

CSD – Partnerships in Practice

Mobilizing Resources: Benefits of Partnering

February 2007

Contents

Purpose

Mobilizing Resources

Communicating Success & Demonstrating Effectiveness

Why develop primers?

- ❑ **WSSD Conference**, Johannesburg, South Africa, August 2002 promotes Public-Private Partnerships (PPPs) across globe. Themes include: implementation and integrated solutions
- ❑ **WW2BW Conference**, Miami, Florida, March 2004 promotes ongoing network to support and promote 100+ Caribbean PPPs. Themes include: 4 WW2BW topics and ***Communicating Success*** to help PPPs articulate successes
- ❑ **WW2BW Steering Committee Retreat**, Panama City, Panama, December 2005 organizes/streamlines WW2BW network. Themes include: reorganization and ***Mobilizing Resources*** to help PPPs effectively and efficiently obtain resources when faced with static funding opportunities

Communicating Success of Public-Private Partnerships and Mobilizing Resources

COMMUNICATING SUCCESSES OF PUBLIC-PRIVATE PARTNERSHIPS

A Primer on How to Develop Metrics for Sharing Your White Water to Blue Water Partnership Successes

August 2006

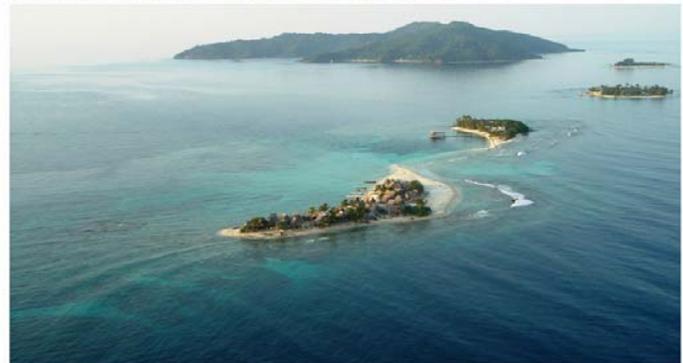
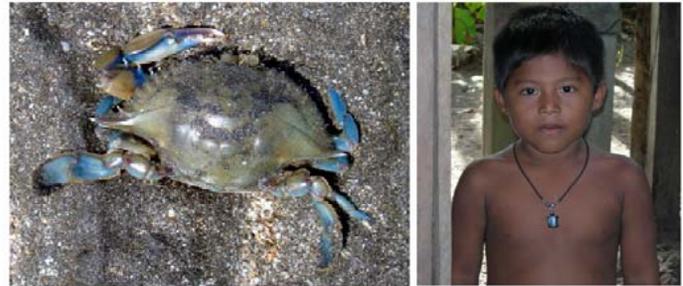


Mobilizing Resources

A Primer of Practical Ideas on How to Improve the Effectiveness of Public-Private Partnership Financial and Other Resource Requests

September 2006

"It's not just about money"



Communicating Success of PPPs: A Primer on how to develop metrics for sharing your WW2BW PPP successes

- ❑ ...to publish a short simple primer on how to develop metrics to communicate successes

- ❑ New/existing partnerships might want to consider developing set of performance metrics, appropriate to size, scale and objectives of the partnership, in order to communicate partnership successes

- ❑ Metrics may also be useful for inclusion in future funding proposals, in enabling more informed decisions on sustainable development policies, programs and projects

PRICEWATERHOUSECOOPERS



Caribbean Conservation Association
One Caribbean, One Vision



Two Primers to Enhance Effectiveness
White Water to Blue Water (WW2BW)

Contents

Purpose

Mobilizing Resource

Communicating Success & Demonstrating Effectiveness

Mobilizing Resources y Movilizando Recursos

Mobilizing Resources

A Primer of Practical Ideas on How to Improve the Effectiveness of Public-Private Partnership Financial and Other Resource Requests

September 2006

"It's not just about money"



Movilizando Recursos

Un Manual de Ideas Prácticas sobre Cómo Mejorar la Efectividad de las Solicitudes de Financiamiento y de otros Recursos de las Alianzas Público-Privadas

Noviembre 2006

"El dinero no lo es todo"



Mobilizing Resources: A second primer of practical ideas to strengthen PPPs developed under the WW2BW initiative

- ❑ ...to publish primer to improve the efficiency of the resource request process and the effectiveness of resource use

- ❑ New/existing partnerships might want to consider developing a business case to convince potential Resource Partners to fund its activities

- ❑ PPPs should carefully evaluate whether they have the capacity to use additional resources effectively and whether they have reached out to existing partners sufficiently

Lessons Learned – there are many moving parts...



Underlying Questions

- ❑ Is PPP maximizing its existing potential? Is PPP monitoring / improving its efficiency?
- ❑ Does PPP know where it is going? Has PPP developed a business case to convince others to fund its activities?
- ❑ Does PPP have capacity to use additional resources effectively? What resources does PPP really need?
- ❑ Can PPP potentially serve as a model for others?
- ❑ Who else should PPP reach out to before approaching Resource Partners? Has it reached out to all relevant stakeholders?
- ❑ How well is PPP working & is it effectively communicating its success? Does your PPP have measurable way to define its goals & evaluate progress and outcomes?
- ❑ What does PPP have to offer in return for support? How can PPP further interests of Resource Partners? Can they leverage involvement with PPPs?

Underlying Concepts

- ❑ Primer intended as practical "how to" guide with lessons learned from various organizations on funding proposals, how to find resources, how to articulate business case, etc.
- ❑ Second primer of practical ideas to strengthen WW2BW PPPs
- ❑ Intended to enhance communications with potential Resource Providers and promote convergence of interests
- ❑ Targeting improved efficiency/effective resource requests
- ❑ Not intended solely for requests for financial support - includes requests for funding, technical assistance, in-kind contributions, and/or volunteer support
- ❑ Written with intent to provide concise document and useful information, pointing to other sources of information
- ❑ Intended as living document which will be updated periodically

Contents –

- Your proposal or mine?
- People, skills or funding? What resources do you need?
- Do you understand your potential Resource Partner's drivers?
- Should you “start where you are, do what you can, and use the gifts you have”?
- Have you developed a strong business case?
- Have you considered innovating financing tools?
- What are time-honored resources?
- How do you engage the private sector?
- Are volunteers worth the effort?
- Are you avoiding common pitfalls?
- What are “out of the box” issues such as improving your operating efficiency?

Contents –

- ❑ A Funder's Perspective – “Anchor's Away”
- ❑ An Applicant's Perspective – Calm Air, Visibility Unlimited
- ❑ Innovative Funding Sources – Caribbean Conservation Corporation - Survival Turtle League
- ❑ A Partner's Perspective – Ecologic Development Fund
- ❑ A Lender/Donor's Perspective –
Inter-American Development Bank
- ❑ A Donor's Perspective – The Nature Conservancy
- ❑ A Prize Competition – Water Center for the Humid Tropics of Latin America and the Caribbean and Plan International Regional Office for the Americas

Mobilizing Resources

Common business case elements –

- Problem statement
- Mission statement or vision of the future
- Specific objectives for the current initiative
- Preferred approach
- Alternatives considered
- Budget
- Expected benefits
- Performance metrics
- Risks and how they would be addressed
- Work plan
- Time lines
- Communications/dissemination plan
- Project management and human resources implications
- Management plan
- Evaluation processes
- Opposing arguments and responses

Mobilizing Resources

Lessons Learned – Need Well Written Resource Requests:

- ❑ Know your potential Resource Provider, identify commonality of interests, and engage them
- ❑ Follow Resource Provider's specific directions, avoid common pitfalls, and strive for error free proposal / resource requests
- ❑ Build a business case for support that can include: problem & mission statements, specific objectives for current initiative; preferred approach; alternatives considered; work plans; budgets; expected benefits; communication / dissemination plans; identified risks & how they will be evaluated; evaluation processes; and performance metrics
- ❑ Tools (e.g. compliance matrix) facilitates proposal preparation

Lessons Learned –Compliance Matrix

RFP Requirement	RFP Description	Section Title(s)	Page(s)
Technical Quote Sections	<p>Offerors shall provide a technical quote that includes the following three general areas:</p> <p>A. Management Approach and Technical Capabilities</p> <p>B. Personnel Qualifications</p> <p>C. Organizational Experience</p>	<p>1.1 Management Approach and Technical Capabilities</p> <p>1.2 Personnel Qualifications</p> <p>1.3 Organizational Experience</p>	<p>3-4</p> <p>5-6</p> <p>7-12</p>
Technical Quote Sections	<p>Discussion of background, objectives, and work requirements.</p> <p>Discussion of proposed methods and techniques for completing each task.</p> <p>Discussion of any anticipated difficulties and potential recommended approaches for their solution.</p> <p>Discussion on major logistical considerations.</p> <p>Discussion of Performance Based Metrics</p>	<p>1.4 Understanding of the Scope of Work</p> <p>1.1 Management Approach and Technical Capabilities</p> <p>1.5 Identification of Challenges and Logistical Concerns</p> <p>1.5 Identification of Challenges and Logistical Concerns</p> <p>1.7 Project Performance Metrics</p>	<p>14</p> <p>3-4</p> <p>15-16</p> <p>15-16</p> <p>18</p>
Management Approach/Technical Capabilities Evaluation Requirements	<p>Understanding of the work, including creativity and thoroughness shown in understanding objectives of SOW and specific tasks, and planned execution of the project.</p>	<p>1.4 Understanding of the Scope of Work</p>	<p>14</p>

Lessons Learned – ‘It’s not just about money’

- ❑ Resource Partners may provide many types of resources – explore opportunities to obtain financial, human and/or intellectual capital resources
- ❑ These include various forms of grants & innovative financing
- ❑ Time honored sources include trust funds, debt-for-nature swaps, volunteer opportunities & in-kind contributions
- ❑ The private sector can bring additional resources to PPPs
- ❑ If properly directed, volunteers can provide significant labor, energy/enthusiasm, and potential sources of funding

Many Types of Resources

- ❑ There are different types of grants
 - ❑ Challenge grants
 - ❑ Action grants
 - ❑ Research grants
 - ❑ Declining grants
 - ❑ Operational support grants

- ❑ There are different types of innovative financing tools
 - ❑ User fees
 - ❑ Merchandising
 - ❑ Earned income strategies
 - ❑ Campaigns
 - ❑ Competitions

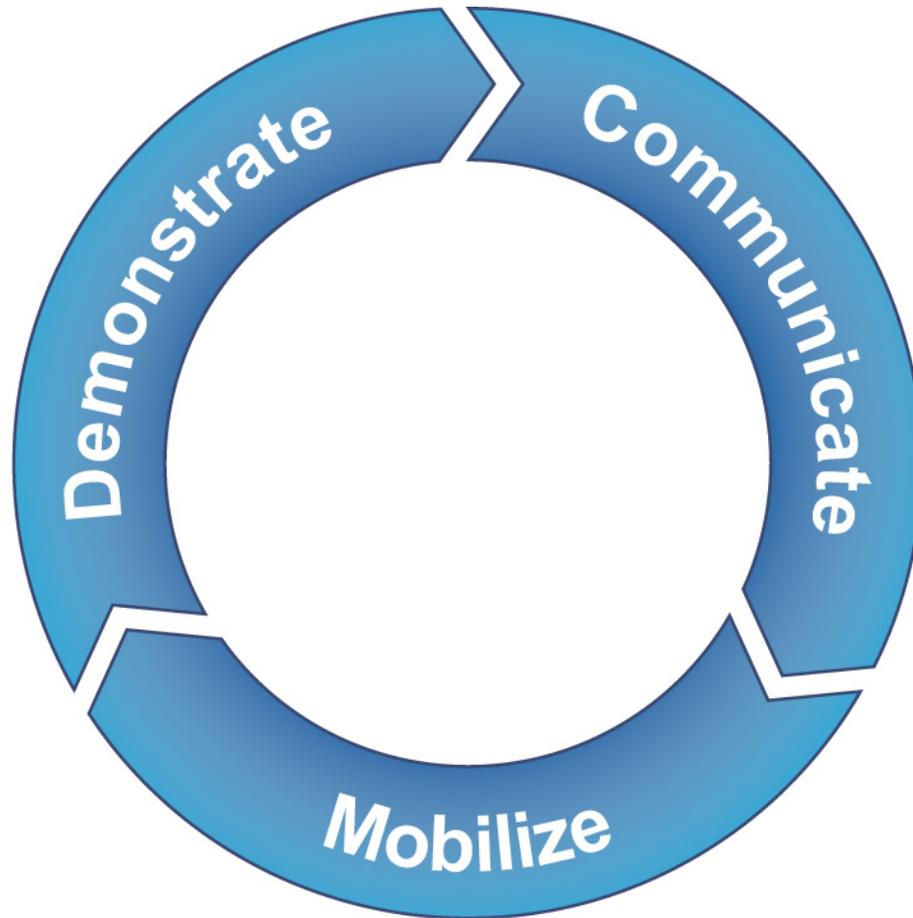
Contents

Purpose

Mobilizing Resources

Communicating Success & Demonstrating Effectiveness

Next Primer?



Communicating Successes of Public-Private Partnerships / Comunicando Los Éxitos de Las Alianzas Público-Privadas

COMMUNICATING SUCCESSES OF PUBLIC-PRIVATE PARTNERSHIPS

A Primer on How to Develop Metrics for
Sharing Your White Water to Blue Water
Partnership Successes

August 2006



COMUNICANDO LOS ÉXITOS DE LAS ALIANZAS PÚBLICO- PRIVADAS

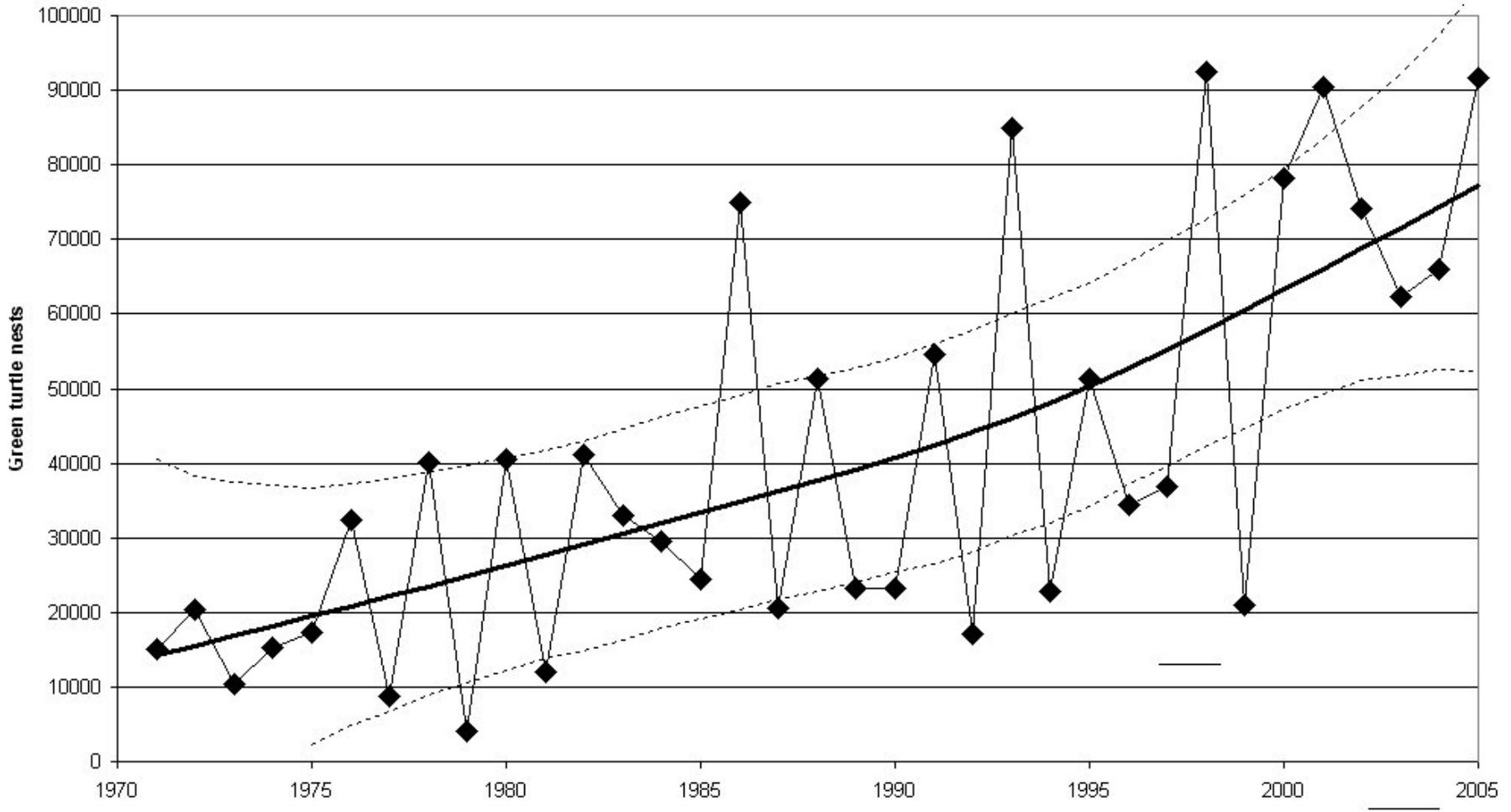
Un Instructivo de cómo Desarrollar
Indicadores para Compartir los Éxitos de
su Alianza de "Aguas Blancas a Aguas
Azules (WW2BW)"

Septiembre 2006



How to demonstrate effectiveness over time...

Tortuguero trend (northern 11 miles)



Potential Topics (DRAFT)

Long-term vision

- Provide additional support/tool to improve effectiveness of PPPs and provide guidance on how to demonstrate to funders, stakeholders, potential partners that proposed activities are progressing or are complete

Specific case studies

- Demonstrating financial comfort to auditors
- Demonstrating impact on large marine ecosystems (e.g. corals, sea turtle population)
- Demonstrating value for funders, partners
- Demonstrating buy-in from stakeholders
- Media specific or triple bottom line?
- How to demonstrate effectiveness if not local/over time

In Summary

- ❑ Stronger more effective organizations can have more impact on environmental protection &/or natural resource conservation
- ❑ ***Communicating Successes / Mobilizing Resources*** tools to build capacity of NGOs working in WW2BW thematic areas
- ❑ Information not shared is energy wasted ...
- ❑ Opportunity to showcase your successes
- ❑ Local case studies usually most relevant and replicable
- ❑ ***Demonstrating Effectiveness*** may kick-off 3/2007
- ❑ To participate, contact PwC: nick.shufro@us.pwc.com