**Format for “Conservation Business Plan” report from Miradi**

Notes on color coding:

Text added by the reporting tool is colored yellow (section headings) or green (within section headings or labels).

**Bold** names show the Miradi **View**, **Tab**, Diagram **Factor**, or **Field** names

Additional Image files names are in colored Red and can be numbered 1-9 and either PNG, JPG, or JPEG images (I’ve listed only PNG). Images will be in a folder called “OtherImages” to be located in the same location as the exported XMPZ file and the Miradi generated “Images” folder that contains conceptual model and results chain diagrams. The Images will be inserted as the last item in each designated section.

1. Title Page

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *Display the Name of the project* | *View*: **Summary** | *Tab*: **Project** | *Field*: **Project Name** | |
|  | Conservation Business Plan | | |
| *Date* | *View*: **Summary** | *Tab*: **Project** | *Field*: **Project Data Effective Date** | | |

Optional Image Filename: COVER1.PNG

1. Table of Contents

|  |  |  |  |
| --- | --- | --- | --- |
| *Display the Name of the project* | *View*: **Summary** | *Tab*: **Project** | *Field*: **Project Name** |

1. Introduction

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Project** | *Field*: **Project Description** |

INTRO1.PNG

1. Plan Scope

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Scope** | *Field*: **Scope/Site Description** |

SCOPE1.PNG

1. Goal

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Scope** | *Field*: **Vision Statement Text** |

VISION1.PNG

1. Management Review / Conservation Impact Measures Outcomes

*Note: the user selects a subset or all of the project goals and objectives to be included here*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *View*: Strategic Plan | | |  |  |  |
| *Fields:* | **Goal** | **ID : Name**  **Details :** | | | |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *View*: Strategic Plan | | |  |  |  |
| *Fields:* | **Objectives** | **ID : Name**  **Details :** | | | |

OUTCOMES1.PNG

1. Situation Analysis

*Narrative*

|  |  |  |
| --- | --- | --- |
| *View*: **Diagram** (Conceptual Model) | *Diagram Properties*: *(right click in diagram area to open dialog box)* | *Field:* **Details** |

*Diagram*

<Conceptual Model Diagram>

*<Repeat Narrative and Diagram for each conceptual model diagram>*

Partners & Stakeholders

|  |  |  |  |
| --- | --- | --- | --- |
| *View*: **Summary** | *Tab*: **Other orgs** | |  |
| **Stakeholder** | | **Role** | | | **Comments** |
| *Field:* **Names** | | *Field*: **Roles** | | | *Field*: **Comments** |

MODEL1.PNG

1. Theory of Change

Narrative:

|  |  |  |
| --- | --- | --- |
| *View*: **Diagram** (Results Chain) | *Diagram Properties*: *(right click in diagram area to open dialog box)* | *Field:* **Details** |

*Diagram*

< Results Chain diagram>

*<Repeat Narrative and Diagram for each conceptual model diagram>*

TOC1.PNG

1. Outcomes, Strategies, and Activities

|  |  |  |  |
| --- | --- | --- | --- |
|  | |  |  |
|  | Strategy Details and Comments (if any) are entered on additional rows  Codes from Outcome list above | | |

~~STRATEGY1.PNG~~

Strategy ID + Name

|  |  |  |  |
| --- | --- | --- | --- |
| Strategy 01 | 0: Capital Costs (also Biz Plan Report Demo Strategy) | Associated Outcome | O01, O08, O09 |
| Status | Activity | Lead Name / All (Initials) | |
| Major Issues | 1: Demo Activity | Glenn Pricket  AD, GF, GP | |
| Minor Issues | Task  1: Task Name |  | |

Activity and Task ID + name

Who (full name for Leader, Initials for everyone else)

Most recent Progress Rating information

STRATEGY1.PNG

1. Strategy Effectiveness

<For each Goal that has at least one indicator associated with it>

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| *View*: **Diagram** | | | | *Factor*: **Targets** | | *Tab*: **Goals** | |
| *Fields:* | | **ID : Name** | | | | | |
| *View*: **Diagram** | | | | *Factor*: **Targets** | | *Tab*: **Indicators** | |
| *Fields:* | | **ID : Name**  **Details :**  **Comments:** | | | | | |

<For each Objective that has at least one indicator associated with it>

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| *View*: **Diagram** | | | | *Factor*: <many types> | | *Tab*: **Objectives** | |
| *Fields:* | | **ID : Name** | | | | | |
| *View*: **Diagram** | | | | *Factor*: **Targets** | | *Tab*: **Indicators** | |
| *Fields:* | | **ID : Name**  **Details :**  **Comments:** | | | | | |

SEM1.PNG

1. Risks

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Scope** | *Field*: **Comments** |

RISKS1.PNG

1. Staffing

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *View*: **Work Plan** | | *Tab*: **Project Resources** | |  | |
| **Name** | | **Organization** | | **Position** | | **Role** |
| *Fields*: **Given Name** <combined with> **Surname** | | *Field:* **Organization** | | *Field:* **Position** | | *Field:* **Roles** |

STAFFING1.PNG

1. Financials

<Numbers reflect the budget total columns in Miradi (which represent work unit + expense costs) for each Strategy; Number of years should match planning date range>

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Strategy | FY13 | FY14 | FY15 | Total |
| *Fields:* **ID** : **Name** |  |  |  |  |

FINANCIALS1.PNG

1. Funding Plan

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Planning** | *Field*: **Key Funding Sources** |

FUNDING1.PNG

**Appendices**

Phasing

PHASING1.PNG

Monitoring Plan

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Top Tab*: **TNC**  Side Tab: **CAP Legacy** | *Field*: **Project-level Comments** |

MONPLAN1.PNG

Conservation Impact Measures

CIM1.PNG

Project Status

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Project** | *Field*: **Project Status** |

Next Steps

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **Project** | *Field*: **Next Steps** |

Literature Cited

|  |  |  |
| --- | --- | --- |
| *View*: **Summary** | *Tab*: **TNC** | *Field*: **Citations** |

ADDIMAGE1.PNG