

Special Feature: Lessons Learned in Fundraising

First Lesson in Fundraising

Making the case

An important first step in fundraising is to prepare your case. You should be able to clearly state both the needs of your Specialist Group, and why you merit support.

A few simple questions can guide you, whether you are preparing a multi-page proposal or a two-minute verbal pitch:

- **What is a Specialist Group (in the IUCN/SSC context)? What does it do?**
- **Why is your Specialist Group unique?**
- **What is the conservation need your Group will address?**
- **Why is your Specialist Group the best organization to address that need?**
- **What is the current situation?**
- **How can a potential donor become involved and what will that donor receive in return?**

The landscape – where to look for support

Your first port of call is likely to be foundations, government agencies, or in some cases, corporations. In all cases, you should research the organization carefully before making your approach. Knowing the organization's priorities, what they have funded in the past, and the language they use to describe themselves will help you prepare a successful solicitation. If possible, having a personal contact within the organization is a great help.

You should not discount individuals as potential donors to your Specialist Group. Chances are that a number of concerned individuals exist who would be interested in what your Group would like to accomplish – if only they knew about it. As with organizations, a key factor in soliciting support from individuals is establishing a good relationship. The small donation today may lead to a bigger donation tomorrow.

In this issue of *Species*, you can read more about the many innovative and entrepreneurial methods SSC Specialist Groups have used to raise funds.

Communicating with donors

Donors need to be "cultivated" through informal conversations, meetings, and general communications about your program. It is important to put the strongest case forward, using the person (or people) that have the strongest relationship with the prospective donor, and to do this at the most appropriate time.

Tips:

- **Talk with the donor about your needs as they often provide the best guidance about what information they require to respond positively to your request.**
- **Cite other donors, as knowing that another donor has expressed confidence in your work can help to legitimize your program.**

- **Thank the donor; formal (in writing) and informal acknowledgment (in conversation) is essential to maintaining a positive relationship.**
- **Do not end communication if a donor turns down a request. Follow-up and explore future funding potential.**

Following up

A successful grant application is only the beginning of a relationship with a funding source. The importance of keeping donors informed of the program's progress cannot be over-emphasized. For instance, consider sending newspaper, journal, and newsletter articles with a short note highlighting an exciting accomplishment.

If the project design or budget needs to be altered, inform the donor immediately. Few projects are so predictable that changes do not occur. Make sure adequate accountability is built into your project. Donors want to know how their money was used. If the donor has been kept well informed, is pleased with the outcome and has confidence in your ability to deliver a product, they will likely donate again.

Resources

Some sources of interest include:

The Chronicle of Philanthropy:
<http://philanthropy.com/>

Non Profit Resource Center:
<http://www.not-for-profit.org/>

The Foundation Center: <http://fdncenter.org/>
http://fdncenter.org/funders/grantmaker/gws_corp/corp1.html

UK Fundraising:
<http://www.fundraising.co.uk/>

Team Species

Fundraising Online – The Crocodile Specialist Group

Generating funds to support Specialist Group activity is a constant challenge that requires constant attention. It is rather different from the academic or grant fundraising that researchers are used to. The Crocodile Specialist Group has built a solid base of support from private and commercial donors whom we have convinced to share our vision of crocodylian conservation. We have the great advantage of an existing commercial constituency of producers, traders, exhibitors, processors, and retailers to approach. The downside is that as the commercial world goes, so does our funding, and the crocodylian skin trade is notoriously fickle and variable (the subject of an economic study we recently commissioned with funding from the industry). There is also the perilous chasm of special

interest advocacy attached to funding. Our solution is complete transparency and a very firm policy—you buy into our conservation mission, not vice-versa, and if you don't like it, keep your donation.

However, an additional problem arises for us with species of no commercial value but pressing conservation need, perhaps what most Specialist Groups face. We have recently developed a new approach to address this need for the Chinese alligator, a Critically Endangered species (see *Species 36*). Faced with the need for urgent emergency funding to assist our Chinese collaborators, we ventured into the new world of internet fundraising by creating a new web presence attached to The Chinese Alligator Fund and appealing to the virtual public:

(<http://www.flmnh.ufl.edu/natsci/herpetology/brittoncrocs/alligatorfund.html>).

This initiative was generated by a couple of our members who were already managing an independent crocodile webpage hosted by the Group and a global crocodilian chat room. They had the

experience and technical know-how to make the site dynamic and interesting, and to promote it. The site and the fund appeal to a new constituency for us—amateur crocodilian enthusiasts and keepers.

In two years of operation, the Fund has raised over USD 14,000 in donations ranging from USD 10 to 2,000, from individuals, amateur groups, zoo programs and sales of some donated poster-size alligator pictures. The Chinese Alligator Fund has enabled the Crocodile Specialist Group to provide strategic funding directly in China at a modest, but useful level. Most significantly, the Fund has been a catalyst for the application of approximately USD 50,000 from other organizations. This in turn has created an interest and environment in China that has resulted in over one million US dollars (in local currency) to be applied, through Chinese government budgets, to the problem.

In terms of generating vital conservation funds, it has been an overwhelming success. We feel the success was due in part to fortuitous timing, but also to recognizing and encouraging the creativity and skills of our members, partnering with non-members who share our interest, and appealing to a new constituency with a clear and urgent message. The other vital component for continuing success is thanks and feedback to donors, so our thanks again to Chinese Alligator Fund organizers Adam Britton, Ragnar Lonn of CROCLIST, John Binns, Tim Weigman and Billy Heinbuch, all the donors, and our partners Wildlife Conservation Society and the China State Forestry Administration—it's working!

Perran Ross, Programme Officer and Adam Britton, member

Just Ask...They Won't Bite!—The Shark Specialist Group

As the Shark Specialist Group Programme Officer, I spend most of my time raising awareness of the problems facing shark and ray populations around the world. Generally, when I tell people I work in shark conservation, they imagine me diving in cages circled by great whites or snorkeling with schools of hammer-head sharks in tropical seas. I am inundated with questions asking which sharks are most likely to attack people, have I ever been close to being eaten and how scared do I feel? What scares me are not the sharks themselves, but the frightening rate with which many populations are declining. However, as people never seem to tire of shark stories, we usually have a willing listener before we even present our case to promote the Group's work to individuals, companies, and foundations.

Recently the Group has been successful in securing several grants to support our work. Government agencies have been supportive and we have been particularly lucky in receiving a three-year grant to employ a Programme Officer (me!) from the UK Department of the Environment. This grant stemmed partly from their interest in shark issues following an unsuccessful proposal to list the basking shark on CITES in 2000. It illustrates how interest generated on one level, in this case through raising awareness about one charismatic (and threatened) species, can be taken to another level, such as explaining that the basking shark issue is only part of a huge global problem. We noted that one of the best ways for the Group to tackle the bigger problem was to employ a staff member to coordinate the voluntary network. Lo and behold, the funding was granted!

Developing a relationship with potential donors has also recently brought us excellent returns. After several years of collaboration between Group members and Packard Foundation staff, we have, this year, received a significant grant. Our earlier contacts helped establish the close relationship of the Shark Specialist Group's aims with that of the Foundation's Marine Fisheries Program. Similarly, Group members working closely with Wildlife Conservation Society staff on various projects led to their providing a grant to the Shark Specialist Group. The benefits of networking, collaborating, and most importantly talking to other organizations about your Specialist Group's aims are clear!

We are now on excellent footing to move the Group's work forward, expand the network and take on more projects. I am busy thinking of

other foundations and companies who may wish to help us. Our newsletter and website helps keep the general public informed, and we work closely with NGOs such as the Shark Trust and Audubon Society (also a Shark Specialist Group donor) to spread our messages widely. We often receive small donations from the public and every little bit adds up.

The simple message I want to convey to other Specialist Groups is to talk! Talk about your species and why they are interesting and important, encourage people to ask questions, then turn their questions around to make them realize for themselves the need to 'put money where their mouth is'. Just ask...they won't bite!

Rachel Cavanagh, Programme Officer

Where do we Begin?—The Tapir Specialist Group

During the First International Tapir Symposium held in November 2001, fundraising was a topic discussed exhaustively. As a result of the discussions and taking into account the difficulties that most tapir researchers have raising funds for their projects, the Tapir Specialist Group created a Fundraising Committee to work on the development of fundraising strategies for the group and for tapir researchers and educators.

We are aiming to have the Specialist Group functioning as an additional funding source for tapir projects. Our plan is to create a Tapir Specialist Group Conservation Fund and raise money through proposals and campaigns. This strategy will raise funds for tapir conservation in general, not for specific projects and we believe this is a major advantage. Over the years, donors to the Tapir Preservation Fund, a major fundraising agency for tapir research based in the United States, have indicated their motivation for donating was the overall tapir conservation cause, not always for individual studies. Since Specialist Groups are not legal entities in themselves, we will rely on the Tapir Preservation Fund to collect, manage and distribute the grants to researchers and educators through a selection process.

As a first step to raise funds, we are putting together a proposal for the Tapir Specialist Group as a whole. It will include the history of the Group and the Tapir Preservation Fund, details about our relationship with the Fund, our mission, objectives and goals, and other general information. Also included will be abstracts about all ongoing tapir projects. Once we have this proposal, we will identify and contact potential donors such as the large conservation organizations, trusts and foundations, zoos, industries, and private donors. In addition to our written proposal, we will prepare multimedia

presentations that can be presented in person by Specialist Group representatives. We are also planning a major zoo campaign directed at tapir holders worldwide, especially the United States and Europe, seeking contributions, as has been done for other taxon groups in the past.

Another strategy we will use to raise funds will be the development of the "Friends of the Tapir Specialist Group" program. We are hoping to attract private donors to make annual contributions to the Tapir Specialist Group Conservation Fund. We will have several different ranges of contribution and each person will be able to choose how much she or he would like to donate.

Eventually, an evaluation committee, taken from the wide range of professionals in the Group, will be responsible for reviewing proposals to the Conservation Fund. As any other funding agency, we will have calls for proposals, application guidelines, application forms and deadlines; once the Tapir Specialist Conservation Fund is fully funded of course!

We are still at the beginning of this work and we would appreciate any comments and suggestions. Email us at epmedici@uol.com.br and crfoerster@aol.com

Patricia Medici, Chair and Charles Foerster, Deputy Chair

In terms of generating vital conservation funds, it has been an overwhelming success

"Friends of the Tapir Specialist Group" program will hopefully attract private donors

Getting Started with Seed Grants— The Declining Amphibian Populations Task Force

The Declining Amphibian Populations Task Force (DAPTF) allocates a substantial proportion of its budget to an annual program of Seed Grants. These are small awards (typically USD 500 to 2,000) given to support projects that further our mission. Awards are intended to further our scientific understanding of the amphibian decline phenomenon and lead to recipients setting up new lines of research that will attract further funds from conventional sources. Between 1993 and 2000, we have received 332 grant applications, from 62 different countries and have funded 95 projects, for a total outlay of USD 209,779.

Such a program is only possible because we have a well-funded office, employing a full-time coordinator. Funding, for both our office and the

Appropriately targeted
small grants can make
a significant contribution to
conservation research

Seed Grant Programme comes from two sources; grants and donations. Obtaining grants has mostly been done by the Group's Chair, formerly Ron Heyer and currently Jim Hanken. Identifying and wooing grant-giving bodies is a

time-consuming and frustrating business. As Ron Heyer puts it, "We throw a tremendous amount of fishing lines into the funding pool with very few nibbles, let alone something that can be reeled in and put in the bank". To maintain a steady stream of donations, it is essential that we maintain a high profile. This we do by publishing a bi-monthly newsletter, *Froglog*, and maintaining an active website:

<http://www.open.ac.uk/daptf/index.htm>.

In the last few years, we have been able to attract substantial awards specifically for the Seed Grant Programme. These have come from organizations such as Conservation International, the Critical Ecosystem Partnership Fund, and the Amphibian Research and Monitoring Initiative and tie grants to specific areas. For example, seed grants funded by Conservation International are limited to 'biodiversity hotspots' and Amphibian Research and Monitoring Initiative grants are restricted to projects in the USA. Generous awards have also come from private individuals such as an anonymous donor funding projects that address the effects of elevated UV-B. In general, we favor proposals that link researchers in developed and developing countries, and are currently encouraging project proposals that look at synergistic effects between two or more causal factors.

Though small in financial terms, Seed Grants have made a big impact. In some parts of the world, USD 2,000 is still a lot of money and many grant recipients have been able to use the support received from an international organization to attract more funding locally. This has been particularly true of those grants that have

funded training workshops, in Asia for example, which have led to the creation of local groups to carry out long-term population monitoring. On average, Seed Grant holders have published two papers in refereed journals and attracted 20 additional US dollars for every Seed Grant dollar provided. These results show that useful research does not always need big grants; appropriately targeted small grants can make a significant contribution to conservation research.

Tim Halliday, International Director

Partnerships for Success—The African Rhino Specialist Group

Over the years the African Rhino Specialist Group has developed a close and mutually-beneficial relationship with the World Wide Fund for Nature's (WWF) African Rhino Programme and some national WWF offices (especially USA, South Africa, Netherlands and Denmark). The Specialist Group acts as a technical partner that assists WWF's African Rhino Programme review and comment on project proposals and reports, as well as sometimes providing technical input and advice to WWF-funded projects and workshops. In turn, WWF funding has provided partial support for the Scientific Officer, some of the Chairman's expenses, and has enabled us to hold Specialist Group meetings every two years. The success of this long-term relationship is largely due to the practical applied focus of the African Rhino Specialist Group and regular and prompt production of the necessary progress and financial reports. We are careful to ensure our meetings are always well planned and productive, and detailed proceedings and press releases are always produced after the meetings.

Another success, following a period of negotiation between the African Rhino Specialist Group, other partner agencies and the Italian government, was the formation of the Italian funded Southern Africa Development Community (SADC) Regional Programme for Rhino conservation. Our Specialist Group is one of five consortium members on this Programme (along with IUCN Regional Office for South Africa, WWF Southern African Regional Office, CESVI (an Italian NGO) and the SADC Wildlife Technical Coordination Unit. In a relatively short span of time, this program has managed to leverage additional funding for a large range of projects that have been or are being undertaken. Through close links with other funding agencies, the program ensures activities complement and do not duplicate the work of other donor agencies.

The African Rhino Specialist Group's primary focus is to promote the development and maintenance of long-term viable populations of rhinos in the wild. Our activities are primarily geared to promoting successful conservation strategies. The ultimate yardstick of success for us is simply whether or not rhino numbers are increasing. The group's small size and combination of official country representatives and specialist members also provides the ideal mix to facilitate the interchange of information and technical advice. In addition, we play an important networking role. Invariably our members are represented on regional, national and international rhino committees. Through the contacts and friendships built up through the African Rhino Specialist Group, a rhino coordinator in any country is only a phone call or email away from assistance or help from rhino specialists throughout the continent. In this way the Group provides a continental coordination role. Through its system of priority-rating projects and rhino populations, and the fact that it regularly reviews and comments on project proposals for a range of donor agencies, the African Rhino Specialist Group assists donors spend their money wisely and effectively.

The African Rhino Specialist Group is extremely grateful to its main sponsor, WWF, without whose assistance the Group would not be nearly as effective or productive.

Richard Emslie, Scientific Officer

New Charity for Orchid Conservation—The Orchid Specialist Group

The Orchidaceae is one of the largest and most diverse families of flowering plants. Their sheer beauty and diversity have made them the focus of great public attention for many years. Worldwide interest in orchids is reflected in the multi-million dollar horticultural and cut flower industries, the vast number of orchid societies that have formed in many countries, the array of

publications, both scientific and popular, and the countless meetings, shows and conferences that take place. Despite orchids being widely recognized as a flagship group for plant conservation, fundraising for the Orchid Specialist Group has presented many challenges. The Group

has had some notable achievements; however, its activities have been compromised and severely limited through insufficient funding, and its continued reliance on volunteers.

A network of the Group's size and complexity requires substantial funding to coordinate its many activities, to operate professionally and effectively, and to ensure that it meets expectations. Currently, our activities are conducted through twelve regional and thematic task forces that receive administrative and technical support from a voluntary Secretariat, which is clearly unsustainable.

Some of the complex challenges to fundraising for the Orchid Specialist Group include:

- *The need for a professional coordinated approach—a fundraising strategy is required, but without the appropriate expertise and staffing, fundraising efforts have been unstructured and disjointed.*
- *Difficulties in raising the profile of the Group as an independent body—many potential donors believe the Group receives financial support from IUCN, or because the Chair is based at Royal Botanic Garden Kew, from Kew itself. Explaining the nature of the relationship between the Group and IUCN presents a particularly difficult challenge.*
- *Lack of independent legal status—the Group relies on a non-profit organization to manage its accounts; therefore, a significant proportion of funds raised go to project overheads.*
- *Donors are reluctant to pay for network and project administration - fundraising is one of the key roles of the Group's Secretariat; however, without paid staff, serious efforts to fundraise are stifled.*
- *Conflicts of interest—fundraising for projects linked to the group's institutional base often take precedence.*
- *Missed opportunities for tapping into the horticultural industry—the multi-million dollar orchid industry is an obvious potential source of funding; however, there is an inherent association between orchid conservation and CITES, which is unpopular amongst commercial growers.*

In response to the urgent need for resources, the Group's Executive Officer and Chair have put forward a proposal to establish a new independent charitable organization, Orchid Conservation International. This professional body will act as a supporting umbrella organization for global orchid conservation efforts, with the ability to fundraise from governmental, non-governmental and private sources. Within a year of the proposal's first circulation, the Orchid Specialist Group, the International Orchid Commission, the American Orchid Society, and the Orchid Digest Foundation have endorsed the establishment of the new charity. Substantial donations have already been pledged for partial funding for the first two years of operation, and a team is in the process of establishing the organization as a formal registered charity.



The establishment of Orchid Conservation International should overcome many of the obstacles faced in fundraising for the Specialist Group. The Group will remain as an active network but benefit from the organizational support of Orchid Conservation International and improved alliances with other conservation organizations, orchid networks, and societies. For further information, contact Shelagh Kell at shelagh.kell@dial.pipex.com.

Shelagh Kell, Executive Officer

An Opportunity for Specialist Groups— BirdLife International

The BP (formerly British Petroleum) Conservation Programme, a partnership between BirdLife International, BP, and Fauna and Flora International, helps international teams of students carry out conservation projects that address global conservation priorities at a local level and deliver major new scientific findings with a long term impact on conservation. Since 1985, the Programme has supported 194 projects in 60 countries.

“Our work has progressed enormously thanks to our BP Conservation Award”, says Milagros Lopez Mendilaharsu, leader of the Karumbé sea turtle project. “Thanks to our Gold Award in 2001, we have completed our entire field research program for the year as planned, set up two turtle research camps, and trained volunteers from Argentina and Uruguay.”

The team’s work with getting baseline data on Uruguay’s sea turtles and co-operating with local fishing communities has been making a real difference, and the project continues to grow.

In South Africa, another BP Gold Award went to a team from Rhodes University, whose project has been set up to restore species-rich Cape heathland, or “Fynbos”. This vegetation type is endangered throughout its range as a result of development, grazing, agriculture and the invasion of alien plant species. Focusing on the Grassy Fynbos in the Eastern Cape, the project aims to understand the complex ecosystem degradation process, and to identify keystone species and methods that will help with restoration. The end result will be a management plan and public awareness campaign to involve local communities in the restoration of this unique ecosystem.

In July 2002, a team of young Colombian ornithologists, also winners of a BP Gold Award, rediscovered the indigo-winged parrot, considered one of the world’s rarest birds. This is the first concrete evidence of the continued existence of the species for 91 years. Jorge Velasquez and Alonso Quevedo discovered 14 parrots as they explored the highest Andean volcano in central Colombia. Jorge recalled how after months of unsuccessful searches in the Andean montane forests, he and Alonso heard the parrots for the first time: “...suddenly, a parrot’s sharp cry pierced the gloom of the cloudy forest, and was immediately joined by a chorus of other birds in the mist. We thought we were witnessing a miracle from heaven, as one of the world’s rarest birds descended before our very eyes.”

These three projects exemplify the aims of the BP Conservation Programme and its annual awards. In 2003, the Programme is expanding significantly. Two additional partners, Conservation International and the Wildlife Conservation Society, both leading international conservation organizations are joining the Programme. This expanded partnership should bring strengthened support network to applicants and winners, and means more capacity for training and development. With this growth, the size of awards has significantly increased and the Programme will be supporting at least 26 young teams with a total of USD 600,000. A representative from each award winning team is also given the chance to attend training workshops on fieldwork techniques and project planning.

For more information concerning the BP Conservation Programme, please visit the website <http://conservation.bp.com> or contact Marianne Dunn, Programme Manager at: bp-conservation-programme@birdlife.org.uk.

Marianne Dunn, Programme Manager

The BP Conservation Programme helps international student teams carry out conservation projects

