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UPDATED TRAVEL PHILANTHROPY TRUST CONCEPT PAPER
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UPDATED TRAVEL PHILANTHROPY TRUST CONCEPT PAPER

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Submitted By: Solimar International

**Contact: Natalie Sellier, Program Manager
1327 14th Street NW, Suite 320
Washington, DC 20005
Tel: (202) 518-6192 (x104)
Fax: (202) 518-6194
Email: n.sellier@solimarinternational.com**

Submitted To: Chemonics International

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SECTION 1. OVERVIEW

About Travel Philanthropy

An increasing number of travelers are seeking to positively impact the communities and environments of the places they visit. Providing financial donations in support of local conservation activities is one of the most effective ways that travelers can make a difference. This concept has led to a new source of international development aid known as “travelers’ philanthropy”. The tourism industry (including individual businesses) are also becoming increasingly motivated to establish and support these programs in order to protect their local environment and safeguard their business investments.

There is every reason to believe that this movement is desperately needed and destined to grow exponentially, benefiting from trends in giving, travel, and globalization. Growth in both giving and travel are two of these dominant trends. By 2020, charitable giving by Americans alone will exceed \$300 billion. Travel is also growing and is now the largest single segment of the world economy. Tastes in travel are changing, with sustainable and heritage travel becoming increasingly popular. Destination preferences are also shifting. Of the top 40 tourist destinations, 11 are in developing countries. At the same time that globalization is on the ascendancy, the percentage of gross domestic product that the United States gives to developing countries continues to decline.

Travel is clearly an indispensable aspect of globalization and has the potential to reduce the staggering economic inequalities of the contemporary world and accelerate environmental and cultural damage.

Increasingly, partnerships that include individuals, businesses, civic institutions, and NGOs are needed to augment governments’ efforts. Travelers’ Philanthropy encourages the development of such partnerships and creates a new stream of economic assistance dollars in locations where the need to conserve natural resources is high.

Travelers’ choices signal a significant shift in attitudes. A recent study of American travelers undertaken by the Travel Industry Association in collaboration with the *National Geographic Traveler Magazine* found that:

- More than 47 million travelers believe it is important that travel companies they use employ local residents and support the local community.
- More than 55 million travelers exhibit a high degree of commitment to travel that protects the local environment, engages visitors in the local culture, and returns benefits to the community.
- Sixty-one percent of travelers agree that their travel experience is better when the destination preserves its natural, historic, and cultural sites and attractions.
- Seventy-one percent indicate it is important to them that their visits to destinations do not damage local environments.

These developments attest to travelers’ interest in life-enhancing, transformational travel. At its best, travel can offer people the opportunity to change: to look outside themselves,

past preconceived notions and cultural conditioning. Travel also provides the rare opportunity to witness firsthand the beauty and fragility of other societies, cultures, and natural systems. Such experiences generate strong philanthropic impulses. The emerging Travelers' Philanthropy movement is channeling these gifts toward economic development and conservation in many of the places where the need is greatest.

Tourism in Izabal

Today, the port of Santo Tomás de Castilla is among the busiest in Central America and currently expanding. In 2004, Santo Tomás de Castilla began receiving cruise ships causing a tremendous boost to the neglected region's tourism industry. A number of cruise ships currently arrive to the port each month, carrying up to 1,500 passengers each. Cruise ships visit Guatemala from October to May, which is the high season. During the 2008/2009 high season, approximately 76,819 visitors arrived by cruise ship. Passengers typically seek to explore Guatemala's Maya culture, spread throughout the country. Attractions within Izabal include Rio Dulce, Lake Izabal, the towns of Puerto Barrios, Livingston and San Felipe Castle, and the Mayan ruins of Quirigua (a UNESCO world heritage site). Several community-based organizations also offer tours in the region, drawing a number of backpacker and overnight visitors.

According to statistics provided by INGUAT, Izabal had 1,627,552 non-cruise visitors in 2007 and 1,715,426 visitors in 2008. The majority of these visitors stayed overnight in either Rio Dulce or Livingston.

Objective of the Izabal Conservation Fund

The main reason that people are visiting Izabal is to experience the wonderful and natural cultural resources (including protected areas, wildlife, mayan ruins, the Garifuna culture) unique to this particular destination. There are a number of active organizations working in Izabal to protect these natural and cultural resources and mitigate some of the major threats to the region. Established as a partnership between the Izabal Geotourism Alliance, MAR Fund, and the traveling public, the Izabal Conservation Fund will serve as a mechanism to link travelers with local grassroots organizations and give them the opportunity to provide financial support to Izabal-based conservation activities. These donations will provide new sources of funding to locally run, grassroots projects doing meaningful work in the destination that may not have access to funding through traditional channels. Local tourism stakeholders will indicate their priorities for these funds through their participation on an Executive Board. Funds will be collected (primarily from travelers) on a voluntary basis, using the following model:



SECTION 2. PROGRAM STRUCTURE AND IMPLEMENTATION

Administrator

The Mesoamerican Reef Fund (MAR Fund) has been selected as the administrating partner for the Izabal Conservation Fund due to its governing principles, complimentary objectives, and experience in distributing funds to approved projects in the Mesoamerican Reef region. MAR Fund is financial mechanism that raises and allocates funds to support conservation and sustainable use of resources in the Mesoamerican Reef Ecoregion. The organization is registered in the United States as a 501 (c)(3), commonly referred to as a *charitable organization*.



About MAR Fund

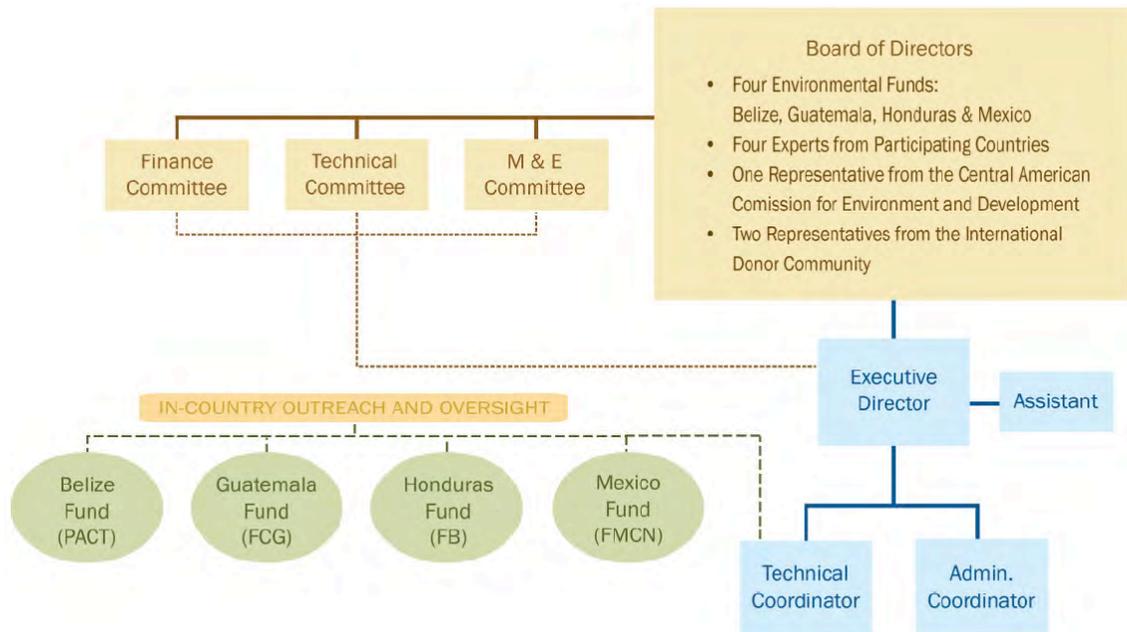
MAR Fund is an emerging environmental fund whose primary goal is to protect the Mesoamerican Reef Ecoregion shared by Belize, Guatemala, Honduras, and Mexico. It provides long-term funding to local organizations and projects in the form of grants.

The **mission** of the MAR Fund is to inspire innovative, transnational solutions to critical Mesoamerican reef issues through providing meaningful, long-term financial support and trustworthy reef management advice so that future generations can enjoy and benefit from a thriving reef system.

The MAR Fund was established by four independent funds representing each of the MAR Countries (Belize, Guatemala, Honduras, and Mexico). The four funds have permanent representation on the Board of Directors, in addition to a representative from the Central American Commission on Environment and Development—the most important cabinet level agency in Central America responsible for environmental stewardship. In addition, one recognized expert from each country and up to seven representatives from the international donor community join MAR Fund’s Board of Directors on a rotational basis.

As the administrator of the Izabal Conservation Fund, MAR Fund will open an interest-bearing bank account under their existing legal structure dedicated specifically to all funds collected by the Izabal Conservation Fund. Although the Izabal Conservation Fund will be housed within MAR Fund, and makes use of its operation mechanisms, it will be an independent entity. This means that the funds generated for the Izabal Conservation Fund will be kept separate from the funds of MAR Fund, and the decision-making power of the Izabal Conservation Fund will be independent from that of the MAR Fund. The Izabal Conservation Fund will be authorized to use the name and logo of MAR Fund to help establish credibility.

MAR Fund maintains a small but efficient core staff in their Guatemala City headquarters. This staff is comprised of an executive director, a technical coordinator, and an administrative assistant. To ensure the highest possible performance and sound decision-making, staff and the Board of Directors are advised by three committees: finance, grants review, and evaluation. The complete organizational structure of MAR Fund is depicted in the graphic on the following page.



El Consejo (the Executive Board)

The Consejo (or Executive Board) for the Izabal Conservation Fund will be comprised of six key stakeholders representing the Izabal region as well as representatives from MAR Fund, CONAP, and INGUAT. The six stakeholders of the Izabal region include the Chairperson and Vice Chairperson of each of the three Geotourism Stewardship Councils (representing the destinations of Rio Dulce, Puerto Barrios, and Livingston). The Consejo member from MAR Fund will act as secretary to the Consejo, with a voice but not a vote. The MAR Fund representative will attend meetings to provide technical assistance and monitor the actions of the Consejo. Refer to Appendix B for biographies of the Consejo members.

The overall role of the Consejo is to make all decisions on behalf of the Izabal Conservation Fund. The main functions of the Consejo include:

1. Approving the administration of the account (through signing a formal agreement with MAR Fund);
2. Providing by-laws for the use and internal operation of the sub-account, sanctioned by the MAR Fund Board.
3. Defining the annual objectives, operating plans, and strategic areas of funding for the account;
4. Defining whether beneficiaries of the funds will be pre-determined or if they will accept proposals;
5. Approving the funding cycle of projects that will benefit from the funds (this can be based on the cycle already established by MAR Fund);
6. Defining the specific criteria upon which to evaluate proposals for funding received. Projects to be approved in protected areas should be based on existing management plans, business plans, and land use plans of the protected areas.

7. Selecting which pre-determined organizations and/or conservation topics will be awarded funding;
8. Appointing a person that will be in charge of all communications and instructions regarding the Izabal Conservation Fund (including updating web sites, etc. with project results);
9. Approving proposals and/or pre-determined beneficiaries for funding;
10. Authorizing external audits of the fund;
11. Any other function considered necessary for the good operation of the account.

The Evaluation Committee

The Evaluation Committee is an advisory committee that may be established to support the Consejo. It will serve to evaluate proposals or workplans submitted by the potential beneficiaries of the Izabal Conservation Fund. This committee will make recommendations to the Consejo of which projects fulfill the criteria established by the Izabal Conservation Fund and therefore have the greatest potential to generate real impacts in terms of conservation. If it is determined that a separate Evaluation Committee is not needed, this function can be served by the Consejo.

The application process should meet the need for comprehensive information as well as applicants' desire for an easy, straightforward application. A comprehensive Due Diligence Checklist is detailed in Appendix C, which includes information that should be required of organizations that wish to feature their projects as part of the initiative. Refer to Appendix D for sample evaluation criteria and grant application form.

Secretary Ex-Officio: MAR Fund

As stated previously, MAR Fund will act as the administrator of the fund and have one active member on the Consejo (who will not have voting rights). The MAR Fund's standard overhead fee to act as administrator is 15 percent of all funds collected. This percentage includes an administrative share for local oversight and administration provided to their in-country partner (Fundación para la Conservación de los Recursos Naturales y Ambiente in Guatemala). This fee may be revised in light of the specific activities and responsibilities required of the MAR Fund after discussion and signing of the formal agreement.

MAR Fund will serve the following main functions:

1. Financial Administration of the Account;
2. Organize call for proposals, based on the criteria defined by the Consejo;
3. Transfer of Funds authorized for beneficiaries approved by the Consejo;
4. Carry out instructions that are given by the Consejo;
5. Organize meetings between the Consejo and the Evaluation Committee, and
6. Prepare reports on the Account and updates on approved projects.

The Fund Administrator specific to the country of Guatemala (Fundación para la Conservación de los Recursos Naturales y Ambiente in Guatemala) will serve the following functions:

1. Signing agreements of financial allocation to projects approved in Guatemala;

2. Submitting payments to the projects approved in Guatemala;
3. Receiving, reviewing, and providing feedback on the technical and financial information submitted by the approved beneficiaries; and
4. Conducting field visits to the approved projects to monitor and evaluate results.

Beneficiaries

The beneficiaries of the Izabal Conservation Fund can be either predetermined (for example, an organization like FUNDAECO) or selected through a “call for proposals”, or a combination of both. In the instance where beneficiaries are predetermined, the organizations will be asked to submit a workplan and budget indicating how they will use the Funds. If the Consejo approves the workplan, a defined percentage of the annual amount collected will be granted to the beneficiary. Alternatively, the Izabal Conservation Fund could facilitate a competitive process for awarding funding through a “call for proposals”. These calls could be for specific areas of focus (i.e. waste management, conservation of endangered species, etc.) according to the needs and priorities as defined by the Consejo. *Refer to Section 5 for more information on potential beneficiaries.*

Summary of the Izabal Conservation Fund Program Structure



SECTION 3. MARKETING AND BRANDING STRATEGY

The three local Geotourism Stewardship councils have agreed upon a name (*Izabal Conservation Fund*), tagline (*Travel with Purpose*), and logo concept that will resonate with locals and travelers alike. When used in marketing and communications materials, the name and tagline will be kept in English to cater to the target market for donations (mostly English-speaking travelers and cruise-ship passengers). The following logo concepts were designed for the Izabal Conservation Fund based on specific feedback received from the three local Geotourism Stewardship Councils (gathered through a survey).



The colors used in the logos were based on survey results as well as the color of the Garifuna flag (yellow, white, and black). The style and square design are representative of the Mayan carvings at Quirigua, which were also mentioned frequently in the survey as one of the symbols that locals associate with the Izabal region. The Izabal Conservation Fund logo also has a dominant focus on nature—depicting imagery of local wildlife, the sun, and the lake.

Marketing Methods

Through the funding support the graphic design assistance of Sustainable Travel International (a leader in travelers' philanthropy), the following marketing materials will be developed to increase awareness of the Fund and encourage donations:

1) Gift Cards

Sustainable Travel International will develop charitable gift cards for travelers to support the initiative. Gift cards will be available in incremental amounts (\$5, \$10, \$25, \$50, \$100) and can be purchased to support a specific topic or issue—or be allocated as a general gift to the Izabal Conservation Fund. Cards will be printed in a pre-numbered series in order to place controls around the collection of money for the cards. Gift cards typically cost between \$1 - \$3 per card to produce. A small portion of funds generated for the Izabal Conservation Fund will be earmarked for the re-printing of the gift cards.

Gift card options include:

- Cards and carrier sleeves will be customized and co-branded to prominently display the Izabal Conservation Fund's logo;
- Cards will be available in a variety of pre-designed themes ranging from cause areas (such as the environment) to events such as birthdays and holidays.
- Cards are environmentally friendly and biodegradable with supporting packaging made from recycled stock.
- Cards could be available for redemption through the Izabal Conservation Fund's online giving portal (available on MAR Fund's web site) where card recipients would have the ability to donate the value of their card to any of the projects that are being offered.



Gift cards will be marketed as a gift that keeps on giving by tying the donation to something tangible (i.e. \$150 gift card will train eight fisherman in marine conservation). The gift cards are not a replacement for souvenirs or other forms of merchandise, which should be purchased from local artisans. Instead the cards will be positioned as a way for travelers to improve the quality of life in the communities they've visited. Gift card donors could be provided with periodic progress reports so they can see how their contribution was used and what results have been achieved.

2) Rack Cards (brochures)

A simple yet visually attractive 4x9 rack card that is both informative and readable will also be developed by Sustainable Travel International to promote the Izabal Conservation Fund. Copy in the rack card will be succinct, and images and graphics will be used to visually tell the story. Rack cards will be distributed through members of the Izabal Geotourism Alliance and placed in a brochure holder (displayed on the front counter of the hotel/restaurant) that includes a membership certificate stating: "*This business is a proud member of the Izabal Geotourism Alliance. Ask how you can support the Izabal Conservation Fund*". See the draft copy for the rack card in Appendix E.

3) Donation Boxes

Donation boxes will be made available in the following strategic locations to collect donation envelopes and loose coins/bills.

- Livingston Information Center
- Puerto Barrios Information Center
- The USAID-CCAW program is currently in discussions with INGUAT to place a larger, more secure pedestal donation in the Santo Tomás de Castilla cruise terminal.

4) Web Sites

The Izabal Conservation Fund and the individual beneficiary projects will be promoted through the following online channels:

- Destination web site for Izabal. Users will be linked directly to MAR Fund's web site to make a donation through Paypal;
- www.Globalgiving.org and www.travelersphilanthropy.com. Users will be linked directly to MAR Fund's web site to make a donation through Paypal;
- Directly on www.Marfund.org.

5) Conservation Awareness Video

The conservation awareness video being developed by South Shore Productions, Inc. will be actively used in the marketing and outreach of the Izabal Conservation Fund to travelers as well as a promotional tool to recruit more business members to join the Izabal Geotourism Alliance. This video will be used to inform travelers of local attractions, threats to biodiversity, organizations and projects on the ground working towards change, initiative, promote the various collection mechanisms, and inspire travelers to give.

SECTION 4. COLLECTION STRATEGY

1) Members of the Izabal Geotourism

Alliance (Alianza Geoturística de Izabal)

The Izabal Geotourism Alliance (IGA) is a group of local non-profits and businesses that are dedicated to working with travelers and the travel industry to enhance the environment and well-being of local residents in the Izabal region of Guatemala.



The Izabal Geotourism Alliance’s mission is to lead, coordinate and promote the development of sustainable tourism in Izabal. IGA members are working to address a number of conservation threats including waste management and pollution, loss of traditional languages and cultures, poverty and public health issues, and unsustainable development.

Over the next few months, the USAID-CCAW program will work to promote Izabal as a sustainable tourism destination and create positive image of the region at an international level through the following actions:

- Recruiting stakeholders from the public and private sector to join the Izabal Geotourism Alliance;
- Implementing and marketing the “**Izabal Conservation Fund**”;
- Developing a consumer-focused web site for the destination featuring detailed descriptions and booking information on Alliance member businesses; and
- Opening Tourist Information Centers in the locations of Livingston and Puerto Barrios to provide assistance to visitors, offer bookings of Alliance member’s products, and sell local handicrafts.

Participation in the Izabal Geotourism Alliance is an opportunity for local tourism businesses to show their support of conservation initiatives in Izabal. Business members that join the Izabal Geotourism Alliance will receive the following benefits in exchange for their commitment to encourage and collect donations to the Izabal Conservation Fund:

- Free six-month trial membership;
- Full page promotional description on the Izabal consumer-focused Web site;
- Right to distribute sales brochures of their business at the tourism information centers (coming soon in Puerto Barrios and Livingston);
- Business linkages with local and international tour operators to promote sustainable tourism activities in the region;
- Access to hotel and activities booking services through the tourism information center locations;
- Special distinction as a tourism business supporting sustainable tourism initiatives in Izabal with a “Member of the Izabal Geotourism Alliance” logo and certificate or sticker;

- A feature business listing in a Sales Directory made available to visitors at the tourism information center locations and distributed to tour operators in Guatemala City; and
- Opportunity to be featured in press/FAM trips.

In exchange for the benefits listed above, business members of the Izabal Geotourism Alliance will be given two options in which they can encourage travel philanthropy and collect donations for the Izabal Conservation Fund:

➤ **Voluntary Donations**

Voluntary opt-in or opt-out programs will provide the guests of member businesses with an opportunity to support the initiative by adding a \$2.00 fee to their invoice. Hoteliers, for example, will add \$2.00 per night upon check-out as an add-on to each guest's invoice. Guests will be informed of the program upon check-in and can opt-out upon check-out, after they have had the opportunity to experience the destination. This will be established as an opt-out program as travel and tourism businesses that include a fee in guest invoices as a voluntary opt-out have been more successful than those who offer them as a voluntary opt-in. The following opt-out language for the accommodations sector could be included on check-in cards at the hotel:

US\$2 per room night will be automatically charged to your room to support the Izabal Conservation Fund.

[] I do NOT wish to support the Izabal Conservation Fund.

The success of this type of program is dependent on its integration into existing sales and booking mechanisms. Member businesses will be required to actively promote the initiative through their marketing activities and on-site in lobby areas and by providing further reading material in guest rooms, for example. Additionally, successful opt-out programs are supported by an informed staff that understands the program and its benefits and are comfortable promoting it to their guests.

➤ **Gift Cards**

Members of the Izabal Geotourism Alliance will also be given the option to sell gift cards of various amounts to their guests.

When members sign up to join the Izabal Geotourism Alliance, the feasibility of these two options will be discussed and they will be asked to state their preference for how they will collect donations. Refer to Annex F for the fact sheet used to describe the program to potential members of the Izabal Geotourism Alliance.

To encourage donations and help ensure the funds received by member businesses are delivered to MAR Fund intact, it may be necessary to provide hotels with an incentive by way of a small commission (i.e. 5%) on all donations reported.

Reporting Donations

As funds accumulate, member businesses will be asked to periodically (monthly or bi-monthly, depending on the amount generated) deposit the donations into a bank account opened for the Izabal Conservation Fund in Guatemala.

While the accurate collection of funds generated by member businesses will rely largely on trust, mechanisms will be tested and established to help ensure all donations are delivered to ICF's bank account in tact. For example, all donors will be asked to sign a ledger which includes their name and donation amount. Business members will be required to submit these ledgers along with donation amounts. Gift cards will also be printed in a pre-numbered series and audited periodically against the donations submitted.

2) Tour Guides

Tour Guides will also serve as an important way for soliciting donations to the Izabal Conservation Fund, especially from cruise line passengers that typically do not stay in local hotels or eat at local restaurants. Through the USAID-CCAW program, tour guides will be trained on how to incorporate conservation messages into each of the tours they are leading, and encourage visitors to donate to the Izabal Conservation Fund at the end of each tour.

To encourage more donations and help ensure the funds received by tour guides are delivered to MAR Fund intact, the Izabal Conservation Fund will incentivize tour guides through paying a 10% commission on all donations received. In exchange for this 10% commission, tour guides will be asked to collect donations to the Izabal Conservation Fund through selling gift cards at the end of a tour.

The donations collected from individual tour guides will be aggregated by their respective tour operator companies, who will be responsible for transferring the total amount of funds collected to the Izabal Conservation Fund's bank account.

3) Web sites

The use of a Web site is an essential component to the marketing strategy. Specific suggestions for utilizing Web sites to encourage and collect donations include:

- ***Donation Engine.*** A specific page for the Izabal Conservation Fund will be set up on the MAR Fund's web site, with an online donation option through Paypal. All donation engines mentioned below will be linked directly to the MAR Fund's web site to minimize the number of intermediaries and simplify the tracking of on-line donations.
- ***Partner Donation Engines.*** The opportunity also exists for the Izabal Conservation Fund to work with other travel philanthropy partners (such as www.Globalgiving.org or www.travelersphilanthropy.com) to incorporate the Izabal Conservation Fund and its individual beneficiary projects onto their globally-focused donation engine web sites. The web sites will be linked to the donation engine available on MAR Fund's web site.

- ***Recruitment Page.*** Incorporating an advocacy page on the new consumer-focused web site will be a highly effective way to engage donors and advocates and recruit their participation, maximizing the level of involvement from Web visitors. The description of the initiative on this page should be very brief (i.e., around 150 words). Once donors and advocates are registered, they will be further educated on the site and through direct email campaigns, etc.
- ***Proactive Outreach.*** In order to ensure the success of the initiative, a marketing budget will be dedicated to the active promotion of the Web site. The new consumer-focused Web site for Izabal will be successful if it is supported and marketed by partner organizations, pitched to the media, and featured on related websites, on blogs and in social marketing “cause” platforms like Facebook.
- ***Report the Results.*** Donors will be kept up-to-date and informed of the results experienced by the Izabal Conservation Fund to ensure ongoing engagement and support. The campaign should appear as a concise narrative to donors and not a series of unrelated “take action” requests. Results of projects supported through the Izabal Conservation Fund will be regularly updated the destination’s web site and other partner sites where projects are listed.

SECTION 5. POTENTIAL BENEFICIARIES OF FUNDING

Active Organizations in the Izabal region

FUNDAECO, Eco Rio, Ak'Tenamit, Garifuna Association of Livingston, and Defensores de la Naturaleza are some of the most active organizations working to protect natural and cultural resources in the area.

FUNDAECO

The Foundation for Ecodevelopment and Conservation (FUNDAECO) was created in June of 1990 with the mission to protect the integrity, beauty and stability of nature through the creation and management of protected areas, the sustainable use of their natural resources and the improvement of the quality of life of its local inhabitants.

FUNDAECO specifically seeks to protect the Caribbean Rainforest Corridor of Guatemala (CORREDOR CARIBE), to establish the Ecological Metropolitan Belt of Guatemala City (CINTURÓN ECOLÓGICO METROPOLITANO) and to support the protection and restoration of the Biological Corridor of the South Coast of Guatemala (COBIOSUR). FUNDAECO is one of the most influential NGOs in the area and has a strong relationship with CONAP (the government entity for conservation). FUNDAECO is also the NGO that is responsible for the management of the Cerro San Gil protected area—one of the main destinations for cruise ship passengers. They maintain the trails, create informative plaques and signs, and work to minimize the impact of the countless visitors that stream through the area during peak cruise ship season. They also have a number of environmental education programs, capacitate locals to create alternative economic opportunities and empower communities. In particular in Cerro San Gil they have trained local women to create handicrafts that are sold to tourists.

ECORIO

In 1992, the Shell Oil Corporation arrived on the Rio Dulce, causing concern among local residents upon receiving a permit to explore the river basin. The oil company's presence in the area caused the group of residents to begin meeting informally, and eventually form the EcoRio organization. The organization began organizing regular meetings between the forest service and Shell. The group's first project was to do a mosaic of the Rio Dulce National Park, to raise awareness of the terrain and location of the various communities. Shell found oil in the region but it contained far too much sulphuric gas to be financially viable to extract and Shell Oil left the Rio.

Over the years, EcoRio has served as a local watchdog group for other environmental issues taking place in the Rio Dulce area—such as the Simpson Paper Company who set up large work camps with no latrines, no sanitary facilities and no medical assistance, causing many of the local surrounding communities to fall ill. More issues arose when the paper company wanted to “dynamite” the bends in the river to clear a passageway for the barges. Guatemalan President Álvaro Arzú terminated Simpson's plans by passing legislation “prohibiting the use of barges for extraction in the Rio Dulce management plan,” at which EcoRio and others breathed a sigh of relief.

EcoRio is still very active in monitoring the Rio Dulce National Park in cooperation with governmental agencies such as CONAP and representing the Rio in the Guatemalan Institute of Tourism. They are the only acting hotel association in the area, and charge a small fee for membership. Membership to EcoRio includes an association with the efforts of the organization and a listing on a website the group manages—<http://www.mayaparadise.com>.

Fundacion Defensores de La Naturaleza

Fundación Defensores de la Naturaleza (Defensores) is non-profit organization working in conservation since 1983. The organization was given authority by the Guatemalan Congress to manage the operations and administration of four protected areas in Guatemala under supervision of the National Council of Protected Areas (CONAP). Defensores also plays a major role in the promotion of conservation and the management of natural resources and works with stakeholders at the community, non-governmental, and governmental levels. In Izabal, they are responsible for the management of Bocas de Polochip, a nationally protected area located on the Polochic River in Lake Izabal. They have created a scientific research station to monitor manatees and host scientists and tourists interested in visiting the area. They also work with the 5,500 Q'eqchi who inhabit the area, teaching them alternative agricultural techniques, and educating them on the importance of protecting the environment.

OGG

The Organizacion Garifuna de Guatemala is a small organization based in Livingston that is working to protect Garifuna culture through small projects to alleviate poverty, improve educational opportunities, and generate community spirit. They help promote and create the festival for Garfuna Day in November, donate wheelchairs to the elderly, and have beach cleaning days to remove trash from the beach.

Ak'Tenamit

Ak'Tenamit is an indigenous community development organization based in the rain forests of eastern Guatemala that promotes long-term solutions to poverty through programs in health, education, and family incomes- run for and by the Q'eqchi Maya. They have a wide variety of programs, including a boarding school compound complete with a health and dental clinic, a restaurant in Livingston run by graduates and trainees from the school, environmental education programs, the organization of a women's craft cooperative, and a community eco-lodge tourists can visit.

Conservation Threats

These conservation organizations are working to address the following conservation threats to the area:

Wastewater & Garbage

Many hotels and tourism businesses (including restaurants, and marinas in particular) do not have any waste management systems. Given the hundreds of boaters that stay along the rivers of Izabal, garbage control is also an issue—especially in the towns of Fronteras and Livingston.

Unsustainable Farming

The main source of income for many local villagers is based around agriculture. Some of the negative impacts of agriculture on biodiversity in the area include the clearing of forests and natural vegetation; eliminating wild species from land to reduce the negative effects of pests, predators, and weeds; and the misuse or overuse of pesticides. Farmers also still practice slash-and-burn agriculture in the area and are putting an immense strain on water resources.

Unsustainable Development

Guatemalan and foreign investors are building more tourism infrastructure (particularly in the areas of Livingston and Fronteras) without proper environmental planning. Such unplanned and unregulated infrastructure development has the potential to cause major long-term damage to Izabal's many unique and fragile ecosystems. Unregulated destruction of forests leads to the unimpeded release of surface run-off directly into the marine environment.

Violence

The Izabal region has some edgy aspects with hustlers operating there, trying to sweet-talk tourists into 'lending' money, paying up front for tours that do not happen, etc. Robberies are also fairly pervasive along the river. Take care with anyone who strikes up conversation for no obvious reason on the street or elsewhere. Like many coastal locations in Guatemala, Livingston is also used as a puente (bridge) for northbound drug traffic. The beachfront between Livingston and the Río Quehueche and Siete Altares had a bad reputation for some years, but is now safe for tourists.

Loss of traditional languages and cultures

As tourism in the region continues to increase at a rapid pace, and globalization and technology continue to spread Western influence and culture, traditional cultural practices and local dialects are disappearing at an alarming rate. The Izabal area is renowned for its cultural diversity, and in a recent survey many tour providers cited the unique cultural attributes (food, dance, music, language, etc) as a major reason tourists visit the area.

Poverty and Public Health Issues

While tourism has done much to increase the cash flow in certain areas such as Livingston or Rio Dulce, much of the Izabal region is isolated, rural, and extremely poor. The lack of proper infrastructure (roads, electricity, etc) and low quality of education available creates a public health nightmare, and recent epidemics such as Dengue and AIDS have only served to highlight these deficiencies.

Potential Benefitting Projects

One of the best ways to encourage donations to travel philanthropy fund is to give travelers specific ways they can help benefit the places they are visiting. Below are some

specific examples of how projects can be incorporated into the gift cards. The projects listed below are illustrative at this point and will be ultimately defined by the Consejo:

Through purchasing a \$5 gift card, you can....

- Buy school supplies for one child in Livingston who participates in a Beach Clean-Up Day (OGG)
- Provide dental care for a patient in the village (Ak'Tenamit)

Through purchasing a \$10 gift card, you can....

- Buy supplies for a local woman to create handicrafts, giving her an alternative source of income (Defensores)
- Buy a uniform for a student trainee to work in a local restaurant (Ak'Tenamit)

Through purchasing a \$25 gift card, you can....

- Pay the salary of a park worker for one day to maintain the trails (FUNDAECO)
- Sponsor a student for one month, including teacher salaries, boat transportation, health care, at the Fr. Tom Moran Education Center (Ak'Tenamit)

Through purchasing a \$50 gift card, you can....

- Create an informational placard to inform visitors of endangered plant species on an interpretive trail (FUNDAECO, Defensores)
- Buy a wheelchair for an elderly Garifuna (OGG)
- Install 2 more permanent trashcans in a nationally protected area, thereby diminishing pollution (FUNDAECO)
- Purchase fuel for the dental boat for one week (Ak'Tenamit)

Through purchasing a \$100 gift card, you can....

- Buy a bunk bed and mattresses for a girls or boys dorm in the Fr. Tom Moran Education Center (Ak'Tenamit)
- Pay for one day of an educational program to boaters in Rio Dulce on the importance of proper wastewater disposal (Eco Rio)
- Pay for an emergency medical trip by boat to the nearest hospital (Ak'Tenamit)
- Vaccinate 100 children (Ak'Tenamit)

Appendix A: MAR Fund Letter of Commitment



September 16, 2009

Members
Executive Board
Izabal Conservation Fund
Guatemala

Dear Sirs,

The Mesoamerican Reef Fund (MAR Fund) is pleased to express our interest in the long-term administration of the Izabal Conservation Fund through the MAR Fund structure.

Upon the execution of a formal agreement, the MAR Fund will open a bank account under our existing legal structure. This account will be exclusively for the funds generated by the Geotourism Alliance of Izabal through a series of mechanisms to raise voluntary contributions from tourists that visit the region.

Among the responsibilities the MAR Fund will have as administrator of the account are transfer of funds to eligible beneficiaries approved by the Executive Board, oversight of approved projects and administration of the account as needed. While you, as members of the Executive Board, will make all decisions on behalf of the Izabal Conservation Fund, a representative from MAR Fund will serve on this board as a non-voting member to ensure our continued coordination.

We look forward to working with you and other partners of the Izabal Conservation Fund. We are excited about the potential of this fund to provide an additional source of funding to local organizations working towards meaningful change and long-term conservation in the region.

Sincerely,

A handwritten signature in black ink, which appears to read "María José González". The signature is written in a cursive, flowing style.

María José González
Executive Director

Mesoamerican Reef Fund

0 calle 19-45 "A", zona 15 Vista Hermosa II, Guatemala, Guatemala, 01015, Tel/ Fax (502) 2369-4996
www.marfund.org www.fondosam.org

Appendix B: Biographies of the members of the Izabal Conservation Fund Executive Board (Consejo)

Gustavo Turcios-President, Livingston Stewardship Council. Gustavo is the owner/operator of Go With Gus, a tour operator based in Guatemala and Atlanta specializing in Humanitarian and Community Tourism. He is also the owner of Posada Delfin, a hotel and restaurant on the mouth of Rio Dulce in Livingston. He is very active in the community and also serves as the Chief of Security in Livingston.

Kleiberth Veliz- Vice President, Livingston Geotourism Stewardship Council. Kleiberth is the general manager of Happy Fish, a Tour Operator and restaurant in Livingston. He is also the President of the CATUR (Comité de Autogestión Turístico) for the Izabal Region and has worked with local tourism stakeholders to improve tourism infrastructure and create an informative website.

Roberto Mora- President, Puerto Barrios Geotourism Stewardship Council. Roberto has over 35 years of experience in the tourism industry and has worked in Chile, the United States, and Central America. He is the co-owner of Caribbean Tours, a travel agency in Puerto Barrios. He is also the owner/operator of EcoWays, a brand-new tour operator focused solely on ecotourism and catering to the cruise ship market and an international clientele. He has a degree in Hotel Management and a post-graduate degree in General Management Practice from Cornell University.

Omar Solis- Vice President, Puerto Barrios Geotourism Stewardship Council. Omar is the Tourist Assistant appointee for INGUAT in the Izabal region, working to help tourists and local businesses in the area. He has a degree in Business Administration and Resource Management and is bilingual in Spanish and English. Before working for the *Asociación Gente Nueva*, providing technical assistance and managing their funds.

Eugenio Gobbato- President, Rio Dulce Geotourism Stewardship Council. Eugenio is the owner and director of Hacienda Tijax, a natural attraction complete with a 2.5 km interpretive trail, a bird sanctuary, and a skywalk canopy. He is also the owner/operator of Tijax Hotel and Marina, and the president of EcoRio, a local community organization devoted to protecting the environment and improving security in the Rio Dulce area. He has worked, traveled and studied around the world, including Africa, Thailand, France, and the United States. He is fluent in Italian, Spanish, French, and English.

Rebecca Nicholls- Vice President, Rio Dulce Geotourism Stewardship Council. Rebecca is the General Manager of Nutria Marina and Hotel located on the banks of Rio Dulce. Originally from New Zealand she first came to Guatemala 3 years ago to continue her passion for volunteering and working with the underprivileged. After completing her year of volunteer work in Casa Guatemala, the local orphanage in Rio Dulce, she took over assisting operations in Hotel Backpackers (this hotel owns Casa Guatemala) and volunteer inductions for Casa Guatemala. Now running Nutria, her aim is to give as much back to the community of Rio Dulce as possible while promoting this beautiful area!

Giovani Lopez- Tecnico SIGAP, CONAP Nororinete

Maria Jose Gonzales – Executive Director, MAR Fund

Appendix C: Due Diligence Checklist for Potential Applicants

NGOs interested in becoming beneficiaries of the Izabal Conservation Fund may be required to submit materials including detailed information on their programs, financials and organizational structure, as well as what happens upon the event of dissolution. A sample due diligence checklist follows:

Required Signed Documents

- Due Diligence Affidavit / Application
- Non-discrimination policy
- Signed Anti-Terror Certification

Program Materials

- Annual report
- Program Descriptions and Materials
- Brochures
- Pamphlets
- Other Public and Printed Information

Financial Documentation

- Budget for current and past two fiscal years
- Audited financial statement (if available)

Organizational Documents

- Articles of incorporation
- Charter
- Bylaws
- Certificates of incorporation
- Certification from any state or national government agency (e.g. related to either status as a non-profit, NGO, charitable, or social organization; and / or an organization's activities which may be regulated, such as health or education services)
- List of Senior Staff and Board Members
- List of all financial Institutions
- Two Letters of Reference

Appendix D: Sample Evaluation Criteria and Application Form

The Izabal Conservation Fund funds projects that address its mission, goals and objectives.

Mission

Example: The Izabal Conservation Fund funds and otherwise encourages efforts furthering the long-term sustainability of the greater Gulf of Honduras' culture, ecosystems, natural resources and related essential qualities.

Granting criteria

Funds raised by Izabal Conservation Fund will be competitively granted. The Izabal Conservation Fund encourages applications submitted by individual organizations, as well as multiple organizations from different disciplines, jurisdictions, and or economic sectors. Applications consisting of multiple project partners, showing collaboration and an integrated approach will be favored. In these instances, each applicant "team" will be required to include at least one 501(c)(3) or equivalent organization.

In general, grants will be made for the full amount requested in the application; in general, the "greater Gulf of Honduras ecosystem" encompasses *to be completed*.

A volunteer grants committee judges each proposal against the following 10 criteria. Successful proposals will:

1. Focus on sustaining the region's natural and cultural resources for future generations and or address critical linkages between the region's economic, social, cultural, and environmental qualities;
2. Address the critical linkages between the area's essential economic, social, and environmental qualities;
3. Offer unambiguous, measurable criteria for evaluating success;
4. Produce significant effects or change with the funds invested;
5. Emphasize forward-looking solutions, i.e. preventing future problems or turning today's possibilities into tomorrow's realities;
6. Demonstrate collaboration by multiple organizations in addressing issues cutting across jurisdictions and disciplines;
7. Demonstrate community involvement and participation in supporting the implementation of projects that directly benefit them;
8. Fund new projects, or innovations in existing projects that will significantly expand and or increase their measurable results and self-reliance;
9. Look to the Izabal Conservation Fund for matching funds, rather than complete funding;
10. Demonstrate the ability to use 10 percent (or less) of the funding received for administrative and overhead costs, ensuring that a majority of the original donation amount is spent on project-related costs;

Grant Application Procedures

All applications must be submitted electronically, in a Microsoft Word-compatible format, and are due by *(to be determined)*. Applications received after that time will not be considered.

Note: The Izabal Conservation Fund posts all successful applications on its website. If you are not willing to have your application made public, the Izabal Conservation Fund will not consider your grant. If you are generally willing to have your application made public, but wish to keep certain portions confidential, please indicate this on your application.

2009 Grant Schedule

Application period opens *(to be determined)*

Application period closes at 5:00 pm on *(to be determined)*

Grant Awards celebration will be held on *(to be determined)*

Sample Grant Application Form

Use this form to apply for funding from the Izabal Conservation Fund. Submit via email to: info@izabalconservationfund.org. Please put "Grant Application" in the subject line. Please note that the application deadline is (*to be determined*).

Organization Name: _____

Employer identification number: _____

If applicant is not a 501(c)(3) or equivalent, the name and 501(c)(3) number of the sponsoring organization that will administer the grant:

Address: _____

Contact Person: _____ Title: _____

Phone Number: _____ Fax Number: _____

Email address: _____

Title of Application (topic): _____

Amount Requested: _____

Please use the questions below to fully describe your program. While there is no word limit for your responses, concise entries are appreciated.

1. Please give a summary of the program for which funding is requested. If this is a collaborative project with several entities, explain the role of each.
2. What need does this program address? What data is available to support this? Include citations and / or web links.
3. How does this program further the mission of the Izabal Conservation Fund?
4. There are 10 criteria for a successful grant. How does this proposal address each?
5. What are the specific, measurable objectives of this program?
6. How will you measure success against each of your objectives? Is there baseline information against which to measure success? What objective methodology will you use to evaluate the performance of the program?
7. Please provide a budget for this program. Include all funding sources: actual and anticipated; both cash and noncash (e.g. labor, materials and other in-kind contributions).
8. Is there additional information you would like to provide?

By submitting this proposal, _____ agrees that the Izabal Conservation Fund has the right to utilize the supporting data however it sees fit, including publishing it.

Further: if this application is funded, _____ agrees that the Izabal Conservation Fund may publish the application in its entirety, including the follow-up evaluation and outcomes report.

Submitted by:

Name and Title	Organization	Date
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If applicant is sponsored by another organization, please provide a signature, name, and title of its responsible party:

Name and Title	Organization	Date
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Appendix E: Draft Language for Izabal Conservation Fund Rack Card

RACK CARD DISPLAY:

Travel with Purpose Support the Izabal Conservation Fund

This business is a proud member of the Izabal Geotourism Alliance. Take one of our rack cards, or ask us how you can support the Izabal Conservation Fund.

4 x 9 RACK CARD COPY:

Travel with Purpose Support the Izabal Conservation Fund

About Us

The Izabal Geotourism Alliance (IGA) is a group of local non-profits and businesses that are dedicated to working with travelers and the travel industry to enhance the environment and well-being of local residents in the Izabal region of Guatemala.

What We Do

IGA operates the Izabal Conservation Fund, a charitable program that provides travelers and travel companies with opportunities to make small donations to regional grassroots projects that make a world of difference.

IGA members are working to address a number of conservation threats including waste management and pollution, loss of traditional languages and cultures, poverty and public health issues, and unsustainable development.

How It Works

The Izabal Conservation Fund connects you to causes you care about. You can either make a tax-deductible contribution to the fund or select specific projects you want to support by purchasing a gift card.

Travel with Purpose by adding a voluntary donation of \$2 (or more) to your bill. Or, purchase a Gift Card as a souvenir or for any special occasion for as little as \$10, \$25, \$50, or \$100. Our Gift Cards are 100% biodegradable, and recipients can choose the project they want to support. Examples of the potential uses of donations include:

- \$10 - Buy supplies for a local woman to create handicrafts, giving her an alternative source of income
- \$25 - Sponsor a student for one month, including teacher salaries, boat transportation, health care
- \$50 - Create an informational placard to inform visitors of endangered species on an interpretive trail

\$100 - Buy a bunk bed and mattresses for a girls or boys dorm in the Fr. Tom Moran Education Center

Protecting Your Investment

Our projects are 100% guaranteed. All projects supported by the Izabal Conservation Fund undergo compliance checks to ensure they have a bona fide charitable purpose, generate positive outcomes, and meet applicable laws relating to international philanthropy.

Stay Informed

One of the things donors tell us they appreciate is staying informed about the projects they support – so you can see how your money is being used and the results that are being achieved. We'd love to provide you with periodic progress reports - just provide us with your email address and the projects you're interested in.

Gifts to the Izabal Conservation Fund represent irrevocable donations, are non-refundable, and do not pay dividends or interest income. The Izabal Conservation Fund has provided no goods or services in consideration of your gift. The Izabal Conservation Fund's tax ID number is x.

Appendix F: Izabal Conservation Fund Fact Sheet



As a member of the Izabal Geotourism Alliance, your business will be helping to support the Izabal Conservation Fund—a charitable program that provides travelers with opportunities to make small donations to regional grassroots projects that make a world of difference.

Visitors are drawn to Izabal to experience the wonderful natural and cultural resources the destination has to offer. The Izabal Conservation Fund will help protect these resources and enhance the quality of life for those that live and travel here. *But we can't do it without you!*

Joining the Izabal Geotourism Alliance and encouraging donations to the Izabal Conservation Fund is the best way to show you care about protecting the cultural and natural resources of our beautiful destination.

HOW IT WILL WORK

Members of the Izabal Geotourism Alliance will have two options for collecting donations from travelers:

1) Voluntary Donations

Including a voluntary opt-out donation of \$2 (per night for accommodations) or \$1 (per meal for restaurants) to each guest's invoice.

2) Gift Cards

Selling gift cards of incremental amounts to support specific projects.

As funds are collected, you will be asked to periodically submit them to MAR Fund, the administrator of the Izabal Conservation Fund. As funds from around the region accumulate, they will be awarded as grants to local conservation organizations.

Every donation is important, no matter how small. Every donation is appreciated, no matter how small. Because added together these small donations can make a dramatic difference in preserving Izabal's natural and cultural resources and maintaining a vibrant tourism industry. With your help, the Izabal Conservation Fund will play a big role in keeping Izabal a place worth visiting.