What do we want to achieve?**

**Problem statement:**
You can't bring about lasting change unless you know the problem you need to solve. The thing that's blocking your mission from being achieved – is ultimately the problem you need to solve.

**Vision & Mission:**
Your vision is your organization's ultimate 'dream' of the future, and your mission is what your organization seeks to accomplish in order to achieve that ideal future.

**How will we do it?**

**Goals & objectives:**
Goals (bigger picture and longer-term) and objectives (more specific and short-term) outline the most important work that an organization needs to achieve in order to deliver on its mission.

**What do we need to get there?**
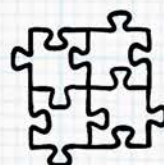
**Organizational growth:**
A good strategy needs to clearly set out the internal organizational capabilities and resources you will need to deliver on your goals and mission.

# What is Theory of Change?

Theory of Change (ToC) in its simplest form is an explanation of how the organization intends to achieve impact.
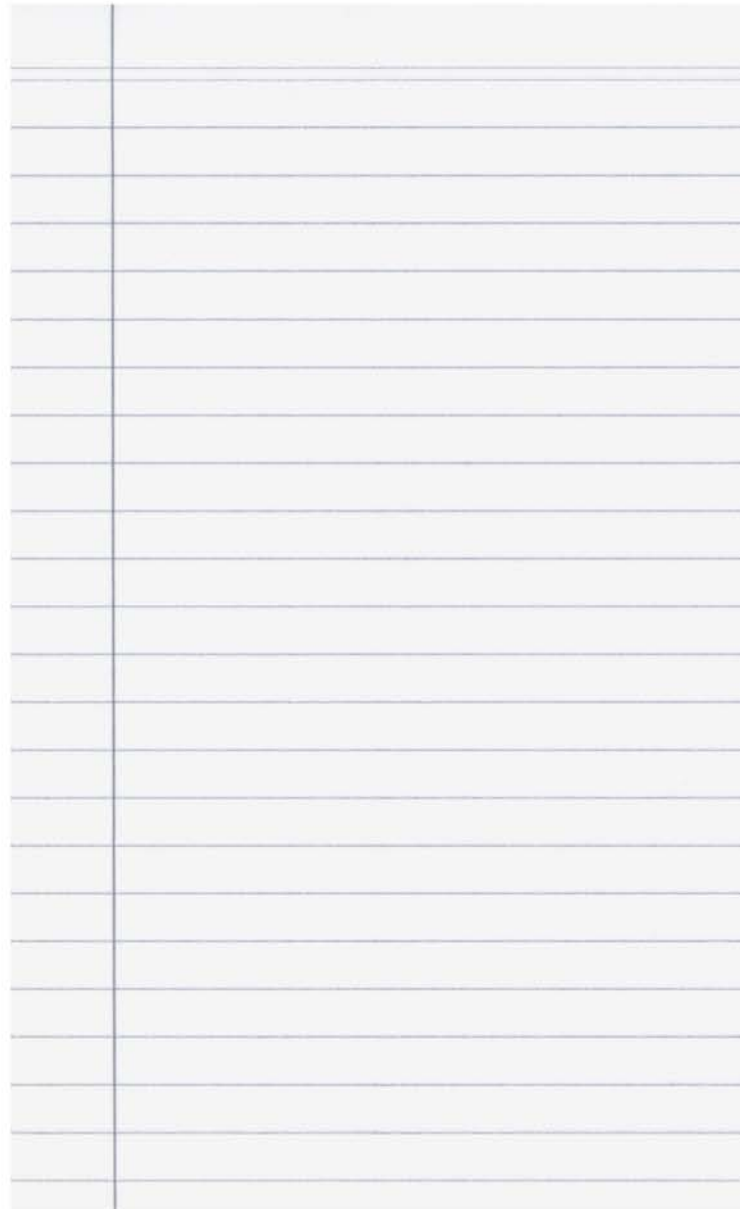
When you describe your theory of change, you are aiming to explain in a compelling way how the actions of your organization (what you chose to do) aligns to create change and deliver the mission and vision of the organization (what you ultimately want to achieve).

Ask yourselves the right questions to interrogate what you should do to ensure that you develop the right approaches (new or old) to bring about the change you want to see.

# Why should you do ToC?

Developing a ToC will take some time and deep thinking from you and your team. So then why should you do theory of change in your strategic plan?

- ToC helps an organization get to the heart of what they want to CHANGE, not just what they do. This is an important shift to be able to have a strategic plan that is truly impact driven.

- A strong ToC process brings unity to a team. It clarifies assumptions and elicits beliefs so that the entire team can have a shared vision of change.

- ToC is the foundation for an organization's monitoring and evaluation efforts. Having a clear ToC in an organization's strategic plan set's them on a strong path for being able to accurately and effectively monitor their impact.

- A strong ToC puts an organization in a better position to communicate with donors and partners about what their focus is (and what it is not!). It gives confidence to external audiences that they know what they are going to achieve and how they are going to achieve it!

# The theory of 'Theory of Change'

In relation to strategic planning, when we are thinking about theory of change it is helpful to look at the most simplistic form of the definition by understanding the term's parts:

**Theory** → **A strong gut feeling.** A systematic way of describing how you believe something works. Can be a well established concept with a lot of evidence, to just a proposition or a well-informed guess. It is something that you are asserting is true but requires testing to prove.

**Change** → **Different than it was before.** Some people see change as a destination, some as a process. One is not more right than the other and often both exist at the same time. It is good to know this when listening and leading conversations about change.

**Action** → **What you do.** The activities, interventions, or programs an organization undertakes as its core work. Action is included above because we are going to need to hold the difference between action (what is done) and change (what results from action). Remember to listen for this difference when people talk. They often talk about action more easily than change.

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### The Theory of Change Product

When you are developing a ToC you are trying to achieve two important results:

**An explicit thinking process.** Help create unity about the theory and beliefs you have about how change happens. Organisations often already have a theory. However their theory is often assumed. When theory is assumed it means different people often are thinking slightly differently and there are missing pieces that often only a few individuals know. The ToC process helps make an organisation's theory explicit and shared.

**Produce an explicit visual output.** As a result of the process, you want to produce a Theory of Change product that visualizes the ToC. Once visualized and articulated, it is easier to work with as a team (implement, assess, and critique) as well as share with the outside world.

---

**ToC language you may want to have on hand when discussing this as a team:**

**Assumption:** The explanation of the belief or feeling (with or without evidence) that something is true.

**Desired end-state:** The description of how the organization wants the future to look like once it is successful with its work.

**Output:** Direct products or deliverables from the action taken. Outputs are the immediate deliverables that result from an activity or intervention (e.g., construction of a school, people trained, people reach etc).

**Outcome:** Change that occurs after some time (intermediate results) such as a change in knowledge, attitudes, beliefs, skills, behaviors, access, policies, or environmental conditions. An intermediate result that helps you know you are on your way to impact. Often there are multiple outcomes before impact.

**Impact:** Long-term result of one or more programs over time. Often a change in state from how the system was in the beginning.

**Result:** A general term of something achieved or changed. It is best to use this term when you don't want to confuse things by being specific about an output/outcome/impact. Results can refer to any of the three.

# How to ask a Powerful ToC Questions

One of the key aspects of the theory of change process is to unearth the reasons why you believe that the actions you will take will achieve your desired outcome. To do this well, you want to craft the best possible questions that will resonate and inspire your team. Use language that fits your organization's culture and speaks to what you care about. Make it personal and help your team feel inspired. Below are some examples:

| What we need to answer | Example Questions from Specific Organisations |
|---|---|
| **Why does your goal help solve your problem?** *You ask this question to clarify why this goal is essential for the organization to achieve.* | → Why do local land rights help reverse land degradation and biodiversity loss? OR → What happens to the land when local people have land rights? *Then, why do you know this to be true?*<br><br>→ Why does improving government policies change how community conservancies can operate? OR → What changes when government policies are supportive of community conservancies? *Then, why do you feel this is true?* |
| **How does this goal help achieve your mission?** *You ask this question to understand the link between a goal and the mission.* | → Why is generating quality research and monitoring data essential to your organization's success? OR → What about good research and quality data is essential for your organization's success? *Then, why do you believe this?*<br><br>→ Why is human health essential for a thriving gorilla population? OR → What happens to gorillas when humans are healthier? *Then why do you think this will happen?* |
| **Why do you believe this goal will achieve the result described?** You ask this question to clarify the logic of what the goal will achieve. | → Why do you believe healthy rangelands promote coexistence? OR → What will change about coexistence when rangelands are healthy? Then why do you believe this?<br><br>→ Why is achieving effective governance important? OR → What does effective governance achieve that is important to you? Then ask why... |

Probably should have
planned first
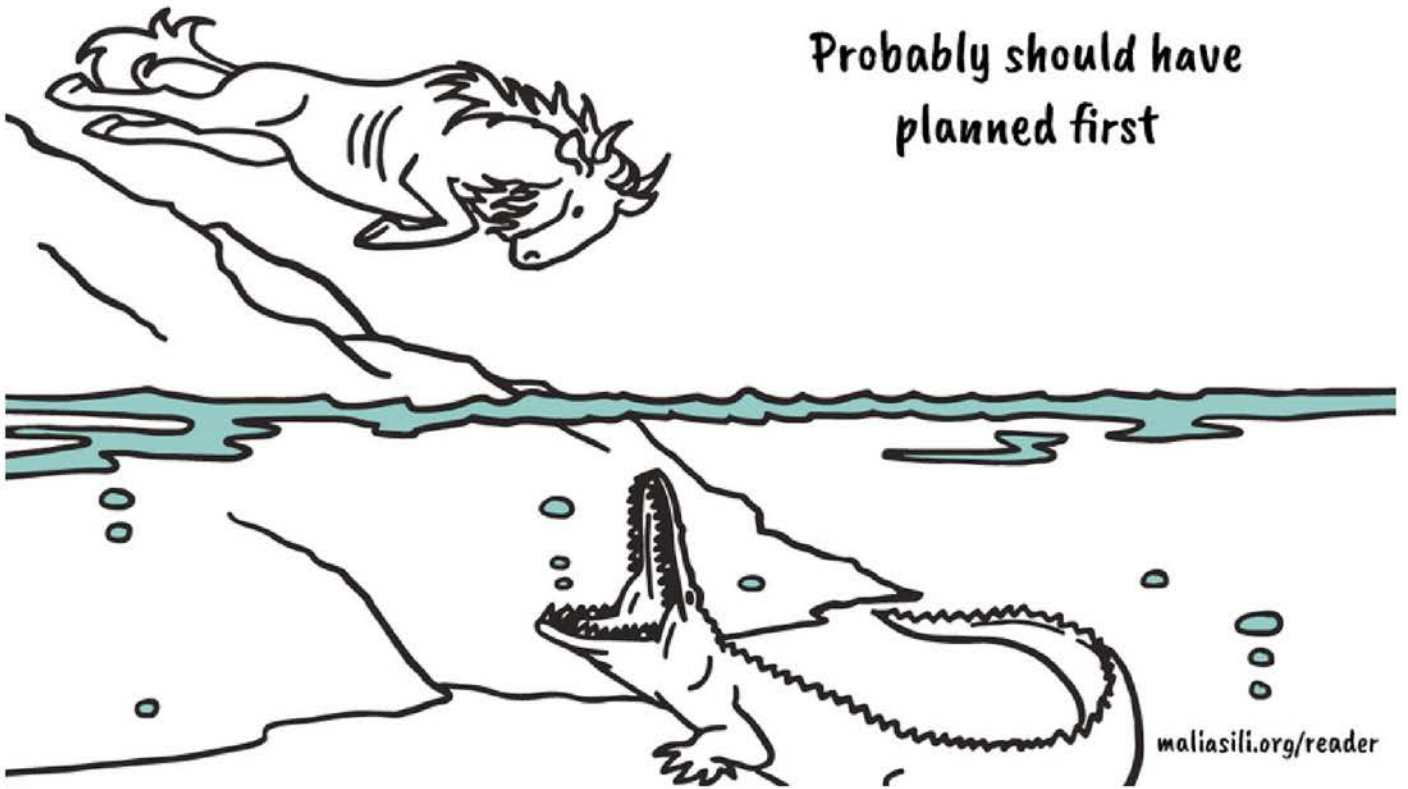
maliasili.org/reader

# Goal Setting &
# Work Planning

To-do lists can be somewhat mindless to put together. You're given a task, and you jot it down. You think of a new idea to implement, you add it to the list. You receive a new grant and copy down the activities that need to be implemented.

To-do lists certainly have their place (let's be honest, where would we be without them). But jumping straight into a list of actions without first thinking through why you're doing them and what you're trying to achieve can result in a lot of checked boxes but not a lot of impacts.

*Don't just dive in. Let's plan.*
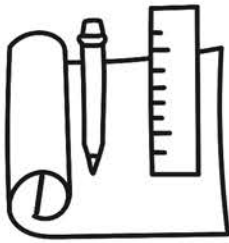
# Toolkit: Annual Goal Setting

## 1. Set performance goals and key results (GKR)

### Understand the basics

- Goals should be aligned to your organization's strategy, and the overall annual targets of your respective teams or departments. Goals should be ambitious and may feel somewhat uncomfortable; if someone consistently fully attains their goals, these aren't ambitious enough and they need to think bigger.
- Key results are measurable and should be easy to assess progress.
- Goals are public so that everyone in the organization can see what others are working on.
- Goals are not a shared to-do list; quarterly work plans provide detail on actions and tasks necessary to make progress towards
- goals - GKRs should be big picture goals focused on results and outcomes desired.

### Write out the goals

Use a simple template to list your goals (see attached). Here's an example of a goal and key result to give you an idea of what this could look like.

Goal: To ensure resilient and effectively managed rangelands support communities and wildlife across northern Kenya.

Key Results: A rangelands monitoring system is set up to ensure that data is effectively collected, processed and analyzed. 3 new community grazing plans are adopted by village committees.

## 2. Identify opportunities for professional development

### What do you want to work on this year and why?

Add a narrative overview of the areas of development for the year, why it's important to your role and your professional development. One bullet for each area of focus. Here's an example:

Area 1: Take a training course on wildlife monitoring which will help in better and more effective collection of wildlife data.

## 3. Add personal goals that your team should know about

Add your top personal goals – things you want to make sure to prioritize for balance and well-being throughout the year, or big things going on in your personal life that would be helpful for your supervisor to know (education, weddings, etc).

### A pro tip: Add your priorities each quarter, linked to your annual goals.

2-5 top priorities per quarter, could be a summation of a series of activities or objectives through the quarter.

Add key results (outcomes) that can be reasonably expected within the scope of the quarter.

These priorities should be the main focus of performance feedback at the end of the quarter.

## Annual Goals | Clearly define your performance goals & key results

Goals should be aligned to your organization's strategy, and the overall annual targets of your respective teams or departments. Key results are measurable and should be easy to assess progress.

**Goal 1:**
**Key Results:**

**Goal 2:**
**Key Results:**

**Goal 3:**
**Key Results:**

## Professional Development | What do you want to work on this year and why?

Add a narrative overview of the areas of development for the year, why it's important to your role and your professional development. One bullet for each area of focus.
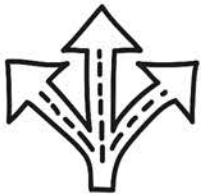
**Area 1:**

**Area 2:**

**Area 3:**

**Professional Development Plan**

| Development Goals | ~70% On the Job assignments (to be integrated into work plans) | ~20% Coaching / Mentoring | ~10% Formal learning or training |
|---|---|---|---|
| | | | |
| | | | |
| | | | |

## Personal Goals | What are your top personal goals?

Add your top personal goals – things you want to make sure to prioritize for balance and wellbeing throughout the year, or big things going on in your personal life that would be helpful for your supervisor to know (education, weddings, etc.)

**Goal 1:**

**Goal 2:**

**Goal 3:**

23

# 8 Tips on Work Planning
**(from you, our partners!)**

## 1. Keep it simple →
Our most useful advice: 'keep it simple.' We struggled with this initially but now see the value of a simple work plan - we use it. -GZT

## 2. Start with your strategy →
Our work plan comes from our overarching strategy, so if a new activity doesn't fit into one of our four overall goals then we question if we should be doing it. -SORALO

We keep our strategic plan in mind - knowing how each activity we carry out contributes towards our Mission. -GZT

We start out by identifying our broader annual targets prior to creating the detailed annual work plan. Not only is this useful for planning, but we also share this narrative document with our donors and partners. -Honeyguide (HG)

## 3. Make it participatory →
Develop the work plan as a team- each member of your team needs to agree to the activities and know what they are taking responsibility for. -GZT

The session needs to be fully participatory- each department needs to include their entire team in the process. -GZT

## 4. Link it to your budget →
We number our annual work plan activities and link them to annual budget lines. This helps us know the work plan activity/milestone/program costs, which can then be broken down into financial scenarios. -Honeyguide

Link the plan to your budget. Knowing which activities are funded and which ones are not is very useful, and makes the plan much more efficient and applicable. -GZT

## 5. Put the details somewhere else →
We keep and manage all of our detailed tasks in Zoho (task management program) in order to keep the workplan simple, not too detailed. -HG

During our first work planning session, we paid too much attention to the smaller details within the activities, and the work plan was barely used by the team. This year, the work plan is more strategic and higher level and is now being used. -GZT

## 6. Review it frequently →
You'll want to review it regularly and use it as a reflection tool. Don't be afraid your seniors will judge you if you're behind in certain areas. It's a tool to track progress and to help you reflect. -SORALO

Reviewing the work plan can help people think about how they use their time and will push them to ensure their plans tie back to our strategic goals. -SORALO

## 7. Don't start from scratch →
It was useful to have a work plan template and framework from Maliasili, but it was also good to be brave enough to modify it to our needs. -SORALO

We use a simple work plan template in Excel. We use one page per program area, which allows the entire annual work plan to be printed on three A3 pages. -HG

## 8. Use it often →
We found it's essential to have someone champion the work plan to ensure it is a live working document. -SORALO

We use the same work plan tool for reporting to our board each quarter. To make it useful to the board, we include a quarterly update column with notes and details. -HG



Organizational Annual Work Plan

Program / Project Work Plans

Individual Work Plans
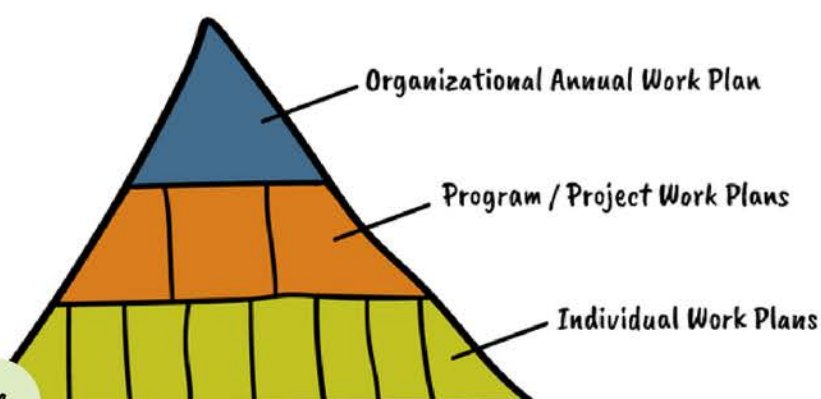
Use part of your last team meeting of the year to create your work plan for the next year. Make sure it is a goal for the entire team that week - it must be participatory.
-Grevy's Zebra Trust

# Prioritization
## 7 steps towards better time management
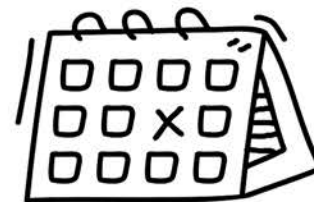
### 1. Know how you work best →
When during the day are you most productive? Are you maximizing those productive hours by focusing on important things rather than mundane, routine tasks? Schedule your time carefully so you do your most critical work during your most productive hours.

### 2. Set weekly goals →
Ask yourself, "what are the most critical things you must accomplish this week in support of your annual work plan?"

Here's another simple formula: Identify 1 - 3 top targets per day, list them in order of priority, and don't do no. 2 until you finish no. 1. This is useful for both personal and organizational priorities.

### 3. Eliminate distractions →
Throughout the day, it's easy to get bombarded with texts, phone calls and emails. Additionally, other distractions such as interruptions from colleagues, family (especially with many of us now working from home), can take away your focus. Find ways to eliminate these distractions to help you be more productive, e.g. turn off notifications, put your phone on silent and out of reach for periods of time, or have 'office hours' where people can meet with you.

### 4. Categorize tasks and activities →
We love the Covey Time Management Matrix, a framework for prioritizing time and tasks for optimized efficiency and productivity. This model uses a four-quadrant system to help you categorize each task and activity, and help you decide where you should focus your time and energy. Urgency: Tasks and responsibilities requiring immediate action or attention. Importance: Those with high significance or value to goals.

### 5. Phase →
Not everything has to be done at once. Often work can be broken down into multiple steps and spread over time.

### 6. Take time to review, reflect and adjust →
Ensure that you take the time to think, review and reflect to understand what's working and what's not. What are the barriers to you and your team achieving your priorities? How can you remove those barriers?

### 7. Say NO! →
'Saying no' should not be just at an individual level - it should also apply at an organizational level. For example, a donor might come with additional funding to start a project not aligned with your strategy and mission. While the project might give you some short-term financing, it will sidetrack you from your overall mission. Saying no is a critical recipe to ensuring that your organization wins in the long term.

My notes

# Maliasili's Peace Nganwa shares her A-Z Facilitation Guide

We could all use a lot more 'easier' in our lives, especially in the complex field of community conservation. Fortunately, we have a solution for you: **great facilitation.** Effective facilitation of meetings, gatherings, and processes can help to increase productivity, foster collaboration, improve decision-making, build trust, and prevent or resolve conflicts. Here are some top tips to help you facilitate your next gathering like a pro!

**Adaptability** → Be ready to adapt to the room set up and whoever is in or joins the room; read the room and adapt your plan to the situation, giving more time or changing track as needed; assess the weather and environment and adapt to that too.

**Be Brave and Bold** → Be confident, you are the expert and leader, the room is yours.

**Charge** → Take back charge of the room when there are interruptions, when dealing with big personalities. Respectfully remind the group who the facilitator of the room is.

**Do** → Facilitation is not a noun, it's a verb. You just have to do it.

**Energy** → Bring your energy to the room. Let your energy work for you - high or calm, be your true self. But also use energizers to bring energy.

**Feedback** → Provide and seek for feedback for improvement. Provide positive feedback also. For debrief provide alternative action - we could have said this or done this - for a different outcome.

**Ground rules** → Set agreements at the beginning of the meeting- let them come from the participants and add what may be missing.

**How you say it matters** → Be clear, be concise, be respectful, be diplomatic but be honest.

**Invest time and energy in head, heart and hands** → invest time in the preparation. The more you sweat in training, the less you bleed in battle!

**Judgement free** → Put your own preconceptions and biases aside - on both the topic and the participants.

**Know your audience** → Use their knowledge.

**Leave no one behind.**

**Mentally prepare** → Bring your whole self, mental awareness and focus before and during the meeting, gathering or community baraza.

**Non-verbal cues** → Read the room, what people are not saying as much as what they are and you can respond without talking (eg pause when people are talking when they shouldn't be or quietly make eye contact with someone on their phone).

**Open your mind to the flow and process** → Be in the zone, go with the flow and flow with the go.

**Procedural suggestions** → Talk about the process of what has been done and what is going to be done.

**Question to reflect** → When reflecting with the group, use what, where, why, how questions. Even when planning and designing the meeting.

**Repeat Repeat Repeat** → Put concepts across in different ways and iterate key concepts until it sticks to your audience.

**Strength of the team** → Use your team! Delegate, assign clear roles, all the resources you need are within the team.

**Take a step back** - Take a step back and look at what's happening - are things heading in the direction you want?

**Understand why you are facilitating/holding the meeting or gathering** → Facilitate with the end in mind. Focus on the outcome. what do you want to get out of it? This will help you choose the right tools and techniques.

**Volunteers** → Use volunteers to help do things and take the pressure off of you while involving others in the room. Give people as many roles as possible to increase participation.

**Wow your audience** → Bring fun to keep the energy high and people engaged. Wow them by delivering content using 'out of the norm' methods that they enjoy and trust.

**eXperience** → Facilitating is different from teaching. In facilitating you are using the groups' experiences and what they already know to come to an end goal. Remember to have eXtra ears!

**You've got this** → Believe in yourself! Also - know who you are, be aware of when you are getting nervous, anxious, etc, so that you can adjust and adapt.

**Zebras are black with white stripes or white with black stripes or have black and white stripes?** → Be a critical thinker - be analytical about the process, outcome and results. Reflect and learn always.
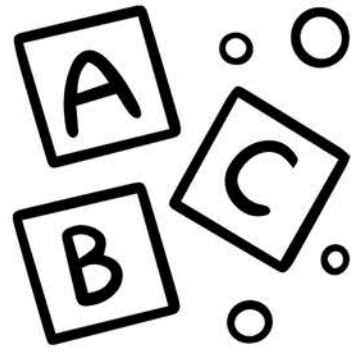
AGENDA

Have a clear purpose and plan.

# Make your meetings more productive

At Maliasili we get it; meetings can sometimes take up too much of your time. But we also know that when done right, they can actually save you time in the long run, e.g. with quick consensus and decision-making or with new ideas to help you do your work better. But to be better than an email, meetings require time and preparation to get right. Here we share top tips that will help.

**Firstly, should you even meet? →**
Decide if the meeting is necessary in the first place. Do you need to convey information? Brainstorm? Make a decision? Before you call a meeting, think about your needs and then decide if it should be done together in person, virtually or asynchronously (e.g. via email).

**Have a clear purpose →**
Identify your goals before the meeting so you can keep your agenda and conversation focused. This will ensure that the meeting is productive and stays on track.

Tip: Create a "parking lot" for other issues that arise during the meeting but run the risk of taking you away from the core purpose of the meeting. The parking lot issues can be tackled another time (and maybe via email!).

**Know who must be there (and who doesn't need to be) →**
Depending on the purpose, review who needs to be in attendance and also who doesn't. Nobody likes having their time wasted, so don't include people who aren't necessary to achieving your meeting's goals.

**Share the agenda beforehand →**
Help people come prepared while also ensuring that everyone who has a role to play in the meeting is aware and clear on what they need to do.

**Prepare →**

This is often overlooked, but it's critical. Before you begin the meeting, prepare any materials (including presentations) or background work that will be discussed at the meeting. If there are materials that need to be read or reviewed ahead of the meeting, give clear instructions and share with enough notice so that all participants can come prepared. If you're attending a meeting, you also need to come prepared, having read all materials circulated beforehand and writing down questions or points that might be relevant.

**Designate a leader for the meeting →**

This person should be responsible for keeping the meeting on track, leading the conversations, and ensuring that the goal or objective of the meeting is achieved. If needed, it can be helpful to designate a separate notetaker - it can be challenging to run a meeting and take notes at the same time.

**Encourage participation →**

Find ways for everyone to participate and give their input - remember, they're all in the meeting because their contribution matters to the outcome. Encouraging participation from the start can help create an environment of collaboration and cooperation.

Structured facilitation helps: Not everyone shares ideas in the same way, so structuring different types of engagement to gather input can help get everyone's ideas in the room.

For example: Have a 'check-in' to get everyone actively engaged. We try to ensure that all our meetings, online or in person, always start with a check-in. A check-in - usually led by a prompt or question - is an opportunity to get everyone's voice in the room. For example, in one sentence, what is the one thing that excites you the most about work lately?

For Zoom meetings, find ways to make them more engaging, such as use of various tools and methods. For example, at Maliasili, we're fond of breakout rooms and Mural, an intuitive digital whiteboard built for teams to do their best work together.

**Set (and stick to) time limits →**

Limit the scope of the discussion to ensure that the meeting ends on time. Let everyone know in advance how much time they have to share their ideas.

**Follow up →**

Ensure that notes and follow-up actions are captured and assigned. This may include additional meetings, assignments, or tasks. Make sure that people know what is expected of them for follow up.

# Weekly Goals

**Why do weekly goals? →**

**Prioritize what really matters** – Weekly goals force us to look beyond our long to-do lists and to identify the most critical pieces of work we need to accomplish right now. Our checklist still matters, but if it comes down to box checking vs. spending more time on accomplishing a key goal, our weekly goals help keep us on track and focused.

**Share what you're doing with your team** – Weekly goals give an entire team a quick glimpse at what it's working on. It's not a competition of who is busiest or who has the 'weightiest' goals, but instead a way to stay coordinated and informed and to encourage collaboration.

**Hold yourself accountable** – When you commit to something publicly you're more likely to do it.

**How it works →**

**Identify** up to (and no more than) 5 top priorities – these are the absolute most critical things you want to accomplish this week. They should always be in service of your personal annual work goals.

**Share** them publicly with your team – write them down and share them with your team. Do this every Monday, and be consistent.
Tip: consider using an online platform, such as Slack or Google Docs, to make sharing easier.

**Update** and share progress against your goals – reflect on your progress from the previous week and share a quick 'status' update of each goal:
- ○ Complete
- ○ Work Delayed because...
- ○ Ongoing but progress made...
- ○ Etc.

## Top Tips:

**Be clear** about what action are you taking and why – The goals you set and share shouldn't be lengthy, but you do want to be clear about what you plan to achieve and why it matters (e.g. "Prepare for and facilitate communications workshop for Maliasili team")

**You DON'T always need to have 5 goals** – you may have just one critical priority that you need to focus most of your time and energy on, that's great prioritization, embrace and encourage it!

**It's okay if some goals are 'bigger' than others** – some goals may be more important than others, but if you list them as a goal they are a priority for you and they matter. For example, you might have a backlog of emails that you need to get through or you might have a number of admin tasks that have been piling up that are important to tie off. What's important is that you are taking the time to reflect on your top priorities and that those are the most critical things you need to get done that week.

**Be realistic about time** – some weeks may be shorter than others, some goals will be much more time consuming than others. The process of identifying weekly goals should include thinking through how much time it will take to accomplish your work.

**Use goals to communicate about your schedule and time** – Make a note if you are taking time off or if you are short on time due to travel or workshops in your weekly goals – a quick "*" at the bottom of your goals is great!

# Focus on what matters and be clear in what you want to achieve.



Download this poster from our website

**maliasili.org/tips-and-tools**

## WEEKLY GOALS
### Keeping your priorities in focus

What are the most critical things you must accomplish this week in support of your annual work plan?

**Maliasili**

| MONDAY | TUESDAY | WEDNESDAY | THURSDAY | FRIDAY |
| --- | --- | --- | --- | --- |

**Why do weekly goals?**

**Prioritize what really matters** - We all have long to-do lists, but weekly goals force us to look beyond our checklists to identify the most critical pieces of work we need to accomplish right now. Yes, our checklist still matters, but if it comes down to box checking vs. spending more time on accomplishing our goals, our declared weekly goals will help us make a decision about what needs to get done.

**Share what we're doing with our team** – Weekly goals gives our entire team a quick glimpse at what we're working on. It's not a competition of who is busiest or who has the 'weightiest' goals, but instead a way to stay coordinated and informed and to encourage collaboration.

**Hold yourself accountable** – When you commit to something publicly you're more likely to do it.

### How it works

1. Identify up to (and no more than) 5 top priorities - these are the absolute most critical things you want to accomplish this week. They should always be in service of your personal annual work goals.

2. Share them publically with your team - write them down and share them with your team. Do this every Monday. (Tip: consider using an online platform, such as Slack, to make sharing easier).

3. Update progress against your goals - reflect on your progress the previous week and share a quick "status" update of each goal:
Complete
Work Delayed because...
Ongoing but progress made...

### Top Tips

**Be clear about what action are you taking and why** - the goals you set and share shouldn't be lengthy, but you do want to be clear about what you plan to achieve and why it matters (e.g. "Prepare for and facilitate communications workshop for Maliasili team").

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Be vulnerable, be honest, take risks.

# 6 tips on fundraising from donors and fundraisers

### 1. Fundraising is all about human relationships →

*"Most of us make decisions based on some combination of head, intellect, and heart"*

*"It is important to connect with supporters at the basic human level- you don't have to talk about wildlife or the work all the time."*

- Individual donors and foundation staff are ultimately just people giving money and support to other people. Thus developing and maintaining relationships lies at the heart of all fundraising. During these unprecedented times, relationships and connections are more important and valued than ever before. Donors appreciate grantees who reach out to inquire how they are doing, and regular and frequent updates from the field.

*"You can get information about organizations off their websites, etc. but what really matters are the personal relationships that build trust."*

### 2. Build strong relationships through effective communications →

*"What foundation staff want to know is: Is this an organization that fits within our mission? Is this organization effective at what they do? Do I trust this organization to do what they say?"*

*"This is the time for authentic communications. Take some risk to be "raw" and personal with what you are sharing. Don't worry about everything being polished or having big budgets for communications."*

- As local conservation organizations - share small stories, challenges you are facing, and what you are doing in the field. Now is the time to communicate frequently and to try out new forms of technology to stay connected. The more you can bring the feel of your work, the vibrancy of it, the challenges and the successes to your funders and supporters, the better.

*"Bring the front line to the donors as they want to see your work, the places you are working in."*

- Donors are often used to visiting the places they invest in. They've appreciated when organizations are creative in their communications, from a short video shared on WhatsApp to a quick story that "made you think of them." These small communications efforts always go a long way, but they've become even more important during these difficult times, when donors want to feel connected, hopeful, and informed.

### 3. Donors need you →

*"Look at it in the way that you are just as important as the donors - the donors have a mission to make impact, they can't do that without the organizations working in the field."*

- With fundraising there is a common feeling of a power imbalance: one person who holds the money and the other without it and asking for it. However, these power dynamics aren't an accurate representation of the reality, which is that grantee organizations are just as important as the donor, because donors have a mission to make an impact and they can't do that without effective organizations on the ground. As a local organization, meet your donor as an equal and recognize the great value you offer.

*"The world feels like it is in crisis...so being able to hear about or feel like we're a part of something good happening, something tangible and positive, is a really powerful desire right now."*

### 4. Be honest →

*"Asking people to give more is absolutely fine right now - the important thing though is to be able to clearly articulate what your strategy is."*

- Right now people want to help, they want to be part of a community of good, they want to fill gaps and make a difference. People want to know how they can help. Ask for help, but be clear how you will use it.
- Don't be afraid to ask your key supporters for more money during this time.
- Some donors are willing to relax restrictions right now - if you can explain why you need them to do that, they'll likely listen. Be prepared and make your case.

### 5. Be yourself →

*"Be yourself and be comfortable - this allows others to then feel comfortable with you. You will have success if your fundraising approach is the same as if you are speaking to one of your good friends or family."*

- Practice conversations with friends, family, and colleagues in order to gain confidence, receive feedback, and to help find your own personal style and communication 'sweet spot.' Donors aren't looking for a one-size-fits-all communications style and relationship. Instead, they want real and genuine connections and in order for you to do that you must be yourself and be comfortable, which will allow others to feel more comfortable too.

### 6. Listen →

*"Fundraising is about listening as much as talking."*

- Fundraising is a little bit like dating, when you don't know someone very well you want to understand common interests and values, and see if you are a good match. To do that, you must listen and understand what a donor's interests are and determine if it's a good fit for both of you.
- The way you communicate and engage with one donor might not work with another because donors are people and people are different. Don't be afraid to try out different ways of communicating, but make sure you listen and learn to figure out what resonates with that individual.

*"We're only successful, each of us, if we're successful together"*

# 5 tips for communications for conservation

**1. Set your communications goals: what do you need communications to help you achieve? →**
Identifying and articulating clear goals for your communications efforts will help ensure you stay on track and focused. Time and time again, we've seen organizations fall into a major communications trap: trying to do it all and ultimately not doing anything all that well or effectively. Instead, before you plan communications activities, step back and set your goals and objectives. Start with your organizational strategy and go from there.

**2. Align your communications activities to your organizational strategy →**
As you work towards setting your communications goals, ensuring that these goals are aligned with your overall strategy remains critical.
Often, teams approach communications as a stand-alone line of work, yet it must be integrated with and supportive of other programmes within your organization for it to be successful. This makes it easier to see the direct link that communications plays in supporting your general work and also makes it possible for you to measure the impact that your efforts continue to have.

**3. Make communications a leadership priority and invest in a team →**
*"Organizations search for communications staff with an impossible-to-find set of skills and talents. These "unicorn" communicators are expected to facilitate the flow of communications internally and effectively market the entire organization single-handedly. They are asked to write, design, and coordinate every aspect of communications - and even (perhaps) manage a program of two."*
-Sarah Durham, The Nonprofit Communications Engine

Sounds familiar!? It certainly does to us!

There are two main hurdles that organizations face when it comes to communications. Firstly, leadership's failure to prioritize it as a core piece of work, consequently allocating insufficient resources towards it. Secondly, there's a challenge with the actual implementation of communications work, such as attracting and building the right communications team and creating realistic expectations.

Where resources might make it impossible to hire a large team, ensuring that your single Communications Officer has clear, achievable goals, receives the proper support from the group - especially from the top - will set them on a path to success. If you can't even invest in one designated lead, then at least try to allocate some team members' time to communications, including leadership's time. And, start adding this to all your budget proposals now!

## 4. Establish a target audience (don't try to reach everyone) →

Often, when we ask partners who they want to reach, a typical response is, "the general public." Basically, everyone. We understand this desire because your work is important, and everyone should care about it. Unfortunately, that's not realistic and trying to reach everyone will likely result in you reaching no one. Who matters to you? Who do you need to reach, engage with, and/or influence to achieve your communications goals and objectives? The group of individuals you need to reach is known as your audience. To be truly effective at reaching your audience, you'll want to understand them: who they are, what they're like, how to get their attention best. Use this simple set of questions to get to know your audience:

### Exercise: Get to know your audience
- Who are they? - Can you describe this 'audience' as if they were a person? What are they like?
- What do they care about? - What things excite them? What matters to them?
- What do you want them to know? - What information do you want them to know? What messages are you trying to get across to them?
- How do they get their information? - In what ways do they like to communicate or receive their information? (e.g. news, social media, websites, videos, meetings, talking to neighbors, etc.)
- Who do they listen to? - Are there any individuals they might be more likely to listen to? (e.g. other donors, a religious leader, a politician, a scientist, your organization's CEO etc.)

## 5. What messages will work? Your message matters →

Remember that you need to convince people why what you are saying matters.

- **Be compelling** - Use real people, tell their story. Tell the story of your organization. Use engaging, powerful images and videos. Be emotive – don't think about telling people to do things, think about ways that will make them feel, that will make them want to do something. Use data to show your impact.
- **Be clear** - Avoid jargon, you don't have to use complex grammar to sound knowledgeable. Use plain English, and common, everyday words.
- **"If you can't explain something simply, you don't understand it well enough."** - Albert Einstein
- **Don't over-explain** - This is a trap many of us fall into. You want to be scientific. You don't want to generalize, and want to be as convincing as possible. But save the details for later on and get people interested first. Always be accurate, but find ways to simplify and summarize. The general audience does not often need full complex reports - what matters to them is the transformation your organization is achieving in its mission.

### And finally, don't let money get in the way →
As mentioned above, your organization should be investing in communications (and, if you didn't read this above, or even if you did, start including communications costs into your proposed budgets!). Communications can feel overwhelming because of the costs. Fortunately, there there are many communications tools that are actually free - and easy to use (we know, we've used them all)!

**Canva** provides you with excellent design templates to take your products to the next level such as reports, social media posts, presentations, brochures, and more. Best of all, you don't need any design skills to use it!

**Grammarly** is a grammar checker and proofreading tool that improves your overall writing. The premium version goes beyond the basics, helping with sentence structure and more, ensuring that your writing is clear, professional and persuasive.

**Mailchimp** - send out beautifully designed newsletters using Mailchimp. You also get powerful data analysis that lets you review how well your emails are doing and whether they resonate with your audience.

# How to give an awesome presentation

### Tell a story, make it compelling →

*"Start with something compelling, end with something compelling. The first and last sentences matter more than any other. Craft them. Memorize them."*
-Tip from Mulago, a Maliasili supporter and an organization that truly understands how to create awesome communications.

Storytelling is the best way to carry your message to your audience. Firstly, think clearly about the message you want to convey, and then map out your narrative arc. What happens in your story? Who are the people involved? Why does it matter, and most importantly, why should your audience care?

Mulago provides excellent advice on how to specifically think about that arc. Your story needs to persuade the audience you have:

- **A big important problem**
- **An effective, scalable solution**
- **An organization that can deliver it**
- **And a compelling vision for the future.**

People love stories. Start with a story, illustrate your solution with a story, with you and your organization as the heroes.

### Keep it simple →

How often do you attend a presentation full of acronyms, scientific or conservation jargon, and long, complex explanations? While it's easy to think that including 'heavy words' and complicated language makes you seem more knowledgeable, what it actually does is isolates your audience, and your message gets easily lost.

Practice your presentation out loud so you can hear yourself. If you think you sound complicated, then you are. Even better, practice your presentation in front of someone less familiar with your work and ask them for tough feedback.

### Think about your visuals →

We often start with the PowerPoint rather than the purpose of our presentations, which is wrong. Visuals, such as a PowerPoint, should add value to your words but should not replace them. So start with your purpose and then determine what visual tools will help you deliver your message even better, e.g., a video, a PowerPoint, photos, graphs, data, etc. Presenters often lose their audiences with cluttered PowerPoint slides, long videos, too many unclear photos, blurry maps, and generally misaligned visuals. If you use slides to support your presentation, keep them simple. And remember, the visuals are there to amplify your message; they're not the main message.

### We love this other tip from Mulago:

*"Visuals – slides – are wonderful, but they are only there to amplify what you have to say. They're not the main show; you are. They may be cues, but they're not your notes. Forget the academic or business protestations you may have done. Slides are simply a way to amplify and punch home the message you are talking about. Good slides are simple."*

**Prepare, prepare, prepare →**

If you wish to deliver an effective presentation, preparation is vital. Even the most prolific public speakers take time to prepare for their talks to ensure clear and exciting delivery. During your preparation, make sure you do the following:

- **Rehearse as much as you can.** Practice with friends, trusted colleagues and ask for honest feedback. Keep improving.
- Time your presentation as you prepare to ensure that your delivery is within the allocated time. This will help you avoid the awkwardness of having to rush or be cut short during the actual presentation.
- **Test and listen to your tone of voice.** Are you emphasizing the key points? Are you speaking clearly and at a pace that your audience can keep up with?
- **Do a tech test before.** If you have slides, make sure they're playing correctly. If speaking in front of an audience, check your microphone and other equipment. Don't let any last-minute tech failures get in the way of delivering an excellent presentation.
- **Top tip - look and listen to yourself.** Record yourself delivering your presentation as you would to your audience. This will help you understand where your message isn't clear, if you're rushing through the presentation, if you need to eliminate jargon, and more.

**And finally, it's okay to be nervous! Just make sure YOU show up →**

Even the most experienced speakers sometimes get nervous before delivering presentations. It's okay to be nervous; it's human. But being adequately prepared and understanding your content well helps calm the nerves and reduces the list of things that could go wrong.

**Bring your authentic self, and your audience will connect with you.**

Before you even get to your presentation slides, you need to start with these three steps:

**Know your purpose.**
Be completely clear on what your message is. What do you want your audience to know, and at the end - how should they respond?

**Know your audience.**
Understand your audience - who are they, and how do they like to receive their information? For example, if you're presenting to scientists, including graphs and data is key.

**Know your stuff.**
First, write out your content in a Word or Google doc. Then map out your presentation - from the first slide to the finish and think about what content goes on each slide. Remember that not all your points need a slide. Sometimes one powerful photo can represent 50% of your content. Practice your pace, then write out the key phrases on your slides and refine them.

**Pro tips to get you started on your presentation slides:**
Your first and last slide should be the strongest. This is because you need a captivating introduction to draw people in and keep them curious, and you want to end with a strong impression. You'll know you're successful when you get positive feedback and engagement.

# Presentations: Dos and Don'ts

## 1. LESS IS MORE.
Do not try to squeeze too many elements into one slide. It's overwhelming and distracting. The best practice is to have no more than two elements on one slide.
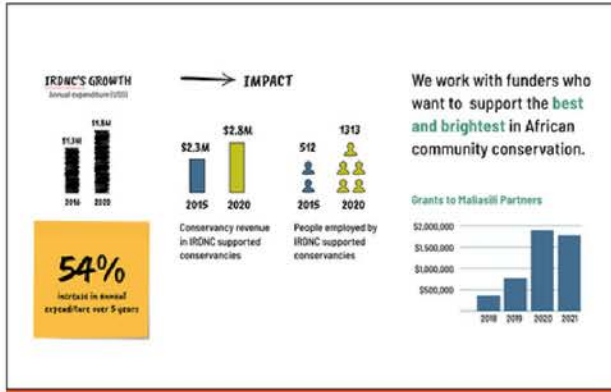


Don't crowd your slide with many elements



Do simplify

## 2. Clarity and consistency always win.
Every slide should share a clear idea, and its content should speak to that point.



Don't include competing ideas



Do include a clear point on each slide

## 3. Keep it proportional.
Do not alter the proportions of your visual elements such as images, icons, graphs, logo, etc. to fit on a slide. It makes your presentation look unpolished and unprofessional.



Don't stretch images, logos, graphs



Do keep image aspect ratio

### 3. Visuals help you make your point.

As you present, your slides should complement your key talking points. Consider these six storytelling elements and ask yourself – what visual backup do I need?

1. **INFORM:** Present a fact, figure, or number in a large font.
2. **EDUCATE:** Include a graph, map, or a simple infographic.
3. **INSPIRE:** Use powerful photography or illustrations.
4. **ENTERTAIN:** Use a meme or a GIF that adds a twist, or brings a moment of pause / reflection
5. **CHALLENGE:** Use a quote or simply pose a question.
6. **ENGAGE:** Use any of the above to help your audience stay on track with your pace. Keeping your audience engaged with both your presence and your visuals will help them feel included (and keep them awake).

Don't layer graphics or text over images
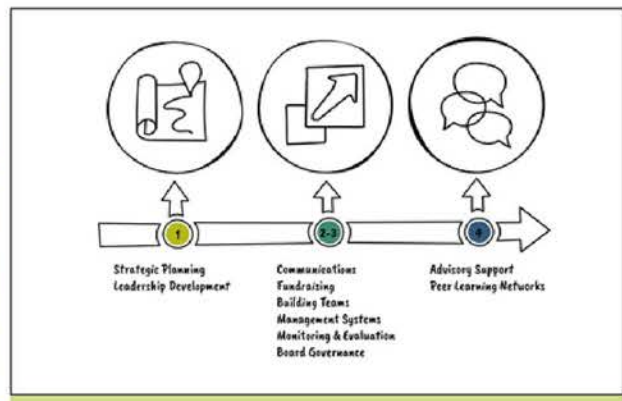


Do use white space

### 5. Limit your words.

Seriously. Research shows that people can't listen and read at the same time. Aim for no more than 30 words per slide. These words should reinforce your message but not explain your point – that's what you're for.

- Even better, don't have any words and just have an image!
- Pick the right font and size. Can your audience read your text? Are your slides crammed with small text and rows of sentences? Is your text over a photo or hard to read? Do not use fonts smaller than 25-point size, and don't add text over photos.
- Pro tip - never read word for word from your slide.



Don't use long text or copy on your slides



Do use photos to help you explain your points

# 5 Tips for better annual budgeting

**Include everyone →**

We always ask each team member to estimate the resources they will need for their scope of work in the coming year. For example, our Finance Assistant will assess needs for office supplies and software upgrades. Our portfolio managers will review their plans with partners and estimate their time and travel or meeting expenses. And our directors will outline their needs for various programs and team meetings. When each person is given a chance to outline their needs, they feel more engaged. It also creates a sense of ownership in Maliasili's overall financial management. Across your organization, strive to find ways to make the budgeting process inclusive.

**Start at the beginning →**

While we manage a relatively large budget that ensures we can achieve our goals, we generally start by estimating our costs by activity, line by line. Our budget is built on what we anticipate requiring for each planned activity, program, project, or meeting. While the budget the board approves is compiled and organized in a high-level format, each piece of the budget can be tracked to a detailed budget estimated by activity.

**Be conservative →**

When estimating revenue, round down. When estimating expenses, round up. Only include secured income or revenue you are confident you will receive (maybe from long-time committed funders). This way, you won't overestimate your resources. Include all expenses you know you will need to spend to achieve your annual work plan. Whatever gap between the two is what makes up your fundraising goal. If it's not certain that you might receive certain revenue, do not include it. If you might have certain expenses, definitely include them. It is easier to allocate extra funds rather than cut costs mid-year.

**Anticipate external financial pressures →**

Plan for increases in operational expenses to account for inflation and other external financial pressures. For many conservation organizations, these external pressures could be a loss of tourism income or decreased donations. Some expenses will certainly increase, so anticipating a per cent increase in all line items creates a buffer in the budget to help you prepare for them.

**Track expenses →**

Use a monthly budget vs an actual report that you can share every month with your team. Once you set the budget, review your monthly budget vs actual report throughout the year to help you understand how well you've budgeted for your revenue and expenses. This will help you estimate better in the coming years. This report will also help you determine what activities you may need to postpone to reduce costs if your fundraising goals aren't met or delayed.

Go pro with LinkedIn, show off your hidden talents
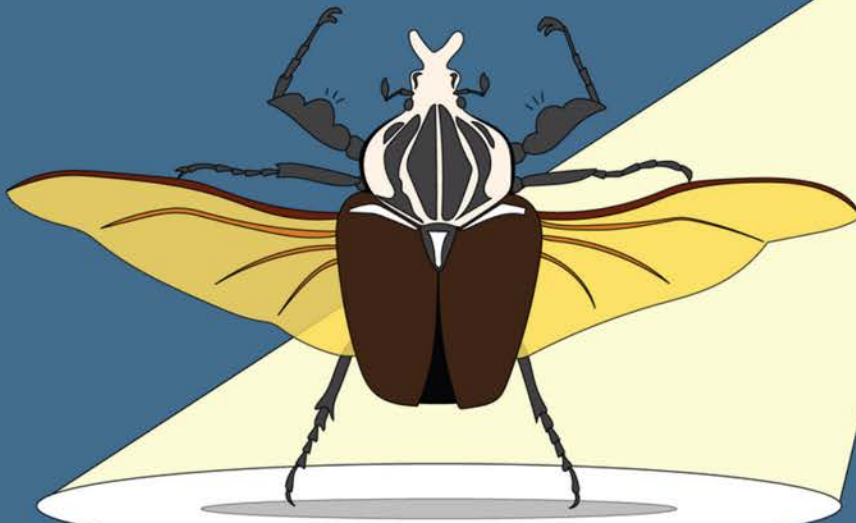
# Are you on LinkedIn?

For conservation leaders and many other professionals, LinkedIn serves as a valuable tool. However, you may be wondering about the specific ways in which this platform could benefit you and your organization. Here are a few tips on how to use it to network, develop a profile, build your brand, and get your messages heard.

## For more tips visit the Reader:

maliasili.org/reader

## Networking →

LinkedIn is a professional social networking site that allows conservation leaders and others to connect with professionals in their field and beyond. As Salisha Chandra of Maliasili put it, **"LinkedIn allows you to go beyond the echo chamber - this is so helpful in our work in community conservation in Africa."** It is a powerful tool that helps you to build relationships, establish partnerships, stay connected with peers and colleagues, and break into new circles.

TIP: Choose to follow some influential people in your sector or people who inspire you. By following them, you will see what they have to say and share, and this is a great way to get new information and also inspiration for your own posts.

## Build your organizational and personal brand →

LinkedIn is a powerful tool for building a brand. Conservation leaders can use the platform to showcase their organization's achievements and share updates about their work and impact. To establish yourself as a thought leader in the conservation industry and build your personal brand, use LinkedIn to showcase your professional accomplishments, expertise, and experience.

TIP: Share articles, videos, or other relevant content that highlights your interests, expertise, and insights in conservation. But go beyond just sharing. Take a moment to add your own opinions and insights, as this will not only help others gain more from the resources you share, but also builds your credibility and brand.

TIP: People love photos! Use interesting and engaging images to get people's attention.

Read the full article here: maliasili.org/reader

Time to relax
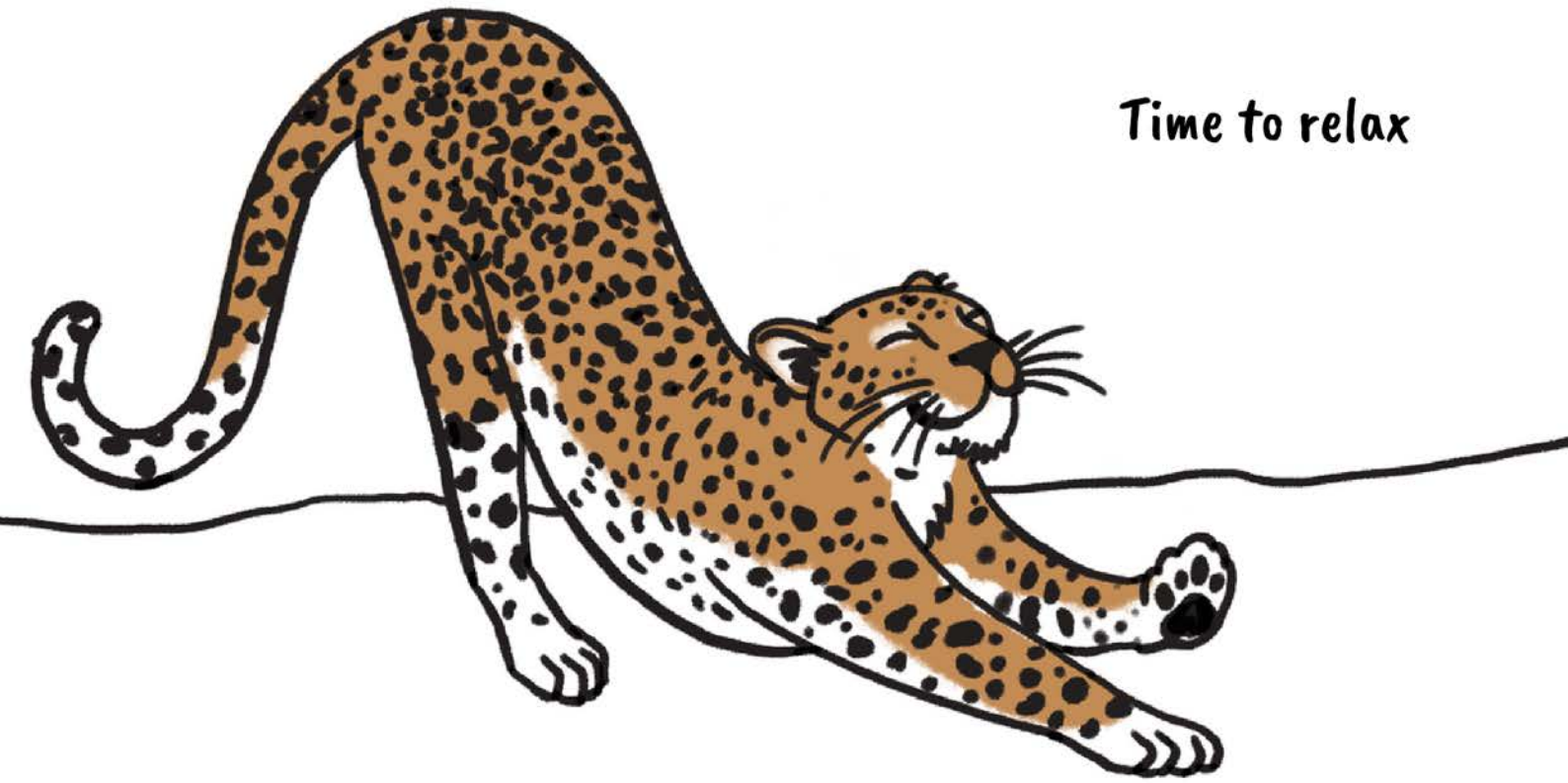
Maliasili
INVESTING IN PEOPLE FOR NATURE