

## CEPF SMALL GRANT FINAL PROJECT COMPLETION REPORT

<b>Organization Legal Name:</b>	Environmental Foundation of Jamaica
<b>Project Title:</b>	Development of a Funding Landscape and Feasibility Action Plan for the Environmental Foundation of Jamaica.
<b>Date of Report:</b>	February 27, 2014
<b>Report Author and Contact Information</b>	Karen McDonald Gayle (kmcdonaldgayle@efj.org.jm)

**CEPF Region:** Caribbean

**Strategic Direction:** Strategic Direction 3.1 – Support efforts to build and strengthen the institutional capacity of civil society organisations to undertake conservation initiatives and actions.

**Grant Amount:** US\$19,990

**Project Dates:** May 1 to December 31, 2013  
(9 months; 6 months originally+ 3 month no-cost extension)

**Implementation Partners for this Project (please explain the level of involvement for each partner):**

**Blue Earth Consultants** – EFJ Consultants on International Fund Raising Opportunities  
and

**Mdk Advisory and Consulting** – EFJ Consultants on Jamaican Fund Raising Opportunities

Broadly speaking two reports were generated from this project. The first the report from Blue Earth Consultants (the consultants on international fundraising) provided us with a road map and a targeted strategy that will lead to some results in a one to three year period. The second, a report from MdK Advisory and Consulting (the Jamaican Private Sector fundraising consultants) basically concluded that the search for cash, given the economic climate in Jamaica, would not be fruitful. However, recommendations were provided as to how best the EFJ can leverage what opportunities exist for partnering with the Jamaican private sector, mainly by obtaining in kind support.

The results / recommendations from these two studies are currently being utilized by the EFJ and it is anticipated that by September 2014 at least one viable source of funding (that can help NGO groups especially in the key biodiversity areas (KBAs)) would have been secured.

## Conservation Impacts

***Please explain/describe how your project has contributed to the implementation of the CEPF ecosystem profile.***

This project specifically targeted CEPF Investment Strategy 1.4 which refers to “*support the establishment and strengthening of sustainable financing mechanisms*”.

It aimed to explore avenues for raising funds, in Jamaica and Internationally, for the Environmental Foundation of Jamaica (EFJ), the largest donor organization to the NGO community in Jamaica, especially for NGOs that work in the key biodiversity areas in Jamaica. The EFJ is well placed to create and house financial mechanisms for conservation and Biodiversity in Jamaica. They have a strong record of grant making and can demonstrate grants to the majority of the Jamaica CEPF KBAs.

In addition, the EFJ is well poised to play a pivotal role in conservation in one of the largest Caribbean islands once it has completed its current process of re-tooling itself to focus on fund-raising. This is a paradigm shift for the entity, which manages two (2) debt-for-nature swap agreements between the US and Jamaican governments, but it is a step they have already begun to embrace.

The EFJ over its 20 year history has been the largest donor organization to the Jamaican NGO community with over J\$2.5 billion or US\$39.7 million in grants awarded. During its latter years the EFJ’s importance in the survival and work of many NGOs has been underscored, because with less monies available for granting, NGOs that work in the key biodiversity areas have not been able to access funding at their normal levels. This CEPF project was done to complement the EFJ’s new role as fundraiser and subsequently “re-grantor” to the NGO community. The final reports have suggested that if the EFJ targets Jamaican private sector companies the probability of raising enough funding for the NGOs will be remote. However, targeting private & corporate foundations, bilateral and multilateral international sources would be a more feasible approach. A road map, with adequate “directional signs” has been provided to take us to the next step in our fundraising. Included in the road map are:

- 10 organisations that can be targeted (3 private foundations, 3 corporate foundations and 4 that are considered bilateral and multilateral organisations – see consultants report in appendix 1)
- A briefer on the possible areas that these organisations may give grant funding
- An introductory email
- A work plan with responsible persons to undertake the respective tasks.
- A database with information on a wide range of foundations, bilateral and multilateral organisations.

It is hoped that over the next two years, having acted on the information provided from this project grant the EFJ would have attracted funding to assist in sustaining NGOs vital to the CEPF Ecosystem profile.

***Please summarize the overall results/impact of your project against the expected results detailed in the approved proposal.***

The EFJ in 2013 implemented a Strategic Action Plan (SAP) for the period 2013 to 2015. Two critical areas of the SAP were fundraising and building the capacity of our grant beneficiaries. This CEPF project of developing a Fundraising landscape for the EFJ was of supreme importance towards these two goals. The following goals were set out by the EFJ’s management:

1. Attracting funding from at least 3 foundations in the first two years of the implementation of the SAP
2. Attracting funding from at least 1 bilateral/multilateral organization in by 2016 (as these relationships and legal proceedings take time)

This project has cemented our expectations that we can achieve (1.) outlined above by 2015 and that for (2.) above, we can have much of the framework laid by 2016.

Under this small grant, the EFJ will begin the more rigorous process of developing an Action Plan for Fund-Raising for Environmental and Biodiversity in Jamaica. In addition to this activity, the Foundation has demonstrated its abilities in proposal writing and fund management in partnership and contract arrangements with groups such as the Inter-American Foundation (IAF), a USAID Global Contractor (ABt) and the UNDP GEF Small Grants Programme. They have also begun considering a more diverse range of both donors (International Development Partners, Private Sector, etc.) and projects (mitigation banking, revolving loans, co-financing, etc.).

With the roadmap given from this exercise and the oversight by the Board (they too have given a similar timeframe) the EFJ has started the activities necessary to execute the tasks. The data to measure the impact of our grants since inception, 20 years ago is now being captured as best as we can using our software package GIFTS, the communications and publicity necessary for us to achieve our goals have received budgetary support from the Board and our meetings to establish relationships with donor organizations through the government ministries with appropriate responsibilities have been initiated.

***In addition, the EFJ has continued its campaign for opportunities for fund-raising.*** The EFJ is also in advanced talks and planning with a government agency to be the administrator and manager of a trust fund that would be re-granting to NGOs in some of the key biodiversity areas for which the CEPF shares interest. We expect that this would be one success of the project since this exercise (of the EFJ being a fundraiser) has started. Definitive success would be measured by us receiving funding through those negotiations by September 2014 as a minimum of US\$250,000.00 is expected to be available annually to the NGOs. ***They also expect to receive feedback on current national and regional partnerships as well as innovative opportunities in areas such as offset funding and recycling.***

Innovation and “out-of-the-box” thinking was also the recommendation for the Jamaican Private sector fundraising campaign. The consultant advised that the EFJ was unlikely to raise significant funds from the local private sector for the following reasons:

- The current economic climate has significantly curtailed charitable giving in general
- The local private sector does not provide funding for re-granting institutions
- The EFJ has always had funding and is not known as an organization that raises money or needs to raise money
- The EFJ has a very limited public profile as little is known about its achievements and therefore it would be difficult to solicit support from companies who need the marketing exposure to justify contribution
- The EFJ has not engaged the private sector before whether for fundraising or partnership.

They advised that since the private sector is unlikely to provide significant amounts of cash, the EFJ should seek to explore options that may be immediately available such as 1) in kind contributions and 2) partnerships. Successful collaborations would make a partnering organization more likely to provide cash in the future –albeit not guaranteed and subject largely to the economic climate. For cash, the EFJ’s best option is an option that also raises its public profile and that is to engage the public through fundraising events or projects. Whilst this is

unlikely to raise very large amounts of cash, it is a useful first step to helping the public to understand the work that the EFJ does and that it does need to be funded. See Appendix B for full document

The CEPF Small Grant has laid a solid foundation for the fund-raising required to sustain the efforts of the EFJ, providing a clear roadmap and set of high level actions and recommendations for EFJ to implement and financial targets from donor community to achieve as well as identified opportunities for the private sector to support KBAs. With this, the EFJ aims to raise funding and other in-kind support in the first instance to supplement and eventually cover its operational expenses of US\$400,000 within 3 years. In its early attempts, the Foundation has begun to attract funding, but in the order of tens of thousands of dollars. The CEPF Small Grant support outlines a detailed path to take EFJ fund-raising to the hundreds of thousands of dollars by 2016.

***Please provide the following information where relevant:***

**Hectares Protected:** N/A  
**Species Conserved:**  
**Corridors Created:**

***Describe the success or challenges of the project toward achieving its short-term and long-term impact objectives.***

Successes:

- The success of the project was in bridging a large gap for the EFJ in moving forward in fund-raising
- The project allowed the EFJ to assess and target the best funding possibilities to ensure fast results in their budding fund-raising campaign. This was done in 2 critical sectors – International donors/funders and Jamaican Private Sector.
- The consultants for the International Donors/Funders (Blue Earth Consultants (BEC)) provided a detailed database of a top ten target donors and a second tier set of choices. (Database available upon request)
- Alternative and in-kind partnerships were detailed for approaching the Jamaican Private Sector.

Challenges:

- The economic situation in Jamaica limited the commitment and enthusiasm of the Jamaican Private Sector towards the environment and EFJ, so immediate results more likely from international supporters. EFJ visibility and their new story will also need to be clear to the local audience and the process of building this image and partnership has been taken on as a focus by the EFJ Board.
- Local fund-raising support and capacity in Jamaica is limited. Much of the time was spent identifying a suitable consultant.
- The level of dedication required for a full fund-raising campaign will require full-time dedicated staff with a budget for their work as well as for a communications campaign.

***Were there any unexpected impacts (positive or negative)?***

- The investigations of the consultants and the sharing with the Board of Directors on the findings and feedback of both local and overseas stakeholders on the value of (i) a communication budget and detailed strategy and (ii) the need for an increase and change in image for the former prolific grant-maker, the EFJ

## Lessons Learned

*Describe any lessons learned during the design and implementation of the project, as well as any related to organizational development and capacity building. Consider lessons that would inform projects designed or implemented by your organization or others, as well as lessons that might be considered by the global conservation community.*

***Project Design Process: (aspects of the project design that contributed to its success/shortcomings)***

- It was important to have the consultants focused on producing their reports as they were able to get into details that the EFJ team would not be able to and heard feedback that would likely not have been shared with the EFJ staffers.

***Project Implementation: (aspects of the project execution that contributed to its success/shortcomings)***

- None

***Other lessons learned relevant to conservation community:***

- For Jamaican Fund-Raising with the weaker economy, the EFJ will need to think outside of the box for in-kind contributions, e.g. donations, or a 5K run – to think more like a charity and will need to emphasise their non-profit status to the public. Innovation will be the key.

## ADDITIONAL FUNDING

*Provide details of any additional donors who supported this project and any funding secured for the project as a result of the CEPF grant or success of the project.*

Donor	Type of Funding*	Amount	Notes

***\*Additional funding should be reported using the following categories:***

- A** *Project co-financing (Other donors contribute to the direct costs of this CEPF project)*
- B** *Grantee and Partner leveraging (Other donors contribute to your organization or a partner organization as a direct result of successes with this CEPF project.)*
- C** *Regional/Portfolio leveraging (Other donors make large investments in a region because of CEPF investment or successes related to this project.)*

## Sustainability/Replicability

*Summarize the success or challenge in achieving planned sustainability or replicability of project components or results.*

*Summarize any unplanned sustainability or replicability achieved.*

## Safeguard Policy Assessment

*Provide a summary of the implementation of any required action toward the environmental and social safeguard policies within the project.*

### Additional Comments/Recommendations

Next Steps:

EFJ with the continued collaboration of Blue Earth Consultants proposes executing a more detailed project in three elements:

Element1 –Assessing Feasibility of Revenue Streams and Developing Comprehensive Sustainable Financing Strategic Business Plan (*months 1-18 – one-time activity*)

- Activity 1 – Data Collection: I
- Activity 2 – Data Analysis and Synthesis:
- Activity 3 – Engagement of Key Stakeholders to Create Support and Buy-In
- Activity 4 – Sustainable Financing Strategic Business Plan Development

Element 2 –Increase Capacity for the EFJ (*months 13-18*)

Element 3 – Implementation of the Plan (*month 19-24*)

The goal of this proposed Phase 2 project is to increase funds and revenue for the EFJ. The two long-term outcomes are:

- Increase EFJ by at least 25% within 1-2 years and 100% within 5 years of implementation of the sustainable financing business plan.
- The EFJ staff is executing the sustainable financing business plan to ensure long-term funding security for Jamaica, with a focus on Forest and other Protected Areas and hotspots targeting all 38 KBAs in Jamaica.

This has been proposed to the CEPF for a phase 2, but will also be included in the continuing EFJ fund raising process.

### Information Sharing and CEPF Policy

CEPF is committed to transparent operations and to helping civil society groups share experiences, lessons learned, and results. Final project completion reports are made available on our Web site, [www.cepf.net](http://www.cepf.net), and publicized in our newsletter and other communications.

**Please include your full contact details below:**

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Organization name: Environmental Foundation of Jamaica

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Fax: 876-920-8999

E-mail: [kmcdonaldgayle@efj.org.jm](mailto:kmcdonaldgayle@efj.org.jm)

**\*\*\*If your grant has an end date other than JUNE 30, please complete the tables on the following pages\*\*\***

## Performance Tracking Report Addendum

### CEPF Global Targets

### (Enter Grant Term)

Provide a numerical amount and brief description of the results achieved by your grant.  
Please respond to only those questions that are relevant to your project.

Project Results	Is this question relevant?	If yes, provide your numerical response for results achieved during the annual period.	Provide your numerical response for project from inception of CEPF support to date.	Describe the principal results achieved from July 1, 2007 to June 30, 2008. (Attach annexes if necessary)
1. Did your project strengthen management of a protected area guided by a sustainable management plan? Please indicate number of hectares improved.	NO			Please also include name of the protected area(s). If more than one, please include the number of hectares strengthened for each one.
2. How many hectares of new and/or expanded protected areas did your project help establish through a legal declaration or community agreement?	N/A			Please also include name of the protected area. If more than one, please include the number of hectares strengthened for each one.
c3. Did your project strengthen biodiversity conservation and/or natural resources management inside a key biodiversity area identified in the CEPF ecosystem profile? If so, please indicate how many hectares.	N/A			
4. Did your project effectively introduce or strengthen biodiversity conservation in management practices outside protected areas? If so, please indicate how many hectares.	N/A			
5. If your project promotes the sustainable use of natural resources, how many local communities accrued tangible socioeconomic benefits? Please complete Table 1 below.	N/A			

**If you answered yes to question 5, please complete the following table.**

**Table 1. Socioeconomic Benefits to Target Communities**

Please complete this table if your project provided concrete socioeconomic benefits to local communities. List the name of each community in column one. In the subsequent columns under Community Characteristics and Nature of Socioeconomic Benefit, place an X in all relevant boxes. In the bottom row, provide the totals of the Xs for each column.

Name of Community	Community Characteristics	Nature of Socioeconomic Benefit
	Small landowners Subsistence economy Indigenous/ ethnic peoples Pastoralists/nomadic peoples Recent migrants Urban communities Communities falling below the poverty rate Other	Increased Income due to: Adoption of sustainable natural resources management practices Ecotourism revenues Park management activities Payment for environmental services Increased food security due to the adoption of sustainable fishing, hunting, or agricultural practices More secure access to water resources Improved tenure in land or other natural resource due to titling, reduction of colonization, etc. Reduced risk of natural disasters (fires, landslides, flooding, etc) More secure sources of energy Increased access to public services, such as education, health, or credit Improved use of traditional knowledge for environmental management More participatory decision-making due to strengthened civil society and governance. Other
<b>Total</b>		

If you marked "Other", please provide detail on the nature of the Community Characteristic and Socioeconomic Benefit:



# Appendix A: International Fundraising Opportunities and Action Plan

**A Memo and Action Plan Prepared for the Environmental  
Foundation of Jamaica**



**DISCLAIMER:** While we have made every effort to ensure that the information contained in this report is accurate, complete, and obtained from reliable sources, Blue Earth Consultants, LLC makes no guarantee of the completeness and accuracy of information provided by project sources, as well as the Environmental Foundation of Jamaica's ability to secure support from potential donors identified in this study.

(NB: BEC provided additional information on each of the Top 10 private and corporate foundation donors and bi-lateral/multi-lateral donors that have alignment with EFJ. In addition, they provided talking points for EFJ to use when connecting with the donor and a completelist of international funders and additional information.)

***Photo Credits:***

*Environmental Foundation of Jamaica*

### **Purpose of the International Fundraising Opportunities and Action Plan**

The Environmental Foundation of Jamaica (EFJ) was established in 1991 out of a debt-for-nature swap with the United States government. Now in its 20<sup>th</sup> year of operation, EFJ is seeking to expand its international fundraising efforts to continue the valuable financial support of civil society organizations and non-governmental organizations (NGOs) working in the environmental and child development sectors in Jamaica. EFJ understands the need to be strategic and thoughtful in fundraising efforts in order to ensure success. Subsequently, they hired Blue Earth Consultants, LLC (Blue Earth) to assist in developing an international fundraising action plan to help guide their efforts. This document, *International Fundraising Opportunities and Action Plan* contains two main sections:

- **Section 1: International Funder Opportunities:** Provides a summary of international donors across multiple sectors, including private and corporate foundations and bi-lateral/multi-lateral donors, with a specific focus on the Top 10 donor prospects most aligned with EFJ's mission, goals, and granting priorities.
- **Section 2: International Funder Action Plan:** Provides specific steps that EFJ can take to cultivate the Top 10 donors and pre-launch tasks to help prepare for implementing the action plan. This action plan includes details such as the lead party responsible for the task, start and end date of when the tasks should be completed, performance targets/indicators, and financial targets.

This document is intended to be a “living” document that is updated and adapted as needed to best achieve international fundraising targets.

### **Overview of Methodology**

Blue Earth utilized multiple data collection methods to identify potential international fundraising opportunities and to inform the development of the action plan. First, we reviewed internal documents provided by EFJ, which included EFJ's Strategic Plan 2013-2015 and EFJ's Resource Mobilization Database of Foundations. Both documents lay out the core strategies and outcomes that EFJ is pursuing and previous efforts for identifying international funders. Next, we performed phone interviews with 12 informants that included potential and past donors, EFJ staff, and consultants as well as administering an online survey with 15 informants that included EFJ Board Members, EFJ staff, and EFJ partners. The goal of the interviews and online survey were to identify potential international funder prospects and cultivation approaches. In addition, we sought to help distinguish EFJ's strengths, weaknesses, opportunities, and threats (SWOT), their competitive advantage, and niche in regards to international fundraising to help to craft an action plan that plays to EFJ's strongest characteristics.

Following the interviews, we analyzed the data, pulling out trends and valuable points. In connection with the informant interviews, we performed robust web-based research and assessments to identify private foundations, corporate foundations, and bi-lateral/multi-lateral organizations. To compile and create the list of international funders, Blue Earth reviewed multiple online databases (Foundation Center Directory, Terra Viva Grants Directory, The Grantsmanship Center) and mined information from Blue Earth's existing donor databases to identify additional international funders.

Blue Earth then traveled to Jamaica to share findings and to gain input into a straw proposal of the action plan from staff and Board members during a day-long working session. See *Appendix A: International Fundraising Action Plan Session*, for the PowerPoint presentation and summary notes from the working session.

**Section 1. International Funder Opportunities**

In Section 1. International Funder Opportunities, we 1) share the methodology Blue Earth undertook to identify and prioritize international donor prospects; 2) present the Top 10 priority international donors, their alignment with EFJ, key and talking points to engage the donor; and 3) provide an overview summary of Tier 2 international funders.

Utilizing the methods described above, we identified upwards of 500 separate donor organizations. Through this search, we narrowed the field to roughly 100 organizations that would plausibly fund EFJ’s work. We then developed a matrix of four key criteria to narrow down the list of the international donors to the Top 10 donors for EFJ to focus their efforts. These criteria include:

- Alignment with EFJ priorities;
- Geographic alignment;
- History of giving to regranteeing organizations; and
- Range of giving amount above \$300,000.

*Top 10 Priority Donors*

Top 10 priority donors are reliable givers and regularly fund projects aligned with EFJ’s topical priorities and within Jamaica and/or the Caribbean region. Top 10 priority donors are those with a high likelihood of funding EFJ based on current giving, funder interest, history and reliability of giving, and amount of available funding. Blue Earth conducted research to identify the Top 10 priority private foundation, corporate foundations, and bi-lateral/multi-lateral donors that may be interested in supporting EFJ’s work within seven main categories:

1. *Protected Area Management*
2. *Biological Diversity*
3. *Forest Conservation*
4. *Early Childhood Development and Education*
5. *Livelihoods and Climate Change*
6. *Care and Development of Children with Special Needs and/or at Risk*
7. *Recycling Initiatives*

Top 10 priority donors include:	
Private Foundations	<ul style="list-style-type: none"> <li>• <b>Charles Stewart Mott Foundation</b></li> <li>• <b>John D. and Catherine T. MacArthur Foundation</b></li> <li>• <b>W. K. Kellogg Foundation</b></li> </ul>
Corporate Foundations	<ul style="list-style-type: none"> <li>• <b>Alcoa Foundation</b></li> <li>• <b>Western Union Foundation</b></li> </ul>
Bi-lateral/ Multi-Lateral Organizations	<ul style="list-style-type: none"> <li>• Australian Agency for International Development (AusAID)</li> <li>• Deutsche Gesellschaft für International Zusammenarbeit (GIZ)</li> </ul>

- EuropeAid
- Global Environment Facility (GEF)
- U. S. Agency for International Development (USAID)

(BEC provided additional information on each of the Top 10 private and corporate foundation donors and bi-lateral/multi-lateral donors that have alignment with EFJ. In addition, they provided talking points for EFJ to use when connecting with the donor and a completelist of international funders and additional information.)

Detailed Pre-Launch Action Steps and Top 10 Priority Donor Action Steps, approved by the EFJ Board not included but available on request.

*Tier 2 Donors*

In addition to the Top 10 priority funders discussed above, Blue Earth also identified key funders that have strongalignment with EFJ priorities. Tier 2 donors share many of the same traits as the Top 10 priority donors, but have a more constrained topical and geographic focus and may have limited their funding to projects in a specific country, though still within the Caribbean region. In addition to the Tier 2 funders, in *Appendix B: Funder Database*, we identified “Donors to Watch” which are donor organizations with fewer areas of alignment with EFJ, less regularity of funding related activities or programs, or in some cases, typically award smaller grant amounts. These donors may be of interest to EFJ down the line, but priority should be focused on the Top 10 priority donors and Tier 2 donors.

Donors in Tier 2 may still represent good prospects and EFJ may consider cultivating relationships with these groups in the interest of securing additional financial support in the future. Below we provide an list of these Tier 2 funders:

**Private Foundations**

- Bill & Melinda Gates Foundation
- Byron Robinson Education Foundation, Inc.
- Cobb Family Foundation, Inc.
- Loyola Foundation, Inc.
- Prince Albert Foundation in Europe
- The Andrew W. Mellon Foundation
- The Ford Foundation
- The Iris O’Brien Foundation
- The Leona M. and Harry B. Helmsley Charitable Trust
- The Rockefeller Foundation
- The William and Flora Hewlett Foundation
- U.R.G.E Foundation
- Koch Foundation, Inc.
- Weeden Foundation

### Corporate Foundations

- Carnival Cruise Foundation
- Citi Foundation
- Coca-Cola Foundation
- Diageo Foundation
- FedEx Corporation Contributions Program
- IBM International Foundation
- IFF Foundation
- Mondelez International Foundation
- Nestlé Foundation
- Norwegian Cruise Line
- PepsiCo Foundation
- Princess Cruises Community Foundation
- Royal Caribbean Cruises Corporate Giving Program (The Ocean Fund)
- Scotiabank Jamaica Foundation

### Bi-lateral/Multi-Lateral Organizations

- **Adaptation Fund- United Nations Framework Convention on Climate Change (UNFCCC)**
- **Canadian International Development Agency (CIDA)**
- **Cool Earth Partnership**
- **Global Climate Change Alliance (GCCA)**
- **Global Facility for Disaster Reduction and Recovery (GFDRR)**
- **Inter-American Development Bank-Netherlands Water Partnership Program (INWAP)**
- **International Climate Initiative**
- **Japan International Cooperation Agency (JICA)**
- **KfW**
- **Le Groupe de l'Agence française de Development (AFD)**
- **Millennium Development Goals Achievement Fund**
- **Netherlands Development Cooperation System**
- **Program on Forests (PROFOR)**
- **Special Climate Change Fund (SCCF)**
- **Swedish International Development Agency (SIDA)**
- **United Nations Economic Commission for Latin America and the Caribbean (ECLAC)**
- **United Kingdom Department for International Development (DFID)**
- **World Bank**

### Section 2. International Fundraising Action Plan

The goal of Section 2. International Fundraising Action Plan (Action Plan) is to provide EFJ with a guide to help them cultivate international funders. The Action Plan identifies the lead party responsible for the task, start and end dates of when the tasks should be completed, and performance targets/indicators. The Action Plan is broken up into three sections: 1) Setting up for success, which outlines tools needed to communicate with donors; 2) Pre-launch actions, which provide steps that need to be taken prior to initiating communication or a meeting with the donor; and 3) Top 10 priority donor actions, which provide specific steps for each of the Top 10 priority donors.

The Action Plan contains the following components:

- **Action:** Specifies a specific task for engaging donors;
- **Lead:** Identifies person(s) in charge or completing task;
- **Support:** Identifies person(s) to seek support for completing the task;
- **Duration:** Provides timeline of estimated start and end dates for completing the task;
- **Performance Targets:** Details outputs and targeted outcomes of each action; and
- **Financial Targets:** Details suggested monetary support from total engagement.

### Setting Up For Success

To ensure successful implementation of the Action Plan, EFJ must have the necessary tools in place to effectively communicate with and cultivate potential donors. Key ingredients for successful international fundraising include:

- Strong support and participation from Board Members.
- Informative outreach materials.
- A clear and adaptable sales pitch to ensure consistent communication with prospects.

It is common practice for Board Members to support in fundraising efforts. Ways in which Board Members can engage in and support EFJ in implementing the International Fundraising Action Plan include:

- Provide feedback on funder outreach materials;
- Make introductions and attend meetings with EFJ leadership and potential funders;
- Host fundraising events;
- Offer up matching challenges; and
- Help cultivate strategic partnerships and donors.

Informative outreach materials are necessary tools for communicating organizational goals, strategies, and intended outcomes to potential donors. A compelling case statement or concept paper would map out the justification for why EFJ is a strong philanthropic investment, including past impact, future goals, and its competitive advantages and niche. EFJ could also create concise one-page flyers that highlight the various priorities to provide more specific information to donors on priorities that may be relevant and aligned to their organization. Lastly, a pitch presentation could be a strong tool to use during conference calls or in-person meetings with donors and EFJ can develop a customizable desk of PowerPoint slides that are tailored to each donor's interests. This is an opportunity for EFJ to get creative in how they would like to communicate and market the organization, thus there are potentially other tools that could be utilized.

The final step for successful implementation of the International Fundraising Action Plan is developing a strong and adaptable sales pitch to integrate into outreach materials, use as talking points in donor meetings, and ensure consistent communication across EFJ staff and Board Members. Blue Earth developed the following sales pitch for EFJ to use as a base and customize for each cultivation opportunity.



*Environmental Foundation  
of Jamaica*

## SUMMARY REPORT

THE EFJ AND THE JAMAICAN PRIVATE SECTOR

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Mdk Advisory and Consulting Ltd.  
December 13, 2013



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## EXECUTIVE SUMMARY

### Executive Summary

In seeking to raise funds for its endowment fund, the Environmental Foundation of Jamaica (EFJ), is exploring the Jamaican private sector as a potential source. However, it is unlikely to raise significant funds from the local private sector given the following 1) the current economic climate has significantly curtailed charitable giving in general 2) the local private sector does not, as a matter of course, generally provide funding for re-granting institutions 3) the EFJ has always had funding and is not known as an organization that raises money or needs to raise money 4) the EFJ has a very limited public profile as little is known about its achievements and therefore it would be difficult to solicit support from companies who need the marketing exposure to justify contribution and 5) the EFJ has not engaged the private sector before whether for fundraising or partnership.

Given the above stated, it is therefore advisable for the EFJ to first engage in a professional media awareness campaign to raise the public profile of the organization and help stakeholders understand the foundation's achievements and that it is indeed raising funds. The EFJ, though, should be mindful of the perception that it is about to close down for lack of funds and therefore any public awareness campaign needs to incorporate sensitivity to that perception. A partnership with the media – through working with the Media Association of Jamaica and/or the Ad Council – would also help to establish that the EFJ can successfully engage in partnerships with an important stakeholder to the private sector – the media. A partnership would also provide a solid foundation for sustained media awareness that will be necessary for long-term fundraising.

Since the private sector is unlikely to provide significant amounts of cash, the EFJ should seek to explore options that may be immediately available such as 1) in kind contributions and 2) partnerships. Successful collaborations would make a partnering organization more likely to provide cash in the future –albeit not guaranteed and subject largely to the economic climate. For cash, the EFJ's best option is an option that also raises its public profile and that is to engage the public through fundraising events or projects. Whilst this is unlikely to raise very large amounts of cash, it is a useful first step to helping the public to understand the work that the EFJ does and that it does need to be funded.

Institutionally, the EFJ is strongly advised to engage professional help – staff supported by external consultants – to begin to change the culture of the EFJ towards one that prioritizes fundraising and private sector partnerships. This initiative needs support from the highest level – the board – if it is to be successful. Additionally, the EFJ would benefit greatly from board members who have experience with fundraising and private sector partnerships, and can share advice and also contacts.

## BACKGROUND AND CONTEXT

### Background and Context

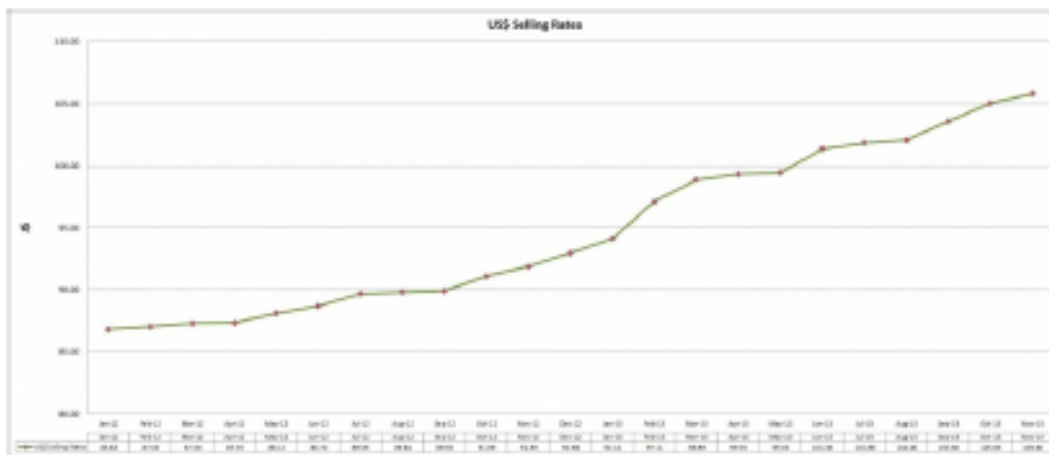
In seeking to raise funds for its endowment fund, the Environmental Foundation of Jamaica (EFJ), is exploring the Jamaican private sector as a potential source. In Jamaica, the private sector has participated in development or charitable causes with:

- 1) one-off projects or donations
- 2) projects that private sector entities implement themselves
- 3) projects for which private sector entities receive significant visibility in terms of branding/marketing
- 4) projects that involve in-kind contribution of private sector goods and services.

It is also important to note that the local private sector is not known for giving cash – either as a one-off or on an ongoing basis – to re-granting institutions.

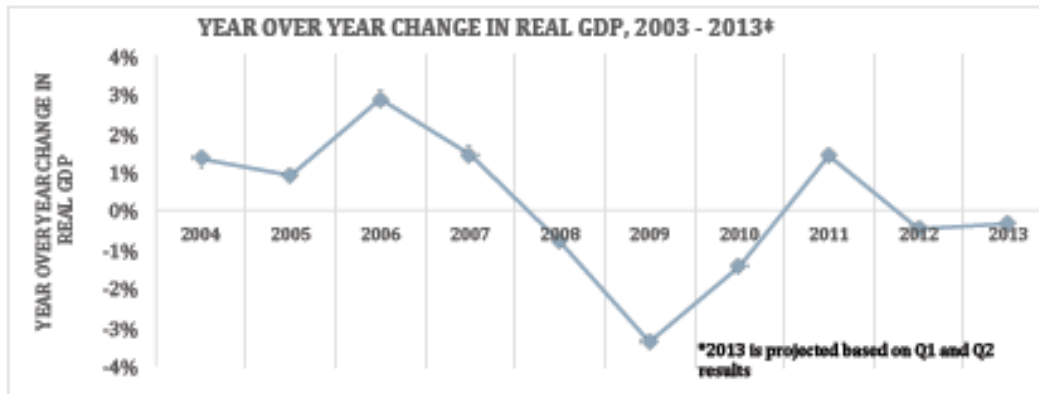
Aside from the general modus operandi, the current economic climate is affecting charitable giving. At the present time, the local private sector has adopted a very cautious approach to expenditure – whether for capital investment, operational expenditure or for donations – because of the reduced confidence in the economy. This cautious approach is driven by uncertainty about the impact of the IMF requirements that must be met every quarter by the Government of Jamaica. The situation is further exacerbated by the unusually fast pace of devaluation of the Jamaican dollar in the past 18 months.

The chart below shows the sharp devaluation of the US dollar since January 2012.



The chart below shows the anemic, and often negative, growth of the Jamaican economy. Negative growth does not create an environment conducive to charitable giving.

## BACKGROUND AND CONTEXT



Given the context, discussions were held with representatives of the local private sector – selected in consultation with the EFJ - with regard to:

- 1) interest in participating and funding projects for the environment and children, the two areas of focus of the EFJ
- 2) models for working with the EFJ

Given the local private sector's traditional preference for high visibility projects, informal discussions were held with the Media Association of Jamaica and the Ad Council of Jamaica to explore interest in supporting media campaigns focused on the environment and/or child development. All discussions were extremely exploratory and intended to gauge general interest.

## THE SIGNIFICANCE OF MEDIA

### The Significance of Media

If the EFJ is to successfully engage the private sector in meaningful partnerships, it is imperative for the EFJ to embark on a professional media awareness campaign. Having always been funded, the EFJ has not needed to cultivate relationships with funders – private sector or individuals. No matter what type of funding models are pursued, the EFJ will need to be more visible and appear attractive as a organization to support/partner with – whether to provide visibility for the donors themselves, or just to make it easier for donors to justify the donations/support.

Using a coordinated strategy - with the help of a communication professional - the EFJ should raise awareness with private sector and the general public using traditional and social media with a clear message of 1) what the EFJ is and does 2) what it has achieved 3) that the EFJ is seeking donations and public support. Various strategies should be employed to engage the public - testimonials, quizzes and games, use of imagery, radio jingle, print ads etc. Testimonials are especially compelling as they are not only stories but they also emphasize a key strategic asset of the EFJ – the network of grantees.

It is critical too to create separate materials for each focus area as too much information all at once can be 1) confusing to the audience 2) unattractive to audiences only interested in specific areas – and not just the two broad categories but also the sub-categories in each. Another key categorization is by activity, for example what has the EFJ done in “training”, “advocacy”, “provision of materials” etc. to show competency across thematic areas.

It would help the public too if messages could be timed to coordinate with existing events – conservation around Earth Day, child development in child month and back to school times, disaster relief during hurricane season etc.

One approach to encourage sustainable long-term media awareness is to partner with media entities on a specific campaign or campaigns in specific thematic areas of focus for the EFJ – environment and/or child development. There are two (2) possible suggestions to explore this partnership:

1. **Partner with the Media Association of Jamaica or its membership.** Whilst any group can approach the Media Association of Jamaica (MAJ) as a group to ascertain interest in supporting a cause, it is rare for the MAJ as a body to commit the members. Presentations are therefore useful to introduce members to a specific issue/project after which individual members may wish to pursue discussions to see how his or her media house can assist. MAJ members are likely to be more persuaded by issues that are viewed by the public as urgent and pressing. Therefore the context within which an environment or child development problem is presented is important. For example, a pure environment or conservation message is unlikely to be as attractive to the media as ending child abuse or cleaning up downtown (of which anti-litter is a part).
2. **Partner with the Ad Council of Jamaica.** For the EFJ, the benefit of working with the Ad Council is access to creative talent and media time at a fraction of the cost or free. As the owner of the

## THE SIGNIFICANCE OF MEDIA

campaign, the EFJ would be expected to cover some costs that would be itemized – but the campaign would have a far greater reach for a fraction of commercial prices. The Ad Council can provide the commercial value of a campaign vis a vis the cost to the campaign owner; i.e. EFJ, to show the immense value leveraged.

The Ad Council of Jamaica is very interested in exploring a partnership with the EFJ. There are two environment related briefs under consideration at the Ad Council at the moment, and a campaign related to children/parenting. It is suggested that discussions be held between the Ad Council and the EFJ to explore the EFJ's taking the lead on a campaign within its focus areas. It could be those campaigns as is, or an amended version of those campaigns, or a completely different campaign.

The Ad Council is also interested in forming a partnership with the EFJ wherein the EFJ would recommend the Ad Council to grantees for media campaigns.

### SPECIFIC RECOMMENDATIONS

1. Engage in a professional media awareness campaign about the work of the EFJ.
2. Explore media partnerships either through the MAJ or the Ad Council (which already has a partnership with the MAJ and the Advertising Agencies Association of Jamaica).

## EXPLORING PRIVATE SECTOR PARTNERSHIPS

### Exploring Private Sector Partnerships

As a re-granting institution seeking cash donations, it appears very unlikely that the EFJ would be successful in raising the desired funds at this time without 1) a media awareness campaign and 2) any previous history of being funded by or working with the private sector. Therefore, it is suggested that the EFJ first explore partnerships with the private sector before seeking to ask for cash contributions.

#### DISCUSSIONS WITH PRIVATE SECTOR ENTITIES

The private sector entities chosen for this exercise have all engaged in projects in the same focus areas as the EFJ - the environment and/or child development. All discussions were informal and meant to try to assess current and future initiatives in this focus area. If the company had a foundation, the foundation was approached, as this is traditionally the necessary first step in making any approaches to companies locally. Most large companies that have exhibited significant interest in and/or support of the environment and/or child development have foundations. At no time was any company specifically solicited to support the EFJ.

#### WISYNCO GROUP

##### Discussion

Wisynco Group<sup>1</sup> is one of the largest distribution and manufacturing companies in Jamaica. As a leading manufacturer and distributor of beverages, Wisynco has shown consistent support for recycling initiatives in Jamaica.

Wisynco was contacted directly because 1) the company does not have a foundation and 2) the company is currently exploring ways to embark on a national recycling initiative. Wisynco has engaged a consultant, Ashley-Gambrill-Rousseau to assess the best methods to achieve this national project. The company is keen on partnerships and at this time, has no fixed position on whether 1) Wisynco does the implementation or 2) Wisynco provides financial support to NGOs and the recycling companies to implement. The company is also very interested in including a component for public education.

##### Recommendation

The EFJ should continue discussions with the Wisynco consultant to explore ways in which the EFJ can be an integral part of this national initiative. Successfully working with one of the largest corporations in Jamaica and also with other partners in a high profile national initiative would help to establish the EFJ as a potential partner to other organizations.

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<sup>1</sup> <http://www.wisynco.com>

## EXPLORING PRIVATE SECTOR PARTNERSHIPS

### SANDALS FOUNDATION

#### Discussion

Sandals Foundation<sup>2</sup> is the charitable arm of the Sandals Group. The Foundation's main areas of focus are the environment, education and community development.

Sandals Foundation is a self-described implementer and whilst they do not provide funds to re-granting organizations, they are very open to exploring a partnership project with the EFJ.

The Director of Sandals Foundation is also willing to forward a request to their sister company, Appliance Traders Ltd. for a vehicle to be donated for the EFJ's use to monitor projects and reserves<sup>3</sup>.

#### Recommendation

The EFJ should make a formal request to ATL for a vehicle donation. The EFJ should also engage Sandals Foundation in a discussion to explore potential partnerships.

### GRACE KENNEDY FOUNDATION/GRACE AND STAFF FOUNDATION

#### Discussion

Grace Kennedy is one of the largest conglomerates in Jamaica with business in the manufacturing, distribution and financial services sector. Grace Kennedy has two foundations: 1) Grace Kennedy Foundation and 2) Grace and Staff Foundation.

Grace Kennedy Foundation<sup>4</sup> is an endowed fund that supports mostly education and at the tertiary level – scholarships, two endowed chairs at the University of The West Indies for example. Small grants are made to basic schools for playgrounds, computers etc. There are minimal funds (J\$1M) for environmental projects - spent last year on an environmental tour for children and support to those involved in recycling.

Grace and Staff Foundation<sup>5</sup> is funded by matching contributions from staff. The foundation supports homework centers in various locations.

Grace Kennedy Foundation is a self-described implementer and whilst they do not provide funds to re-granting organizations, they are very open to exploring a partnership project with the EFJ. Grace Kennedy Foundation is also very supportive of the EFJ especially since they support the endowed chair held by the current Chairman of the EFJ.

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<sup>2</sup> <http://www.sandalsfoundation.org>

<sup>3</sup> Request should be addressed to Stephen Hector, Global PR Director of Sandals Group and forwarded to Heidi Clarke, Director of Sandals Foundation.

<sup>4</sup> <http://www.gracekennedy.com/foundations/grace-kennedy-foundation>

<sup>5</sup> <http://www.gracekennedy.com/foundations/community-development-foundation>



## EXPLORING PRIVATE SECTOR PARTNERSHIPS

### Recommendation

The EFJ should engage Grace Kennedy Foundation in a discussion to explore potential partnerships.

### DIGICEL JAMAICA FOUNDATION

#### Discussion

Digicel Jamaica Foundation<sup>6</sup> is the corporate foundation of Digicel Jamaica. The foundation spearheads all of the company's charitable initiatives. Although Digicel Jamaica – the company itself – has environmental initiatives, they are also led by the foundation.

There is significant overlap in the areas of interest for Digicel Jamaica Foundation and the EFJ as the three priority areas for the Digicel Jamaica Foundation are:

- 1) education
- 2) special needs
- 3) community empowerment

The environment – especially recycling and renewable energy - is an underlying theme in all projects.

Digicel Jamaica Foundation is an unlikely source for providing funds for the EFJ because 1) the foundation does not give to re-granting institutions and 2) the foundation has described itself as an implementer and hence provides fewer and smaller grants to organizations.

Digicel Jamaica Foundation is willing to explore partnerships with the EFJ where each party brings assets and resources to the table.

### Recommendation

The EFJ should engage in discussions with Digicel Jamaica Foundation about areas for potential collaboration and partnership.

### SCOTIABANK JAMAICA FOUNDATION

Scotiabank Jamaica is one of the largest financial institutions in Jamaica. Scotiabank Jamaica Foundation<sup>7</sup>, an endowed fund, supports projects in education, healthcare, community development and environmental preservation. At this time, the foundation is in the process of reviewing the foundation's future projects and advised that January is better for discussions as key decisions will be made by then.

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<sup>6</sup> <http://digiceljamaicafoundation.org>

<sup>7</sup> [http://www.scotiabank.com/jm/en/0\\_71\\_00.html](http://www.scotiabank.com/jm/en/0_71_00.html)

## FUNDING MODELS

### Funding Models

In order to raise the funds and/or resources needed to continue its mandate, it is suggested that the EFJ explore the following:

#### ENHANCE INSTITUTIONAL CAPACITY TO FUNDRAISE

As a priority, the EFJ should take some steps to increase its capacity to fundraise. Namely,

1. **Engage in a professional media awareness campaign.** See "The Significance of The Media"
2. **Engage professional fundraising help.** In order to shift the culture of EFJ towards raising money there needs to be a staff member/department/full time engaged outsourced services dedicated to cultivating relationships, publicizing EFJ and raising funds for the EFJ. The imperative for the EFJ to focus on fundraising needs support from the highest level – the board. It would also be helpful to engage board members - who have experience with fundraising and creating partnerships between NGOs and the private sector – to guide the staff and decision-making as well as making introductions where possible.
3. **Be more stringent with quantifying impact of projects and visible outcomes.** The local private sector will be more willing to support activities that they can "see". To engage the private sector in the long term, it is critical to support projects with quantifiable visible results or encourage the grantees to make sure that their projects produce results that can be seen and quantified.

#### EXPLORE FUNDING OPTIONS

This section will explore options available to the EFJ to obtain resources to continue its mandate. Whilst there are many traditional funding models for NGOs, the current socio-economic environment is not conducive for exploring obtaining funding from 1) the government which is severely resource constrained or 2) large individual donors given limited persons with significant wealth who provide personal donations.

##### Partnerships

The EFJ should explore partnerships that it can undertake now to build its relationship with the private sector. Having never done this before, it is advisable to undertake something in the EFJ's strongest area of expertise and also manageable in terms of resources required (people, cash etc.) to demonstrate that the EFJ

## FUNDING MODELS

is a valuable partner. This will assist in raising awareness with the private sector entities and help to open doors for larger kinds of support while allowing the EFJ to fulfill your mandate on a cost-share basis.

### In-kind

The EFJ should itemize in-kind support and seek from different donors. For many private sector entities, it is an easier and quicker decision to make resources that it already has available for use of charity. The EFJ should identify all the in-kind items that would assist them to meet its mandate with a strategy of what to offer the private sector donor entity in return. For example, a donated vehicle could be so branded by the donating entity.

### Cash

The EFJ could host fundraising events that raises awareness and also potentially provide real cash resources. The EFJ's focus areas – the environment and child development – are ideal for engaging "heartfelt connectors" i.e., individuals who are aligned to the cause through personal experience and are willing to help raise funds for the cause. Fundraising ideas that seem to have done well in Jamaica include charity runs (Sigma, Digicel Foundation, CB/UWI), walking (Relay for Life), signature dinners/lunches (WLI, Jamaica Chamber of Commerce) and golf tournaments<sup>8</sup>. The EFJ can enlist its network of grantees and members to help promote and sell tickets.

The EFJ could also explore creating an item to be exchanged for contribution. A grantee could create an item that could be provided in exchange for a donation (e.g. similar to the ribbons and pins). This could be something out of recycled materials, or something to represent the EFJ's dual mandate. Alternately, the EFJ could have an item that could be scanned repeatedly at the supermarket checkout counter – for example similar to the wood block created for raising funds for Alzheimer's<sup>9</sup>

The EFJ could also explore crowdsourcing – engaging people to donate online via a fundraising website, for example Indiegogo.com. This would also help to raise public awareness but involves significant administration in terms of deliverables to individual funders for potentially small individual donations.

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<sup>8</sup> There is no centralized public data on what the yields have been from these events.

<sup>9</sup> See the block of HOPE idea here:

<http://www.jwt.com/en/news/global/jwtlondoncreatesnewfundraisingmechanismcalledhope/>

## CONCLUSION

### Conclusion

Having never needed to raise funds, the EFJ is advised to strengthen the institutional capacity to fundraise and engage in a public awareness campaign. That public awareness should involve not only the EFJ's strengths and achievements, but also that the EFJ is seeking to raise funds. The EFJ, though, should be mindful of the perception that it is about to close down for lack of funds and therefore any public awareness campaign needs to incorporate sensitivity to that perception. Fundraising events are a mechanism to raise awareness and cash, albeit possibly limited cash. In light of the current economic climate, the EFJ is advised to explore partnership arrangements and seek in-kind contributions rather than cash from the private sector that already does not, by and large, fund re-granting institution.