



**COLUMBIA UNIVERSITY**  
IN THE CITY OF NEW YORK



# Conserving Manta Rays & Sustaining Local Communities

Building a Business Plan and Ecotourism Program for Planeta Océano

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**PLANETA OCÉANO**  
-PLANET OCEAN-

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# Executive Summary

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Since 2007, Peruvian non-profit Planeta Océano has actively engaged in marine conservation, research and advocacy. The organization has rallied around the giant manta ray as a flagship species, as the northern coast of Peru boasts the largest populations of the vulnerable and understudied species world-wide (Neme, 2016). By increasing awareness, education and advocating for conservation legislation for giant manta rays, Planeta works to serve wider marine conservation goals in the region.

In addition to its environmental impacts, Planeta aims to positively impact the northern coastal community in Tumbes, Peru. Key features of their model include education initiatives and providing members of the community with opportunities for an alternative sustainable livelihood to fishing.

Planeta engaged the Columbia University team to increase its impact. The organization is developing international volunteer programs in partnership with affiliate NGOs and hopes to roll out its own standalone programs. Planeta sought recommendations from the Columbia team regarding environmentally and socially conscious programs, associated finances, feasibility of targeting U.S. and other universities for partnerships, as well as financial and human resource recommendations regarding the organization as a whole. In order to promote and amass funding for their ecotourism/voluntourism program, the team, in collaboration with Planeta, drafted a crowdfunding campaign through the Global Giving platform, a nonprofit that connects donors with grassroots projects around the world, which has since gone live and raised several thousand dollars. The team interviewed numerous experts and stakeholders, including referenced NGOs, fishers, university contacts, and peer organizations across different sectors to gather the necessary information.

The report and following appendices offer detailed recommendations across these topics which are summarized here. By implementing these recommendations, Planeta can begin building the Tumbes programs that provide alternative/supplemental livelihoods to fishers in the community and educate larger audiences about giant manta and marine conservation.



1. Planeta saw benefits in implementing an ecotourism/voluntourism program in hopes of raising giant manta ray conservation awareness, educating participants of the importance of biodiversity, and financially benefiting the local community. Planeta successfully tested a pilot program that contracted local fishers as paid tour guides of the manta-rich Tumbes coast, and reached out to the team for help in further developing their program. The team developed both single-day and week-long program schedules and created supplemental instructions for implementation. Key program recommendations include:

- Broaden target markets to include locals, and offer multiple programs tailored to needs of each market segment
- Implement planned programs in phases to maximize organizational capabilities
- Develop safety and customer service training procedures for fishers
- Leverage social media and visual marketing campaigns to reach target audiences

2. Planeta envisions building long-term partnerships with universities in order to maintain the sustainability of their ecotourism/voluntourism program. To assess the feasibility of establishing partnerships with universities, the team surveyed a number of representatives from university contacts across the United States. Based on the survey responses, the team has developed recommendations for building university partnerships:

- Universities tend to partner with organizations with whom their faculty have established relationships. To increase market share in student-focused voluntourism programs, participate in conferences and study abroad fairs, or host on-site seminars to network with faculty.
- Due to university program length requirements, consider alternative solutions for short-term volunteer travel abroad, and use the initial program structure as a template to be built out in the future.
- Given the participation of university faculty in international study abroad programs, and the various university requirements, consider including professor-led activities/lectures in programs, and be prepared to be flexible with program criteria, itineraries, and length.

3. A fee calculator has been created as a tool to enable Planeta to determine the appropriate program fees to charge participants for programs. Importantly, it is not designed to advise Planeta how much the organization should charge, but rather provides the variables and expense items that could be considered to determine how much Planeta wants to charge, in excess of covering costs. Rather than providing static costs that may be different by the time the next trip is being planned, the calculator was devised as a way for Planeta to regularly adapt



its pricing to market fluctuations and programmatic changes. A supporting projections tool has also been provided that will use fee calculator data to assist Planeta with forecasting future earnings, expenses, and profit based on the expected number of each type of trip annually. Recommendations include:

- Customize the expense items and their costs in the fee calculator for each trip (or as often as needed) to ensure that the fees charged to participants strike the right balance between affordability and covering Planeta's needs.
- Use the fee calculator and projections calculator together to manage operating expenses and revenue strategically over both the immediate and long term.

4. Planeta reported a history of long term retention challenges and sought related input from the team regarding its human resources. The Columbia team engaged the organization's employees and provided recommendations for improved personnel management and procedural guidance for conducting the program tours, which include the following:

- Develop and implement protocols for employees and management
- Create systems for employee feedback in a small office environment
- Identify employee growth opportunities as Planeta expands into new program

# Introduction

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## Peru Overview

As one of Latin America's most robust and least volatile economies in recent years, Peru outpaces the rest of South America in terms of fiscal growth. Peru is a continental leader in trade, emphasizing international and trans-pacific free trade agreements as a member in trade alliances. Agriculture makes up 7.5% of the economy, specializing in exports of coffee, coca, cotton, and sugar (Central Intelligence Agency, 2017). The industry and service sectors make up the remainder of the economy, specializing in petrol extraction and refining, fish and fish processing, tourism, and the mining of copper, silver, lead, zinc, oil, and gold (Mining & Minerals Investment Guide, 2017). Perhaps because of the emphasis on international trade, chronic underdevelopment abounds in rural areas while poverty has declined over last decade in urban centers like Lima (OECD, 2015). Subsequently, roughly 50% of the population in Peru live in the coast in Lima and Callao (INEI, 2015).

With the heart of the economy in the cities, this leaves a strong opportunity for tourism, the 3rd largest industry in Peru, to empower the country's disadvantaged non-urban communities. Situated in a non-urban area, Machu Picchu was awarded World's Leading Tourist Destination by the World Travel Awards (WLTA, 2017), suggesting a significant opportunity for additional in-country tourism. According to a 2014 survey, a majority of Peru's foreign tourists hail from neighboring countries in South America (especially Chile), the United States, and Spain (Perfil del Turista Extranjero, 2014).

Peru contains three different types of land use: agriculture, rainforest (including Peruvian Amazon), and urban development (Central Intelligence Agency, 2017). A portion of land is owned by native fishing communities by the coast. One of these communities exists in the coastal region of Tumbes, home to about 500,000 residents. The economy is based around fishing, livestock, and tourism (Chapilliquen, R., 2017).

## Environmental Description of the Region

Tumbes is nestled within the Tumbes-Chocó-Magdalena hotspot. This 1,500 kilometer territory ranges from the southern portion of the Panama Canal, along the western coasts of Columbia and Ecuador, to the northwestern tip of Peru. It is home to a diverse array of habitats, including rainforests, dry forests, mangrove forests, beaches, rocky shore lines, deserts, scrub, and



coastal wilderness (Caley et al., 2007). According to Oceana Peru, the waters off of the coast of Tumbes and Piura support 70% of the extensive marine biodiversity that makes Peru the world's largest fishing country (by weight) (Guy, A., 2016). With so much biodiversity condensed into such a small area, the Tumbes-Chocó-Magdalena hotspot represents one of the world's most prominent areas of endemism and speciation.

Tumbes is a microcosm of this hotspot. Here, a relatively small geographic region on the northern coast of Peru is packed with an array of ecosystems, with 50% of the land in the region reserved for national parks. Tourist destinations in the area include Puerto Pizarro, where tourists can visit mangroves as well as a crocodile breeding farms. From July to November, many foreigners visit the area for its humpback whale tours on the water. The Hervideros Hot Springs is another draw for the region. At the northernmost tip of its border with Ecuador is the town of El Bendito, home to the Santuario Nacional Los Manglares de Tumbes, a Peruvian mangrove Sanctuary. To the west lies the Reserva Nacional de Tumbes, an animal-rich tropical rainforest. To the south is the Parque Nacional Cerros de Amotape, known for its dense, tall, dry forests. Separating these forests and the beach coast are an assortment of dry desert conditions and scrub landscapes, defining the region as a ring of ecological activity with a relatively barren center.

## Manta Ray Biology & Threats Facing the Species

*Manta birostris* is a relatively young species, as the genus *Manta* was considered to be monotypic until 2009, when it was split into the reef manta ray (*M. alfredi*) and the giant manta ray (*M. birostris*) (*Manta birostris*, 2018). Truly gentle giants, *M. birostris* can have a wingspan of up to 23 feet and weigh over 4,000 lbs (*Manta Ray Research*, 2018). *M. birostris* has the largest brain-to-body ratio of all boned fishes (*Manta Ray Research*, 2018), and has been noted by researchers and tourists alike for its innate level of curiosity. The species has few natural predators (*Manta birostris*, 2018) and is classified as a planktivore, meaning its diet consists almost entirely of microscopic life forms throughout the ocean (Burgess et al., 2016). Furthermore, the species' dietary consumption and breathing are entirely incumbent on its locomotion. It continually travels the ocean with an open mouth, allowing water and food to pass over its gills, providing both oxygen and sustenance in a single gulp. Given this characteristic, it is unsurprising that *M. birostris* is a migratory species, found in temperate ocean waters throughout the globe (*Manta birostris*, 2018). There is no consensus regarding their lifespans, but researchers believe they can live to at least 40 years of age under the right conditions (*Manta birostris*, 2018). Crucially, the species is known for its low biotic potential, with females giving birth to only one to two pups over a period of two to five years (*Manta Ray Research*, 2018).



With such a low reproductive potential, the manta is unfortunately vulnerable to anthropogenic exploitation. The International Union for Conservation of Nature (IUCN) lists the species ‘vulnerable’ in its *Red List of Threatened Species* due to overharvesting (Marshall, 2011). Globally, the manta is primarily vulnerable to targeting and bycatch from commercial and artisanal fisheries (Croll et al., 2015). Since the 1990’s, the demand for pre-branchial gill plates for Asian medicinal uses has exploded in southern China, Sri Lanka, Indonesia, India, and the Philippines (Croll et al., 2015), and is largely responsible for the IUCN’s designation. Anthropogenic threats to manta rays are not just species specific. As filter feeders, these creatures are threatened by microplastic pollution by humans (Germanov et al., 2018). Additionally, researchers have begun to showcase the diverse ecosystem interactions that affect the incidence of manta rays in a given region (McCauley et al., 2012). Needless to say, ecosystem disruptions caused by anthropogenic interference have a deleterious impact on manta ray populations.

## Legal Protections

*Manta birostris*’ ‘vulnerable’ status led to its protection under two key international conventions. The Convention on the Conservation of Migratory Species of Wild Animals (CMS), is an international agreement stipulating conservation of species which regularly cross national boundaries (Convention on the Conservation of Migratory Species, 1979). *M. birostris* was included in Appendix I and II of the Convention in 2011, which recognizes that the species faces the potential threat of extinction and that international cooperation would benefit the species (Convention on the Conservation of Migratory Species, 1979). The Convention on International Trade of Endangered Species of Wild Fauna and Flora (CITES) regulates the trade of products using animal or plant components from threatened or potentially threatened species. The Convention improves the transparency and traceability of traded products through restrictions and permitting requirements (Convention on International Trade in Endangered Species, 1973). Protection of all manta ray species, including *M. birostris*, was expanded under CITES in 2014 (Convention on International Trade in Endangered Species, 1973).

In late 2015, Peru adopted national legislation banning the fishing of giant rays, and requiring any rays accidentally fished as bycatch to be returned to the ocean, ensuring that their meat cannot be sold (Neme, 2016). The legislation follows the significant advocacy and conservation work by Planeta Océano, WildAid, and The Manta Trust (e.g. Mulvaney, 2016).

# Ecotourism Project Background

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Over the past decade, Director Kerstin Forsberg has built an organization dedicated to marine research, education, community impact and advocacy. Since 2012, Lima-based Planeta Océano has increased its level of engagement with Northern Peruvian communities in both conservation research and education. The organization aims to instill these communities with a sense of ownership, and pride in the conservation of the giant manta ray and other marine species. These communities exhibit a high dependency on fishing for household income, which has begun to negatively impact marine life and biodiversity through overfishing and bycatch (Pereira, 2017). To address these issues, Planeta saw benefits in implementing an ecotourism and voluntourism program, which would use local artisanal fishers as boat-tour guides for the manta-rich coast. In doing so, Planeta will provide these communities with enhanced economic opportunities and will increase conservation engagement in the Tumbes region.

Planeta is developing partnerships with other NGOs and plans to begin offering citizen-science and conservation focused educational programs by 2019. Planeta approached the Columbia team interested in exploring options for additional programs, including opportunities for programs run solely by Planeta Océano.

## Business Plan for Ecotourism

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The team was asked to review Planeta Océano's own initial program drafts as well as existing plans for ecotourism programs with partner NGOs and develop a new enhanced business model that would promote Planeta's further development of community-based ecotourism and self-financed international volunteering (voluntourism) programs in the Tumbes Region of Peru (hereby referred to as "eco/voluntourism").

**Ecotourism:** The team has accepted the definition of ecotourism developed by non-profit The International Ecotourism Society in 2015 "responsible travel to natural areas that conserves the environment, sustains the well-being of the local people, and involves interpretation and education" (TIES, 2015).

**Voluntourism:** The team has drawn on other definitions of voluntourism (e.g. Projects Abroad, 2018) to define voluntourism as a cousin of ecotourism, where participants pay to engage in international volunteer activities, which benefit the local people, and involves interpretation and education. For Planeta Océano, volunteer activities will also heavily reflect the ecotourism principles of environmental conservation.

## Vision and Mission

Planeta Océano envisions becoming the premier organization for giant manta ray eco/voluntourism in the Tumbes region of Peru within the next 5 years. These activities will complement their existing missions of marine research, conservation, advocacy, community engagement and development, and education. Ecotourists will add a revenue stream to Planeta's work in providing sustainable alternative livelihoods to local fishers. Volunteer tourists (voluntours) will additionally contribute to Planeta's research and education missions while engaging with the local community.

## Learnings from SWOT Analysis

The team undertook a SWOT analysis to better understand the organization, utilizing its findings to create an ecotourism/voluntourism (eco/voluntourism) program.

In summary, Planeta's small size means that the organization is not burdened by bureaucratic challenges and can adapt swiftly to change if needed. However, the small size also means fewer funding streams and a lack of resources (i.e. staff, materials, funding). In addition, the niche focus in a biodiverse but underdeveloped region means new initiatives may grow slower than desired. Planeta's strong reputation can help open doors to opportunities like corporate sponsorships and/or grants that can aid ventures like a new boat, equipment, etc. Furthermore, there is untapped tourism potential including local interest to visit these areas. There are inherent safety risks to the type of program Planeta is interested in, as well as risks due to Planeta's inexperience providing customer-facing services and decision to rely on non-employee, local tour guides (fishers). These risks can be reduced or mitigated with adequate training, procedures, terms of contract, and liability insurance, and will require significant forethought and attention.

## SWOT Analysis

		(+) Strengths	(-) Weaknesses
Internal		<ul style="list-style-type: none"> <li>• Small, thus agile</li> <li>• Local, community based</li> <li>• Well-known founder and reputation and credibility of organization</li> <li>• Synergies between organization and program</li> <li>• Capacity for program growth and impact</li> <li>• Strong alignment between organization's mission and potential program demand</li> <li>• Program can serve as a research/ Education platform for the organization</li> </ul>	<ul style="list-style-type: none"> <li>• Limited and restricted financial resources</li> <li>• Management bottlenecks</li> <li>• Employee turnover</li> <li>• 'Niche' scope</li> <li>• Safety risks associated with planned program</li> <li>• Inexperience in customer-facing services</li> <li>• Infrastructure not currently equipped for Planned program</li> <li>• Remote program location</li> </ul>
		(+) Opportunities	(-) Threats
External		<ul style="list-style-type: none"> <li>• 'Free' funding positioning</li> <li>• Demand for programming from diverse market segments</li> <li>• Interest in alternative livelihoods from the community</li> <li>• Support from donors / sponsorship</li> <li>• Timing of launch of program</li> <li>• Many examples of how other organizations have dealt with safety risks and other issues associated with program activities</li> </ul>	<ul style="list-style-type: none"> <li>• Ecosystem degradation</li> <li>• Giant manta ray stigma</li> <li>• Fishers losing interest in slow-to-launch program</li> <li>• Programs are reliant on non-employee partners (fishers)</li> <li>• Tourist companies</li> </ul>

Fig. 1) The above figure is a graphical representation of the team's SWOT analysis. Blue text refers specifically to eco/voluntourism programs, while black text refers to the organization as a whole.

## SWOT Recommendation Highlights

- Broaden target markets to include locals, and offer multiple programs tailored to needs of each market segment
- Implement planned programs in phases, to maximize organizational capabilities
- Consider rotational programs based on best times of year for certain species
- Contact companies for partnerships and sponsorships
- Work with appropriate legal entities to ensure liability insurance, documents and planning are adequate
- Develop safety and customer service training and procedures for fishers
- Ensure all vendors (fishers included) have a formalized contract agreement detailing the terms of the arrangement, responsibilities of both parties, and liability (where applicable)

## Organizational and Business Objectives

Planeta Océano currently operates as a non-profit organization, reliant on grant funding to support its operations. Director Kerstin Forsberg envisions future ecotourism/voluntourism programs operating under a separate, for-profit arm of the organization. Despite the term “for-profit,” the short- to medium-term goal is to provide exceptional eco/voluntourism experiences that offer enough revenue for the programs to be self-sustaining and cover all associated costs. This will financially support the fishers engaged in the program, provide the fishermen’s association with an additional source of revenue through a small percentage of profit-sharing, and cover Planeta’s additional expenses while they grow the program. Planeta’s long-term goals include generating enough revenue from the for-profit programs to help fund the non-profit organization. This would alleviate some staff resources devoted to grant writing and securing other sources of funding for the non-profit. Figure 2 illustrates Planeta’s envisioned finance structure.

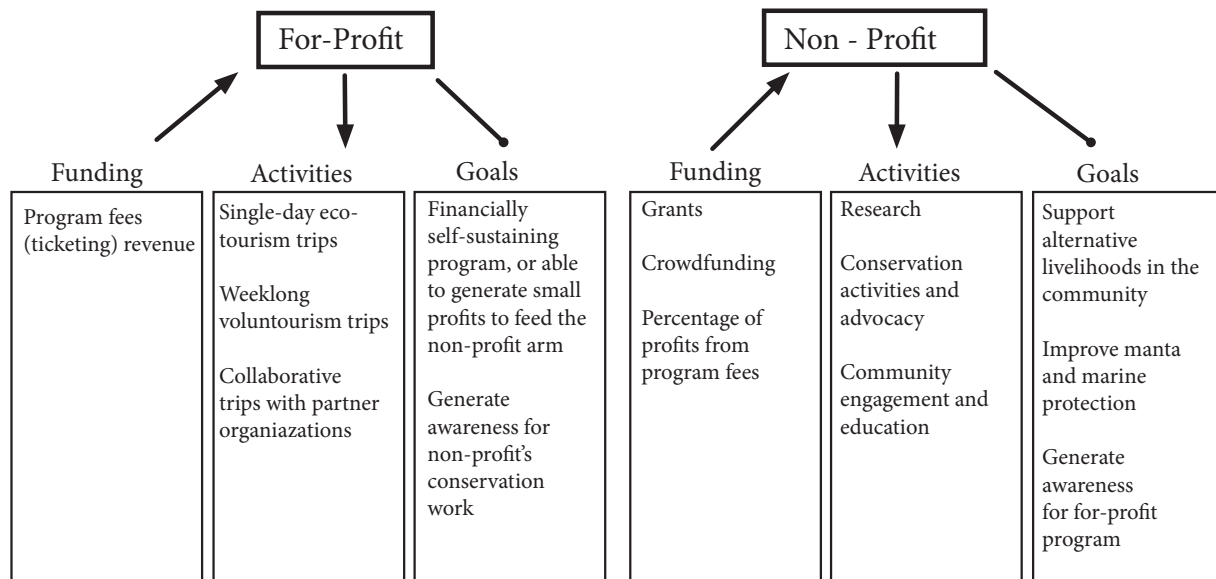


Fig 2) This graphic is not intended to convey all activities that each organization could engage in, but rather to illustrate the division of types of activities and funding between them.

## Strategy

Planeta will partner with other NGOs to offer collaborative citizen science voluntourism trips by the summer of 2019. Some partners may only provide enough funding to cover trip expenses for paid volunteer participants, contributing to Planeta's short term goals of self-sustaining trips but falling short of its longer-term financial goals. Other partners may be able to provide Planeta with more funding to reinforce the non-profit arm of the organization, alongside Planeta's own eco/voluntourism programs which will aim to do the same.

## Action Plan

The ecotourism program, which will draw on a readily available target market in Tumbes and its neighboring coastal region of Máncora. will be most easily implemented and thus allow Planeta Océano to build organizational capacity, tap into a more immediate revenue stream and to learn from this initial expansion before implementing more involved programs. Planeta's engagement with partner NGOs to implement voluntourism programs built around citizen-science curricula in 2019 will similarly allow Planeta to "test the waters" with a longer and more involved program before implementing a long program with complex activities on their own.



Planeta will engage with several important stakeholder groups to roll out its internal and partner programs within the next 2 years and to achieve its goal of becoming the premier manta ray ecotourism organization within the next 5 years.

### **Fishers and Fishers' Association**

Planeta Océano is working with the Asociación Ecoturística de Pescadores Artesanales Mantas Pacífico Tropical to prepare local fishers to act as ecotourism guides on manta boat trips. This arrangement will benefit each organization as well as the marine ecosystem:

- 1) The local fishers will benefit economically from Planeta Océano's tourism activities, and the association will receive a small percentage of the profits in addition to the salary/fees earned by each fisher.
- 2) Planeta will be able to maintain a contract-type relationship with the fishers, offering Planeta, as a small organization, flexibility in its capacity building during this expansion and opportunity to positively impact the local community.
- 3) On a small scale, the marine ecosystem will benefit directly, as any economic activity that is redirected from fishing toward ecotourism will relieve pressure on the fisheries. As Planeta plans to work with an initial group of 10 fishers, this direct impact will be small. A much bigger opportunity to benefit the marine ecosystem is the indirect impact, stemming from the organization's, program's, and fishers' education and conservation efforts. Educating the community and raising awareness around the manta as a flagship species can contribute to an increased understanding of the importance of protecting marine environments as a whole and the need for more sustainable fisheries.

In January of 2018, Planeta began working with Peruvian tourism consulting firm StrategiK on a pro-bono basis. StrategiK conducted a focus group with the fisher's association to understand their goals and vision for their partnership with Planeta and arrived at the following 10 year vision statement (translated from Spanish):

*By 2028, the Asociación Ecoturística de Pescadores Artesanales Mantas Pacífico Tropical will be recognized as a sustainable tourism company (social, environmental, economic) and positioned in the market for its quality of service, commitment and shared work of its members, as well as offering a quality product that makes tourism a tool of conservation and economic development for the district of Zorritos in the Tumbes region.*

Planeta will need to continue working with the fishers ahead of the program launch. Key activities will include:

- 1) Safety and first aid training
- 2) On-board procedure training (*i.e. division of labor among crew, learn script etc.*)
- 3) Customer service training
- 4) Protocols for working with Planeta - (*i.e. how will fishers receive payment etc.*)

### **Planeta Océano Employees**

All but one of Planeta Océano's regular staff currently operate out of the Lima office, necessitating a plane flight to the Tumbes region to interact with the fishers, the Association, and the greater Tumbes community. As Planeta moves forward with the new programs, it will need to consider the organizational capacity building necessary to grow the program and how that growth will impact current employees. See Human Resource Management Section.

## **Program Structure**

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The purpose of implementing an eco/voluntourism program is two-fold. Over the past decade, the organization has dedicated itself to promoting community engagement in the research and education of manta ray conservation. A community-oriented eco/voluntourism program would work to further enhance the conservation of giant mantas in the area, elevate local engagement in their research and education, and through protecting the flagship Manta species, Planeta Océano will promote the conservation of the greater marine biodiversity of the Tumbes Peru region. The program itself is intended to be run by artisanal fishers from the area. This will provide participating locals with a sustainable alternative livelihood, as many of northern Peru's coastal communities are reliant on fishing for household income (FAO, 2018). The goal for Planeta is to promote manta ray conservation, protect marine biodiversity and generate superior means of income for locals by implementing a program of manta ray-focused ecotourism.

In the process of developing an eco/voluntourism program structure for Planeta Océano, the team interviewed a number of established NGOs in order to better understand their approach to creating comparable programs within their organizations. More specifically, the team reached out to leading NGOs with similar eco/voluntourism business models, and programs based in areas with a socioeconomic status similar to that of Peru. Questions concerning target markets, program design and itinerary, timelines, and costs, were posed to interviewees to better inform the program created for Planeta. Questions surrounding program schematics - housing options, research opportunities, and community impact and engagement also informed the team's program structure and recommendations, discussed further below. Through research, these interviews with NGOs, and a survey of universities (see page 23), the team identified the program's target client demographics.

Table 1, detailing the program target markets, focus and implementation timeline is displayed on the following page. Full program schedules designed by the team are included in Appendix A. The team developed a series of documents to support Planeta Océano in its implementation of the programs. Some are based on initial drafts of documents submitted by Planeta and some were created entirely by the team.

### Supporting Documents

- Overview of Changes to Support Documents
- Program Protocol: Role of Each Actor
- Instructions for Services on Board & Code of Conduct for Visitors
- Fisher's Script Draft (Full speech, and don't-miss highlights)
- Security, Supply and Equipment Checklists
- Post-Trip Survey Draft
- Post-Trip Thank you email
- List of Lima accommodations -associated with Scholar program
- Portable Bathroom Options for First Aid Kit

## Program Comparison

Name of Program	Length of Trip	Focus of Trip	Target Market	Program Implementation Goal (assuming legal documentation and certifications are in place)
Nomad	1 day	Swim with manta excursion; departure from Zorritos area	Regional tourists traveling from Ecuador by bus; Lima holidayers; backpackers; locals already in the Zorritos area	3-6 months
Jetsetter	1 day	Swim with manta excursion; pickup from Máncora. area	International and Regional tourists in the Máncora. area	3-6 months
Scholar	7 days in Tumbes; additional days may be required for travel	Conservation and marine biology focused experience including manta and plankton research opportunities as well as cultural engagement	US and other undergraduate students	15-18 months
Expeditioner	7 days in Tumbes; additional days may be required for travel	Conservation and citizen-science opportunities and swim with manta opportunities; cultural, ecotourism activities and rest & relaxation activities	International tourists; individuals; couples; families	3+ years

Table 1) Compares the length, focus, target market, and program implementation goal for each of the programs designed by the team. Detailed program schedules can be found in the appendices.

## Program-Specific Recommendations

### Nomad and Jetsetter

The Nomad program is a single day boat trip and manta ray snorkel excursion leaving from one of three docking locations in the Tumbes area (La Cruz, Acapulco, or Zorritos). The Jetsetter program is also a single-day excursion mimicking the Nomad program, but accommodating tourists staying in the popular area of Máncora. Implementing this program will allow Planeta Océano to reach beyond the tourists/locals in the immediate Zorritos area.

- The Jetsetter has an early morning start time due to travel to the boat launch site and the need for the boat trip to end between 1-2pm as winds arise in the afternoon, making later returns difficult. Planeta should include questions about the start, end time, length of trip and overall experience on the post-trip survey. Planeta should adjust the program based on feedback.
- The Jetsetter program requires transport for tourists. Planeta will either need to engage a tourism agency, hire a service specifically for transport purposes, or consider introducing an internal mode of transportation. While using a service (public or private) for transport may be sufficient in the short term, serious consideration should be allocated to introducing an internal mode of transport with a dedicated driver. This staff member could fill multiple roles, with this being their central responsibility. The upfront cost of this may be high, but internalizing this cost would likely save money in the long run, particularly if multiple programs require frequent transport (such as the Scholar program). Liability concerns and insurance should be considered.

### Scholar

The team designed a 7-day conservation and marine-biology focused program targeting undergraduate students.

- Planeta expressed the desire not to be responsible for program participants in Lima, Peru as they connect through the Lima airport onto the Tumbes region. The program itinerary reflects this. The team recommends Planeta schedule the travel day on a date when there is a morning and evening Lima to Tumbes flight in case of flight delays. In case a participant is unable to arrange a same-day connecting flight to Tumbes, the team recommends that Planeta advise the participant to arrive in Lima the day prior. Planeta would provide the participant a list of recommended transportation options from and to the airport, hotel accommodations, local restaurants, and an emergency Planeta contact number. The team recommends that a staff person be available to join the participant(s) for dinner in the hotel if patrons desire.

- Future recommendation – If the Scholar program is successful, the team recommends building out a second, similar program with greater emphasis on the community and cultural exchange components, rather than blending these broad interests into a single program. If there is sufficient demand to support multiple weeks of the program, delineating between specific interests would allow students to find a program that best suits their needs. Potential students have many choices in this market due to significant competition from other international volunteer and study abroad opportunities. The team believes that offering a tailored experience will attract the targeted market segment.

### Expeditioner

- Planeta indicated early on the desire to focus on only the single-day ecotourism program and Scholar program, so the team has kept its recommendations and program for the Expeditioner limited.
- Given the potential difficulty of breaking into the study abroad/university trip market that the team learned of from its phone interviews with universities (see University Survey section page 23) as well as the limited schedules of students, the team recommends Planeta continue to explore additional target demographics. The team identified other successful conservation ecotourism programs which attracted individuals, couples, and families. Activities included citizen-science, conservation activities (e.g. shepherding newly hatched sea turtles into the ocean), and rest & relaxation opportunities (e.g. downtime to kayak or snorkel).
- Planeta expressed a desire to include more cultural exchange activities such as surf lessons, art classes, and cooking classes, particularly as Western couples and families are likely willing to spend more money than undergraduate students, and the activities are not intended to be academic in nature.

### Opportunities for Long-Term Impact on Community

There are significant opportunities for tourism to impact the local economy through the multiplier effect, where an influx of tourist dollars can create a ripple of secondary and tertiary spending in the community (Barcelona Field Studies Centre). While the long-term impact findings fall outside the scope of this report's primary recommendations, the team interviewed several NGOs which provided insights into opportunities for long-term community impact and can provide a model as Planeta Océano's programs grow.



## General Program Recommendations

### Program Phasing, Implementation, and Timing

To allow Planeta Océano to build necessary operational capabilities and avoid overburden during implementation, the team recommends that Planeta implement the programs in phases. Single-day programs could be implemented in a first phase to provide Planeta the necessary expertise and coordination with the fishers before implementing any multi-day programs. Planeta should work with their NGO partners to implement the joint multi-day voluntourism programs before implementing their own weeklong programs. Phasing allows Planeta to ensure each program is executed with enough resources and allows for quality control. If there is high variability in days/times/locations for best manta sightings, Planeta should use the research data over time to inform trip scheduling to cut down on wasted/idle time for participants and guides and maximize the experience on a day-to-day basis.

### Safety and First Aid

There are significant safety and other risks associated with the planned programs that need to be addressed properly to ensure the longevity and success of the program. In addition to the wellbeing of program participants, staff, and fishers, poor safety/first aid handling can result in extremely damaging reviews and reputation. As such, this aspect requires significant planning, forethought, and coordination with various agencies (*i.e.* coast guard, proper liability insurance etc.)

Safety and first aid equipment, equipment checklists, and protocols must be developed, updated, and maintained.

- Planeta should retain legal counsel to develop appropriate liability waivers. Liability waivers should be developed in accordance with national law and ecotourism best practice. Waivers should be tailored to each program's associated activities as appropriate.
  - Planeta should develop appropriate age restrictions/guidelines with the advisement of legal counsel. Relevant questions to determine might be:
    - Will non-swimmers be able to participate but not swim?
    - At what age can children participate in swimming?
    - Must all minor children wear life jackets in the water?
    - If not, must all parents or guardians have signed an additional liability waiver indicating their minor child will not be wearing a life jacket and at what age would Planeta permit this?
- As a sanitary measure, the team recommends that each boat carry an emergency portable bathroom in its first aid kit.
- Fishers and all staff associated with trips must be trained in safety and first aid procedures.

## Vendor Contracts

Launching the single-day and the multi-day program will potentially bring Planeta into contract with many vendors. Planeta will need to require the following items before entering into a vendor agreement.

- Vendor qualifications
- Safety considerations and track record
- Liability arrangement and insurance

Both the Association and individual fishers should be treated as vendors, and written contracts should be in place establishing an understanding of the arrangement and mutual responsibilities of each party. According to StrategiK, a pro-bono consulting group engaged by Planeta, fishers have high expectations in terms of financial gain. Introducing a contract will help mitigate unreasonable expectations and provide Planeta documentation of responsibilities in the event that a relationship ever needs to be terminated.

# University Survey

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Planeta Océano envisions establishing and building long-term partnerships with universities in order to maintain the sustainability of their eco/voluntourism program. The team was tasked with surveying universities to assess the feasibility of establishing these partnerships to offer the program to students.

## Methodology

*Survey design:* Planeta designed an initial survey presenting their program, and discussing university partnerships and program details. The team's redesigned survey raised questions tailored around university requirements for study abroad programs, their collaboration with third-party organizations, and financial information relevant to Planeta's program costs. The team also surveyed opportunities for Planeta's potential partnerships with the institutions.

*Outreach:* Three approaches were made to reach out to contacts: an introductory email with information on the program, organization, and deliverable; "cold-calls" that introduced our research goals and desired survey outcomes; and follow-up calls to any emails with no response. The team offered university contacts the choice of completing the survey via an online questionnaire or a short phone call.

*Contacts:* U.S. and international universities with marine biology programs were identified through online research and Planeta's existing resource documents. Contact was made to both departmental directors and professors, as well as university study abroad offices.

## Survey results and Go-to-market recommendations

We surveyed 10 university contacts. Below are highlights of the survey results.

1. While 9/10 respondents collaborate with organizations for academic trips, 6/8 partner with the same organizations each year.<sup>1</sup> Respondents work with organizations with whom they have long-standing relationships, and seek to maintain partnerships to ensure stable access to facilities in the program location.

- This can create a significant barrier to entry for establishing university partnerships. Rather than casting a wide net, the team recommends building strong personal connections with 2–3 strong leads among professors, department heads, or study abroad officials (see Sections 2 and 4 below). Building strong personal connections can help Planeta Océano establish relationships needed to maintain partnerships and enhance the credibility of both the program and organization.

2. One respondent said their university looks at potential partners' track record with other schools (they typically seek out recommendations from schools with whom they have worked) and consider what they offer, including staff on site during the experience, insurance, health and safety protocols, and host family options. Another university conducts a comprehensive review of all potential programs' academic and student support services, looking for academic connections within the university's colleges and/or departments. A final respondent said that when they start a new program, they either seek out a recommendation from the organization's previous partners, or recommendations from their faculty. If there is no connection, it is extremely unlikely that they would work with a new provider.

- As such, Planeta might consider hosting faculty seminars on location. These seminars would allow faculty to learn more about Planeta's program, see the organization's facilities, and meet the team. Establishing firsthand contact will allow Planeta to promote their program directly to faculty who would advocate for the program within their university.

3. Three respondents said that academic trips have to be at least 4 weeks long for students to receive credit, and only one respondent said that trips can be as short as one week long.

- This will be important for Planeta to consider when planning both the length and structure of their program for university students. The team recommends Alternative Spring Break (ASB), mentioned by one respondent, as a solution for short-term volunteer travel abroad. During ASB (~1 week), students travel abroad to do service learning and volunteer work. While this differs from formal study abroad, and likely does not allow

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<sup>1</sup> Two respondents gave ambiguous or unclear answers to this question.

students to receive credit for work done, it will allow Planeta to implement a short-term program targeted at university students. The team also recommends using the initial program structure as a guide when first approaching universities and/or faculty members. This will allow Planeta to build out the one-week “template” into a longer program that would satisfy study abroad length requirements in the future.

4. International academic trips for the universities contacted take place between December and February (university winter break) and May or August (university summer break). One respondent replied that trips must be taken over school breaks (i.e. summer and winter), while Alternative Spring Break takes place during March or April.

- Planeta should take this into account when planning the timing of university-led trips.

5. In some universities, professors can select the partner organizations they would like to work with to create *faculty-led study abroad programs*. According to one respondent, faculty-led trips are initiated with the faculty’s research connections with whom they have logistical connections with on the ground.

- Informal connections and networking with faculty through participation in conferences, seminars, etc. is one option for establishing partnerships with universities. Attending study abroad fairs at universities is one specific way for Planeta to “break in” to the university forum, advertise programs to students, and meet potential faculty partners face-to-face.

6. 6/8 respondents said they bring professors with them on academic trips.<sup>2</sup> One respondent also pointed out that some of these trips are taught by university faculty, some of whom are local to the region. The latter respondent also said that during faculty-led trips, faculty members create programs overseas and use host institutions as a “support service” for help in creating these programs.

- Planeta should consider including professor-led activities/lectures in their eco/voluntourism programs, and be prepared to be flexible with program criteria and itineraries.

7. According to most respondents, an average of 15 students/participants attend per trip. Two respondents, however, said that trips can be as large as 30 students.

- Planeta should take this into account when planning boat trips, activities, transportation, housing, etc.

8. One respondent said that program requirements for study abroad programs must be equivalent to a course taught on the university’s campus. Another respondent said that the

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<sup>2</sup> Two respondents did not address this question in their answers.

program must include university requirements for academic credit.

- **Planeta should research the requirements of the universities they wish to target and include necessary elements in their programs to make their program more attractive to potential partners.**

9. According to respondents, universities partner with:

- Government organizations of specified countries (Ministry of Fisheries, Ministry of Tourism, etc.)
- Local universities, NGOs, and community groups
- Third-party hosting organizations (Foundation for Sustainable Development, Child Family Health International, etc.)
- A majority of these groups are non-profit organizations. Planeta should take this into consideration when developing future business models.

## General Findings and Recommendations

- Study abroad offices have a more thorough knowledge of university program and financial requirements than most professors and program directors. For answers to program-specific questions (i.e. requirements for inclusion in university programs, fee structures, etc.), initial contact might be best directed towards these offices.
- Some universities only work with education abroad accredited programs. According to the International Studies Abroad (ISA), the accrediting bodies of most countries is the Ministry of Education for the respective country.<sup>3</sup> In other cases, the institution is accredited by U.S.-based accreditation agencies (International Studies Abroad, 2018). Several databases and directories provide information on program accreditation, including the Council for Higher Education Accreditation (CHEA), a U.S.-based organization that collaborates with 3,000 degree-granting universities and 60 institutional/programmatic accrediting organizations worldwide (Council for Higher Education Accreditation, 2018). While seeking accreditation can be a long process, having it can put more weight and credibility behind the program.

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<sup>3</sup> Contacts in Peru, for reference:

Ministry of Education - San Borja, Peru - 615-5800 - [www.minedu.gob.pe/](http://www.minedu.gob.pe/)

Superintendencia Nacional de Educación Superior - Lima, Peru - (511) 500-3930 - [www.sunedu.gob.pe/](http://www.sunedu.gob.pe/)



# Marketing

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Marketing will play a key role in Planeta Océano's ability to launch a successful ecotourism program.

## Marketing Outlets

- Social media - Planeta should maintain its social media accounts with upcoming programs, registration information, and updates (photos and posts) from past excursions. Planeta's social media managers should stay up-to-date with current platforms and trends in order to craft messages that relate to the widest audience.
- Brochures - The team created several brochures for Planeta using an online design tool called Canva. With this program, Planeta can print up to 250,000 brochures for free (exclusive of print costs). With the provided log-in information, Planeta will be able to update the brochures as needed. Additional draft content and example brochures are included in Appendix B.

## Advertising Recommendations

- Many hotels and restaurants carry brochures of local attractions and programs, either at the front desk or on public display in a lobby area. Planeta should explore establishing a relationship with hotels and restaurants to carry brochures.
- During the high tourist season, Planeta's future Tumbes hire could regularly visit high traffic areas in Máncora to pass out brochures and engage tourists.

## Marketing Recommendations

- One target market segment, the team identified through interviews with representatives from StrategiK and another NGO, as an opportunity for the single-day Nomad program are regional tourists from Ecuador who take buses South to Peru. Planeta could market to the transit companies, to help make the target market aware of the program prior to arrival in the area.
- Planeta should distribute brochures to local institutions in the Tumbes region and could host a launch party with sign-up dates. The team's research and interviews with affiliate NGOs indicated that some locals were not aware of the tourism opportunity that giant manta rays could provide and were interested in paying for the experience themselves.

## Photography

Planeta Océano has indicated the ability to take photographs of tourists on ecotourism trips.

### Recommendations

- Include either notification that participation in trip constitutes consent for Planeta Océano use of their image in its marketing materials, or include an opt-out checkbox on registration form/liability waiver.
- Include option for tourist to list their email address to receive photos and additional communication from Planeta post-trip on post-trip survey.
- Distribute photos to tourists post-trip via email. This action can also form the basis for future email newsletter outreach campaigns.
- Encourage tourists to share photos of the trip on their own social media accounts with suggested hashtags.

## Employee and Contractor Visibility

Employees represent the organization each time they engage in activities outside the office on behalf of Planeta. An employee uniform, shirt, or hat bearing the Planeta Océano logo will increase the organization's visibility.

### Recommendations

- Staff should be given a branded shirt or other item (*e.g.* hat) for out-of-office work.
- Volunteers should also have a branded shirt, serving the same visibility purpose and also as a staff equalizer.
- Branded shirts should be secured for all of the fishers who will act as local guides for Planeta's ecotourism programs. Though they will not be employees, they will represent the organization. A shirt bearing the logo of both Planeta and the Asociación Ecoturística de Pescadores Artesanales Mantas Pacífico Tropical could be designed.

# Global Giving

In unveiling its new mission to sustainably develop and empower communities through manta ray conservation, Planeta Océano tasked the team with creating a crowdfunding campaign to help fund the first steps for the program to get off the ground. The goal was to create and consolidate community-based manta ecotourism while developing alternative livelihoods for local artisanal fisherman. Planeta's initial target totaled \$8,500 (USD), budgeted for a new ecotourism boat, safety supplies and first aid, a permanent exhibit for the new education center, and preliminary visits to the exhibit by local schools.

The team drafted several narrative concepts to present Planeta in the most marketable light to Global Giving, a nonprofit that connects donors with grassroots projects around the world. The team reviewed previous narratives, donation suggestions, and similar projects that received substantial funding. Planeta finalized the team's draft and published the final version in March 2018. The campaign was accepted into Global Giving's March 2018 Accelerator program, allowing it to compete for bonus prizes. As of April 24, the fundraiser has raised over \$3,602 dollars from 57 donors.



[EXPLORE PROJECTS](#)

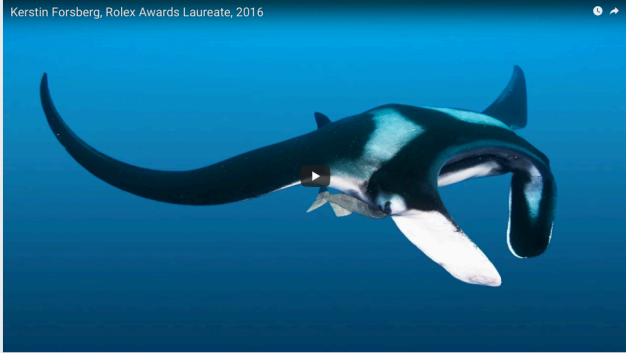
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Animals | Peru | Project #32033

Engaging Communities to Conserve Giant Manta Rays

by Asociación para la Conservación de Ambientes Marinos y Costeros

Kerstin Forsberg, Rolex Awards Laureate, 2016



\$3,602 raised of \$8,500 goal

57 donations \$4,898 to go

DONATE NOW

Donate once

Donate monthly

\$10 (USD)

supports the visit of two local youth + a local teacher to the exhibit

\$30 (USD)

helps implement the permanent educational exhibit

\$50 (USD)

purchases safety supplies and a first aid kit for the ecotourism boat

\$80 (USD)

installs seating for one tourist on the fisher's ecotourism boat, to help fishers develop an additional revenue stream through ecotourism

STORY | REPORTS | PHOTOS | SHARE

Summary

We aim to empower coastal communities in marine and manta ray conservation. We'll equip a permanent local exhibition on manta rays and purchase a suitable boat for local fishermen to lead ecotourism excursions in northern Peru. Community members and visitors will learn from the exhibition and local fishers will receive equipment and training to promote ecotourism. This will benefit sustainable development of low-income fishing communities, and enhance manta ray and marine conservation.

\$8,500

total goal

\$4,898

remaining

49

donors

0

monthly donors

1

month

Image 1

# Finance

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## Fee Calculator for Eco/Voluntourism Programs

The fee calculator is a tool to enable Planeta Océano to determine the appropriate program fees to charge participants for the Nomad, Jestsetter, and Scholar experiences. Importantly, it is not designed to advise Planeta how much the organization *should* charge, but rather to provide all of the variables and expense items that could be considered to determine how much Planeta *wants* to charge, in excess of covering costs, in one template. Program fees will be at the discretion of Planeta. A calculator is provided instead of fee recommendations, because this will be more useful to Planeta for more precise cost determination over time. There may be some variation in activities from trip to trip, and the associated costs for activities as well as logistics and travel requirements (staff airfare, boat and vehicle fuel, etc) will fluctuate over time. Rather than providing static costs that may be different by the time the next trip is being planned, the calculator was devised as a way for Planeta to regularly adapt its pricing to market fluctuations and programmatic changes.

This tool allows for high customization of the activities for individual excursions, as well as expenses. For example, a six-person Scholar trip departing from Acapulco in the Spring may have different boat-related expenses and participant activities than an eleven-person excursion departing La Cruz in the Fall. It is also likely that activities and costs will change over time, and the calculator allows for this adjustment.

Two key features of the calculator will enable Planeta to use the tool for financial management beyond covering the costs of the boat excursions. The first is an optional allocation to individual trips within the calculator of central costs (marketing, ticketing, etc.) related to the excursions, thereby removing the need to budget for and fund these expenses from grant money. The second is the “revenue above cost” calculator, which Planeta can use to determine the profit margin required to cover, over time, necessary funding that is *not* specific to the excursions. Initially, these are expected to be the contributions to the Fisher’s Association, contributions to the manta conservation work, and the salary of the administrative manager that will be hired.

See Appendix C for a blank example fee calculator for the “Scholar” program.

## Recommendations Related to the Eco/voluntourism Programs and Fee Calculator

- Planeta should standardize the current 550 soles allowance to the fishers. This should include an assessment of their equipment and support staff needs, and visibility into the breakdown of expenses that comprise the 550 soles. The appropriate amount may be more or less than 550, and this understanding should reduce the variability of the “additional allowance.” The types of extra expenses that are reimbursable should also be decided, and the reimbursement amounts standardized. This is important for Planeta’s “equal pay” priority. To further support the equal pay priority, Planeta should meet with the fishers periodically (bi-annually) to assess current needs and any necessary changes to the itemized breakdown of the allowance, and reach a consensus on the right dollar amount of the allowance. The agreed outcome should be documented in an agreement between Planeta and the fishers.
- The ‘per trip allocation of central costs’ function should be used to cover central excursion-related costs through the program participant fees, so that these expenses do not need to be budgeted for separately.
- A review of the documents provided revealed a mention of various miscellaneous expense items (“inspection fee,” taxes, “negotiable commission to tourist office,” etc.). Planeta should be sure to understand and input all expenses into the calculator, both those specific to a given excursion, and those central costs for which a portion can be allocated.
- The fee calculator should be used as the expense reimbursement template for the associated trip. After an excursion, expense reimbursement should align with the individual expense items in the fee calculator for that excursion. Any variances or additional expenses incurred should be justified and explained. This may happen regularly, as program fees for a given excursion must be calculated well in advance of the actual trip, and there may be late changes to a program or unexpected expenses. Planeta could add a small percentage to the margin calculator to establish a small fund to pay for these unexpected reimbursements. An example might be having to send a Planeta staff member to Lima to assist a participant. Although Planeta prefers to avoid this responsibility, such expense is a possibility.
- The margin/revenue above cost calculator should be used strategically and with a long term view for continuity with funding. Key questions include, what is the total annual contribution Planeta would like to be able to make to the fisher’s association?

- Planeta should create a holistic “profit”/funding model that incorporates the funding contributions from partner NGOs when those programs are up and running, along with the ecotourism program fees. Fee structure and cost-minimization best practices should be adopted from partner NGOs as those programs scale up.
- The organization should consider a discounted rate for locals and last-minute additions to the day trips, in the interest of filling any vacant seats and maximizing revenue every trip.
- In the future, Planeta might consider incorporating scuba diving in the ecotourism program. There is an indication, through research and discussions with partner organizations, that diving can generate strong revenue locally in an underserved market.

## Financial Projections

To support Planeta Océano’s long term planning, a separate tool has been developed to project revenue, expenses and profit over the first five years of program operation. Within the same file as the fee calculator, the projections calculator will “pull” revenue and expense totals from three completed trip forms (the blank tabs provided in the file): one Nomad, one Jetsetter, and one Scholar. It is important that each of these forms be a representative example of that program, because the projection tool will multiply these values by the number of each type of trip expected in a given year. This number can be determined by Planeta.

A simple net revenue over expenses, specifically for the ecotourism program, is thus calculated for each of five years, assuming a growth rate of 1.5% per year.

The tool also includes gross profit of the overall program, when factoring in central overhead costs. Note that this central overhead component is not based on any budget or expense information from current or prior years of operation, but includes only the projected salary of an additional administrative hire that Planeta has indicated will be required for successful operation of the ecotourism program. The remainder of the fields are optional for the addition of other central overhead costs for inclusion in the projections.

A further option includes a net profit calculation, which factors in other non-ecotourism specific funding needs, such as the contribution to the Fisher’s Association and conservation research activities. These are ideally the same medium to long term funding needs that are included in the margin/revenue above cost section of the fee calculator. Another option for the net profit calculation is to include the impact of taxes.



In summary, similar to the fee calculator, the projections calculator should be used and updated regularly, and relies on cost data entered by Planeta in the form templates to project revenue and profit over time.

# Organizational Recommendations

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## General Financial Management Recommendations

- Procedures should be drafted for key financial processes, including post-trip expense reimbursement and non-excursion budgeting. The organization should ensure that a backup individual to the financial manager/administrative manager is trained to ensure continuity and mitigate the inefficiencies of staff turnover.
- The organization should improve filing and organization of financial documents. Those that are obsolete, no longer useful, or of indeterminate usefulness should be discarded.
- There should be clear multi-year projection for grant contributions, and these individual grants should have clear alignment to specific costs and funding needs. As the timeline for ecotourism program success is an uncertainty, the organization should continue soliciting grant funding and allocating costs not covered by excursions to central overhead (*e.g.* expansion to include additional boats etc.) in the near term.

## Financial Management Software

Planeta Océano currently uses Microsoft Excel to manage their annual budget, track employee expense forms for field operations, consolidate funding sources, and identify program operating costs. In order to strengthen their organizational capacity, the organization foresees utilizing more diverse financial management software programs. To achieve this goal, the team has evaluated several low-cost, easy to use financial management programs. In the following table are several software programs that would benefit Planeta's financial management capacity.

Highlights are taken from online reviews. More highlights, reviews, and services for the following software programs are listed in Appendix C, along with links to full site reviews.

<b>Program</b>	<b>Cost</b>	<b>Invoices &amp; Estimates</b>	<b>Track time &amp; Expenses</b>	<b>Manage Bills</b>	<b>Reports</b>	<b>Highlights</b>
<b>FreshBooks (PLUS)</b>	\$25/month - additional \$10 per person/ month	✓	✓	✓	✓	User- Friendly Cloud based Team collaboration tools
<b>Zoho Books (Professional)</b>	\$29/month for 10 users	✓	✓	✓	✓	Full-featured accounting software Full support options
<b>QuickBooks Online (Essentials)</b>	\$20/month Add \$39 Multiple users: \$19/month + \$2/employee/month	✓	✓	✓	✓	Exceptional user interface Easy navigation
<b>Xero small business (Premium)</b>	\$60/month, 5 users	✓		✓	✓	Easy to use for Macs and Pcs Integrates with third- party business solutions

Table 2) Shows several software programs that would benefit Planeta's financial management capacity.

Also included in the team's recommendations is Microsoft Office 365, which offers a Nonprofit plan for small and mid-size nonprofits. While this program is not solely focused on financial management, Office 365 offers a full service staff management software option and utilizes Microsoft Excel, a program the organization is familiar with. Below are highlights from the program, with details included in Appendix C.

Program	Cost	Applications	Services	Highlights
<b>Office 365</b> Small and Mid-size Non-profit	\$3/user/ month - up to 300 users	Word Excel PowerPoint OneNote Outlook	Exchange OneDrive SharePoint Skype for Business Microsoft Teams	Web versions of Word, Excel, and more File storage and sharing Unlimited online meetings, IM, and audio, HD video, and web conferencing Work management tools to help teams create plans, organize, assign and collaborate around tasks -IT-level web support and 24/7 phone support

# Human Resource Management

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The team was asked to develop a simple plan for human resource management and growth within the organization. Planeta Océano reported that the organization has typically employed a small team of young professionals and seeks to employ methods to increase long term retention. The organization sought input from the team regarding reinforcing organizational capacity and resource management. Within this scope, Planeta's goals are to:

1. Better understand how to retain talent within the organization
2. Understand what staff need to feel like they are developing themselves within the organization
3. Learn if staff have personal goals outside of work

The team created a series of questions for Planeta to use during a structured conversation with its employees to better understand their motivations, needs, and goals, as well as a series of questions for management. Based on feedback from the organization about the employee conversation, management response, and the team's work throughout the project, the team has developed several recommendations. Detailed recommendations follow the four topics identified below.

## Recommendations

1. Develop employee protocols
2. Implement management protocols
3. Create systems for employee feedback in a small office environment
4. Identify employee growth opportunities as Planeta expands into new Tumbes program

1. The team identified employee protocols as an area where both staff and management would benefit greatly. The team recommends that staff members begin documenting their processes for working on on-going or long-term tasks. Developing employee protocols will help mitigate the loss of institutional knowledge when there is turnover or an employee's sudden departure. Involving employees in the development of these protocols serves several purposes:

- Gives employees a sense of ownership of their work
- Transfers knowledge of how an employee completes a task
- Relieves management of fulfilling this task

2. The team recommends that more standardized management protocols be put in place including:

- Individual monthly check-ins between each manager and his/her direct reports, including volunteers
- Monthly team meeting
- Annual review of each employee
- Implement a “2-week notice” policy for employees and termination procedure
- All employees leaving the organization be offered a private exit interview with his/her manager and/or the director

3. In such a small office environment where there is little room for anonymous feedback, open channels of communication are important. Regular communication will help the organization find ways to address goals identified in the staff and management questionnaires, such as recognizing the work of employees and volunteers, creating more equality between volunteers and paid staff, and promoting team building efforts. In addition to the more formal procedures above, the team recommends:

- Regularly discuss and implement opportunities for employee feedback (*i.e. whole team meetings, office suggestion box regularly reviewed by management, etc.*)

4. As Planeta expands its organization with eco/voluntourism programs, the team offers further items for consideration:

- Planeta suggested the need for an additional staff person in the Tumbes region to oversee local ecotourism ticketing and marketing. It is important to think about how this person will fit into the overall organization as a staff member isolated from the rest of Planeta’s staff in Lima.
- The fishers who will captain and crew the boats for the tours will not be Planeta employees, but will effectively represent the organization. It is incumbent upon Planeta to think carefully about the customer service protocols the fishers will follow on the boat with tourists as well as how the fishers will interact with Planeta staff and vice versa. The success of the program will rest on the fishers’ ability to deliver an exceptional experience to customers as they represent the organization.

# Conclusion

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Planeta Océano has ambitious plans for its eco/voluntourism programs. Successful phasing in of new programs will allow the organization adequate time and resources to sufficiently train both its own staff and the fishers before launching all proposed programs. Planeta should focus its efforts first on the necessary safety, liability, financial, training and marketing needs of the single-day programs. Demonstrated success in these excursions will help prepare Planeta and the fishers for their longer programs with partner NGOs, building Planeta toward the necessary capacity to take on weeklong-plus programs on their own.

Successful implementation of these eco/voluntourism programs will provide the fishers with an increased and more stable income, offer Planeta diversified funding sources, increase community engagement around Planeta's marine conservation work, and hopefully lead to more sustainable fisheries and the ultimate protection of the giant manta.

During this time, Planeta will strengthen its financial and human resource management, as well as its outreach and communications with universities to support its implementation of eco/voluntourism programs.

Networking across various channels, as well as being prepared to be flexible with program criteria, itinerary, timing, and length, will help Planeta to build long-standing partnerships with universities needed to maintain the sustainability of their program. Enhancing human resource management with organizational protocols, feedback systems, and growth opportunities will increase resilience as the organization grows. Increasing financial management through the use of the customizable calculator and projection tools will allow Planeta to consistently update changes to program or organizational fees at their discretion, and better understand the impacts to their annual projections.

While there is awareness about the potential externalities of ecotourism in the conservation community, Planeta's program, small-scale in nature, will promote marine conservation in the region by raising knowledge and awareness around a critical flagship species, as well as engage communities and support local businesses. Planeta should continue to monitor the impacts the program has on the environment and surrounding community over time, building the credibility of a sustainable ecotourism program and supporting the environmental, social, and economic goals of the region.

Though the organization is small in size, Planeta Océano is poised to take their already outsized impact a big step further.





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## Image Credit

Image 1: Global Giving (2018). Retrieved 29 April 2018 from <https://www.globalgiving.org/projects/engaging-communities-to-protect-giant-manta-rays/>

# Appendix A

## Single Day Program Itineraries

Time	The Nomad (Single Day- Already in the local Area)		Time	The Jetsetter (Single Day From Mancora)
1-2 days before	Tourists send in documents previous day. Tourists receive recommendations for next day		1-2 days before	Tourists send in documents previous day. Tourists receive recommendations for next day
5:30 AM			5:30 AM	Arrival at group meeting point / check-in / Liability waiver
6:00 AM			6:00 AM	Group van travel to Zorritos (or Acapulco/La Cruz point of departure)
	Arrival/ Check-in / Liability waiver Safety overview (before getting in boat): Safety on water, procedure and equipment use, safety with manta rays			Arrival/ Check-in / Liability waiver Safety overview (before getting in boat): Safety on water, procedure and equipment use, safety with manta rays
7:00 AM			7:00 AM	
7:30 AM	<b>Departure</b>		7:30 AM	<b>Departure</b>
	Presentation on local community, local marine ecosystems, giant manta rays, conservation, other wildlife, fishermen stories and Planeta (throughout trip)			Presentation on local community, local marine ecosystems, giant manta rays, conservation, other wildlife, fishermen stories and Planeta (throughout trip)
8:00 AM			8:00 AM	
9:00 AM	Hand-out photo albums on manta project		9:00 AM	Hand-out photo albums on manta project
	Overview: safety with manta rays			Overview: safety with manta rays
10:00 AM	Swim with mantas / Photos taken of tourists		10:00 AM	Swim with mantas / Photos taken of tourists
11:00 AM	Snacks: water/juice/fruit		11:00 AM	Snacks: water/juice/fruit
12:00 PM	Fisherman catch fish. Demonstration of ceviche on-board		12:00 PM	Fisherman catch fish. Demonstration of ceviche on-board
1:00 PM	Return to shore		1:00 PM	Return to shore
2:00 PM	Participants fill out survey on return boat ride back in/ upon arrival		2:00 PM	Participants fill out survey on return boat ride back in/ upon arrival
3:00 PM			3:00 PM	Lunch in Zorritos
4:00 PM			4:00 PM	
5:00 PM			5:00 PM	Group van travel back to Mancora
6:00 PM			6:00 PM	

The Scholar	Program description: Conservation/ marine biology focused exprience. Program designed for undergraduate students but not necessarily marine biology majors (i.e. citizen science okay)								
	[Backup travel day if needed]	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	[Backup travel day if needed]
Time		Travel to Tumbes	Field Work	Field Work	Community Involvement	Field Work	Tumbes Tourism	Return to Lima	
6:00 AM	[Arrival and Lima hotel check-in]	Lima Arrival (from major US markets)							
7:00 AM									
8:00 AM									
9:00 AM									
10:00 AM	If needed for participants who cannot get a flight through to Tumbes on single day		Manta Trip #1	Manta Trip #2:	Data and tissue collection at fishing terminal	Manta Trip #3	Tumbes Mangroves / Hot Springs / Other local ecotourism opportunity	Sleep-in Day	
11:00 AM									
12:00 PM									
1:00 PM									
2:00 PM	PO will provide Miraflores hotel recommendations and airport transportation recommendations and an emergency contact, but will not be responsible for participants.	Flight Lima to Tumbes (~10:45am - 12:52pm)		The focus here is less for manta watching and more focused on Plankton research	Lunch in Zorritos			Breakfast	
3:00 PM									
4:00 PM									
5:00 PM									
6:00 PM	[Dinner at Miraflores hotel- with PO staff member if any participants required backup travel day]	Taxi to Zorritos	Lunch in Zorritos	Lunch in Zorritos	Surfing Class		Lunch	Surveys from week; informal recap; discussion about program with all actors	
7:00 PM									
8:00 PM									
9:00 PM									
10:00 PM		Lunch in Zorritos	Lunch in Zorritos	Travel Time	Lunch in Zorritos		Beach Clean Up / Assist at education center	Flight Tumbes to Lima (~1:42 - 3:24pm)	
11:00 PM									
		Unpack	Data entry	Data entry	Visit IMARPE lab; talk with specialists	Data entry		Marine biology lecture	
		Orientation/ Workshop: Prep for field work	Dinner	Dinner Bonfire	Dinner	Cooking class to make dinner	Dinner		
		Dinner					Pack for return trip	Participants continue onto flights home	

<b>Color Code Key:</b>	Classroom/office	Field work	Community Engagement	Flight	Ground Transport	Meals	Tourism	Other
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Scholar Program Activity Details			
ACTIVITY	DAY(S) ON SCHEDULE	DESCRIPTION	MATERIALS
Orientation / Work Shop	1	Introduction delivered by Director or other staff member <ul style="list-style-type: none"><li>- Get-to-know-you/ice breaker group introduction activity for the whole group</li><li>- A rundown of what PO is about and what the specific program is all about, i.e. manta ray conservation through community engaging ecotourism.</li><li>- An overview discussion of the citizen science opportunities on the manta trip; what will be asked of the passengers, how to log the data, etc. - Cover the basics of 'research' side of the trip.</li><li>- A discussion of the weeks itinerary - print outs should have been made available prior to this, however additional copies should be passed out here.</li><li>- A walk though of saftey procedures both on the boat and in the water with the mantas should be given</li><li>- Logistics for departure the following morning; meeting time, breakfast, what to bring on the boat, duration of trip etc.</li></ul>	Printed materials (1/ participant): <ul style="list-style-type: none"><li>- Trip itinerary/schedule</li><li>- Safety procedures for on boat/near water</li><li>- Safety procedures for swimming with mantas</li><li>- Emergency contact phone numbers for the Planeta staff member(s) on the trip</li><li>- Medical emergency contact, in the event that Planeta staff cannot be reached to help coordinate (local doctor/hospital etc)</li></ul>
Manta Trips	2,3,5	<ul style="list-style-type: none"><li>- Discussion of giant manta rays, other wildlife, and Planeta organization; likely spearheaded by the guide/PO employee rather than the fishermen personnel.</li><li>- Recap the safety content from the orientation; Discussion of how to swim with manta rays - safety, procedure and equipment use, as well as proper conduct on the boat. (It is important to note this may not be necessary come the third and final boat trip)</li><li>- When possible, the PO guide will lead the swim opportunities with the mantas.</li><li>- Citizen science opportunities; this could consist of anything from identifying the marking on individual mantas, watching the assigned guide actually tag on of the creatures, and ocean clean up.</li><li>- For the second boat trip, the research focus will shift away from Mantas and towards Plankton, thus providing a bevy of new research opportunities for trip 2, compared to 1 &amp; 3.</li><li>- Photos of tourists at various points in the trip.</li><li>- Snacks: water/juice/fruit throughout the trip</li></ul>	<ul style="list-style-type: none"><li>- Safety/first aid equipment</li><li>- Laminated safety instruction sheets (at least 1 per boat)</li></ul>
Data Entry	2,3,5	In addition to data logging, these session can be used to recap the days activities on the boats and have a discussion about the day's work.	Computer access/ data logs
Bonfire	3	Who doesn't like a good old fashioned bon fire. <ul style="list-style-type: none"><li>- Sing alongs are welcome.</li><li>- Acts as the solidifying event that bonds together all of the participants on the trip.</li><li>- Allows for some reflection discussion about the first manta trip.</li></ul>	
Data and tissue collection at fishing terminal	4	Planeta staff member should provide introduction to data collection procedure and goal/purpose of activity Opportunity to shadow fishermen/ day in the life of a fishermen experience?	Research materials for tissue collection
Surfing Class	4	A fun change of pace activity for anyone who is willing to learn. Obviously anyone who is not interested in taking the lesson is welcome to simply enjoy the beach scene instead. <ul style="list-style-type: none"><li>- alternative community engagement activities could be offered during this time (art class etc)</li></ul>	
Visit IMARPE lab; talk with specialists	4	Tour of the Tumbes facility. <ul style="list-style-type: none"><li>- Discussions with scientists about their work, which is directly related to fisheries resources, regional aquatic health, and marine biodiversity and biology.</li><li>- Discussion about national manta legislation enforcemencement.</li></ul>	
Cooking Class	5	  Either through partnership with a local restaurant, or a very welcoming and accommodating home cook with a restaurant-grade kitchen (for food safety)	Not essential, but a thoughtful touch would be a print out of recipes used in the class
Tumbes Mangroves/ other local ecotourism opportunity	6	Manglares de Tumbes National Sanctuary: Unique oppertunity to see rare flora and fauna. Has a very large collection of tropical birds - big attraction. Group boat or individual/pair kayak rental Opportunity for discussion ecology and community-based conservation including: <ul style="list-style-type: none"><li>- shimpers impacts on local ecology in mangrove area</li><li>- local pollution in the area (how can communities prevent the "tragedy of the commons")</li><li>- Positive and negative effects of tourism on an ecologically sensitive area</li></ul>	
Beach Clean Up / Assist at education center	6	Choice between two activities may depend on level of completion of education center and participants' Spanish language skills. i.e. beach clean up with local kids may be less about community engagement if no participants speak Spanish but they could work on a project at the education center.  Beach clean up: <ul style="list-style-type: none"><li>- Should involve a partnership with a local school.</li><li>- Functions as both a conservation activity as well as community outreach.</li><li>- The interaction with local school kids allows for a excellent opportunity for cultural exchange</li></ul> Assist at Education Center: <ul style="list-style-type: none"><li>- Assist with projects at the education center as needed</li></ul>	
Marine Biology Lecture	6	Could be conducted by Director. However, in her absence this could also be conducted by either a local university professor or one of the IMARPE scientists. Down the road, one of the guides on staff should ideally be equipped to give this lecture. <ul style="list-style-type: none"><li>- Topics should be relevant to manta ray and plankton biology, regional conservation and biodiversity, anthropogenic impacts on the region.</li><li>- PO should coordinate the content specifics with the chosen speaker.</li></ul>	
Surveys from week; informal recap; discussion about program with all actors	7	A recap discussion on the weeks events and activities. Focus should be primarily on the Boat trips, the participant take aways. Surveys should be administered and filled out by the participants. Any additional memorabilia should be passed out at this time, i.e. formal thank yous, trip photos (or reminder of when photos will be emailed etc), contact information, etc.	Printed surveys (and provide enough pens for participants to fill out)

The Expeditioner	Program description: A showcase of the Tumbes Region. Program designed for anyone with interest in ecology. Replicates other tourist programs that cast a wide(er) net for interested applicants, including but not limited to families, couples, students, locals, & international participants. Predicated on a flexible program with a mix of marine and terrestrial exploration.								
	This program structure is a template, from which Planeta Océano can build and adapt at a later point in time.								
	Travel	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Travel
Time	[Back up travel day if needed]	Travel to Tumbes	Manta Day 1	Manta Day 2	El Bendito - Mangrove and Beach	Manta Day 3	Reserva Nacional de Tumbes	Return to Lima	[Back up travel day if needed]
6:00 AM	[Arrival and Lima hotel check-in]								
7:00 AM									
8:00 AM	If needed for participants who cannot get a flight through to Tumbes on single day				Trip to El Bendito: Home to the Santuario Nacional Los Manglares de Tumbes			Sleep-in Day	
9:00 AM									
10:00 AM	PO will provide Miraflores hotel recommendations and airport transportation recommendations and an emergency contact, but will not be responsible for participants.	Flight Lima to Tumbes (~10:45am - 12:52pm)			Lunch in El Bendito		Trip to Reserva Nacional de Tumbes	Breakfast	
11:00 AM									
12:00 PM		Taxi to Zorritos	Manta Trip #1	Manta Trip #2	La Playa el Bendito Dinner		Lunch	Taxi to airport	
1:00 PM									
2:00 PM		Unpack	Lunch in Zorritos	Lunch in Zorritos		Manta Trip #3	Trip to Dive center		
3:00 PM									
4:00 PM		Lunch in Zorritos			El Bendito Local Tourism	Lunch in Zorritos		Flight Tumbes to Lima (~1:42 - 3:24pm)	
5:00 PM									
6:00 PM		Orientation and prep for fieldwork	Free	Free	Travel Back to Zorritos	Free	Travel Back to Zorritos		
7:00 PM									
8:00 PM		Dinner	Local Cooking Experience	Local Cooking Experience		Local Cooking Experience	Dinner	Participants continue onto flights home	
9:00 PM									
10:00 PM									
11:00 PM									

Color Code Key:	Classroom/office	Field work	Community Engagement	Flight	Ground Transport	Meals	Tourism	Other
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# Appendix B



Tumbes, in northern Peru, is home to one of the most important giant manta populations in the world. However, mantas in this area have been entangled in local artisanal fisheries, consumed locally and commercialized - especially worrying given this species' slow reproductive rate.

Contact:

[www.planetaoceano.org](http://www.planetaoceano.org)  
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## PRESERVING MANTA RAYS AND COASTAL COMMUNITIES



PLANETA OCÉANO





## ABOUT US

Since 2007, Planeta Océano has educated and empowered coastal communities in Peru to sustainably manage their coastal and marine environments. Notably, our education and ecotourism networks, award-winning research, and environmental advocacy efforts resulted in legal protections for the giant manta ray in 2016.

---

**"Manta rays are flagship species and indicators of ocean health."**  
**Kerstin Forsberg,**  
**Co-founder & Director**

## WHAT WE DO

### EMPOWER FISHING COMMUNITIES...

...by enabling low-income fisherman to become conservation ambassadors. They will earn reliable and higher incomes while building a modern economy around ecotourism and teaching conservation practices.

---

### PROTECT GIANT MANTAS...

...by ending their capture by artisanal fishers. This will allow these gentle yet vulnerable giants to recover their shrinking population, and preserve their important ecosystem.

## YOU & PERU

### Inquire about our Day Trips

Snorkel with mantas  
Boat excursions with expert guides  
Tumbes wildlife tourism  
Snacks/lunch provided



### N o m a d

- 7am - 3pm
- Leaves from Tumbes

### J e t s e t t e r

- 7am - 7pm
- Leaves from Mancora



Tumbes, in northern Peru, is home to one of the most important giant manta populations in the world. However, mantas in this area have been entangled in local artisanal fisheries, consumed locally and commercialized - especially worrying given this species' slow reproductive rate.

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...by enabling low-income fishers to become conservation ambassadors. They will earn reliable and higher incomes while building a modern economy around ecotourism and teaching conservation practices.

### PROTECT GIANT MANTAS...

...by ending their capture by artisanal fishers. This will allow these gentle yet vulnerable giants to recover their shrinking population, and preserve their important ecosystem.

## YOU & PERU

### Get involved with our 7 Day Scholar Program:

- Designed for undergraduate students with or without science background
- Marine biology immersion

- 
- |   |                            |
|---|----------------------------|
| • Snorkel with mantas                               | • Lab Work                 |
| • Field Research                                    | • Surfing                  |
| • Specialized training & education from specialists | • Explore mangrove forests |

### Key Program Takeaways

- Hands-on science education
- Immersive cultural experience
- Protect, research giant mantas!

"Manta rays are a flagship species and indicators of ocean health."

Kerstin Forsberg,  
Co-founder & Director



# Appendix C

PLANETA OCEANO EXPEDITION - FEE CALCULATOR (Blank Template)

Scholar Week-long Trip

Date of trip:

Size of group (persons)

8

Staff

3

Total

11

Departure Port

Zorritos, Acapulco, La Cruz

Min 6 /Max 11: Depending on Boat

PO Staff

# of days

7

Current exchange rate

1 USD3.41 PEN

SUMMARY				
N people	Final price per person USD	Total revenue USD	Expenditures	Net profit
8	0 USD	0 USD	0 USD	0 USD

Expenditures

Item	Quantity	Comment	Price PEN	TOTAL PEN	Price USD	USD Total P.P.
Activities						
Orientation Workshop/Closing Session	1	costs related to orientation and closing session	0.00	0.00	0 USD	0 USD
Cooking class	1	dependant on local resturant or household willing to accommodate. Fees would likely include ingredients and renting out the space	0.00	0.00	0 USD	0 USD
Surfing class	1	Instructor fee + renting the gear	0.00	0.00	0 USD	0 USD
Lecture	1	Local university professor or IMARPE scientist (likely cheaper)	0.00	0.00	0 USD	0 USD
Bonfire	1	Wood, fuel/kindeling, possibly a permit	0.00	0.00	0 USD	0 USD
Tumbes Mangrove Trip	1	Admissions fee and likely a boat rental (logistics/local transport indicated below)	0.00	0.00	0 USD	0 USD
Beach Clean Up	1	costs related to beach clean-up	0.00	0.00	0 USD	0 USD
	0		0.00	0.00	0 USD	0 USD

Boat						
[Boat related expenses not included in the standard trip allowance - listed individually]	0	could include additional fuel, maintenance, radio, life vests, first aid equipment etc. The third boat may require different expense categories	0.00	0.00	0 USD	0 USD
additional boat-related expense #1	0		0.00	0.00	0 USD	0 USD
additional boat-related expense #2	0		0.00	0.00	0 USD	0 USD
additional boat-related expense #3	0		0.00	0.00	0 USD	0 USD
	0		0.00	0.00	0 USD	0 USD
	0		0.00	0.00	0 USD	0 USD

Staff and Administrative						
Standard Trip allowance	1		0.00	0.00	0 USD	0 USD
Allowance for extra mileage	2/3	the allowance for extra mileage for the two out of every three cases where fishers must travel from either Acapulco or La Cruz to Zorritos. for simplicity and consistency, this cost will be included in every trip by taking two-thirds of the extra mileage allowance amount	0.00	0.00	0 USD	0 USD
Payment to PO staff diver/research lead	1		0.00	0.00	0 USD	0 USD
Flight for staff members	1		0.00	0.00	0 USD	0 USD
Photos taken by Planeta staff and emailed to participants	1		0.00	0.00	0 USD	0 USD
[Per trip allocation of central costs]	0	optional if Planeta wishes to capture a per-trip allocation of central costs related to boat trips (guides, instruction sheets, etc.) - RECOMMENDED	0.00	0.00	0 USD	0 USD
[Miscellaneous pre-arrival or post-departure participant support]	0	Might include expenses related to chaperoning participants in extenuating situations	0.00	0.00	0 USD	0 USD
	0		0.00	0.00	0 USD	0 USD

Food and Transport						
Taxi from Tumbes Airport to Zorritos	4	assumes cost is included in program and half can share the ride	0.00	0.00	0 USD	0 USD
Transport from Zorritos Accomodation to Port/dock	1		0.00	0.00	0 USD	0 USD
Transport from the port/dock to lunch spot	1		0.00	0.00	0 USD	0 USD
Transport from lunch spot to data entry	1		0.00	0.00	0 USD	0 USD
Transport from data entry to dinner spot	1		0.00	0.00	0 USD	0 USD
Transport from data entry to cooking class	1		0.00	0.00	0 USD	0 USD
Transport from Zorritos Accomodation to Fishing Terminal	1		0.00	0.00	0 USD	0 USD
Transport from terminal to Lunch Spot	1		0.00	0.00	0 USD	0 USD
Transport from lunch spot to Surfing Class	1	TBD - potentially not necessary if lunch spot is near the surfing class / within walking distance	0.00	0.00	0 USD	0 USD
Transport from Surfing Class to IMARPE lab	1		0.00	0.00	0 USD	0 USD
Transport from IMARPE Lab to Dinner	1		0.00	0.00	0 USD	0 USD
Transport to Mangroves from zorritos	1		0.00	0.00	0 USD	0 USD
Transport to lunch from mangroves	1		0.00	0.00	0 USD	0 USD
Transport to beach clean up	1		0.00	0.00	0 USD	0 USD
Transport to Bio lecture from beach clean up	1		0.00	0.00	0 USD	0 USD
Transport to dinner from lecture	1		0.00	0.00	0 USD	0 USD
Transport from Dinner Back to Zorritos Accomodation	1		0.00	0.00	0 USD	0 USD
Transport from Cooking Class to Zorritos Accomodation	1		0.00	0.00	0 USD	0 USD
Breakfast	48	"Bag breakfast" likely on-the-go or something quick in the morning before early morning activities	0.00	0.00	0 USD	0 USD
Breakfast (whole group)	1	Whole group sit-down breakfast on the last Tumbes day	0.00	0.00	0 USD	0 USD
Lunch	48		0.00	0.00	0 USD	0 USD
Dinner	40	evening cooking class excluded from total dinner count	0.00	0.00	0 USD	0 USD
Snacks on boat	3	Fruit and water on each boat trip	0.00	0.00	0 USD	0 USD
Accommodation in Zorritos	56	different options at different price levels should be provided if possible	0.00	0.00	0 USD	0 USD
TOTAL (breakeven with expenses)				0.00	0 USD	0 USD

Margin calculator

Profit Margin	the profit margin determines how much extra Planeta would need to charge program participants (total and per person) to meet a desired percentage above costs, to cover other funding needs. Initially, Planeta has indicated these to be an ongoing contribution to the Fisher's Association, and funding to support conservation research. These needs can be adjusted over time.	Percentage	TOTAL PEN	Price USD	USD Total P.P.
		25.0%	0.00	0 USD	0 USD
Total (including revenues above cost)			0.00	0.00	0.00

Profit calculator

Total revenues	Total expenditures	Net profit
0 USD	0 USD	0 USD

# Financial Management Software

## 1. Office 365 Nonprofit plans (for small and mid-size nonprofits)<sup>1</sup>

- Premium Services (\$3/user/month).
- Highlights include:
  - Desktop versions of Office 2016 applications: Word, Excel, PowerPoint, Outlook, and OneNote, plus Access and Publisher for PC only on up to 5 PCs or Macs per user
  - Optimized Office experience on 5 tablets and 5 phones
  - Web versions of Word, Excel, and more
  - File storage and sharing with 1 TB of OneDrive storage
  - Business class email, calendar, and contacts with a 50 GB inbox
  - Unlimited online meetings, IM, and audio, HD video, and web conferencing
  - Get a hub for teamwork with Microsoft Teams
  - Intranet site for your teams with customizable security settings
  - Corporate social network to help employees collaborate across departments and locations
  - Work management tools to help teams create plans, organize, assign and collaborate around tasks
  - Professional digital storytelling tools to create interactive reports, presentations, and more
  - Personalized search and discovery across Office 365 using the Office Graph
- All plans have Guaranteed 99.9% uptime, financially backed service level agreement, IT-level web support and 24/7 phone support for critical issues, Active Directory integration to easily manage user credentials and permissions, World-class data security

## 2. FreshBooks cloud accounting<sup>2</sup>

- PLUS services (\$25/month - additional \$10 per person/mo to add team members to track time, expenses and help manage projects).
- According to Freshbooks support team, base currency in FreshBooks can be set as Nuevo Sol (PEN). Companies in turn, can also create invoices and estimates for clients in Nuevo Sol. At this point in time, however, FreshBooks does not have any compatible payment gateways that process credit card payments in that currency so

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<sup>1</sup> <https://products.office.com/en-us/nonprofit/office-365-nonprofit-plans-and-pricing?tab=1#seemore>

<sup>2</sup> <https://www.freshbooks.com/pricing#feature-list>

the company would only be able to use FreshBooks for offline payments (IE Cash, check, etc.)

- Highlights include:
  - Unlimited Invoices and Estimates (customizable)
  - Track Time and Expenses
  - Easily Accept Online Credit Card Payments
  - Automatically Import Expenses from your Bank Account
  - Schedule Recurring Invoices
  - Send Proposals
  - Project budgets that keep your team on track
  - Powerful reports with insights about your business
  - Automatically Import Expenses from your Bank Account
  - Automatically Send Payment Reminders
  - Charge Late Fees for Overdue Invoices
- Business News Daily (BND) review highlights<sup>3</sup>: user-friendly, cloud-based accounting applications for non-accountants. Incredibly easy to use. This accounting software connects to banks, generates reports, tracks time and helps manage projects.
- PC Mag review highlights<sup>4</sup>: PROS: Exceptional user experience. New team collaboration tools, estimates, and projects. Settings are context-sensitive. CONS: No product or service records. No inventory tracking. Lacks expansive customer records.

### 3. Zoho Books small business accounting<sup>5</sup>

- Professional services (\$29/month for 10 users) - \$10 for 1 user/month + \$7 for additional active users/month.
- Highlights include
  - Invoices, Estimates, Time Tracking, Expense Tracking, Client Portal, Financial Reports, Banking, Work Flows, Credit Notes, Bills, Inventory
  - Purchase Order, Sales Order, Purchase Approval,
  - Multi-Currency, Multi-lingual
  - Recurring Invoices, Expenses, Bills
  - Zoho Integrations: Inventory, Expense, Projects, Reports
  - Documents management
  - Mobile Applications for iOS, Android, Windows

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<sup>3</sup> <https://www.businessnewsdaily.com/7543-best-accounting-software.html>

<sup>4</sup> <https://www.pcmag.com/article2/0,2817,2458748,00.asp>

<sup>5</sup> <https://www.zoho.com/us/books/pricing/pricing-comparison.html>

- BND review highlights: full-featured accounting software with basic features micro-businesses need as well as advanced tools and integrations so businesses can continue using the software as the business grows.
- PC Mag review highlights: PROS: Nice price. Excellent user interface, navigation. Superior depth in records and transaction forms, including custom fields. Multiple payment gateways. Good project- and time-tracking. Generous support options. Excellent mobile version. CONS: No integrated payroll application. User permissions not deep enough. Minimal report customization.

#### 4. QuickBooks Online for Small Businesses<sup>6</sup>

- “Essentials” package (\$20/month).
- Highlights include:
  - Invoice & accept payments
  - Run reports
  - Send estimates
  - Track sales
  - Manage bills
  - Multiple users
  - Track time
- BND review highlights: basic accounting features or software with advanced accounting capabilities.
- PC Mag review highlights: PROS: Excellent user interface and navigation. Flexible contact records and transaction forms. Customizable report templates. Comprehensive payroll support. Hundreds of add-ons. CONS: No dedicated project-tracking. Poor online documentation.

#### 5. Xero small business<sup>7</sup>

- Premium (\$60/month, 5 users)
- Highlights include:
  - Send invoices and quotes
  - Enter bills (schedule bill payments, batch pay suppliers)
  - Reconcile bank transactions (daily updates and simple bank reconciliation)
  - Manage and submit GST online (online processing in Xero)
  - Handle multiple currencies
  - Manage payroll

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<sup>6</sup>[https://search2.quickbooksonline.com/qb-online/?priorityCode=3969702399&cid=aff\\_cj\\_5226272&cvosrc=affiliate.cj.5226272&cvo\\_campaign=qbo\\_trial&aid=12469784](https://search2.quickbooksonline.com/qb-online/?priorityCode=3969702399&cid=aff_cj_5226272&cvosrc=affiliate.cj.5226272&cvo_campaign=qbo_trial&aid=12469784)

<sup>7</sup><https://www.xero.com/au/pricing/plan-details/#premium5>

- Add Xero Projects (First month free for any number of users. \$10 for 1 user/month + \$7 for additional active users/month)
- According to Xero support team, the Global edition allows organizations to use their own currency and tax rates.
  
- BND review highlights: easy to use for Macs and PCs, offers a number of features and integrates with hundreds of third-party business solutions. Can help save time and simplify accounting by automating tasks and integrating with more than 600 apps. Xero also comes with 24/7 email and live chat support and outbound phone assistance at no extra cost.
- PC Mag review highlights: PROS: Thorough records and transaction forms. Inventory tracking. Customizable reports. Online Quotes. Smart lists. Exceptional online support. CONS: No dedicated time tracking or project management. Lacks phone or chat help.