

# **CEPF Mid-Term Review Conference for the Polynesia-Micronesia Hotspot**

## **Conference Proceedings**

**6<sup>th</sup> to 8<sup>th</sup> June, 2011**



**Novotel Hotel, Lami, Suva, Fiji**

## CEPF Mid-term Review Conference

### Acknowledgements

First, many thanks to the Minister of Local Government, Urban Development, Housing and Environment, Samuela Saumatua, for accepting the role of chief guest and giving the opening address to the meeting. To Vilikesa Masibalavu, Conservation International Fiji, for performing the opening and closing prayers for the meeting. To Posa Skelton (SPREP), Easter Galuvao (SPREP), Leilani Duffy (Conservation International), Souad Boudjelas (Pacific Invasives Initiative), Alan Tye (SPREP), Greg Sherley (UNEP), Nick Askew (Bird Life International), Ashwini Prabha (Communications Consultant), Siniva Tuuau-Enosa (Conservation International), and also to Jean-Yves Meyer, for French translation assistance.

Particular thanks also to Sarojni Raj and Mere Valu from Birdlife International and Anna Sahai and Tamara Naikatini-Osbourne from NatureFiji-MareqetiViti for providing logistical support for the organisation and facilitation of the meeting, and Birdlife International for leading the organisation of this conference.

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## CEPF Mid-term Review Conference

### Acronyms

AIS	Alien Invasive Species
BL-I	BirdLife-International
BTS	Brown Tree-snake ( <i>Boiga irregularis</i> )
CEPF	Critical Ecosystem Partnership Fund
CI	Conservation International
CBD	Convention on Biological Diversity
CSIRO	Commonwealth Scientific Industrial Research Organisation (Australia)
DoE	Department of Environment, Fiji
DoF	Department of Forestry, Fiji
EIA	Environmental Impact Assessment
FLMMA	Fiji Locally Managed Marine Areas Network
GEF	Global Environment Facility
GLISPA	Global Islands Partnership
IUCN– ISSG	International Conservation Union – Invasive Species Specialist Group
Log-frame	Logical Framework
MESCAL	Mangrove Ecosystems for Climate Change Adaptation and Livelihoods
NBSAP	National Biodiversity Strategic Action Plan
NFMV	Nature Fiji- Mareqeti Viti
NWCR	National Wildlife Research Program (USDA)
NZ-DOC	New Zealand Department of Conservation
MoU	Memorandum of Understanding
PAC	Protected Areas Council
PCS	Palau Conservation Society
PFE	Permanent Forests Estate
PII	Pacific Invasives Initiative
PIP	Pacific Invasives Partnership
RIT	Regional Implementation Team (in this case CI is the RIT for CEPF)
SOP MANU	Societe d'Ornithologie de Polynesie Manu
SPC	Secretariat of the Pacific Community
SPCLRD	Secretariat of the Pacific Community Land Resources Division
SPREP	Secretariat of the Pacific Regional Environment Programme
SPRH	South Pacific Regional Herbarium
TIS	Te Ipukarea Society Inc.
TPAF	Technical College (Fiji)
USDA	US Department of Agriculture
USFWS	US Fish and Wildlife Service
USP	University of the South Pacific
USGS	US Geological Service

## CEPF Mid-term Review Conference

### 1 Executive Summary

The Polynesia-Micronesia Hotspot is one of 34 hotspots around the globe identified by the Critical Ecosystem Partnership Fund (CEPF) - areas that are both biologically rich and highly threatened. CEPF provides grants for non-governmental and private sector organizations to help protect these biodiversity hotspots; Earth's most biologically rich yet threatened areas. CEPF initiated a 5-year funding programme in the region in June 2008 in partnership with Conservation International's Pacific Islands Programme and partners in a Regional Implementation Team (RIT).

The goal of the conference was to undertake a mid-term assessment of the investment programme in the Polynesia-Micronesia Hotspot to provide CEPF and CI Pacific Regional Implementation Team with an insight into what has been done well, areas for improvement and to identify investment gaps that must be filled with the remaining funds and within the time available.

Twenty-seven of the 36 grantees who had been managing a project under the CEPF Polynesia-Micronesia Hotspot programme and had responded to a questionnaire were able to attend – most non-attendees were based outside of the region, in Australia, New Zealand, USA and UK (Annex 1). A detailed, extensive agenda was developed for the meeting to ensure that potential grantees were well aware of the objectives and planned outcomes from the meeting (Annex 2). An additional bonus was that representatives from the World Bank also attended as part of their assessment of CEPF programmes.

To date US\$4.3 million have been committed to projects under the CEPF programme in Polynesia-Micronesia. These funds have been split so that approximately half have been spent on Strategic Direction 1, Invasive species and a quarter on each of Strategic Directions 2, Sites and 3, Species. A further US\$1.7 million is available for redistribution. The majority of this will be apportioned following the call for applications in March 2011 with a final call, for small projects, likely in September 2011.

A key message throughout the conference was that increasing the levels of communication between all organisations involved in the grant process would benefit all parties. Meeting face-to-face for, in many circumstances, the first time at the conference should make this easier all round. All parties are partners attempting to deliver biodiversity benefits within the region. Each partner has its own restrictions on how it can deliver these benefits. Successful projects minimise the impact of these restrictions for all partners.

Any substantive programme will produce both successful and less-successful outcomes. The lessons learned from these outcomes can serve to improve future conservation measures both within the programme and also in future, up-coming, projects. However, improvements will only occur if future projects take on board the lessons learned, which in turn can only happen if those lessons learned are reported. The CI Pacific RIT took the opportunity of this conference to launch a series of 'Lessons Learned' reports, developed as outcomes from the programme. These findings were used as the basis of a series of group discussions at the conference that identified a number of further Lessons Learned for future reporting. These discussions have been summarised in Table 1 of this report.

A second key area discussed by the grantees was the subject of capacity gaps. Inevitably a long list of gaps was generated, which were in turn ranked in terms of priority (Tables 2 & 3). It was clear that many of the gaps could be filled through communication with other grantees, and/or through projects to facilitate training for grantees. A series of potential solutions were identified and a number of subjects that might justify future projects were identified (Table 3).

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Interestingly, it was noted that there are partnerships/networks within the Pacific that attempt to provide an opportunity for organisations to identify experts across a range of subject areas. It was clear that many of the grantees involved in the current project have not accessed these networks. A useful development might be to make some of the networks more widely available/accessible within the region.

A discussion around future opportunities for funding for biodiversity conservation was followed by two short and enjoyable training sessions on fundraising and communicating projects. Both workshops could have extended for 2-3 days, so this was very much just a 'taster' for grantees. Key messages were transferred and enacted, in front of a panel of 'experts'. This again generated some ideas for future projects to help enhance capacity for individual grantees and their organisations.

The success of the conference will be determined by the response of all parties during the remainder of the programme. It is to be hoped that partnerships will have been developed, or strengthened, between grantees and donors. The subject areas for proposals in September 2011 will be influenced by the outcomes from this conference, thus developing at least one positive outcome. Responses of attendees to the conference were overwhelmingly positive, the opportunity to discuss various issues and problems face-to-face being exceedingly helpful. Suggestions as to how the exercise could be further improved will always be very useful. It is anticipated that there will be an end of programme conference to showcase the successes and to sell projects to future potential donors in early 2013.

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### 2 Introduction

The Critical Ecosystem Partnership Fund (CEPF) is a global leader in enabling civil society to participate in and benefit from conserving some of the world's most critical ecosystems. CEPF is a joint initiative of l'Agence Française de Développement, Conservation International, the Global Environment Facility, the Government of Japan, the MacArthur Foundation and the World Bank. A fundamental goal is to ensure that civil society is engaged in biodiversity conservation. CEPF provides grants for nongovernmental and private sector organizations to help protect biodiversity hotspots; defined as areas which are both biologically rich and yet highly threatened terrestrial areas. CEPF's current grant programme for the Polynesia-Micronesia Hotspot is roughly mid-way through its lifetime. As such CEPF's Grant Coordinator/Regional Implementation Team, Conservation International's Pacific Islands Programme, were required to organise a mid-term review workshop of the projects funded under this programme. The RIT sub-contracted Bird Life International to help co-ordinate the event.

#### 2.1 Conference Goal

The overall goal of the mid-term assessment conference was to provide CEPF and the RIT with an insight into what has been done well, areas for improvement and to enable an assessment of CEPF's investment gaps and to develop a plan to fill these gaps with the remaining funds and time available.

The Conference also enabled the CEPF grantees to:

- share and act on lessons learned
- identify and address their capacity needs in relation to the implementation of their projects
- explore fundraising opportunities to continue the work of the projects
- discuss with CEPF and the RIT ways to make improvements to the coordination of their work

The conference embraced the following principles:

- *Emphasise the sustainability of projects and project results*
- *Maximise the linkages between separate CEPF projects in terms of sharing lessons learned, resources and capacity*
- *Provide the grantees with support to implement their projects and meet their commitments to CEPF*
- *The need to translate lessons learned into action (adaptive management, replication and scaling-up of success stories)*



## CEPF Mid-term Review Conference

### 2.2 Conference Objectives

Conference Objectives	Outputs
<p><b>1. To share our experiences and, in particular, lessons learned in relation to our projects with each other and our partners</b></p>	<p>1.1 A list of positive and negative lessons learned identified by the grantees (what worked and why, what didn't and why as well as any surprises)</p> <p>1.2 An indication of how these lessons learned will be applied through actions to resolve problems, build on successes (replicate and scale-up) and respond to opportunities</p>
<p><b>2. To provide a training opportunity for grantees in the delivery of conservation projects by addressing the grantees relevant areas of interest (in particular financial/technical reporting, fundraising, and promoting project findings)</b></p>	<p>2.1 Grantees to have shared their capacity needs and identified opportunities to build capacity</p> <p>2.2 Grantees to have received practical training in financial/technical reporting, fundraising, and promotion of project findings</p>
<p><b>3. To give CEPF and the CI Pacific Regional Implementation Team an opportunity to meet with grantees in the Polynesia-Micronesia Hotspot and to see first-hand the achievements that CEPF support has provided to grantees in the Pacific</b></p>	<p>3.1 CEPF and CI Pacific to have greater awareness of the achievements of CEPF projects in the Pacific and to have developed a personal working relationship with grantees</p>
<p><b>4. Grantees, CEPF and the CI Pacific Regional Implementation Team to be given an opportunity to provide feedback to each other on the grant management process and any issues arising</b></p>	<p>4.1 CEPF and grantees to have agreed on improvements to the grant management process in terms of how to communicate and coordinate.</p>
<p><b>5. CI Pacific/CEPF to present the key gaps in the investment portfolio and to identify the key areas for thematic and geographic focus in the remaining years of the programme</b></p>	<p>5.1 Grantees have a better understanding of CEPF funding opportunities</p>
<p><b>6. To invite other donors in the Pacific Region to the conference to raise their awareness about grantee projects and to raise grantee awareness of other long-term funding opportunities</b></p>	<p>6.1 Grantees have a better understanding of other funding opportunities in the region</p> <p>6.2 Donors in the region to be more aware of the CEPF projects</p>

## CEPF Mid-term Review Conference

### 3 Day 1 Records

The aim of Day 1 was to establish the strategic and administrative context in which the CEPF Projects were operating. Once this context was established the aim was to reflect on the performance of the Polynesia-Micronesia Hotspot projects to date and to translate lessons learned into future action in the form of recommendations to a specific party. Over the course of the day Objectives 1, 3, 4 and 5 were addressed (refer Section 1.2)

#### 3.1 *Opening address.*

The conference was opened by the Fijian Minister of Local Government, Urban Development, Housing and Environment, Colonel Samuela Saumatua. Mike Donoghue, CI Pacific Executive Director responded. This placed the conference in a regional perspective – indicating the processes within which the governments in the region work to deliver their conservation requirements (Annex 3).

#### 3.2 *Setting the context – the CEPF Programme and the Polynesia-Micronesia Hotspot (Output 5.1)*

The day continued with a series of presentations to set the context. Mike Donoghue opened the section with a brief summary that puts the CEPF Polynesia-Micronesia programme into context.

- CEPF is a global conservation fund for conservation in terrestrial biodiversity hotspots - its funds are administered by Conservation International on behalf of the six global donors, namely - the World Bank, the Government of France (through AFD), the Government of Japan, the MacArthur Foundation, the GEF and CI itself.
- The Polynesia-Micronesia Hotspot is one of 34 global terrestrial biodiversity hotspots, where high levels of biodiversity are coupled with high levels of threat. The Polynesia-Micronesia Hotspot is notorious for losing more species to extinction in recent times than any other biodiversity hotspot in the world.
- The \$7 million CEPF fund was launched for the Polynesia-Micronesia Hotspot in September 2008 and will end in April 2013. The main purpose of the fund is to catalyse key actions to safeguard critically threatened terrestrial species and sites. Since the launch, approximately \$4.3 million has been committed to 58 projects. About \$1.7 million is still to be allocated. Thus this conference is an excellent opportunity to take stock of progress and to focus on using the remaining time and funds in the most effective way possible.
- CI Pacific has been continually involved since the very beginning of CEPF's investment in the Pacific in 2003, when preparation of the investment strategy or ecosystem profile for the Polynesia-Micronesia Hotspot began; through the securing of GEF focal point endorsements from 14 countries in the region between 2005-2007; to working with CEPF to manage a \$1 million funding programme in 2006 on invasive species management; and the launch of the full five-year CEPF investment in 2008.

This was followed by presentations covering the following subjects:

- Managing CEPF projects – a view from Washington, John Watkin, CEPF (Annex 4)

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- CEPF Polynesia-Micronesia Overview/History, A short history of the Polynesia-Micronesia Hotspot programme and a summary of the investment strategy including strategic directions and conservation targets, James Atherton, Conservation International (Annex 5)
- Gap Analysis of the CEPF investment programme in the Polynesia-Micronesia Hotspot and future grant-funding opportunities, Leilani Duffy, Conservation International (Annex 6).

### **3.3 Poster Presentations of CEPF Projects in the Polynesia-Micronesia Hotspot (Output 3.1)**

Each grantee had been asked to prepare a conference poster prior to the conference. These were displayed in a gallery area at the venue. Each grantee was asked to introduce themselves and to talk briefly about the project/poster (Annex 1 includes a list of all grantees that attended the conference). The posters remained up for the duration of the conference and were referred to during the different conference exercises. With the participants' permission, Conservation International took possession of the posters once the conference ended so that they could continue to use the posters to promote the projects and the CEPF Programme. As many as possible of the electronic versions of these posters were also collected and passed to CI and CEPF. The communications consultant that was charged with providing communications training on Day 3 of the conference also attended this session and took notes so that she could provide feedback to the participants on their presentation and poster (thus further delivering on Objective 2, Output 2.2).



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### **3.4 Lessons learned by CEPF grantees and their future application (Output 1.1, 1.2)**

In the afternoon of Day 1, the participants were facilitated through an exercise whereby they 'translated' the 'lessons learned' that had already been identified by grantees in relation to their projects through evaluation reports and through a pre-conference questionnaire into recommendations for future work. The premise of this exercise was that unless lessons learned are integrated into the work of CEPF's projects going forward they may not be applied.

The session began with a presentation by James Atherton of Conservation International that summarised the lessons learned from questionnaire feedback and reports already received from grantees (this presentation is included in Annex 7). The participants were then split into three thematic groupings who were given lists of the lessons learned already identified in these thematic areas and were tasked with translating these lessons into useful, specific recommendations for the future work of CEPF, CEPF grantees and conservation practitioners in general. The thematic groupings were as follows:

1. Invasive Alien Species Eradication and Control (Facilitator: Souad Boudjelas)
2. Project Design, Management and Reporting (Facilitator: Greg Sherley)
3. Working with Communities and other Stakeholders (Facilitator: Easter Galuvao)

The results of this exercise are presented below .

#### **2.3.1 Invasive Alien Species Eradication and Control – Recommendations for future projects and donors**

**Group Facilitators:** Souad Boudjelas, with Alan Tye

**Group members:** Graham Wragg, Anne Gouni, David Butler, Anu Gupta, Joel Miles

##### **Recommendations:**

1. Find out what's there
2. Do something about it
3. Secure your gains
4. Thorough research to remove uncertainty
5. Feasibility studies are a must
6. More strategic approach is needed to set priorities for IAS work and these priorities need to be communicated to donors
7. Adopt a stepwise approach to planning and implementing projects
8. Separate operational plan from eradication...
9. ...AND Include 10% to cover risk (contingency)
10. ...AND persuade donors of this necessity
11. Donors to better consider diversity of grantees, some are very vulnerable to cash flow
12. Need to also consider diversity of projects, for example an eradication may need 98% of its money in one month upfront
13. Donors need to consider project funding need schedule (for example 10% retained until end of the project is a problem)

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14. Continuous contact with the donor is essential especially if there are problems (like talking to your mother)
15. As much as possible use local experts
16. Donors need to be flexible and allow activities to be changed as necessary
17. Funding time lines need to match biological and seasonal timeline necessities
18. Eradication projects demand all components occur in precise sequence and timing
19. Many donors don't fund salaries
20. Close relationship and understanding between donor and project team is essential to resolve most of the above issues

***Applicability - what kind of projects do these recommendations apply to? Do they apply to any existing projects underway?***

Potential new projects:

- More surveys of more islands: invasive species and native biodiversity. Specific needs include up-to-date information for the Southern Line Islands and an assessment of island eradication priorities for Polynesia similar to that done by Island Conservation for Micronesia.
- Refine and update the ecosystem profile for the Polynesia-Micronesia Hotspot.

***Who needs to receive these recommendations?***

Grant applicants and donors (implementing organisations), CEPF and other donors.



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### 2.3.2 Project Design, Management and Reporting

**Group Facilitator:** Greg Sherley

**Group members:** Elisabeth Erasito, Gillianne Brodie, Bernie O'Callaghan, Mark O'Brien, Dick Wating, Shyama Pagad, Sharon Patris, Lorraine Rdiall, Craig Costion, Nick Askew

#### **General Discussion Points:**

##### **Time issues**

- Project planning – Often grantee skill level is not sufficient to cope with meeting the standards required of modern project application procedures
- Not enough time to implement increasing activities – The project tends to grow after inception and the time/resources available become progressively restrictive and prevent completion
- Luck as a factor – it needs to be recognized that ad-hoc and unforeseen factors do play a significant role in the success of a project such as cyclones, accident etc.
- Project design tends to:
  - be over ambitious
  - have high expectations
  - have too many specified outputs

##### **Staff Resource issues**

- Staff: not having adequate staff resources affects time needed for implementation

##### **Scoping issues**

- Issue of funding and practical constraints such as purchasing, employment etc.
- Where possible, use the log-frame model as a project planning disciplinary tool to make sure of the best possible output. This may depend on the size of the project as to whether it is worthwhile (small ones may not justify).

##### **Communications issues**

- Issues – Communicating with RIT – don't underestimate the value of this
- Communicating with the stakeholders - important
- Need to work with the right stakeholders for example, NFMV recognised that they worked less with national government and more with Provincial Offices than originally anticipated
- Do organisations put sufficient time and resources into communications?
- Preparing a formal exit strategy is important
- Important to record ways in which project approaches/integrates communications with stakeholders
- TAG concept, advisory body, informal networks – can help project partners

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### **Recommendations:**

#### **Project Design-related Recommendations for all conservation projects in the Pacific**

1. In order to better plan activities and account for activities/outputs/outcomes – make a practice of systematically recording activities against time to quantify just what time/energy is required to achieve outputs in future
2. Review – obtain independent opinion from colleagues at the start of project and at pre-set “benchmark” intervals during the implementation of the project
3. Formal project plan – set specific and realistic timelines
4. Don't be over ambitious -\_Consciously assess capability in order to avoid over ambitious objectives (set SMART objectives: specific, measurable, actionable, relevant and time-bound)
5. Plan for phasing so that realistic timelines can be set to allow proper implementation and meeting targets
6. Take a phased approach to deal with scoping and planning:
  - Approach as process
  - Plan a realistic inception phase
  - Small grant for follow-up with bigger scale projects
7. Assess capacity of team vis a vis project
8. Design, resource and formalize an exit strategy (including with relevant stakeholders) so that the project is concluded properly and meets expectations
9. Logframes are a useful tool to help us to reach realistic project planning and timing (Some of the software being advocated as project planning ‘tools’ are actually expensive to download and some considered them to be difficult to use eg CEPF's ‘online grant management software - GEM).

#### **Communications-related Recommendations for all conservation projects in the Pacific**

1. Effective communication means imparting information that results in changed behaviour and in some ways is the most important component of a project and so should be the last to be cut back (in practice communications tend to get dropped off a project plan first whenever funds become tight).
2. Constant communication with RIT by CEPF grantees is a must (and, more generally, between grantees and donors)
3. Systematically/formally put time aside for providing information on project outputs to stakeholders
4. Careful analysis of potential stakeholders at the planning stage is critical. But also be mindful that new stakeholders may arise during the implementation of the project

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5. Plan for and provide adequate resources for a communications strategy for projects
6. Design communications to target specific stakeholders group
7. Formalise an exit strategy for the project and ensure this is disseminated to appropriate stakeholders
8. Establish a support network of experts/supporters for the project (any project), this could take the form of a network or a steering committee
9. *Specific recommendation: CEPF to produce a manual for how to communicate conservation projects in the Pacific.*
10. *Specific recommendation: There is a need to better communicate the NBSAP activities to wider communities in the Pacific.*

### 2.3.3 Working with Communities and other Stakeholders

**Group Facilitator:** Easter Galuvao

**Group members:** Nunia Thomas, Leilani Duffy, Brian Patrick, Lui Bell, Posa Skelton, Sione Faka'osi, Tamara Naikatini-Osbourne, Miliana Ravuso

#### **Recommendations:**

1. Identify and Engage with Communities & Stakeholders
  - Community involvement/engagement and awareness (on all project stages)
  - Need partnership with relevant stakeholders before starting fieldwork
  - Building trust (spend time with communities)
  - Anticipate and manage conflict
  - Follow and respect protocols
  - Clear understanding of government decision-making
  - Identify key influential people in the community
  - Avoid negative incentives (e.g. providing alcohol)
2. Project Sustainability
  - Identify and communicate benefits to community (cultural, economic, alternative livelihoods)
  - Explore novel/creative ways for sustaining the project work and results beyond the project lifetime
  - Linking species conservation to cultural preservation
  - Facilitate collaboration between local communities and government
3. Acknowledgement, reporting and dissemination
  - Acknowledging communities and stakeholders



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- Disseminate results – keep stakeholders updated on project progress (use language that they understand)
- Recognising and acknowledging traditional knowledge

### ***Applicability - what kind of projects do these recommendations apply to? Do they apply to any existing projects underway?***

- These issues apply to all projects
- Everyone working in conservation in the Pacific needs to be advised of these recommendations...

### ***3.5 Presentation: Financial and Technical Reporting to CEPF – an overview and tips (do's and don't's)***

One of the main requests from participants in the pre-conference questionnaire was for more information/training about technical and financial reporting to CEPF. In response to this request, John Watkin from CEPF gave a presentation on this subject, a copy of his powerpoint presentation is included in Annex 8.

## **4 Day 2 Records – Output 2.1**

The aim of Day 2 was to enable grantees to explore opportunities to address their capacity needs after the conference in collaboration with each other, CEPF and other partners. Prior to the conference, participants had been asked to communicate their capacity gaps in relation to their CEPF-funded projects through a questionnaire. This information was used as the basis for the Day 3 exercise.

The session began with a brief presentation about the definition of capacity gaps and the importance of delineating between capacity gaps on the different levels of: individual, organization and network. Participants were also reminded to focus their thinking on capacity gaps in relation to the aim of their project. Participants were also reminded that there are many ways to address a capacity gap – once gaps have been identified they should be prioritised (based on their level of importance/urgency/significance in relation to the project aim) and solutions to the gap should be explored based on available resources. Participants were urged to think outside of the box in identifying capacity solutions – other than training or new staff members, capacity gaps can also be addressed through: mentoring, partnerships with other organizations, new networks of collaborating organizations etc.

Participants were then asked to write their 'top three' capacity gaps as well as their 'top three' areas in which they or their organization could provide capacity solutions. For instance, can the participants provide training, mentoring or support to other CEPF projects in certain areas? Participants were then encouraged to refer to their 'top three' in the next group exercise. At the end of the sessions, these 'top three' lists were also collected and summarized into a matrix which is presented in Table 1 below.

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**Table 1. Summary of main capacity gaps identified and solutions offered by CEPF grantees and other conference participants**

Capacity Needs	Need by	Potential Solutions	Offer by
<b>Funding</b>			
<ul style="list-style-type: none"> <li>• Sustainable financing</li> <li>• Individual/organisation skills</li> <li>• Money</li> <li>• Disconnect between UN Funding mechanism and local needs</li> </ul>	PILN, Dave Butler, James Atherton, Joel Miles, Shyama Pagad, Coral Reef Research Foundation, Gilianne Brodie, Brian Patrick, Pacific Invasives Initiative, Greg Sherley, TIS [11]	<ul style="list-style-type: none"> <li>• Grants to support partners</li> <li>• Fundraising training</li> </ul>	Conservation International, Nick Askew [2]
<b>Communication</b>			
<ul style="list-style-type: none"> <li>• Public relations</li> <li>• Media</li> <li>• Speak clearly and understandably</li> <li>• Communicate to all stakeholders</li> <li>• Promoting success</li> <li>• Awareness of politicians on species</li> <li>• Communication system links to remote sites</li> </ul>	James Atherton, Joel Miles, Shyama Pagad, IUCN, Gilianne Brodie, Alan Tye, Anne Gouni [7]	<ul style="list-style-type: none"> <li>• Media training</li> <li>• Communication training</li> <li>• Communication and talks</li> </ul>	Tamara Osborne, SPREP (Nanette Woonton, Seema Deo), Brian Patrick, Jacqui Evans [4]
<b>Technical support</b>			
<ul style="list-style-type: none"> <li>• Lack of information on local flora/fauna</li> <li>• Eradication and control methods for eradication</li> <li>• Policy and advocacy</li> <li>• Expertise on identification</li> <li>• Pacific islands taxonomists</li> <li>• Scientific methods in various issues</li> <li>• Bait stations</li> <li>• Training on how to control Invasive Alien Species</li> </ul>	Irma Motua, Nick Askew Mareqeti Viti, IUCN, Gilianne Brodie, Anne Gouni, TIS [7]	<ul style="list-style-type: none"> <li>• Marine invasive species</li> <li>• Technical skills in terrestrial conservation, species recovery management</li> <li>• Technical expertise in conservation setting, strategic planning, invasive species and management issues</li> <li>• Expertise in Environment Impact Assessments and biological surveys, GIS and change detection</li> <li>• Knowledge of invasive plants</li> <li>• Pesticide application</li> <li>• Data and information management</li> <li>• Data sourcing and mining</li> <li>• Weed control (site-based)</li> </ul>	Posa Skelton, Dave Butler, Conservation International, James Atherton, Joel Miles, Shyama Pagad (IUCN-ISSG), Tamara Osborne, IUCN, Coral Reef Research Foundation, USP, Birdlife

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Capacity Needs	Need by	Potential Solutions	Offer by
		<ul style="list-style-type: none"> <li>• Publication review</li> <li>• Red Listing training</li> <li>• Expertise on fish spawning aggregation, aerial surveys, marine invertebrates, bathymetric mapping, marine lakes</li> <li>• Advice on taxonomy and tools to use</li> <li>• Assist with bird-banding issues</li> <li>• Species (birds) survey and monitoring</li> <li>• Bird and plant conservation, research and management</li> <li>• Insect survey in a cost-effective manner</li> <li>• Formal training in i) how to eradicate rodents and cats on islands; ii) island biosecurity; iii) invasive plant project management</li> <li>• Best practice resources on Invasive Species Management</li> <li>• Technical support: threatened species recovery and habitat protection (terrestrial and marine)</li> </ul>	International, Alan Tye, Brian Patrick, Pacific Invasives Initiative, Greg Sherley, TIS [16]
<b>Community and stakeholder engagement</b>			
<ul style="list-style-type: none"> <li>• Engage with French territories</li> <li>• Engage better with communities</li> <li>• Stronger linkage with local conservation and research groups</li> <li>• Partner commitment</li> <li>• Cultural liaison</li> </ul>	PILN, Jel Miles, Mareqeti Viti, Alan Tye, Brian Patrick [4]	<ul style="list-style-type: none"> <li>• Good link with PICTs on conservation, climate change, invasive species, CBD, etc.</li> <li>• Community and private stakeholder engagement/support</li> <li>• Mentoring on community engagement methodology</li> <li>• On-line collaboration</li> <li>• Community awareness</li> <li>• Stakeholder retention</li> <li>• Facilitate international researchers and locals (Palau, Fiji)</li> <li>• Access to keen students</li> <li>• Link with local communities and how to improve their participation in the programme</li> </ul>	SPREP, Irma Motua (CRP), Nick Askew, Mareqeti Viti, Coral Reef Research Foundation, University of the South Pacific, Jone, National Trust of Fiji, Anne Gouni, TIS [10]
<ul style="list-style-type: none"> <li>• Mediation</li> <li>• Facilitation</li> <li>• Negotiation</li> </ul>	James Atherton, Souad Boudjelas [2]		Jill Key, Michelle Frank, NZ DOC?

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Networking			
<ul style="list-style-type: none"> <li>• Pacific Islands Taxonomists [network]</li> <li>• International networking with coral reef networks</li> </ul>	IUCN, Coral Reef Research Foundation, TIS [3]	<ul style="list-style-type: none"> <li>• Effective networking at the country level</li> <li>• Network and tools</li> <li>• Social networking</li> <li>• Working with global networks of species experts</li> <li>• Connections and support from Global Red Listing Process</li> <li>• Advice on potential collaborators</li> <li>• Networking skills</li> </ul>	PILN, Shyama Pagad (IUCN-ISSG), Nick Askew, IUCN, Gillianne Brodie, Greg Sherley [6]
Coordination			
<ul style="list-style-type: none"> <li>• Organisations to better coordinate work in country</li> </ul>	PILN	Coordination at the national level (organisation of the administration – information service, local administration)	Anne Gouni
Operational (including Project Design and Management)			
<ul style="list-style-type: none"> <li>• Transportation (cost and quality – impact site visits)</li> <li>• Government procedures lead to delay in project implementation</li> <li>• Human resources</li> <li>• Lack of staff</li> <li>• Time [management]</li> <li>• Organisation skills on funding need to be improved</li> <li>• Operational management in remote sites</li> <li>• How to build organisational capacity</li> <li>• Directory where to obtain/purchase equipment and tools (baits, toxins, pesticides)</li> <li>• Management skills</li> </ul>	Irma Motua, Nick Askew, Mareqeti Viti, Coral Reef Research Foundation, Gillianne Brodie, Alan Tye, Brian Patrick, Pacific Invasives Initiative, Anne Gouni, Greg Sherley, Jacqui Evans [11]	<ul style="list-style-type: none"> <li>• Build local capacity</li> <li>• Project management and evaluation</li> <li>• Programme design (strategic planning)</li> <li>• Project development and design (invasive species, conservation)</li> <li>• Delivery of quality projects in a timely manner</li> <li>• Mentoring on invasive species management – including on the job training in various aspects of Invasive Species Management</li> <li>• Including research programme in conservation programme</li> <li>• Design training for projects</li> </ul>	Dave Butler, Alan Tye, Brian Patrick, Pacific Invasives Initiative, Anne Gouni, Greg Sherley [6]

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Once the participants had communicated their information about their top three gaps and needs, they were led in an exercise whereby they examined the existing list of capacity gaps that they had communicated through their pre-conference questionnaires and were invited to make additions to these lists as well as identifying solutions to the gaps based on their thinking so far.

Leilani Duffy of Conservation International briefly summarised for the participants the information that they had already provided in an earlier questionnaire (Annex 9 includes a copy of this presentation). Posa Skelton, Souad Boudjelas and Alan Tye then also gave a presentation about the Pacific Invasives Learning Network and the Pacific Invasives Initiative which are two successful capacity-building programmes that have been operating in the Pacific for some time (Annex 10 includes a copy of this presentation).

The lists of capacity gaps had been broken into 4 thematic areas which were:

1. Technical Skills (surveying, eradication, species recovery planning)
2. Project Design, Management and Reporting
3. Working with Communities and Other Stakeholders
4. Other Capacity Gaps

Each thematic area was assigned a facilitator tasked with ensuring that the groups focussed on completing the list of gaps and, more importantly, proposing solutions to these gaps. Grantees were encouraged to explore ways they could support each other and pool resources to fill their capacity gaps. The facilitators were also asked to pay attention for any new project ideas which may be eligible for funding by CEPF's Small Grants Programme.

The participants circulated between the 4 thematic areas in groups of around 8 participants. The result of their exercise was a list of capacity gaps matched to ideas for solutions to these gaps. These are presented in Tables 2 to 5 below.



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Table 2. Technical Skills (surveying, eradication, species recovery planning) – Capacity Gaps and Proposed Solutions

Facilitator – Posa Skelton

Capacity Gap	Organisation with the gap	Potential Solution	Organisations/individuals that can provide solutions
<b>1. Common Theme: Bird and other Species Surveying</b>			
Species (bird) survey	Tonga Community Development Trust	Engage local students Research – long term.  One of the organisations to the right to set up a course?	NZ-Department of Conservation , BirdLife Pacific, University of the South Pacific, USFWS, USDA, NWCR
Survey and capture techniques for pigeons/ Capture techniques for honeyeaters as well as recording/playback	David Butler Associates Ltd -Samoa		SPRH/BLI
Inventory monitoring of birds, Bird Banding System (data recovery)	Marshall Islands Conservation Society SOP. MANU	Develop national systems  Work using an existing system as a basis(eg France , NZ)  Opportunity for funding from the European Union  Also information can be obtained from the IUCN – ISSG	European Union  IUCN – ISSG  BLI
Invertebrate pest survey	Ray Pierce, Eco Oceania Pty Ltd	The organisations to the right could provide training/mentoring in these areas.	USP, Palau National Museum, CSIRO, SPC Plant, Landcare NZ, Universities PestNet, Padil (Australia), NZ-DoC

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<b>Capacity Gap</b>	<b>Organisation with the gap</b>	<b>Potential Solution</b>	<b>Organisations/individuals that can provide solutions</b>
Plant survey methods Species(Taxonomic) identification	Joel Miles Craig Costion	Establish a database of experts, Universities + Museums (Collections). The people and organisation to the right could help to establish this database.	SPRH-Marika Tuiwawa *IUCN-ISSG *Joel Miles PABITRA Initiative (University of Hawaii)
Marine Taxonomy	TIS	CI-Rapid Assessment Programmes (RAPs), Peer Learning, OBIS, CRRF(Coral Reef Research Foundation), Marine-USP, Identified experts	Conservation International CRRF(Coral Reef Research Foundation), USP (Marine Department)
American iguana surveys and eradication	NFMV	Expert in this area listed to the right	USGS (Guam BTS) - James Stanford
<b>2. Common Theme: IAS eradication</b>			
Technical training related to eradication	Societe d'Ornithologie de Polynesie Manu	'We would be very interested to share information with other invasive species eradication projects in the region'	Jonathan Hall, Royal Society for the Protection of Birds
		Can give some training in Mynah eradication.	Gerald from Cook Islands Natural Heritage Trust
		CEPF have funded Durrell and Samoa to do training in this, sometime this year.	Jill Key, SPREP provided this information
		Technical support in eradication Islands conservation	PII Eco Oceania Pacific Expeditions NZ-DOC IUCN (Island specific) Landcare NZ

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<b>Capacity Gap</b>	<b>Organisation with the gap</b>	<b>Potential Solution</b>	<b>Organisations/individuals that can provide solutions</b>
			Derek Brown USFWS USDA USGS (Guam BTS)
We need to establish a biocontrol co-ordinator(s) for the Pacific	Landcare Research New Zealand Ltd	SPC or SPREP could be a possible host for this position	SPC SPREP
Biosecurity Training		Islands	USGS (James Stanford) PII SPC-LRD
		Specifically for terrestrial invertebrates	USP (Gillian Brodie)
		Marine	IUCN
		Marine Invasives – Ballast Water Management – legal and policy	SPREP (Tony Talouli)
<b>3. Common Theme: Species Recovery Planning</b>			
Our project needs suitably experienced people to be part of a Recovery Group to enable the Samoan swallowtail butterfly to be returned to Samoa. First step is writing a Recovery Plan, grow and establish the larval food-plant in strategic places in Samoa, breed and release the butterfly once sufficient places and larval food-plants are in place and established. Then on-going monitoring of the success of the transfer	New Zealand Butterfly Enterprises Ltd	Tonga Development Trust recommends advertising Expressions of Interest.  Madeline Bottril (another CEPF Grantee) may be able to help with monitoring and evaluation.	Tonga Development Trust  Madeline Bottril (m.bottrill@uq.edu.au)
Translocation and Re-introduction of Species  - Birds, turtle eggs			IUCN (Reintroduction Specialists Group)-SSC, NZ-DOC (Ian Stringer), Tim New of the La Trobe Uni Melbourne, San Diego Zoo, Birdlife,



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Capacity Gap	Organisation with the gap	Potential Solution	Organisations/individuals that can provide solutions
Plants			NTBG(Hawaii), SPREP (turtles)
Holistic Planning: - Support on write-up of Mule (imperial pigeon) Recovery Action Plan - Same support for other species e.g Marine species	Marshall Islands Conservation Society		Butler-NZ System, IUCN, SRG, ISSG, NZ-DOC, Birdlife, SOP-Manu
		Priority species need list could be fed in curriculum -for student practise	USP
		Training Programme /Course in Recovery Planning	Experienced organisations: NatureFiji- Mareqeti Viti, SPREP
Access to specialists of relevant species, who can assist either through correspondence ora site visit. We did this for both the <u>Fiji Flying Fox</u> project and the <u>Green Iguana</u> project. The experts' site visit proved to be very effective as it helped us gather the relevant scientific data	Fiji Nature Conservation Trust (NatureFiji- Mareqeti Viti), Te Ipukarea Society	Solution: a database or list of experts to contact for assistance	-IUCN-SSC - Birdlife -RoundTable: Have collated a list of experts in threatened species (Helen Pppard) - Experts from other Regions, CEPF(Caribbean)
Need a publication to show the main plant biodiversity gaps.	Craig Costion, University of Adelaide		
Peer Learning -Learning exchanges, build capacity	Anne Gouni, SOP Manu		

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Table 3. Project Design, Management and Reporting – Capacity Gaps and Proposed Solutions

Facilitator/Gate-keeper: Nick Askew

Capacity Gap	Organisation with the gap	Potential Solution
<b>Common Theme: Project design and management</b>		
Financial and technical reporting and compliance with CEPF rules	Most grantees!	<p>There will be a presentation during the conference by CEPF on this</p> <p>Presentation from John Watkin given on Day 1 useful. Make available online (see Annexes 4 &amp; 8 of current document)</p> <p>Add comments to excel reports into small grants.</p> <p>Produce an idiots guide to reporting and FAQs to help grantees. <i>[Potential project - but see current FAQ on CEPF web site (copied as Annex 17 below)].</i></p> <p>Produce case studies on best practice reporting. <i>[Potential project].</i></p> <p>CI / CEPF to send lessons learnt 2 months before reporting deadline to act as reminder and show best practice to grantees.</p>
Conservation management planning – interested in lessons learned from elsewhere	Palau Conservation Society	<p>Improve mechanisms for sharing reports – low resolution etc.</p> <p>Set up exchange / secondment programmes (links to other gaps – e.g. buddy system) <i>[Potential project].</i></p> <p>Suggestion from Jill Key (SPREP): Regional conservation or similar (eg PILN) meeting could address this?</p>
Building conservation strategy for species with the construction of decision trees	SOPManu	<p>PCS can help (Anu Gupta)</p> <p>Birdlife International Fundraising handbook very useful (a copy was given to each of the participants).</p> <p>Nick Askew's training tomorrow will help (Day 3 Session 7).</p> <p>Need for dedicated Fundraising workshop to take projects forwards.</p> <p>Start a fundraising network within the Pacific to support and share knowledge <i>[Potential project].</i></p> <p>Durrell can help and can provide training in French through ISLA scheme.</p> <p>Suggestion from Jill Key (SPREP): Durrell do this, could do training. They are planning francophone ISLA course but have no money</p>

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Capacity Gap	Organisation with the gap	Potential Solution
<b>Common Theme: Project design and management</b>		
I would like some training in keeping our activities sustainable and long term and building this into our planning	Regional Pacific Office IUCN/SSC Invasive Species Specialist Group (Auckland Uniservices Ltd. ), Te Ipukarea Society	To review the costs and benefits of running advertising on website to generate core income for the project. Nick Askew / BL to help. Could be applied to other organizations. <i>[Potential project]</i> .  Suggestion from Jill Key (SPREP): a regional peer learning conservation strategies conference?
Project Management – training in key elements of managing a project	<ul style="list-style-type: none"> <li>• Nature Fiji- Mareqe Viti</li> <li>• Conservation et Restauration des Iles de Polynesie</li> <li>• The Nature Conservancy - Micronesia Programme</li> <li>• Royal Society for the Protection of Birds</li> <li>• IUCN Oceania</li> <li>• National Trust of Fiji</li> <li>• University of Adelaide</li> <li>• Te Ipukarea Society Inc</li> <li>• SOP Manu</li> <li>• Tonga Community Development Trust</li> <li>• USP</li> <li>• Birdlife International Pacific Programme</li> <li>• SPREP</li> </ul>	<p><i>Potential project:</i> Need to review existing training opportunities, e.g.</p> <ul style="list-style-type: none"> <li>- Existing in-country training in Fiji-TPAF</li> <li>- Many GEF projects have capacity-building elements (Greg Sherley)</li> <li>- Dave Butler – some PIP members might be able to help for AIS work, but also to provide links to experts for non-AIS work. Have email list of 600 people.</li> <li>- Micronesia in Conservation.</li> <li>- Madeline Bottril and/or Nicola Thomson could provide for training</li> <li>- <i>Potential project:</i> Greg Sherley – used to manage NZDOC Buddy System which could be resurrected.</li> <li>- Unitech &amp; Conservation Leadership Programmes good for future leaders.</li> <li>- Packard Foundation currently has grants for review of management processes.</li> </ul>

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Table 4. Working with Communities and Other Stakeholders – Capacity Gaps and Proposed Solutions

Facilitator/Gate-keeper: Leilani Duffy

Capacity Gap	Organisation with the gap	Potential Solution	Who/Organisation can offer a solution	
<b>Common Theme: Working with Communities</b>				
Working with local communities to ensure long-term sustainability of conservation management	David Butler Associates Ltd	<ul style="list-style-type: none"> <li>• Depends on Site / Locations</li> <li>• Review and assess current Community Conservation Actions</li> <li>• Working with local authorities (district / Provincial / Traditional) and maintain constant communication</li> </ul>	SPREP/IUCN	
Understanding communities needs, Cultural values and views	Joel Miles		<ul style="list-style-type: none"> <li>• Case studies / Models of Marine Managed Areas to Terrestrial systems</li> </ul>	Birdlife International
Assessing what communities are getting out of these projects	Claudia Sobrevila (World Bank)			Jill Key from SPREP: do we need a regional peer-learning meeting on conservation strategies?
Key elements/tips on conducting effective community workshops/awareness	Fiji Nature Conservation Trust (NatureFiji - Mareqeti Viti)	Network of Site support Group Engage Development Partners Basic Survey Techniques – Turtles	BirdLife FSPI / CI SPREP NFMV	
Focus on Community needs / knowing someone in the community	SOP Manu	Community networks from different islands Buying tools / equipment for communities before engaging in projects	SOP Manu NFMV	
Innovative mechanisms to assist our newly formed Fiji Petrel volunteer scheme which has the objective of better integrating our 16 village communities into the project and gaining their support	Fiji Nature Conservation Trust (NatureFiji - Mareqeti Viti)	<ul style="list-style-type: none"> <li>- Project site Exchange</li> <li>- Community learning Exchange</li> <li>- Community networks from different islands</li> <li>- Development of threatened species network (terrestrial)</li> <li>- Replicate activities in different communities</li> <li>- Jill Key from SPREP suggestion: Peer learning with an effective project?</li> </ul>	SPREP / BirdLife CSP / MIC Pacific Roundtable/ IUCN	

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<b>Common Theme: Networking and Partnerships</b>			
Tangible support to establish and maintain international networks that integrate complementary initiatives	Coral Reef Research Foundation Dave Butler	PILN Threatened Species Network (Terrestrial) - roundtable	Pacific Round table, SPREP, IUCN, GLISPA, ISSG, CI
Networking and developing long term partnerships	Tonga Community Development Trust Jean-Yves Meyer	PILN Database for all NGOs/organisations with contact details, what they do, etc.	IUCN, SPREP, CI (CEPF), ISSG, Pacific Roundtable, PII, PIP, and MIC
Dealing with governments When project crosses several government departments it's difficult to keep all in the loop	USP – Fiji Land Snails Project	Joint planning, local roundtable meetings Provide structure (e.g. NBSAP, CITES group); appoint govt. reps to sit in relevant stakeholders fora  Use these entities to involve government representatives  <i>Jill Key from SPREP: a regional peer-learning meeting on conservation strategies?</i>	PCS – Anu Gupta Pacific Roundtable, SPREP and IUCN
Dealing with media	USP – Fiji Land Snails Project	Does terrestrial conservation sector need a SEAWEB equivalent (i.e. LANDWEB)? Taskforce (e.g. Invasive species) Media Training (conservation, threatened species, invasives) CI can assist CEPF grantees with media press releases  <i>Jill Key from SPREP: SPREP do media literacy training</i>	SEAWEB/ SPREP – roundtable / SPC / USP / CI– HQ through communications group Joel Miles SPREP CI TIS – Jacqui Evans
Inventory of ecosystems in the Pacific region	CI, The Nature Conservancy (TNC), IUCN	Conduct an inventory of ecosystems in the Pacific region	ISSG / CI-Pacific

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Table 5. Other Capacity Gaps and Proposed Solutions

Facilitator/Gate-keeper: Easter Galuvao

Capacity Gap	Organisation with the gap	Potential Solution
<b>Fund raising Opportunities</b>		
Fundraising to achieve sustainable funding after the CEPF project ends	Most grantees	<ul style="list-style-type: none"> <li>• SPC/ SPREP Joint Country Strategy as a process to reflect biodiversity projects for funding</li> <li>• Micronesian Challenge Trust Fund as an example of an existing financing mechanism that can fund biodiversity initiatives for Micronesian countries,</li> <li>• GEF 5 – STAR and GEF National Prioritization Formulation Exercise – Get involved in the GEF5 National Prioritization Process and ensure key biodiversity priorities are adequately reflected in the National GEF5 priorities. Get in touch with your National GEF Operational Focal Points for more information.</li> <li>• USFS (Micronesia),</li> <li>• LifeWeb (POWPA) Financing Roundtable for Protected Areas. SPREP, in collaboration with LifeWeb, will be conducting a Financing RoundTable for Protected Areas in October. This is an avenue for CEPF grantees to link up with.</li> <li>• CBD Strategy for Resource Mobilization is another important strategic process which provides an avenue for CEPF grantees to identify and incorporate their biodiversity priorities into the national Strategies for Resource Mobilization</li> </ul>
Proposal development and report writing		<ul style="list-style-type: none"> <li>• CEPF grantees and NGOs to check out the following training opportunities available to assist with project proposal and report writing skills:               <ul style="list-style-type: none"> <li>✓ GEF Country Support Programme</li> <li>✓ AusAID in-country training</li> </ul> </li> <li>• PCS Peer to Peer support</li> <li>• Manual/CD of successful proposals</li> <li>• Develop a proposal for CEPF Small Grants to undertake the training in proposal development and report writing</li> </ul>
<b>Communication, advocacy and media</b>		

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Capacity Gap	Organisation with the gap	Potential Solution
Promoting your project and its findings to a broader audience	Most grantees	<ul style="list-style-type: none"> <li>• Develop and implement communication strategies and incorporate these as one of the key activities for all CEPF-funded projects</li> <li>• Use the following existing platforms, portals and networks to disseminate CEPF project results:               <ul style="list-style-type: none"> <li>✓ CEPF Small Grants – Lessons Learnt series</li> <li>✓ PILN sound bites</li> <li>✓ SPREP digest, Pacific Environment Information Network (PEIN)</li> <li>✓ Newsletters and websites</li> <li>✓ PII Newsletter and website</li> </ul> </li> <li>• Seek IT advice on website development</li> <li>• Develop and produce merchandise for CEPF projects as part of your promotional activities</li> </ul>
I would be happy to have support in promoting the project and our work to other CEPF regional initiatives. Since the work we do is for a global audience and is focused on sharing lessons learned and experiences, this will play a vital role in us being more effective in the work we do in the Pacific and to the wider global audience	Regional Pacific Office IUCN/SSC Invasive Species Specialist Group (Auckland Uniservices Ltd)	<ul style="list-style-type: none"> <li>• Make sure you join the communications clinic on Day 3.</li> <li>• <i>Jill Key from SPREP: Use PILN + do we need a regional peer-learning meeting on conservation strategies?</i></li> <li>• Other potential for support include:               <ul style="list-style-type: none"> <li>✓ SOPAC, CCL PIR, GIZ</li> <li>✓ Sione, Dick, Mike and Anne</li> <li>✓ Merchandising – Dick</li> </ul> </li> </ul>
Keeping track of colleagues/experts as they move between jobs		<ul style="list-style-type: none"> <li>• Use PILN and ISSG – for invasive and others</li> <li>• Develop a “Skill register” as an activity of the Pacific Island Round Table for Nature Conservation</li> </ul>
Developing community-based toolkits and manuals (locally appropriate)	TIS, Manu	<ul style="list-style-type: none"> <li>• Use existing toolkits and manuals</li> <li>• Use the CEPF Small Grant to compile and develop toolkits for specific areas which are considered as major gaps</li> <li>• Identify a local cultural liaison focal point to provide advice and guidance</li> </ul>

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Capacity Gap	Organisation with the gap	Potential Solution
		on cultural protocols
<b>Need for more Pacific Island taxonomists</b>		
		<ul style="list-style-type: none"> <li>Recognise and provide sponsorship and scholarships for Pacific Island para-taxonomists/experts</li> <li>Creating/producing a video about Pacific Island taxonomy to raise awareness on taxonomy</li> <li>Explore the IUCN (Red List) group, reinvigorated PACINET as a possible idea, and promote taxonomy at regional/intergovernmental meetings</li> </ul>
<b>Lack of understanding and support by political decision makers</b>		
	CRIP	<ul style="list-style-type: none"> <li>Promote Peer learning for example where community leaders from an active community share their experiences with communities that are currently neither active nor committed to conservation work</li> <li>Use the Forum Leaders meeting as an avenue to discuss conservation issues Perhaps a role for the Forum Secretariat</li> <li>Undertake Social Marketing (Cost benefit analysis) on invasive species including other key biodiversity priorities and share the findings and outcomes with political leaders and decision makers</li> </ul>
<b>Technical assistance</b>		
Assessing change in grantees invasive species management capacity – Evaluating the effectiveness of capacity building	Pacific Invasives Initiative	Madeline Bottril – M&E Approach the AUSTRAL Foundation (PIP Member – Annette Lees) Conduct an Independent evaluation of the impacts / effectiveness CEPF capacity building and use the CEPF Small Grants to do this
Watershed assessment, runoff prevention from agricultural practices, and buffering riparian areas	The Nature Conservancy – Micronesia Programme TIS	Technical assistance to secure from the following organizations: <ul style="list-style-type: none"> <li>SPC?</li> <li>Landcare?</li> <li>NRCS (Micronesia Challenge)</li> <li>SPC (Technical assistance)</li> </ul>



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Capacity Gap	Organisation with the gap	Potential Solution
		<ul style="list-style-type: none"> <li>• USFS, TNC, CI, BLI, IUCN, IAS/ USP</li> </ul>
Technical support for translation of French and Tahitian supports (movies, workbooks, etc) realized during the project in English language (for dissemination by CEPF)	Te mana o te moana – French Polynesia	French-English Translation Services? <ul style="list-style-type: none"> <li>• CEPF does accept materials / reports in French (SPREP to assist with translation – Allan Tye)</li> <li>• Use the IUCN French Committee</li> </ul>
Need to understand more what ‘Gap analysis’ means, if possible’	Palau Conservation Society	<ul style="list-style-type: none"> <li>• POWPA Gap Analysis (James Atherton to share Samoa POWPA Gap Analysis report)</li> </ul>
Implementing new requirements under the CBD - particularly how it links to current investment programs	Palau Conservation Society	<ul style="list-style-type: none"> <li>• The following are initiatives in the pipeline that will provide guidance and support on CBD priorities:               <ul style="list-style-type: none"> <li>✓ NBSAP Capacity-Building workshops</li> <li>✓ GEF set aside funds is available to countries to review their NBSAPs. Get in touch with your national CBD focal points and NBSAP Coordinators for more information</li> <li>✓ UNEP MEA project - SPREP/ UNEP</li> </ul> </li> </ul> SPREP is liaising closely with the CBD Secretariat on the NBSAP workshop
Analysing and interpreting climate change data		<ul style="list-style-type: none"> <li>• Conduct a Training workshop to               <ul style="list-style-type: none"> <li>- Communicate with existing Climate Change projects to identify common problems/solutions</li> <li>- Use Project posters from current workshop to showcase activity in conservation areas</li> <li>- Funding for the workshop could be secured from an existing climate change project or through a CEPF small Grant</li> </ul> </li> <li>• Other potential sources of support:               <ul style="list-style-type: none"> <li>✓ USP, SPREP, SPC and others</li> </ul> </li> </ul>
Reliable renewable energy supply	CI	Explore and find out more information on Renewable energy possibly from SPC, SPREP, GIZ and others

## CEPF Mid-term Review Conference



## CEPF Mid-term Review Conference

### **4.1 CEPF Grant Management Process meeting (Output 4.1)**

On the evening of Day 2 a meeting was held between CEPF, CI and grantees that had requested in their pre-conference questionnaire that they would like to discuss specific aspects of the grant management process that could be improved. This meeting was held and full and frank discussion enabled these matters to be discussed in detail. This also provided the opportunity for CEPF and CI RIT to give detailed answers and explanations in relation to various aspects of the grant management process. The upshot from the meeting was that increased communication between **all parties** would improve the grant management process. The group deemed that it was not necessary to minute the meeting but were satisfied that the conference output 4.1 (refer Section 1.2) had been addressed, i.e. 'CEPF and grantees to have agreed on improvements to the grant management process in terms of how the communicate and coordinate'.

## **5 Day 3 Records**

The aim of Day 3 was to focus on addressing the grantees' top two priority capacity gaps – fundraising and communications and to provide some targeted capacity building in these two areas. The Day also aimed to agree on a way forward post-conference in terms of improving the way CEPF, CI and the grantees work together and enhancing their capacity to jointly deliver and communicate conservation results. Day 3 also aimed to provide the grantees with the opportunity to showcase their projects and proposals to other donors. Unfortunately few donors were able to attend the meeting.

### **5.1 Information about Funding Opportunities relevant to CEPF grantees**

Day 3 began with a series of presentations to inform the grantees about funding opportunities beyond the CEPF programme. The participants were advised that the information provided in the presentations would be useful for the capacity-building exercises in the afternoon. The presentations were:

- Presentation: Funding Opportunities for Conservation in the Pacific Region – GEF PAS, GEF 5 and some general pointers on fundraising. Greg Shirley, UNEP (refer Annex 11 for a copy of this presentation)
- Presentation: GEF Small Grants programme, Katarina Atalifo, GEF Small Grants Programme (refer Annex 12 for a copy of this presentation)
- Presentation: Save our Species Programme, Valerie Hickey, World Bank (refer Annex 13 for notes of key points made during this presentation)

During the plenary discussion after these presentations the following key points were made:

- Talk to GEF focal points in your country – get to know this person if you are interested in securing GEF funding or being better informed about GEF funded activities in your country.
- Also check this website [www.thegef.org](http://www.thegef.org)
- SPREP leads the following GEF5 funded projects, if you are interested in these projects, then get in touch with Joe Stanley at SPREP ([joes@sprep.org](mailto:joes@sprep.org)):
  - POPS, Hazardous and Solid Waste Management

## CEPF Mid-term Review Conference

- Micronesia Challenge (ETFs – sustainable funding mechanism)
- Pacific IAS project
- Integrated Biodiversity Conservation Project (4 countries - Tuvalu, Cook Islands, Nauru, Tonga)
- Kiribati – Phoenix Island Protected Area project

### **5.2 Capacity Building Clinics (Output 2.2)**

The afternoon of Day 3 was spent in two clinics that focussed on the 'top two' capacity gaps that were identified by almost all CEPF grantees in their pre-conference questionnaire, these gaps were:

- Fundraising
- Communications/PR for projects to a broader audience

Two experts in the field were enlisted in the workshop to lead these two clinics, they were:

- Nick Askew, Fundraising Coordinator from Birdlife International, Suva
- Ashwini Prabha-Leopold, Communications Consultant, Suva

Participants had been asked to select which clinic they would like to join at registration on Day 1 and the experts had taken the opportunity during breaks on Days 1 and 2 to talk in more detail with each of their 'students' about what they felt their specific capacity gaps were. The clinics began with a presentation from each of the experts about the 'Dos and Don'ts' of communications and fundraising respectively (Their presentations are included in Annexes 14 and 15). The experts then lead their groups in a training activity. The communications group developed a communication strategy and a series of 5-minute performances that they could carry-out in plenary for a 'panel of experts' which would then provide feedback. The fundraising group did the equivalent for a series of new project concepts.

### **5.3 Where to from here**

James Atherton gave a presentation to the participants on what next steps CI and CEPF would take in relation to the results of the conference (Annex 16).

The key next steps he noted are:

- RIT and partners to write up meeting proceedings, circulate for comment, revise then publish
- Grantees to consider how they will apply their lessons learned and fill capacity gaps
- A small grant call for proposals to be held in September 2011- to target gap filling incl. capacity gaps identified at this conference
- CEPF and RIT to expedite contracting for remaining approved grants
- RIT to continue publishing and disseminating lessons learned documents
- A CEPF terminal evaluation conference to be held in February or March 2013
- CI Pacific to continue to look for donor opportunities to continue a funding programme post 2013; grantees encouraged to do the same for their projects

Closing remarks were then made by: James Atherton, John Watkin, CEPF and Claudia Sobrevila of the World Bank.

## 6 Summary

A wide array of projects are being undertaken across the region, by diverse partners, under the CEPF banner, many of which are identified on the CEPF Polynesia Micronesia website.

### 6.1 Lessons Learned

Note that a key issue here should be not so much Lessons Learned, but that lessons learned need to be **applied** to relevant future projects.

#### **Working with Communities and other Stakeholders.**

- Identify Communities & Stakeholders at the outset, and expect to spend considerable time engaging with them. Need to develop strong partnerships to improve chances of a long-term, sustainable, conservation programme
- Need to consider project sustainability from the outset. Focus on ways of ensuring that the work, on the ground, can continue even with no/minimal financial inputs
- Very important that local communities are acknowledged for their part in the project, that reporting and dissemination of information is presented in different ways, to ensure that they can be presented that is most relevant to each of the communities and other stakeholders

#### **Project Design**

NGOs can lack the capacity to effectively implement and manage projects. This is a key problem. NGOs tend to be very good at identifying problems and determining solutions, but maybe less good at identifying realistic timeframes and providing sufficient capacity to deliver those solutions. So, in order to reduce these problems, when thinking about projects

- BE REALISTIC not OVERAMBITIOUS
- Set SMART objectives (**S**pecific, **M**easurable, **A**ctionable, **R**elevant and **T**ime-bound)
- Log frames can be a useful tool for realistic project planning. While they can initially appear daunting, it is worth taking the time to get to understand what they are trying to achieve

#### **Communications.**

- EFFECTIVE Communication involves imparting information that produces a change of response by another party. This can be seen to be the most important component of a project. Yet it is often the part that gets dropped from a project if funds become tight
- There are a variety of means of communicating. Do not just focus on presentations, posters or reports (although these can be very effective). Look at other opportunities.
- Constant communication with the fund providers (in this case both CEPF and RIT) by grantees is a must. Not only does it maintain good relations, but there is a lot of information/knowledge that the fund providers can extend
- Consider ways to measure the impact of communication plans

## CEPF Mid-term Review Conference

### **6.2 Priority capacity needs/requirements.**

Assessments based on questionnaires split the requirements into 3 levels of need.

**High** - Fundraising, methods to achieve sustainable funding after the CEPF

**Medium** – Technical support to achieve project objectives

**Medium** – Financial and technical reporting and compliance with funders rules.

**Medium** – Promoting project and its findings

**Low** – Project management.

The capacity needs represented by 'technical support' was further split into a number of sub-headings

- Technical skills, such as survey work, recovery plans, etc.
- IAS techniques
- Communication
- Community and stakeholder involvement
- Co-ordination

A number of grantees/partners felt that they could provide support and assistance, or that they knew of mechanisms within the region that could fill many of these capacity gaps. In addition a range of possible solutions for remedying some of the capacity gaps were identified. Some of these will be taken forward as proposals at the next call for applications for funding.

Note that, within the region, the Pacific Islands Nature Conservation Roundtable provides a forum for this kind of exchange of information. Currently, however, many of the grantees had little or no involvement in that forum. This might be worth discussing at the next PIRT in July 2011.

### **6.3 Fundraising and Communication skills.**

Attendees had an opportunity to take part in a 'taster' session for programmes that might involve developing fundraising expertise within grantee organisations, and also communication skills for individuals to best present their project findings, etc. Workshops designed to give grantees opportunities to develop some aspects of the key requirements were organised.

## 7 Specific Recommendations

### 7.1 *Invasives.*

- More surveys of more islands are required in order to identify the presence of both invasive species and native biodiversity. Specifically include surveys in the Southern Line Islands
- An assessment of island eradication priorities for Polynesia similar to that done by Island Conservation for Micronesia

### 7.2 *Communications*

- Produce a manual to provide best practice on how to communicate conservation projects in the Pacific.
- There is a need to better communicate the NBSAP activities to wider communities in the Pacific.

### 7.3 *Capacity-building.*

- Produce case studies showing best practice reporting.
- Set up exchange/secondment programmes (links to other gaps – e.g. buddy system) particularly for discussions regarding conservation planning.
- Start a fundraising network within the Pacific to support and share knowledge.
- Review the costs and benefits of running advertising on websites to generate core income for the project.
- Review the availability of existing training opportunities across the region.
- Resurrect the NZ DOC buddy system
- Review and assess current Community Conservation Actions to identify recommendations for best practice.
- Compare and contrast models of Marine Managed Areas with Terrestrial Community Conservation systems, and identify examples of best practice that might transfer from one environment to the other.
- Develop a proposal for CEPF Small Grants to provide training in proposal development and report writing generally.
- Undertake Social Marketing (Cost benefit analysis) on invasive species including other key biodiversity priorities and share the findings and outcomes with political leaders and decision makers
- Conduct an Independent evaluation of the impacts / effectiveness of CEPF capacity building and use the CEPF Small Grants to do this

## CEPF Mid-term Review Conference

### Annex 1 – Conference Participants

**Participants:**

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## CEPF Mid-term Review Conference

### Observers:

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## CEPF Mid-term Review Conference

### Annex 2 – Conference Agenda

#### Sunday, June 5

**5:00pm**      **Registration**, Participants to submit their posters

**7:00pm**      **Welcome Cocktails**, Hotel Foyer area

#### DAY 1 - Monday, June 6

**Day 1 will establish the strategic and administrative context in which the CEPF Projects are operating, reflect on performance to date and to translate our lessons learned into future action.**

Time	Activity	Presenter/Lead
8.00	Registration for late-comers	
8:30	Prayer	Vilikesa Masbalavu, C Fiji
8.35	Opening address by Guest of Honour	Minister of Local Government, Urban Development, Housing and Environment, Samuela Saumatua
8.50	Welcome	Mike Donoghue, C Pacific Executive Director
9.10	Introductions Review objectives and agenda Housekeeping	Nicola Thomson
9.20	<b>Presentation: Managing CEPF projects – a view from Washington</b>	John Watkin, CEPF
9:40	<b>Presentation: CEPF Polynesia-Micronesia Overview/History</b> Q&A	James Atherton
10.10	<b>Presentation: Gap Analysis of the CEPF investment programme in the Polynesia-Micronesia hotspot and future grant funding opportunities</b> Q&A	Leilani Duffy
10.40	Morning tea	
<b>10.50</b>	<b>Session 1: Project Overviews</b> Each Grantee to present their project poster.	Nicola Thomson
<b>12.50</b>	Lunch	
<b>1.40</b>	<b>Session 2: Reviewing our Work – Lessons Learned</b> <b>Presentation:</b> A summary of the lessons learned from feedback and reports already received from grantees to start this session	James Atherton

## CEPF Mid-term Review Conference

Time	Activity	Presenter/Lead
1.55	<b>Breakout Groups:</b> Thematic working groups: 1. Invasive Alien Species Eradication and Control 2. Project Design, Management and Reporting 3. Working with Communities and other Stakeholders	Break-out Group Facilitators: Souad Boudjelas Greg Sherley Easter Galuvao
2.10	<b>Break-out Group Task 2.1: Complete the list of lessons learned in your thematic area</b>	
2.25	<b>Break-out Group Task 2.2: Translate your lessons learned into actions and recommendations – how can these lessons learned be applied?</b>	
3.00	Afternoon tea – to be taken during Task 2.2	
3.30	<b>2.3 Breakout groups to present back to plenary</b>	
4.15	<b>Presentation: Financial and technical reporting to CEPF – and overview and tips ('dos and don'ts)</b>  Q&A	John Watkin
5.15	Housekeeping Logistics for getting to cocktail Participants feedback on Day 1.	Nicola Thomson
5.30	Thanks and close for the day.	Mike Donoghue

**6.30-9.30pm Evening reception will be hosted by IUCN/USP/BLI/NTF/NFMV at a nearby venue.**

### DAY 2 – Tuesday, June 7

**Day 2 will enable grantees to explore opportunities to address their capacity needs after the conference in collaboration with each other and CEPF and other partners**

Time	Activity	Presenter/Lead
08:30	Housekeeping/Review agenda.	Nicola Thomson
8.45	<b>Session 3: Assessing and addressing our capacity needs</b>	
	<b>3.1 Introduction to the Session – Day 2 goals and overview of the process</b>	Nicola Thomson
9.00	<b>3.2 Presentation: Overview of the findings of the Capacity Assessment Questionnaire – the first column of the matrix.</b>	Leilani Duffy
9.20	<b>3.3 Capacity building Opportunities in the Context of the Pacific region – PILN and PII</b>	Posa Skelton Souad Boudjelas
9.40	<b>3.4 Group exercise: Completing the picture, round-robin</b>	Facilitators: Posa Skelton Nick Askew

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Time	Activity	Presenter/Lead
		Easter Guluvao Leilani Duffy
10.40	Morning Tea	
10.55	<b>Plenary: Breakout groups to present back</b>	
11.50	<b>Housekeeping, feedback forms and Close of conference for the day.</b>	
12.00- 7.00	Lunch and Field Trip.	
7.00	Return from Field Trip	
7.30	<b>Talanoa night</b> This is an opportunity for participants to hold smaller meetings and to continue any discussions that have been parked. CEPF Grant Management Process meeting will be held at this time.	Convene in Dining area to be directed to meeting areas.

### DAY 3 – Wednesday, June 8

**Day3 will focus on addressing the grantees capacity gaps and agreeing on a way forward for after the conference in terms of improving the way we work together and our capacity to deliver conservation results. It will also be a chance for the grantees to showcase their projects and proposals to donors.**

Time	Activity	Notes
08:30	Housekeeping/Review agenda.	Nicola Thomson
9.00	<b>Presentation: Funding Opportunities for Conservation in the Pacific Region – GEF PAS, GEF 5 and some general pointers on fundraising.</b>	Greg Sherley
	<b>Q&amp;A</b>	
9.30	<b>Presentation: GEF Small Grants programme</b>	Ms Katrina Atalifo
	<b>Q&amp;A</b>	
9.40	<b>Presentation: UNDP Funding Opportunities</b>	Floyd Robinson
	<b>Q&amp;A</b>	
10.00	<b>Session 7: Addressing our priority capacity needs</b>	Nicola Thomson
10.05	<b>Presentation: The ‘Dos and Don’ts’ of Fundraising</b>	Nick Askew
	<b>Q&amp;A</b>	
10.35	Morning Tea	
10.50	<b>Presentation: Communications – The ‘Do’s and Don’ts’</b>	Ashwini Prabha
	<b>Q&amp;A</b>	

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Time	Activity	Notes
11.20	<b>7.1 Capacity-building Clinics</b> <ul style="list-style-type: none"> <li>• Fundraising and communicating with donors group</li> <li>• Promoting project to a broader audience Group</li> </ul>	
1.00	Lunch	
2.00-	<b>7.2 Groups to present back to plenary and a panel of experts</b>	
3.00	<b>for feedback</b>	
3.00	<b>Afternoon Tea</b>	
3.15	<b>Session 7.2 continues.</b>	
4.15	<b>Session 8: Where to from here?</b> <ul style="list-style-type: none"> <li>• Conference outputs</li> <li>• What CEPF and the RIT will do with the findings of the meeting</li> </ul>	James Atherton and John Watkin
4.45-	Conference feedback forms.	Nicola Thomson
5.00	Formal close of conference	CEPF and World Bank

**7.00 pm Evening reception at venue hosted by CEPF and CI Pacific**

## CEPF Mid-term Review Conference

### Annex 3 – Opening ceremony.

#### **Opening Speech by Hon. Samuela Saumatua, Minister for Local Government, Urban Development, Housing and Environment**

Ladies and Gentlemen, good morning and bula vinaka to the Executive Director of Conservation International's Pacific Islands Program in Samoa and his colleagues from Washington DC, to all the CEPF grantees, to those representing UNDP and the World Bank as donors to the CEPF, to members of the Technical Advisory Group and to all other distinguished participants and observers. It is my pleasure to welcome you to this important meeting- the Mid-Term Review of the CEPF investment in the Polynesia-Micronesia hotspot. Bula vinaka again and a warm welcome to Fiji on behalf of my Government to all of you, especially those who are visiting our beautiful islands for the first time.

The objective of this Mid-Term Review is for CEPF grantees to share experiences and lessons learned from their projects so far. Such lessons, both good and bad, are of immense value for the broader conservation community in the Pacific, both immediately and also beyond the term of this 5 year CEPF investment.

This Meeting is also an important opportunity to identify priority capacity needs for conservation projects and also for CEPF, CI Pacific and their partners to assess investment gaps in the CEPF project portfolio and to determine how to fill those gaps. I understand that the main strength of the CEPF program in this region has been the development of strong partnerships between conservation colleagues in NGOs, the education sector and governments.

My Government takes its commitments to biodiversity, conservation and the environment very seriously. The three focal areas in your programme, Invasive Alien Species, Priority Sites and Species conservation are very much in line with the Fiji Government's concerns and efforts.

The Fiji Government has established a Bio-Security Unit to tackle problems that arise with Invasive Alien Species. So I am encouraged that the National Trust for Fiji and Nature Fiji MareqetiViti are using CEPF funds to work in partnership with the Unit on the threat posed by American Iguanas, for example.

Similarly, the Fiji Government has set up a Protected Areas Committee to address some of the expectations of the Programme of Work for Protected Areas as indicated by the Convention on Biodiversity. Again, the National Trust for Fiji leads on this project but I know that several partners in this room are taking an active part in pursuing the Committee's objectives. Clearly, there are a number of issues with the concept of Protected Areas here in the Pacific. I hope and anticipate that the conclusions from the Protected Area Committee will be helpful not just for Fiji but for other countries in the Pacific region as well.

In looking at the projects that have been funded by CEPF to date, I note that more than US\$700,000 has so far been allocated to nine projects in Fiji. Grantees include NatureFiji/MareqetiViti, National Trust for Fiji, USP and BirdLife Pacific. I am encouraged that each and every one of these projects addresses issues covered in Fiji's NBSAP. To those of you who have come from outside of Fiji, I apologise for taking so much of the available funds. To those of you from Fiji, well done and keep up the good work!

## **CEPF Mid-term Review Conference**

I have looked through the agenda and am impressed with the extent to which it is clearly aimed at providing an opportunity to develop the skills and capacity required for both you, the attendees, and for other interested parties to continue the work to promote conservation and the environment in the Pacific and for the Pacific. I commend the Conservation International team for providing the resources to undertake this programme and the various parties, in particular BirdLife International, for bringing together attendees from across the region.

I note that you have a lot on the agenda so, without further ado, it is now my great pleasure to declare the Meeting open. Vinaka vaka levu for providing me with the opportunity to do so.

### **Response from the Executive Director, CI Pacific, Michael Donoghue.**

Thank you for those welcoming kind words, Minister. You do us a great honour by opening our meeting.

As the new Executive Director of the Conservation International Pacific Islands Programme, I am very pleased that the location for this meeting is Lami, where we are engaged in a collaboration with SPREP on a project involving ecosystem-based adaptation to climate change. I want to sincerely thank the team at the Bird Life International Pacific Partnership for helping to coordinate this meeting and for dealing with all the complex logistics involved in getting 30 odd participants safely here to Fiji. In particular I would like to thank Don and Mark from Bird Life and Nicky, from Environment Consultants Fiji, who will be our facilitator for the next few days. I'd also like to acknowledge the efforts of James, Leilani and Siniva from the CI office in Samoa in preparing for this meeting

I would like to provide some background on the Critical Ecosystem Partnership Fund's investment in the Pacific Islands region. CEPF is a global conservation fund for conservation in terrestrial biodiversity hotspots - its funds are administered by Conservation International on behalf of the 6 global donors, namely the World Bank, the Government of France (through AFD), the Government of Japan, the MacArthur Foundation, the GEF and CI itself.

The Polynesia-Micronesia hotspot is one of 34 global terrestrial biodiversity hotspots, where high levels of biodiversity are coupled with high levels of threat. The Polynesia-Micronesia hotspot is notorious for losing more species to extinction in recent times than any other biodiversity hotspot in the world.

The \$6 million USD CEPF fund was launched for the Polynesia-Micronesia hotspot in September 2008 and will end in April 2013. The main purpose of the fund is to catalyse key actions to safeguard critically threatened terrestrial species and sites. Since the launch, approximately 4.3 million USD has been committed to 58 projects. About \$1.7 million USD is still to be allocated. Thus this conference is an excellent opportunity to take stock of progress and to focus on using the remaining time and funds in the most effective way possible.

CI Pacific has been continually involved since the very beginning of CEPF's investment in the Pacific in 2003, when preparation of the investment strategy or ecosystem profile for the Polynesia-Micronesia hotspot began; through the securing of GEF focal point endorsements from 14 countries in the region from 2005- 2007; to working with CEPF to manage a \$1 million

## CEPF Mid-term Review Conference

USD funding program in 2006 on invasive species management; and the launch of the full five year CEPF investment in 2008.

The CEPF program is one of CI Pacific's most important programs, because it funds critical conservation action that wouldn't otherwise happen. We thank CEPF for having the confidence in us to help them manage the funding program in this region.

As noted by the Honorable Minister, sharing our experiences and lessons learned is of great value to all of us as conservation professionals. We consider that it is critical to make such lessons learned – be they good, bad or ugly - available to a broad audience. -

With this in mind CI Pacific is publishing a series of lessons learned reports for many of the CEPF and CI Pacific funded biodiversity conservation projects. We are formally launching the first 10 reports today, and they are all on display here on the side. We will continue to publish these reports in the remaining years of the program.

Honorable Minister, you also noted the need for capacity and investment gaps in the CEPF project portfolio to be identified and we hope that this conference will provide ideas on how to fill such gaps and also how to improve our support to grantees.

I would like to briefly clarify CI Pacific's role in the management of CEPF funds in this region, as I am aware that there has been some confusion about this in the past.

In regions such as Polynesia –Micronesia, CEPF funds are managed as a partnership between CEPF and in-region entities called Regional Implementation Teams, or RITs. RITs are partnerships of conservation organizations who help review and assess funding applications and provide technical advice to grantees to help them develop and implement their projects; they bring local knowledge and in-region ownership to the CEPF grant management program.

In this region, the RIT is administered by CI Pacific and includes SPREP, Bird Life Pacific, USP, UNEP, the Pacific Invasives Partnership, the Micronesia Conservation Trust and others. I want to take this opportunity to thank our RIT partners for their significant contributions and ongoing commitment to help us manage this funding program to the highest possible standard.

Most importantly I want to congratulate you, the CEPF grantees, for the tremendous work you have been doing over the past few years to safeguard this region's unique biodiversity. You, and the organisations you represent, have been responsible for many significant achievements, including eradicating rats or other invasive vertebrates from a number of islands; successfully managing other invasives such as weeds, goats or macaques in key sites; improving our knowledge of threatened birds, plants, reptiles, mammals, butterflies and land snails, including the development and implementation of numerous threatened species recovery plans; and also improving the management of many key conservation areas and sites. In most cases you have built strong and enduring partnerships with the local community and with national government departments to implement these complex projects. You will be able to hear all about these successes over the coming days from your colleagues here.

In conclusion I wish you all a very useful and informative meeting with lots of interesting discussion and debate and sharing of experiences and lessons learned. We want the meeting to be informal and as useful to you as possible, so please don't be shy and don't be afraid to ask lots of questions.



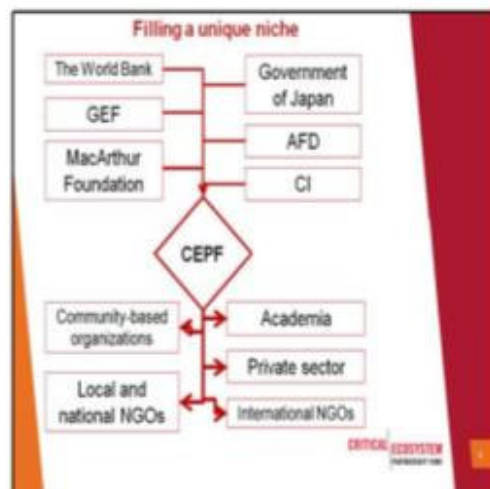
## **CEPF Mid-term Review Conference**

Finally, Minister, thank you again for joining us here this morning, and I have great pleasure in presenting you with the first in the biodiversity conservation lessons learned series, which appropriately is a conservation plan for a Fijian species, in this case the rare and beautiful Fiji flying fox or Mirimiri from Taveuni.

Vinaka vaka levu.

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### Annex 4 – Presentation: Managing CEPF projects – a view from Washington, John Watkin, CEPF



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### CEPF: understanding the demands of field projects

- There is always a need for additional financial resources
- This need is invariably urgent
- Organisations "do what is necessary" to keep the project activities rolling on the ground
- Complicated alliances between organisations working together
- Frustration at the long list of requirements in the application process
- Delay in grants being signed and funds transferred adding to this sense of frustration

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### CEPF's Requirements

- Grantees should be familiar with the full grant agreement (Annexes!!!!!!!!!!!!!!)
- Projects can only allocate funds to project activities that occur within the grant period
- Grantees have to follow the established policies
- There are some additional complications by being an American based organisation
- The financial and performance reporting are the minimum feedback that we should receive
- Acknowledge your Donors

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### Practical considerations

- Everyone has many other activities to address in addition to a CEPF grant
- There are complications resulting from the differences in time and date
- "Shifting goal posts"
- Compliance with the policies, safeguards of CEPF's donors
- Seeking to ensure that CEPF's projects will have the greatest impacts/leverage additional funds

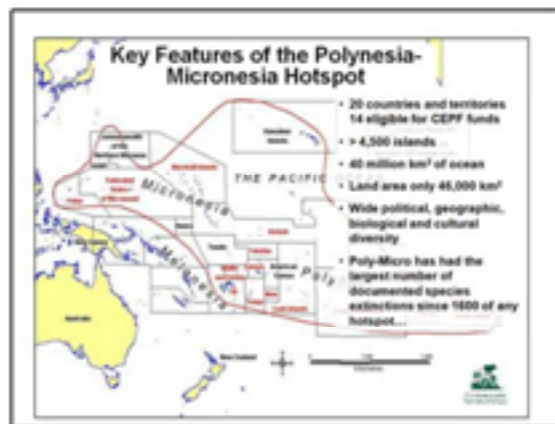
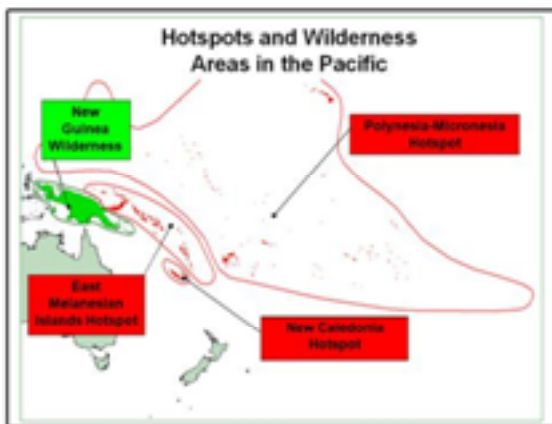
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### Aspirations for this meeting

- Assess progress to date against the Ecosystem Profile and Log Frame
- Open and respectful conversations of the lessons learned
- Develop a better understanding of the respective roles and demands from both sides
- Look at ways and means to improve the implementation of projects
- Identify creative mechanisms to address gaps in the grant portfolio
- Have a great time!

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**Annex 5 – Presentation: CEPF Polynesia-Micronesia Overview / History, James Atherton, Conservation International**



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### Key Features of the CEPF funding program in this region

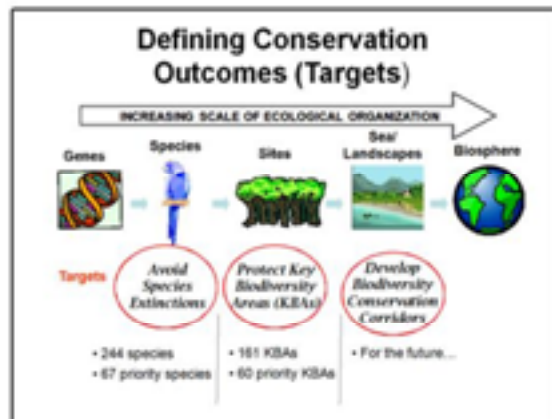
- Investment strategy (ecosystem profile) developed in 2003-2005; approved by CEPF Donor Council in 2007
- Five year \$7 million USD program launched in Sept 2008; ends April 2013
- Grants are for civil society
- Focus is on terrestrial conservation
- A short term funding program
- Three funding components (SDs)
- Managed as partnership between CEPF and CI Pacific and its technical partners
- Partnership between CI Pacific and regional partners is called a Regional Implementation Team (RIT)
- CI Pacific is assisted by the Technical Advisory Group (TAG)
- TAG consists of SPREP, PI, Birdlife, MCT, USP, UNEP and others



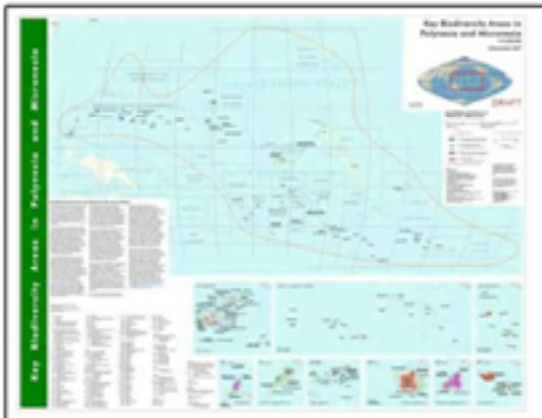

### CEPF Grant Making in the PM Hotspot

- Proposals must be linked to one of the three Strategic Directions
- Two types of grants: Small (\$20k US)-management by RIT alone; Large (>20k US)-management by RIT in collaboration with CEPF
- Calls for proposals every year since Sept 2008
- Three calls for proposals completed; now assessing fourth call for proposals (March 2011)
- Next CFP planned for September 2011 (small grants only)





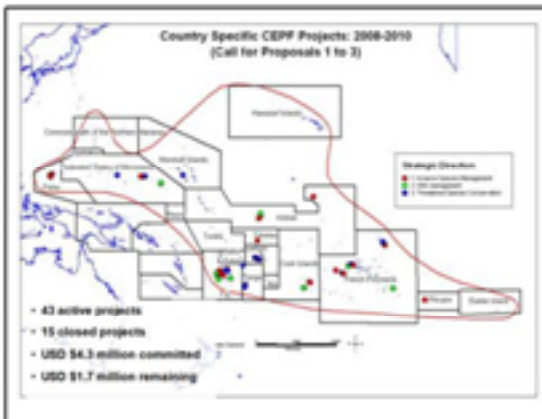
## CEPF Mid-term Review Conference



### Highlights so far

- 43 active projects, 15 closed projects; 37 different grantees; 11 PICTs
- Progress on target relative to milestones
- Most projects are cross-cutting with multiple benefits or outcomes
- Invasive species management projects completed or underway in more than 14 sites
- Conservation effort on 22 species including 9 species recovery plans under development
- More than 20 sites with improved conservation
- 8 projects related to capacity building for grantees- eg training, networks, technical support, info dissemination etc
- 10 lessons learned documents published
- This conference!

A vertical strip of small images showing various conservation activities and species, including a bird, a tree, and a person working in a field.



### Future Priorities and Challenges

- Fill gaps in the investment portfolio-eg PICTs not represented, site conservation effort gaps, species under-represented
- Capacity building of grantees, especially smaller NGOs
- Reduce timeframes for project contracting, especially large grants
- Dissemination of project findings more broadly
- Human livelihood linkages with projects
- Sustainability- ie maintaining funding and momentum, post 2013...

A vertical strip of two photographs: the top one shows a white bird perched on a green branch, and the bottom one shows a bright orange butterfly on a flower.

**Annex 6 – Presentation: Gap Analysis of the CEPF investment programme in the Polynesia-Micronesia hotspot and future grant funding opportunities, Leilani Duffy, Conservation International**



### Key Points to discuss

- 1. Brief summary of the Gap Analysis:**
  - > Highlighting the gaps in the Polynesia-Micronesia hotspot
  - > Update of progress in addressing objectives as stated in the Logical Framework
- 2. Portfolio overview:**
  - > Grants committed by Strategic Directions (Large / Small)
  - > Investment in the Polynesia-Micronesia hotspot per country
  - > Portfolio Status by Strategic Directions (approved/pending/decline)
  - > Grants portfolio for active grants pending grants & closed (Large Grants)
  - > Grants update for Territories and Non-Territories
- 3. Conclusion – way forward**

### Brief summary of the Gap Analysis highlighting the gaps;

- Identify gaps in the portfolio of grants for the Poly-Micro hotspot since inception of the current CEPF investment for the Pacific region, September 2008;
- Analysis considers both the spatial and thematic distribution of funds in relation to the investment strategy or Ecosystem Profile;
- Informs the focus of grant making in the CEPF funding windows in the PM hotspot, starting with the 3<sup>rd</sup> Call for Proposals, March 2010;

### Update of progress in addressing objectives as stated in the Logical Framework

Objective	Intermediate outcome indicators Year - 3	Progress
Invasive spp have been prevented, controlled or eradicated from priority KBAs	# sites containing KBAs free of IS increased	5 KBA sites with projects to control / prevent the increase of IS, 1/5K projects
	Hotspot strategies to prevent IS from establishing new areas	4 CEPF supported projects with invasive spp strategies developed
	Rapid response program to respond to sightings of IS	2 emergency small grants awarded to address sightings of invasive
At least 15 000 projects implemented by the end of the funding period	Action taken by civil society to implement at least 10 000 projects	25 invasive spp projects supported by CEPF, 2 = closed projects small grants
Conservation status of a prioritized set of KBAs is improved	# of protected areas with strengthened protection & management	20 KBAs supported by CEPF strengthened protection & mgmt
	# of hectares of KBAs with strengthened protection & mgmt	Information yet to be generated through the METT tools, questionnaire
	# of newly established reserves or expanded protected areas	Information yet to be generated through the METT tools, questionnaire

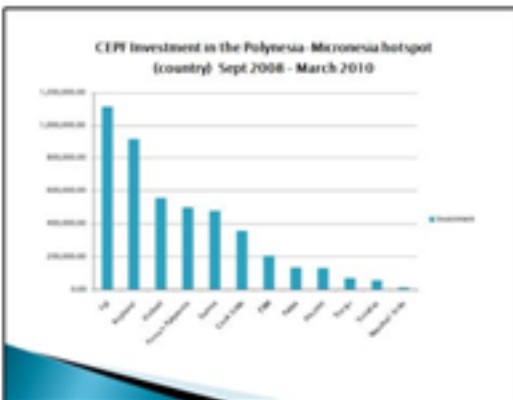
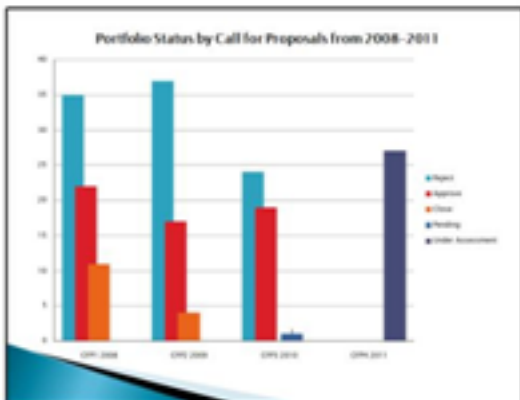
## CEPF Mid-term Review Conference

Cont'd

Objective	Intermediate outcome indicators Y1 - 3	Progress
Action taken by civil society to strengthen protection of at least 50% of priority sites by the end of funding period	Action has been taken by civil society to safeguard at least 35 % of priority sites	20 KBAs, strengthen protection which is about 33%. Need to cover 10 more KBAs in the next funding cycle
A prioritized set of threatened spp are restored & have effective conservation safeguards	Effective stewardship of biodiversity & ecosystem services by indigenous & local communities enabled local areas	29 projects which directly shows effective stewardship of biodiversity & ecosystem services by indigenous & local communities
	# of projects outside protected areas / conservation mgt	38 projects supported by CEPF outside protected areas
	# of targeted communities involved in managing/preserve use of natural resources etc	23 projects which targets communities involved, and within some of these projects there are more than one local communities targeted
Action taken by civil society to safeguard at least 50% of priority spp by the end of funding period	Action has been taken by civil society to safeguard at least 35% of priority spp	20 CEPF priority species are covered in projects either under SD-0 or SD-3, therefore about 33%. Need 10 more CEPF priority species projects.

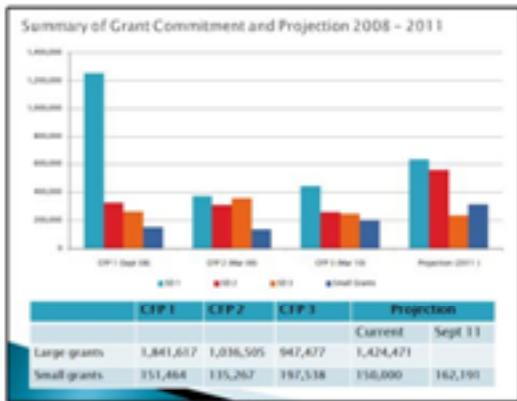
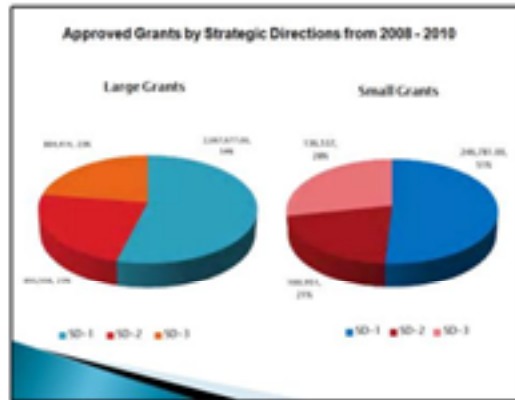
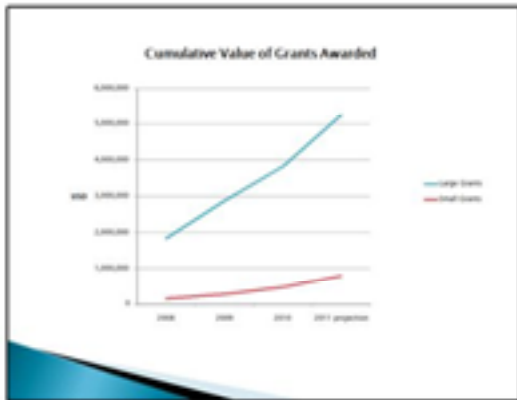
Portfolio overview - CEPF Poly-Micro Budget Current Expenditure and Future

Total number of active projects Small & Large grants	Small Grants - 14 active grants Large Grants - 29 active grants
Total number of closed projects	Small Grants - 13 projects Large Grants - 2 projects
Total Funding Envelope	6,046,530.00 USD million
Total Amount Committed to projects Sept 2008 - March 2010	4,309,868.00 USD million
Remaining Funds for Small Grants (CFP 4 & CFP 5)	312,191.00 USD
Projected to be committed in the current round CFP-4	1,424,471.00 USD million





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### CEPF Grant Allocation for Pacific Territories

<b>Total Small Grants Allocation</b>	<b>790,400,000 USD</b>	<b>Pacific Territories include:</b>
Non-Pacific Territory	500,000,000	
Pacific Territory Allocation	110,000,000	
<b>Total Large Grant Allocation</b>	<b>1,270,000,000</b>	
Non-PT	4,300,000,000	1. French Polynesia
PT Allocation	807,000,000	2. Tokelau Island
<b>Current Expenditure for PT Small Grants Allocation</b>		3. Pitcairn Island
Total Allocation for PT SG	110,000,000	4. Easter Island
PT Commitment for CIP 2 & 3	55,000,000	
<b>Remaining Balance</b>	<b>27,000,000 USD</b>	
<b>Current Expenditure for PT Large Grants Allocation</b>		
Total Allocation for PT LG	807,000,000	
PT Commitment for CIP 2 & 3	630,000,000	
<b>Remaining Balance</b>	<b>210,000,000</b>	

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### Conclusion – way forward

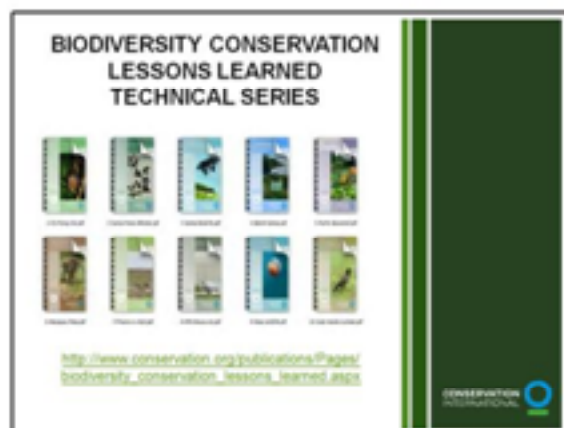
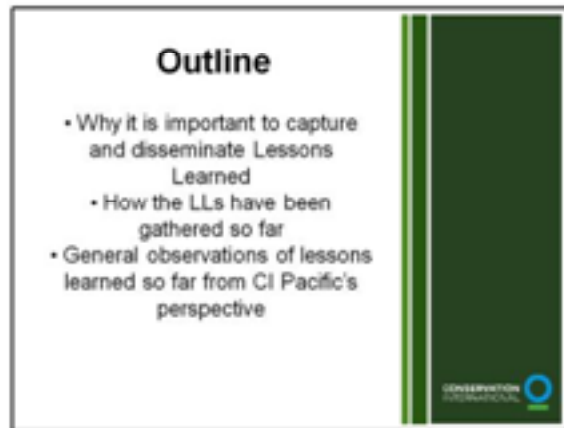
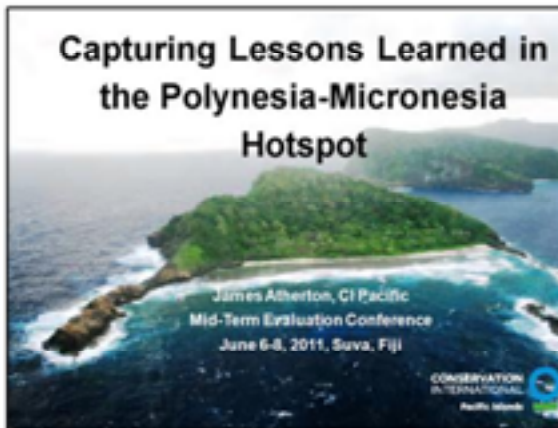
- CI-Pacific RIT has achieved many successes for the CEPF programme;
- Grant portfolio is on target for achieving milestones as set out in the project doc etc;
- Supporting 48 country specific projects in 11 PICs and 10 Regional projects;
- CI-Pacific RIT in partnership with CEPF expects to commit 1.4million;
- This mid-term evaluation is very critical for the RIT ;because the outcomes will shape the

### Small Grants Reporting Tips

- Project duration – always give yourself enough time to carry out the project to avoid extensions
- Foreign exchange rates – always used the rates given by your local bank on the date you receive funds from CI
- All funds must be spent within the timeframe of the project
- Know your expense categories



**Annex 7 - Presentation: A summary of the lessons learned from feedback and reports already received from CEPF grantees, James Atherton, Conservation International**



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### Capturing lessons learned

- Project completion reports- hosted on CEPF website:
  1. Conservation Impacts
  2. Results by Project Components
  3. Lessons Learned

*Project Design Process:*  
*Project Implementation:*  
*Other lessons learned relevant to conservation community:*

  4. Additional Funding
  5. Sustainability/Replicability
  6. Safeguard Policy Assessment
  7. Performance Tracking Report Addendum
- Questionnaire sent out to grantees last October asking for key lessons learned...



### Some Lessons Learned from CI's perspective Project Design Phase

- More time needed than you think is necessary
- Project needs to be well planned, focused with clarity of purpose and clear achievable goals
- Good collaboration with Govt agencies and relevant partners is critical
- Community participation and responsiveness to local need and information is required, but community assumptions must be understood and managed
- Allow for worst case scenarios in budget
- Build on prior work successfully completed
- Need an active partner in country; often Government
- Flexibility and adaptability are needed to achieve better outcomes



### Project implementation

- Good collaboration with Govt agencies and relevant partners is critical
- Promotions and outreach and consistent communication with partners
- Trial and error- learn by doing
- Clear management structure and roles and responsibilities for all partners is needed
- Community engagement and involvement is required, ideally with clear community benefits
- Good facilitation techniques are needed, especially for workshops
- Clear and regular communication amongst partners is key
- Knowledgeable staff or advisers need to be identified and involved
- Monitoring effort and progress is important



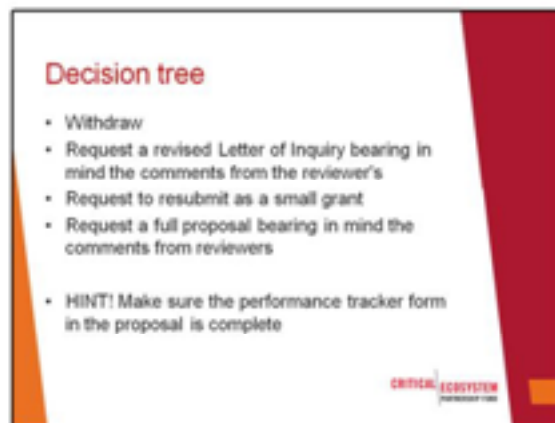
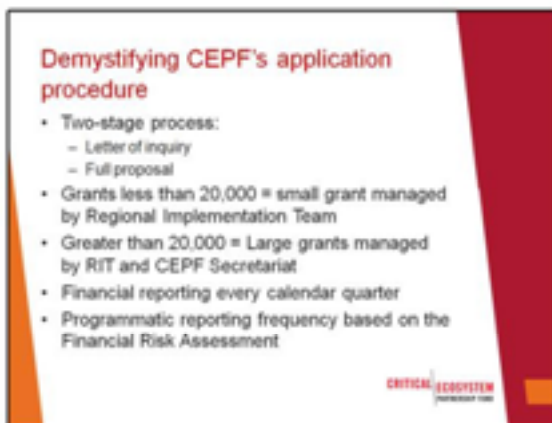
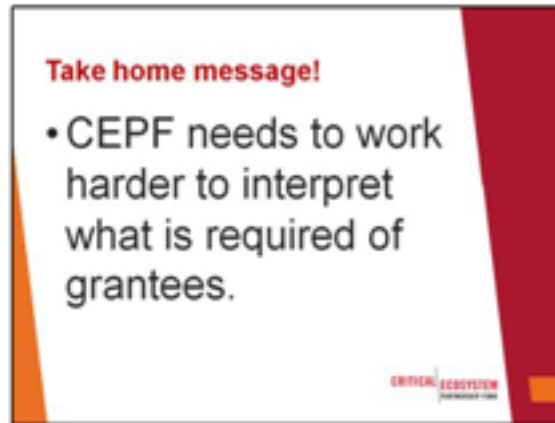
### Other lessons learned

- Use local skills, as much as possible
- Implement the project slowly
- Obtain appropriate approvals/letter of support from relevant bodies
- Use calls for expressions of interest to obtain relevant professional skills
- Integrate between marine and terrestrial work
- Academic theory and practical implementation are often very different
- Lack of NGO capacity to implement and manage projects is a key problem
- Delays in contracting have been an issue, but donor flexibility in budgets and timelines has been valuable
- Communication with the donor is very important

*Now, breakout groups to tease out lessons learned including practical recommendations to apply them...*



**Annex 8 - Presentation: Financial and Technical Reporting to CEPF – an overview and tips (do's and dont's). John Watkin.**



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### From the CI agreement

- International Bank for Reconstruction and Development (IBRD) Safeguard Policies,
- Conflict of interest policy
- Prevention of corrupt and or fraudulent practices
- Anti-terrorist financing rules and
- Procurement Guidelines
- Annual independent audit if required

These are all described in the annexes and standard provisions

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### World Bank Safeguards

Specifically:

- Environmental Assessment
- Natural Habitats
- Forests
- Pest Management
- Physical Cultural Resources
- Involuntary Resettlement
- Indigenous Peoples

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### Programmatic reporting

- Submit on time or even early
- Include relevant details on project activities
- Consider Communications opportunities
- Include electronic "products" or additional documents and images!
- Forward any media coverage of the project
- Update the Next Period Planned field with any changes in project activities

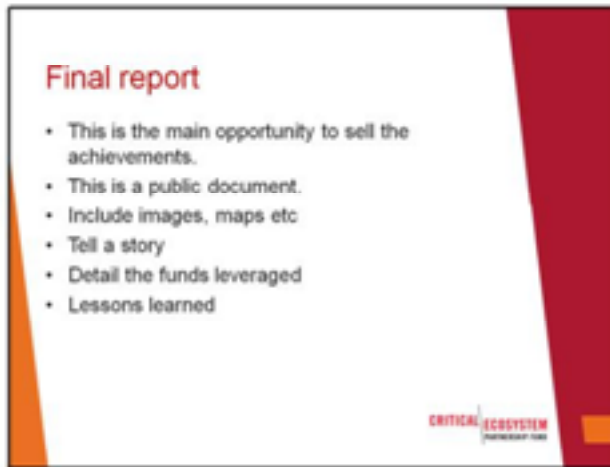
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### Financial Reporting

- Ensure the amounts reported by budget line coincide with the institutions accounts
- Add "comments" on the accounts as necessary
- Grantees can reallocate up to 15% of the total project budget between budget lines without an amendment
- CEPF withholds 10% of the total funds until final narrative and financial reports are approved
- Any item over US\$ 5,000 needs a minimum of three quotes
- No single item can cost more the US \$ 50,000
- Address exchange rate issues in the report

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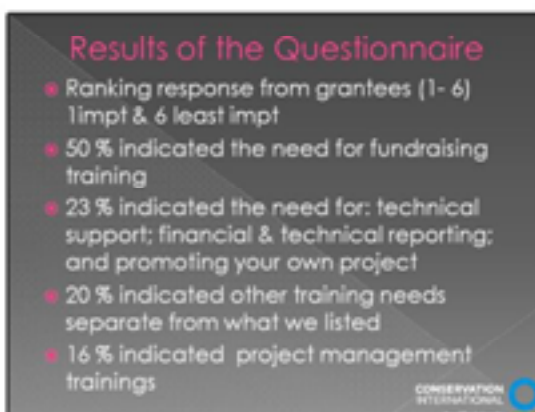
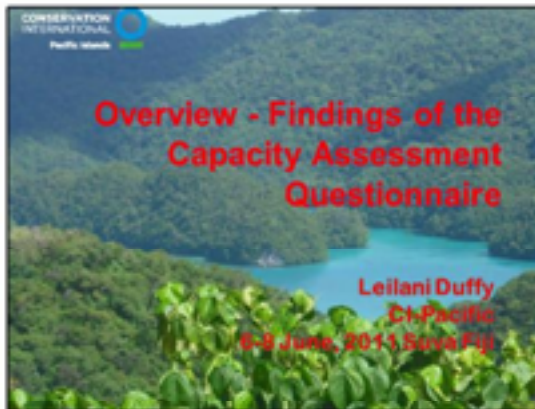


**Final report**

- This is the main opportunity to sell the achievements.
- This is a public document.
- Include images, maps etc
- Tell a story
- Detail the funds leveraged
- Lessons learned

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## Annex 9 - Overview of the findings of the Capacity Assessment Questionnaire, Leilani Duffy, Conservation International

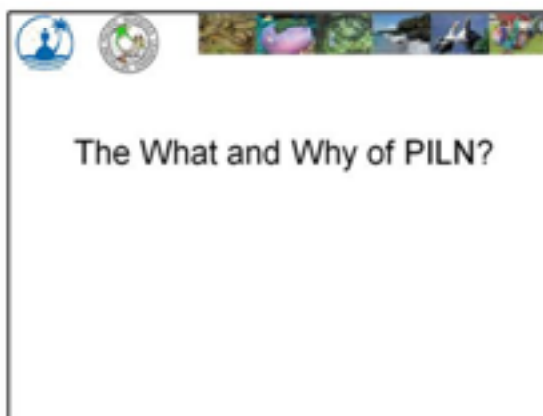
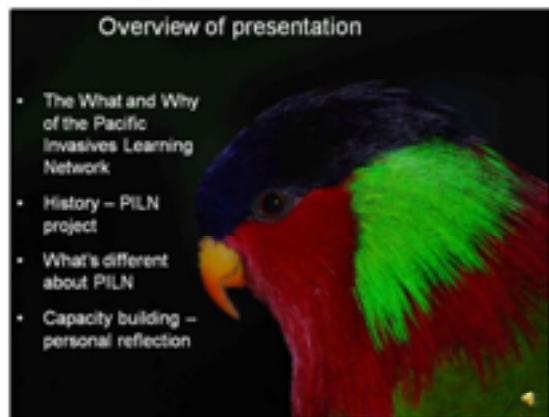
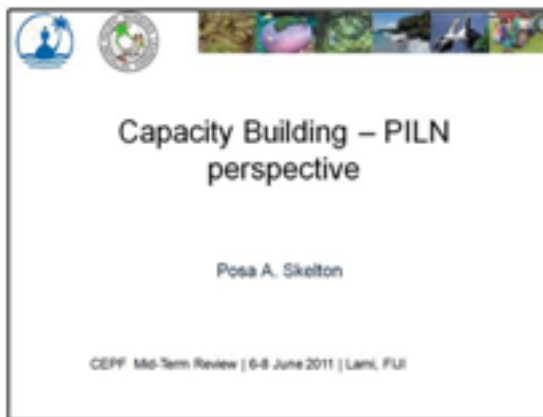






### Expected outcomes for this exercise

- *Share capacity needs and identified opportunities to build capacity through:*
  - networking with relevant partners
  - establishing partnerships to exchange expertise and information sharing
  - developing a project idea with a specific training need/s that could be funded by CEPF or any other donor

**Annex 10 - Capacity-building Opportunities in the Context of the Pacific region – PILN and PII, Posa Skelton, Souad Boudjelas and Alan Tye, SPREP**




## CEPF Mid-term Review Conference



### The What and Why of PILN

Island situation exacerbated by:

- Limited human capacity
- Limited resources
- Lack coordination (national/regional)
- Lack of policies, information & legislation
- Geographic and Professional isolation



### Pacific Invasives Learning Network is a peer-learning network for south-south cooperation on biodiversity for development



- Countries requested its set-up in 2003; established in 2004 at the 15<sup>th</sup> SPREP meeting
- Coordinator recruited and 8 partners (TNC, CI, SPREP, SPC, Palau Office of Environmental Response and Coordination, ISSG, USP and USDA Forest Service) agreed to collaborate on a 2-year pilot project

Goals:

1. Strengthen Capacity
2. Demonstrate on-the-ground action
3. Work cooperatively at the local/national level
4. Collaborate at the regional level



### How PILN works



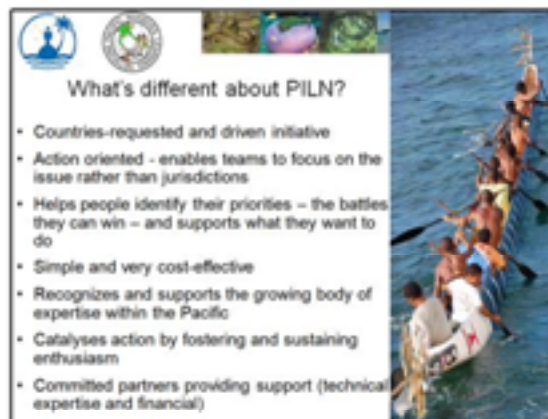
- Dedicated Network Coordinator
- Forming multi-sector and multi-agency teams
- Doing on-the ground projects and learning from each other and sharing knowledge
- Dedicated support network and partnership (PIP and PII)

## CEPF Mid-term Review Conference




**PILN's Capacity Building activities**

- Face-to-face Network meetings (building trust)
- Targeted workshops and training events (address capacity needs/gaps)
- Learning Exchanges (sharing experience)
- Country visits & technical support (engaging experts)
- Strategic action planning (team building and ownership)
- Communicating successes (Information sharing and motivates others)



**What's different about PILN?**

- Countries-requested and driven initiative
- Action oriented - enables teams to focus on the issue rather than jurisdictions
- Helps people identify their priorities – the battles they can win – and supports what they want to do
- Simple and very cost-effective
- Recognizes and supports the growing body of expertise within the Pacific
- Catalyses action by fostering and sustaining enthusiasm
- Committed partners providing support (technical expertise and financial)



**Identified areas for capacity building**

- PILN coordinator was tasked with capacity building in 5 specific areas:
  - Rat eradications in tropical environments
  - Weed management
  - Marine invasive species
  - Strategic planning
  - Social marketing



**PILN and the Future**

- Strategic planning and expansion in the Pacific region:
  - Sub-regional teams: e.g. Micronesia Regional Invasive Species Council
  - Explore opportunities with other initiatives: e.g. Coral Triangle Initiative (linkage with Asia?)
- Linking with other global island network – Asia, Indian Ocean and Caribbean (Helping Islands Adapt)
- Work-planning with partners



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### Matrix

Capacity Gap	Rank	Organization	Potential Solution
Species (bird) survey	1	Tonga Community Development Trust	Birdlife?
Capture techniques for birds	4	David Butler Associates Ltd - Samoa	Durrell?
PIT Tag technology/application/compliance with animal ethics...	1	Fiji Nature Conservation Trust (Nature/Fiji-Manager/VIS)	
Inventory monitoring of birds	4	Marshall Islands Conservation Society	Birdlife?


- 
- ### Session Outputs
- Capacity needs shared and opportunities identified
  - Grantees received practical training in fundraising, financial technical reporting and promotion of project findings [how?]

#### About Capacity Building

**Paddling a V8 Canoe**

- i) Clarify each person's roles and responsibilities before start of race (stroker, steerer, paddlers)
- ii) Paddlers are the strongest team members and must be seated in the middle of canoe (3-5). Key is biceps/tricep strength - responsible for canoe's speed
- iii) Stroker sits in the front (1) - needs strength but more endurance. Responsible for setting/keeping the pace and
- iv) Steerer sits at rear (6) - responsible for maintaining a straight course

- 1 - stroker/pacer
- 2 - stroker assistant
- 3 - engine
- 4 - engine/armour guard
- 5 - engine/steerer assistant
- 6 - steerer




#### About Capacity Building

**Individual level** - conditions for personal development; articulate role/responsibility;

**Team level** - working together as one!

**Organizational level (club level)** -

- 1 - stroker/pacer
- 2 - stroker assistant
- 3 - engine
- 4 - engine/armour guard
- 5 - engine/steerer assistant
- 6 - steerer



**Annex 11 - Presentation: Funding Opportunities for Conservation in the Pacific Region – GEF PAS, GEF 5 and some general pointers on fundraising. Dr Greg Sherley, UNEP**



**"Finance: Tips for Countries and Partners"**

Critical Ecosystem Partnership Fund Micronesia Polynesia  
Hotspot mid term evaluation meeting

Novotel Hotel, Suva, 6 to 8 June 2011

Prepared by Greg Sherley,  
UNEP Task Manager



**Outline**

- Global Environment Facility Trust Fund (GEF TF)
- Co-financing and costed In-kind support
- General recommendations



**GEF Trust Fund**

- What is the "GEF Trust Fund"?
- "Windows" = Biodiversity; Land degradation and deforestation; Climate Change Mitigation → "STAR" allocations to countries for the "GEF 5"
- GEF structure oscillates between "programmatic" and "project"



**GEF TF funded projects - key considerations 1**

- Must align with:
  - current GEF policy documents (which arise in theory from current convention Conference of Parties decisions and GEF Council directives)
  - Country priorities (e.g. National Biosafety Strategy Action Plans)



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 **GEF TF funded projects - key considerations 2** 

- Should have:
  - Country Government formal endorsement
  - Measurable tangible outcomes/ outputs/ activities
  - Co-finance and in-kind support at a ratio of at least two to one (final policy pending)



 **Co-financing** 

Co-financing consists of those resources without which the GEF objectives could not be met.

In particular, note that:

- (a) Finance for baseline activities is included in the definition only when such activities are essential for achieving the GEF objectives and are managed as an integral part of the same project, which would be described in the project document (eg. a supplementary waste audit to help fine tune a waste strategy).
- (b) Resources that are not committed as part of the essential financing package at the outset, but which are mobilized subsequently are *not* included as "co-finance." Such leveraged resources are nevertheless important and will be also be tracked.

Taxes and duties are not economic costs of the project, and so taxes and duties that are waived by the Government are not included as financing.



 **In-kind "co-financing"** 

Where it is necessary to include resources "in kind" to meet minimum co-financing ratios, those resources must be accounted for with the same diligence as financial resources. In-kind resources should be:

- Dedicated uniquely to the GEF project (eg the time dedicated by a government paid officer to project matters ie. x days per week over the time of the project);
- Valued as the lesser of the cost and the market value of the required inputs they provide for the project; and
- Monitored, with documentation available for any evaluation or project audit.



 **General Recommendations about financing (GEF) projects 1** 

- Plan first - don't retro-fit a project into a "GEF" model
- Use a classic log-frame approach (apriori)
- Ask - "does this project suit GEF funding?"
- Time frame - will the project's aims be complete by the end of the funding cycle?
- Do payment schedule, resourcing project activities, cash flow requirements all align?



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 **General Recommendations about financing (GEF) projects 2** 



- Is the project over-ambitious relative to the level of funding?
- Is the project leveraged to the maximum against similar projects?
- Has someone knowledgeable been consulted properly?
- Have the "best" Implementing and Executing Agencies been involved?



 **General Recommendations about financing (GEF) projects 3** 


- Market your project as if it is answering the prospective funder's objectives so it is something THEY want
- Endowment Trust Funds - establish these where ever possible



 **Additional "tips"** 

Recognizing that all countries have been provided a guide to calculating co-financing, some overarching suggestions:-

- 1) Utilise your government budgets and annual expense reports to quickly calculate co-finance of contributions that directly benefit the project delivery
- 2) Do approach facilities, whether private or public sector, to do a similar kind of assessment of their budgets if they are participating in the project
- 3) Do make sure to work with your accounts department and Treasury to you are able to account for, monitor, or audit all funds/expenses under the project, whether co-finance or GEF funding
- 4) Where in-kind staff time is being costed, do try to use the exercise to identify project technical focal points, and the number of days a week they will be dedicated to the project. This makes tracking of co-finance far easier in reporting.





**Annex 12 - Presentation: GEF Small Grants programme, Katarina Atalifo, UNDP**



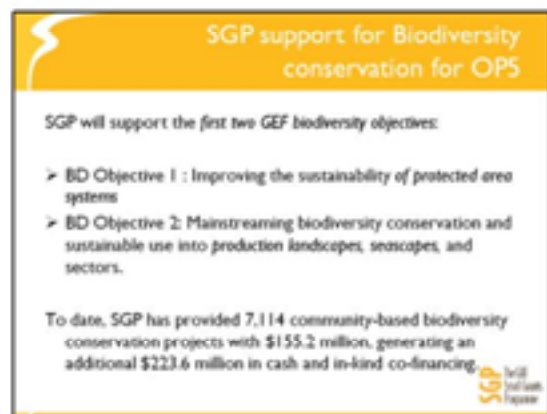
Slide 1: GEF Small Grants Programme. The slide features a yellow header with the GEF logo and the UN logo. The main text reads: "GEF Small Grants Programme" and "Funding opportunities under SGP for Biodiversity Conservation Activities in community". The SGP logo is in the bottom left corner.



Slide 2: SGP OPS Goal. The slide features a yellow header with the text "SGP OPS Goal". The main text reads: "Global environmental benefits secured in the GEF focal areas through community-based initiatives and actions." The SGP logo is in the bottom right corner.



Slide 3: Community & Local Ownership. The slide features a yellow header with the text "Community & Local Ownership". The main text reads: "Global environmental problems can best be addressed if local people are fully involved in project design and formulation, have strong ownership of the activities undertaken through a "demand-driven" approach, and that direct socioeconomic benefits will accrue to communities during project implementation." A bullet point states: "It should be re-emphasized that the SGP seeks impact-level results contributing to global environmental benefits." The SGP logo is in the bottom right corner.



Slide 4: SGP support for Biodiversity conservation for OPS. The slide features a yellow header with the text "SGP support for Biodiversity conservation for OPS". The main text reads: "SGP will support the first two GEF biodiversity objectives:" followed by two bullet points: "BD Objective 1 : Improving the sustainability of protected area systems" and "BD Objective 2: Mainstreaming biodiversity conservation and sustainable use into production landscapes, seascapes, and sectors." A paragraph states: "To date, SGP has provided 7,114 community-based biodiversity conservation projects with \$155.2 million, generating an additional \$223.6 million in cash and in-kind co-financing." The SGP logo is in the bottom right corner.

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**SGP OPS Objective 1: Improve sustainability of protected areas and indigenous and community conservation areas through community-based actions**

- The SGP will support communities and the CBD protected areas Program of Work by working at the community-level to promote community conservation areas and indigenous protected areas, increase their recognition and support at the national level, improve their effectiveness in conserving biodiversity, and ensure the generation of local benefits, which are critical for the success of protected areas.





**Potential activities for funding under BD Objective 1 :**

- development and improvement of management frameworks,
- the promotion and recognition of CCAs and indigenous protected areas in national systems of protected areas
- the development of communities' capacity to apply protected area approaches.



**Possible Outcomes- ICCAs**




- Adoption/initiation of ICCAs (100 ICCAs)
- Consolidation for landscape level conservation
- PAs influenced
- Community-involvement in conserving species of endangered flora and fauna

**SGP OPS Objective 2: Mainstream biodiversity conservation and sustainable use into production landscapes, seascapes and sectors through community initiatives and actions**

To support the sustainable use of biodiversity, the SGP will promote the mainstreaming of biodiversity friendly practices in production landscapes and seascapes, through measures such as :

- organic certification for community level and small-scale producers of biodiversity-based products;
- improved community-based resource use of non-timber forest products;
- and community level enforcement measures in near shore fisheries.




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### Potential Activities for funding under BD Objective 2 :

Activities that depend on biodiversity resources will be addressed, including:

- agriculture,
- fisheries,
- forestry,
- and tourism

( SGP has an established history of supporting a range of biodiversity-based sustainable products in these sectors).



### Possible Outcomes 2 – Sustainable use

- Projects on sust. use and market labeling, including ecotourism
- Projects for protection of native crops, medicinal plants
- Projects in agrobiodiversity hotspots



### What constitutes a good SGP proposal?

- Community involvement
- Baselines
- National BD Frameworks/Policies are consulted
- NGO – technical input/administration aspects
- Knowledge management
- Livelihoods addressed
- Best Practice



### Ways forward – SGP /CEPF collaboration

- Sharing of best practice and ongoing lessons
- Sharing grantee /partner list
- Strengthened engagement with SGP Secretariat in Micronesia / Polynesia countries
- CEPF contribution to SGP Country Programme Strategy (CPS) document – particularly in BD Focal Area



**Annex 13 – Notes from Presentation: Save our Species Programme, Valerie Hickey, World Bank**

- Same application format as CEPF – contact IUCN before you write up proposal
- Private-sector funded (species-related BRANDS)
- IUCN-managed (IUCN SSG vetted)
- Rapid grant – anything on Red List
  - < \$25K
  - Decision (yes/no) in one month
  - 12 month project timeframe
- Birds - \$25-100K for two years
- CALL FOR PROPOSALS DUE NEXT WEEK!!!
  - \$10M USD
  - Closes mid-July
- Categories of fauna where funding is available:
  - Asian / African Mammals
  - Threatened amphibians
  - Critically Endangered birds
- Excluding French territories
- Next Donor Council Meeting 6 months

**Annex 14– Presentation: The Do's and Don'ts of Fundraising, Nick Askew, Birdlife Interational**

**Fundraising:**  
*How to develop a good idea and think like a donor*



- Developing a project idea
- Different type of donor
- Identifying donors
- Building a proposal

Dr Nick Askew – BirdLife International

**Match the donor**



*Think like a donor...*

**The Moneybags Fund**

**Your mission:** "Provide funds for individuals working on pioneering projects to conserve the natural environment and sustainably improve local people's livelihoods"

**Budget:** Fund projects up to US\$ 50k over 2 years.

**Region:** South Pacific wide.



*Think like a donor...*

**Askew Atoll – The Environment Society**



*Think like a donor...*

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### The Moneybags Fund



**Your mission:** "Provide funds for individuals working on pioneering projects to conserve the natural environment and sustainably improve local people's livelihoods"

**Budget:** Fund projects up to US\$ 50k over 2 years.

**Region:** South Pacific wide.

*Think like a donor...*




**Doesn't match donor – Individuals only**

**What's the problem?** Noddy decline (is it threatened?), reef protection (does it need it?), DNA analysis...

**Poor project design – unsustainable livelihood, mongeese, unrealistic activities for budget...**


*Think like a donor...*



### Start with the problem



*Focus on the problem...*

**Problem...**


**Causes & effects...**

**Project purpose...**

**Objectives & outcomes...**

**Finally ... activities**

*Focus on the problem...*



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### Different types of donors



**Governments**  
Bi-lateral - AusAid, NZAid, Darwin (UK)...  
Multi-laterals - EC, GEF 5, UNDP, UNEP...

**Foundations & Trusts**  
Aage V. Jensen, MacArthur, David and Lucile Packard, CEPF...

**Corporations**  
Ford, Mitsubishi, Toyota, Shell, Exxon


**Individuals**  
Wealthy people, groups, membership schemes, events, appeals



### Different types of donors

	Governments	Foundations & Trusts	Corporations	Individuals
Large grants	X	X	X	
Donor support beneficial	X			
Clear guidelines	X	X		
Money may not be project tied				X
Regular income (appeals, membership, events...)				X
Able to provide skills, contacts, influence...				X


*Advantages...*



### Different types of donors

	Governments	Foundations & Trusts	Corporations	Individuals
Complex application & extensive reporting	X	X		
Payment can be slow & require co-funding	X			
Can change their priorities frequently		X	X	
Need for due diligence			X	
Events, appeals, membership schemes require extensive management				X
Donors require regular feedback			X	X

*Disadvantages...*



### Identify Suitable Donors



**Hot** – Currently funding your projects  
**Warm** – Funded your work in the past  
**Cold** – Funds similar projects of others (internet searches, annual reports, word of mouth...)

*Think like a donor...*



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### Identify Suitable Donors



<p><b>Do your research</b></p> <ul style="list-style-type: none"> <li>• Funding amounts</li> <li>• Timeframe for funding</li> <li>• Objectives</li> <li>• Eligibility requirements</li> <li>• Previous projects</li> <li>• Deadline</li> </ul>	<p><b>Moneybags Fund</b></p> <p>\$50k</p> <p>2 Years</p> <p>...to conserve the natural environment and sustainably improve local people's livelihoods.</p> <p>South Pacific, Individuals</p> <p>??</p> <p>??</p>
--	--

*Think like a donor...*



### Fundraising:

*How to develop a project idea and think like a donor*



- Developing a project idea
- Different type of donor
- Identifying donors
- Building a proposal

[Nick.askew@birdlife.org](mailto:Nick.askew@birdlife.org)



### Group session – 1 hour

The aim is to develop a proposal which suits the CEPF funding criteria. See sheets.

- Groups to choose a project idea which is suitable for CEPF funding. (Project board for details).
- For the chosen project, the group are to choose a central problem.
- Then brainstorm the causes and effects to build a problem tree.
- Turn problem tree into the objective tree, with project purpose, objectives (below) and outcomes (above).
- Choose your project strategy
- Develop a 5 minute pitch to present to CEPF for funding.



### Governments



bi-lateral: AusAid, NZAid, Darwin (UK)...

multi-lateral: EC, GEF 5, Asia Development Bank, UNDP, UNEP...

<p><b>Advantages</b></p> <ul style="list-style-type: none"> <li>• Large grants</li> <li>• Useful for policy work.</li> <li>• Project gets Gov. support.</li> </ul>	<p><b>Disadvantages</b></p> <ul style="list-style-type: none"> <li>• Complex bureaucratic two-stage application process.</li> <li>• Payment can be slow and require co-funding.</li> <li>• Little flexibility.</li> <li>• Expensive and onerous reporting requirements.</li> </ul>
--	--




*Different types of donor...*






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**Large foundations** 

Age V. Jensen Foundation, MacArthur Foundation, David and Lucile Packard Foundation, CEPF...

<b>Advantages</b>	<b>Disadvantages</b>
<ul style="list-style-type: none"> <li>• Large grants</li> <li>• Staff professional and understand the issues</li> <li>• Clear guidelines on funding and application process.</li> </ul>	<ul style="list-style-type: none"> <li>• Application and reporting process can be lengthy.</li> <li>• Priorities can be personal and reflect the members of the board – may change.</li> </ul>

 *Different types of donor...*

**Small foundations** 

Disney Wildlife Conservation Fund, Mohammed Bin-Zayed Fund, GEF SGP, Rolex Award etc...

<b>Advantages</b>	<b>Disadvantages</b>
<ul style="list-style-type: none"> <li>• Allow for a more personal approach</li> <li>• More flexible and simple application process and funding.</li> </ul>	<ul style="list-style-type: none"> <li>• Some staff not always as informed as other funders.</li> <li>• Small amounts of money.</li> <li>• Application and report can be as onerous as larger funders.</li> </ul>

 *Different types of donor...*

**Large Corporate Foundations** 

Ford, Mitsubishi, Toyota, Shell, Exxon... Vodafone, Fiji Water, FEA, Coaltiz.

<b>Advantages</b>	<b>Disadvantages</b>
<ul style="list-style-type: none"> <li>• Can be large grants</li> <li>• Staff professional and understand the issues</li> <li>• Usually clear on what they want from the arrangement.</li> </ul>	<ul style="list-style-type: none"> <li>• Can change their priorities frequently.</li> <li>• Contractual agreements can be cumbersome.</li> <li>• Expect a lot of donor care and profile for their money.</li> <li>• Need for due-diligence.</li> </ul>

 *Different types of donor...*

**Individuals** 

Wealthy people, groups, membership schemes, events, appeals etc...

<b>Advantages</b>	<b>Disadvantages</b>
<ul style="list-style-type: none"> <li>• Money may not be project-tied – core.</li> <li>• Can be regular income from appeals, membership, events etc.</li> <li>• People may be able to provide skills, contacts, influence and more.</li> </ul>	<ul style="list-style-type: none"> <li>• Events, appeals, membership schemes require extensive management.</li> <li>• Individual donors require regular feedback.</li> </ul>

 *Different types of donor...*

**Annex 15 - Presentation: The Do's and Don'ts of Communications, Ashwini Prabha-Leopold, Communications Consultant, Suva**

### Smart communications



By Ashwini Prabha-Leopold

### Goals for today

In a nutshell

- Basic's on communicating
- Learn to develop a communications strategy
- Know your audience
- Learn about the media
- Learn to "make" news
- Do's and Don'ts



### Random verses planned comms

- Part of the conservation strategy vs. an afterthought
- Real budget vs. scraps
- Dedicated time from an individual (% or full)
- Traditional and modern methods/tools (think outside the box)

=

Strategic communications

### Communications is hard, challenging, interesting work. Don't take it lightly.




Have a strategy/plan

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### Audience (internal and external)


- "General public" is DEAD!
- Who do you need to reach in order to do what you want to do?
- Be as specific as possible
- Think about who they listen to? What drives them?
- Appeal to your audience – motivate around something they already believe in



### Key message

Observation  
↓  
Interpretation  
↓  
Conclusion  
with/or call to action

Be clear and specific about what do you want to change or what action do you want as a result?



### What messages are

- Concepts – not slogans, soundbites, etc.
- You only get 3-4 messages for the entire outreach effort!
- You must exercise message discipline – say these messages and no others

### Comms Mix and Re-Mix

Media	Others
■ Press (radio, print)	■ Pacific region
■ Online (including social media)	- dramas and skits
■ TV	- radio is better
■ Paid media – advert	- anecdotes and stories
■ Op Eds and editorials	-church

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- Call a reporter
- Develop a relationship with a reporter
- Print (reports, letters)
- PR stunts, calls etc
- Face to face and conference calls
- Media List
- Press Materials
- Video
- Pitch letters
- Speaker tours
- Talk show outreach
- Background briefing
- Be creative!

### Who are Reporters?

- Regular people like you and me.
- Some good, some bad.
- Overscheduled, underpaid, underappreciated, young and insecure
- Reporters follow each other. It's risky to be first and often you're not rewarded for it.



### Reporters are NOT:

- Reporters are NOT experts!
- Reporters are NOT perfect!
- Reporters are NOT your friends!
- Reporters are NOT lemurs!



### What is news?

- Editors and reporters look for "news?"
- Newsworthiness
- Interesting
- Unexpected
- Has direct relevance to people's lives



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### You MUST give reporters the story

- Goes back to reporters not being experts
- You must tell reporters what the story is
- DONT leave it to them to infer what it is.
- Do NOT be subtle (Don't be shy)

### Reporting is an imperfect art

- Limited space
- Room only for the basic facts
- Facts, quotes, anecdotes, etc. all represent the entire issue and all the subtleties involved. That's hard to do!

### 10 rules for working with the press -- effectively and enjoyably

- **Be available.** If you want to be seen as an expert, you have to make yourself available. Find out what the deadline is and call back in plenty of time.
- **Assume you're always on the record – because you are.** As soon as someone tells you they're a reporter, everything you say is fair game to be quoted.
- **Give them what they want.** It's OK to ask what the story's about, what their deadline is and what they're interested in getting from you.
- **Never lie.**
- **Respect reporter-source confidentiality.**

### 10 rules ....

- **Make your point with stories.** You have amazing ones from places most people will never see, so share them – in language your Aunt Betty would understand.
- **Remember: important doesn't equal newsworthy.** The press may not be interested in your work no matter how important it is. Accept this.
- **Understand that reporters are not cheerleaders.**
- **Simplify, simplify, simplify.** Reporters must simplify your info for a lay audience, so it's better if you simplify it for them.
- **Know when to complain.** And when to let a mistake go.


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### Gold rules

- Prepare, prepare, prepare
- Repeat, repeat, repeat (key message)
- Practice, Practice, Practice (presentation and interviews)

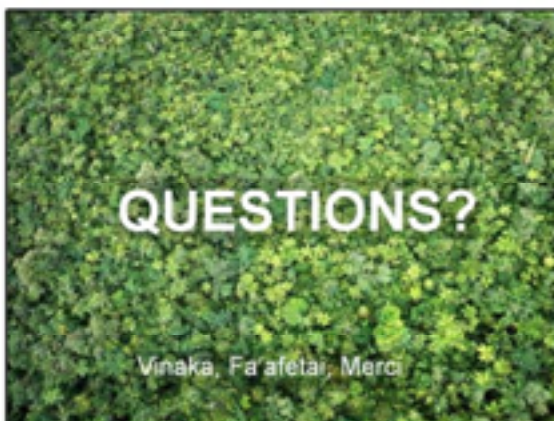


### Be bold, be heard and KIS



By Ashwini Prabha-Leopold  
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+670 9268016

**Annex 16 – Presentation: Where to from Here, James Atherton, Conservation International**



## CEPF Mid-term Review Conference

### 9 Annex 17. Frequently Asked Questions for Current CEPF Grantees.

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### **1 Reporting Requirements & Grant Management**

#### **When are my reports due?**

Your reporting requirements are in your contract. If you are unsure of what a provision in your contract means, please contact your Grant Coordinator.

All CEPF grantees are required to submit quarterly financial reports, and the deadline after the end of the quarter. These dates are January 30, April 30, July 30, and October 30. The frequency of performance reporting is unique to each grant. Your final completion report and final financial report will be due 60 days after the closure date of your grant.

#### **When will I receive payment?**

CEPF will process your initial payment as soon as we receive the countersigned agreement back from you.

Subsequent payments are requested in your financial reports. The amount in "Advance Received" is what your next payment will be. This amount is calculated by subtracting your closing balance (the cash you

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have left on hand) from your projected expenditures (how much money you think you will need for the next several months)

Please allow two weeks from the time you submit your report to receive your payment. Errors in reports will need to be corrected and will cause delays in receiving your payment.

### **I will not be able to submit my report on time. Can I receive an extension?**

We cannot grant extensions to reporting deadlines as this is a contractual obligation. We understand that some delays are inevitable, but please do the best you can to report by the deadline. CEPF places high importance on timely reporting and we do track statistics on reporting compliance for each grantee. If you foresee difficulty in submitting your report by the deadline, please contact your grant coordinator, who may be able to assist you.

## **2 Workplan and Grant Agreement**

### **I need to make some changes to my project – what should I do?**

Please contact your Grant Director. Depending on the circumstances, a formal amendment to the grant agreement may need to be processed.

### **I'm about to purchase some expensive equipment that I had budgeted for. Are there any rules about this?**

Yes. Please consult the procurement guidelines in your grant agreement. CEPF closely regulates the purchases of goods and services with a cost of \$5,000 or more, and failure to comply can result in additional requirements or consequences. If you have questions about the procurement guidelines, please contact your grant coordinator.

### **I have underspent in the Supplies line item, and would like to re-allocate some of these funds to the Salaries line item, where I have overspent. Is this permitted?**

You may reallocate up to 15% of your budget between line items without prior approval from CEPF, however it is important that you let your grant director know and explain the realignment in the comments section of your report. Additionally, when redistributing the funds, please keep any programmatic implications in mind and be sure you are still in compliance with our procurement guidelines.

If you need to realign more than 15%, you need prior approval from your grant director. Please send a formal request with proposed changes to your budget.

### **The exchange rate has changed and has significantly reduced the value of my CEPF funds. Can I receive more money?**

Unfortunately, CEPF cannot fund currency exchange rate fluctuations. Please contact your grant director for help in making a plan to maximize your remaining funds. Please be sure to always document the exchange rate you are using when creating your project budget.

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**We were able to raise additional funds to contribute to this project. Where do I record this in the financial report?**

Congratulations on successfully leveraging additional funds, but only CEPF funds should be recorded in the CEPF reports. You will have an opportunity to report leveraged funding in your final completion report.

**My grant is closing. Can I apply for more funds?**

A specific amount of funds are allocated for investment in each region, which is designed to last for five years. Once all funds have been distributed and we reach the five-year mark, the region is “closed” and we no longer accept letters of inquiry.

Please check our website to see if your region is still accepting letters of inquiry. If so, you may submit another letter of inquiry for consideration. If your region is no longer accepting LOIs, please contact your grant director, as he or she may be aware of additional sources of funding that may be able to support your project.

### 3 Grant Writer

#### 3.1 *Installation and Opening Project Data-files – Offline users only*

**How come the Grant Writer data file you sent me won't open? I double-click on the file and a window appears prompting me to select a program from a list.**

Grant Writer data files cannot be accessed by double-clicking on the file. You must first launch the Grant Writer program from your Start button (Start → Programs → CEPF Grant Writer), then open the project from within Grant Writer (File → Open Project).

**I can't seem to open a data file sent by someone for me to review. I try opening it in Grant Writer and I get a message about this “not being a valid Grant Writer file”. What do I do?**

Check the extension of the file sent to you for review. If it ends in .html, it's most likely a read-only copy of a Grant Writer proposal that cannot be opened from within Grant Writer. To view a read-only (.html) version of a proposal or report, simply open the file in Internet Explorer or another web browser. Usually, just double-clicking the file will launch your browser and display the Grant Writer application for review.

**Do I have to be online (connected to the Internet) in order to work in Grant Writer?**

No, you do NOT have to be online if you downloaded the Grant Writer software and installed it on your PC. You should have everything you need to work on your proposal on your computer (the Grant Writer software and your application data file). Even though Grant Writer works through your internet browser (Internet Explorer), it is working completely offline and is writing to a data file located on your hard drive.

However, you do need to be connected to the internet to send your data file to a peer for review or to submit your application to CEPF.

**How can I start a new proposal in Grant Writer? I see an option for opening an existing project, but not an option to create a new one.**

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Grant Writer does not allow for the creation of a new project. The program can only be used to complete existing application data files sent to you by CEPF after being invited to Part 2 of our application process. The first step in requesting project funding from CEPF is to submit a letter of inquiry. For guidelines, visit <http://www.cepf.net/xp/cepf/apply/index.xml>.

### 3.2 *Application and Reporting Worksheets*

**I am trying to access the reporting worksheets from the “Forms” menu, but nothing happens when I click on the different reports. How can I access these reporting forms?**

When you are in the application phase of your project, the reporting forms are disabled and cannot be accessed. If your project is approved, CEPF will send you a new Grant Writer data file that has the reporting worksheets enabled and the application worksheets locked.

**I am currently using Grant Writer to report on an approved project, but I need to change some things in the application due to an amendment to our contract. How can I edit the application worksheets? Grant Writer doesn't seem to let me change anything.**

Grant Writer reporting files are sent to the grantee with all the application forms locked to represent the project plan exactly as it is outlined in your grant agreement. If an amendment will occur, you will be sent a new reporting data file that has been adjusted by CEPF according to the terms of your amendment. Contact your grant director if you have not received a new reporting data file.

**I have some old application templates in Microsoft Word and Excel from a previous project application. Can't I just develop my proposal using those instead of Grant Writer?**

No. Unless you were specifically told to use the Word and Excel format templates, CEPF will *not accept* applications submitted in those formats. If you received a Grant Writer data file when you were invited to Part 2 of the application process, you are expected to complete and submit your application using Grant Writer.

**Where can I find instructions for creating a well-designed proposal?**

Your installation of CEPF Grant Writer contains general information and instructions for filling out each worksheet, including guidelines for developing a sound project proposal and log frame. Anywhere you see an icon with a question mark (?), click the icon to bring up the help file for that particular section.

### 3.3 *Saving, Backing Up, Technical Requirements – Offline users only*

**Where is my grant application being saved when I use Grant Writer?**

Your application is being saved in the data file that was originally sent to you in an e-mail from [cepfsupport@conservation.org](mailto:cepfsupport@conservation.org). The data file has a .gwa extension. When you are working in Grant Writer, the program is saving your work to that data file each time you press Save.

**How can I backup or copy my grant application? I've put many hours of work into this proposal and I don't want to lose it should my laptop crash.**

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Your entire grant application or approved grant reporting information is stored in the data file for your project. The file has a .gwa extension. You can copy that data file to a floppy disk, burn it to a CD, e-mail it to a friend, or save it to your organization's network servers just like you would any other electronic file (like a Word or Excel document).

### **What are the software and hardware requirements for installing CEPF Grant Writer?**

Currently, Grant Writer is compatible with both PCs and Macintosh computers, and works with most internet browsers (Internet Explorer, Firefox, etc). It is not yet available for Windows Vista, and it may not function properly with older versions of Windows. If you experience problems, please contact your grant coordinator.

### **Grant Writer tells me I need to upgrade to a more recent version of Internet Explorer. Where can I download the current version of Internet Explorer?**

You can obtain the most recent version of Internet Explorer by visiting Microsoft's Internet Explorer download page at: <http://www.microsoft.com/windows/ie/default.asp>

## **3.4 *Sending, Submitting, and Printing***

### **How do I send a copy of my Grant Writer grant application to someone for review?**

There are two options:

First, if the reviewer simply needs to read your application and does not need to make any changes to it, you should use the File→Send to A Peer feature within Grant Write and select "A read-only copy of the application in HTML format". This will send a copy of your proposal (or whichever worksheet you designate) as a read-only HTML file. The recipient does not need to have Grant Writer installed to view your proposal – they simply need any browser such as Internet Explorer or Netscape Navigator.

The second option is suitable when you need to send your proposal to someone for them to actually edit the proposal or complete a portion of it. To send your actual data file, simply choose the File→Send to A Peer and select "My actual application data, which must be viewed using the CEPF Grant Writer software." This will send an exact copy of the data file you are currently working with, which must be opened using the Grant Writer software.

### **To whom do I send my application when I am finished with all the forms?**

Please do not e-mail the application to your grant director or to any other CEPF e-mail address unless specifically requested to do so. Rather, open your project application in Grant Writer and select File→Submit to CEPF. When the submission window appears, confirm that you are done by checking the "Yes, I am finished" box and hit "Submit". This will send your application directly into our database and is by far the best way to ensure we receive and begin processing your application. Remember, you must be connected to the internet in order to submit your application.

**When I try to submit my grant application to CEPF, I receive a message saying "A completed submission for this application is already being reviewed by CEPF" and that I can't submit again without notifying CEPF. What does this mean?**

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It means that you have previously submitted the application and it is marked as “Final” in our system. If you need to submit again because of revisions, contact your grant director. They can mark the existing submission as “Not Final” which will allow you to immediately resubmit your application.

### **When I try to submit my application or send it to a peer, a window appears that reads “Processing...” but it just stalls and never does anything. What should I do?**

There is a problem with your data file that is preventing it from being submitted into our tracking database. Usually, this problem can be resolved easily. Just e-mail [cepfsupport@conservation.org](mailto:cepfsupport@conservation.org) with a description of your problem and we will assist you with resolving it so your data file can be sent or submitted.

### **Can I export my proposal into MS Word so I can print it and send it to others?**

Grant Writer doesn't have an export feature. If you want a nicely formatted version of your proposal for printing, simply select File→Print Preview Entire Project (or Current Form if you only want to print one worksheet). The result is an html file ready-to-print. You should see a Print button on the first page, but if it is not there, just right-click anywhere on the page and choose Print.

If you'd like to send a similarly formatted version of your proposal/reports to others, select File→Send to a Peer and select “A read-only copy of the application in HTML format”. This allows you to send a read-only, formatted version of your proposal that can be viewed without the Grant Writer software.

### **How do I print a copy of my proposal?**

Select File→Print Preview Entire Project (or Current Form if you only want to print one worksheet). The result is an html file ready-to-print. You should see a Print button on the first page, but if it is not there, just right-click anywhere on the page and choose Print.

### **When I print my proposal, the boxes and frame borders that are visible on the print preview screen do not print. How can I make those print so my budget and LogFrame are easier to read?**

The lines and borders that you see on the screen are background graphics. As such, they will only print if your browser is set to print background colors and images. If Internet Explorer is your browser, open it and go to Tools→Internet Options→Advanced and scroll down to the Print section where you should see an entry for *Print Background Colors and Images*. Make sure the box next to this entry is checked, then click OK. The boxes and lines will now print with your proposal.

## **3.5 Grant Writer Online users**

### **Where is my grant application being saved when I use Grant Writer Online?**

The information you write in your online proposal or reports will be saved to our server. You will be able to access any information you saved to Grant Writer Online during a previous session when you log back in to GEM.

### **How can I get a hard copy of the Grant Writer file for my records?**

At any time you can obtain an html version of the proposal or report by using the “Send to a Peer” function. If for some reason you need the actual data file (which can only be opened by downloading Grant Writer), please contact your grant coordinator.

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**I know I submitted my Quarter 1 report on time, but when I logged in today to work on my Quarter 2 report, I could not open it because Quarter 1 was still marked as un-submitted. What happened?**

When using Grant Writer online, it is necessary to save your work at least twice – at least once before you submit the report to CEPF, and once after. You need to reopen the report you just submitted and click “save” one more time. This way, you are not only saving the data you entered, but also the successful submission of the report. Your grant coordinator can assist you with correcting this problem when you see it, but to prevent it in the future, be sure to always hit “save” even after submitting.