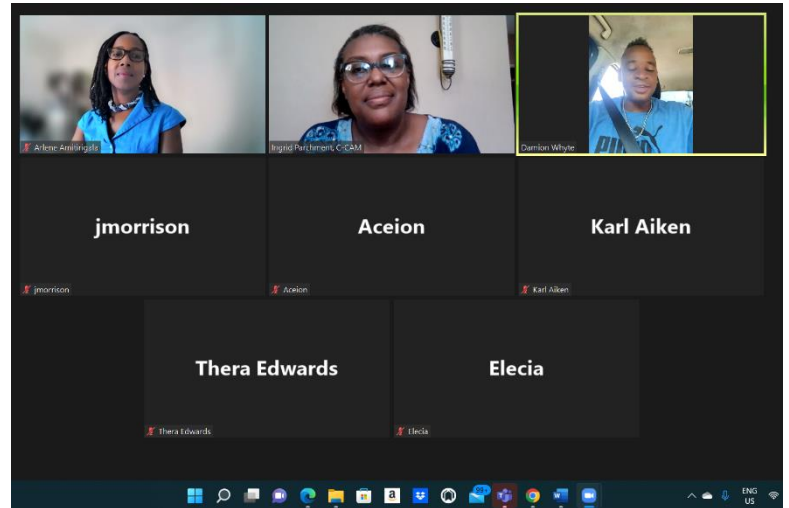


# Technical Capacity building of the board and staff related to fundraising



Figures 1and 2: Participants at GPN workshop

## REPORT ON BOARD AND STAFF WORKSHOPS

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**For:** Caribbean Coastal Area Management Foundation (C-CAM)

**Funded by:** Global Partnership Network (GPN)



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## **BACKGROUND**

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This workshops entitled “*Technical Capacity building of the board and staff related to fundraising*” were held as part of Caribbean Coastal Area Management Foundation (C-CAM)’s development of team members to manage the Portland Bight Protected Area (PBPA) sustainably. It is part of a larger project that is being implemented in partnership with The University of Kassel, represented by the president, acting for and through its Global Partnership Network (GPN).

## **OBJECTIVES**

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The objective of the workshops was on improving the financial sustainability of C-CAM focused on implementation of the updated C-CAM funding plan 2022- 2027. The focus of the workshop was to implement Output 1.1: A sustained internal enabling environment, governance and management framework to facilitate donor confidence and attract funding and investment to meet Strategic Objective 1 - to leverage the strength of the board, track record and credibility of C-CAM, and assignment of dedicated resources to increase funding inflows.

## **Learning goals of the workshop**

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The learning goals of the workshop were:

- A better understating of the roles and responsibilities towards good governance – board
- A better understanding of their role in fundraising – staff and what is involved in fundraising
  
- A better understating of what a corporate philanthropist might be looking for when seeking selecting funding support areas
- How to create and develop a prospect list?
- How to develop a Funding Plan budget?
- What priorities should be included in the budget?

## Target audience of the workshop

The target audience was 10-12 of C-CAM's board of directors, staff, consultants and volunteers. The actual participants included 5 directors, 10 staff, 2 consultants, 2 volunteers/Interns and 1 representative from a partner organization (University of the West Indies plus one corporate representative and, 2 presenters (Appendix 1).

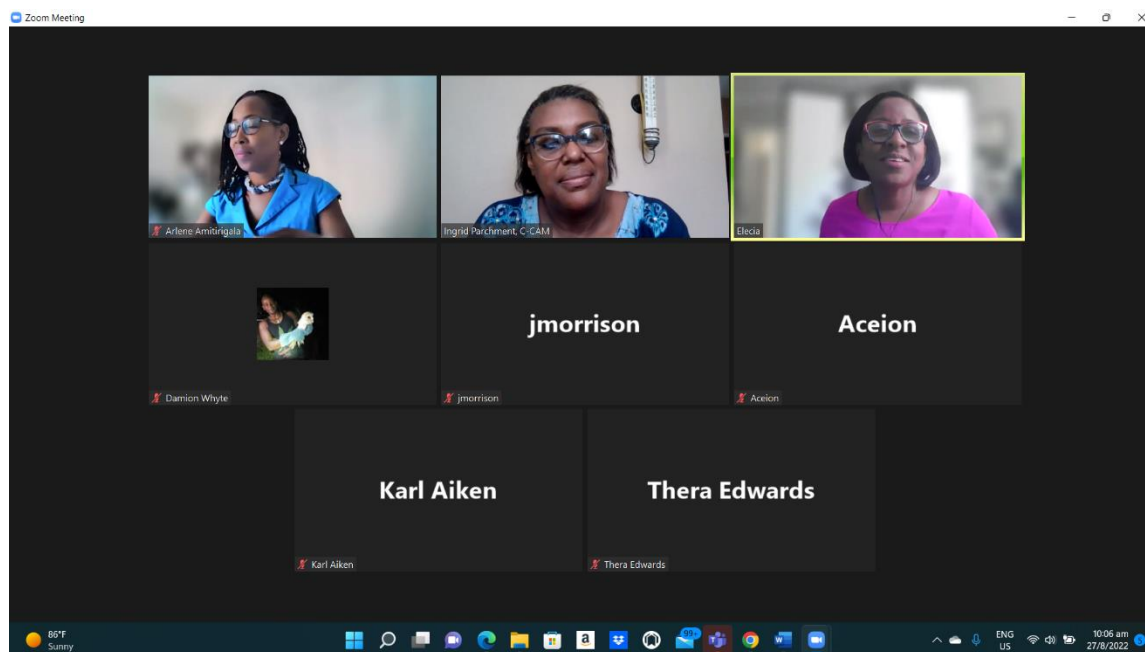


Figure 2: Remote participants on Zoom for the board session

## METHODS

Two sessions were held on separate days to facilitate participation of the members of board and staff. The first session as held on August 26, 2022 utilizing the Zoom platform with participants in Lionel Town and Salt River and others online including the presenters.

The staff session started with a review of the updated five-year funding plan for C-CAM focused on the role of staff and board in fundraising led by **Elecia Myers, Fundraising Consultant**. This session was the first output recommended in the funding plan.

Some highlights were about donor stewardship, communication with donors, climate financing, donor mix to include carbon trading and the need for increased C-CAM visibility. There are also opportunities for more tourism related activities to be leveraged.

### **Donor listing**

We drafted list of potential donors which the consultant will build on and the C-CAM team will continue to develop and utilize to bring funding to C-CAM. This included some donors that have already funded C-CAM as well as others not yet approached or where we were not successful in the past. This included local, regional and international. Also, C-CAM's financing mechanism.

Strengthen the fundraising culture in C-CAM to leverage greater impact from staff and board.

How to keep and maintain donors?

**Donor stewardship** - Impact of donors to be recognized, what are donors interested in, how do they feel about their giving experience, do they feel valued and informed. Keep them engaged.

This was followed by a robust Q & A session where staff members asked questions including

Troy - "how should they interact with donors, as a team or individually especially if not in the top tier of management". Should other staff members have a partial relationship with donors directly?

Response – Everyone is a part of the marketing and work of the organization and feel a part of the actions. It might not be practical; however, this will help to show succession planning and continuity and provide a space for learning.

Brandon – "Should we hire a fundraiser?"

Dawkins – Most of C-CAM's Corporate donations (for events). We send a thank you letter but no communication in between. She is now understating that we should keep in touch so they know what we are doing (maybe quarterly). This might reduce the hesitancy when reach out again. Maybe we could give them an email/or personal visit (maybe 15 minutes) to update them

### **Arlene Amitirigala, Communications consultant**

"The good story must be told" was the focus of this presentation. The work is good and visible but you must tell people since they won't automatically know.

Comm strategy to drive success

Communicating with Corporate donors

Communications Planning

Communication to drive positive outcomes for C-CAM is critical. All persons should have input in the Communication plan

How to thank donors – They need to see themselves. What does your organization support?

**The board session also included a conversation with a David Lowe, Investment Specialist. Corporate.**

The corporate donor must connect the dots when a request comes in, it must be aligned with their mandate. Any funds used for non-operational purposes must be earmarked and the shareholders want to see that it is supporting good principle e.g., environment, health or education. Too far from core objectives is not looked at favourably

The organization being approached wants to know if they are being asked to support something what is the Return on Investment. What does success of that look like.

The need for on-going assessment and reporting on the activity being implemented in a reasonable timeframe. Periodic reports during the implementation and beyond looking at the overall impact is viewed favourably.

What is the financial capability of the organization asking for funding?

Damion Whyte– sometime the corporate donor asks after the presentation – what can we do for you? He does not always know the answer to that.

Response: Maybe the corporate donor can give support outside of funding – e.g., PR benefit. That can be requested. What is the overall objective? – time, money and people can add to what your organization needs.

Elecia Myers: Donor stewardship is to be highlighted – are emails sufficient or a 10-minute meeting? Thank you letter? Check-in Phone call?

David Lowe– Maybe all of the above starting with the formal letter. It depends on the donor. Call or WhatsApp. Share where their support has been highlighted so they can share with their team. A request for a meeting should be resisted. Know the gate keepers which is where you maintain the communication. 1. CEO/President/2. head of Not-for-profit arm/ 3. Marketing Director

Ingrid Parchment – How do you get your foot in the door?

David Lowe- Cold calls need to be informed by research. Understanding the alignment is critical. Start with a properly worded introduction. A one to two pager. Where they will benefit. Not too much detail regarding the project or history. That would be next step. Make sure the letter goes to the correct person in the organization.

**Further Recommendations**

Printed copies of funding plan for staff

*Note: Elecia Myers and Arlene Amitirigala provided copy of their presentations as well as other related documents which are included in the Appendix*

**Please note that presentations, agenda, register, evaluation sheets and post workshop deliverables are attached in the email.**

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