



LEADERSHIP IN PHILANTHROPY

First Annual Report - Preliminary Draft

January-October 2018

Leadership in Philanthropy, a new unit created by the Costa Rica USA Foundation for Cooperation (CRUSA) in November 2017, is working to promote philanthropy nationwide. We build capacity in nonprofit organizations, connect key nonprofit leaders to share best practices, and improve organizations' capacity to fundraise through collaborations with Amigos of Costa Rica, CRUSA's U.S. counterpart. In 2018, the programming of Leadership in Philanthropy was run as a joint effort between CRUSA (Katherine Stanley) and Amigos of Costa Rica (Emily Arnold).

Our ultimate goal is to establish CRUSA-Amigos as the recognized brand to connect funders and collaborators with the best solutions in the country, and with organizations that responsibly manage funds and donor relationships. Building this capacity in nonprofits is an essential prerequisite to building CRUSA-Amigos' overall fundraising operation: CRUSA-Amigos cannot successfully engage a broader network of donors without offering them solutions with proven effectiveness, responsible use of donations, and cultural competency in donor stewardship.

With the premier network of donors and solutions, we will be able to scale the best ideas nationwide for maximum impact, in support of CRUSA's broader five-year strategic plan.

WE DO THIS BY:

Engaging with communities nationwide to find structures for CRUSA donor-advised funds

Uniting nonprofits and donors to share strategies and best practices

Offering nonprofit solutions our toolkit for growth, including grants and networking

Connecting nonprofit solutions to donors

Advising nonprofits on the culture of donor engagement and stewardship

Community Engagement: Connecting with Potential CRUSA-Amigos Donors and Local Solutions (Nonprofits)

Nosara / Guanacaste (February)

- Met GCF/Amigos affiliates, gained understanding of local dynamics

Uvita / Bahía Ballena (March)

- SOMOS Foundation working meetings, establishing CRUSA Donor-Advised Fund/DAF (\$40,000 DAF, \$10,000 for fund establishment)

Limón (April)

- Identified new Amigos affiliates and Catalyst Grant applicants

Monteverde (June)

- Evaluated sustainability of Monteverde Community Fund (MCF) to establish a CRUSA DAF (\$10,000 DAF, \$1,500 for fund management)
- Two-day Community-Led Emergency Response meeting to share best practices, build networks and establish protocol for future funding collaborations

Northern Zone/La Fortuna (August)

- Followed up with community emergency response partners and met with potential Amigos affiliates

Atenas (October)

- Meeting with local leaders in expat philanthropy from Supporting Atenas to expand our network of community funds/foundations that can share best practices



Donor Advisory Services: Working with Amigos of Costa Rica to Support Donors' Goals in Costa Rica

- Establishment of Andrea and Fitz Haney Donor Advised Fund to Support the Anna Ross Foundation, and extensive publicity work/preliminary work towards strategic plan on cancer fundraising for Costa Rica
- Coordinating with Rotary International preliminary plans for an MIT Club House in Perez Zeledón

- Connecting Developing World Connections to a variety of Amigos of Costa Rica affiliates resulting in a collaboration forming with Mar a Mar including a \$4,200 donation
- Advising Parker Ingram on setting up a nonprofit in Playas del Coco
- Advising Arun Sardana regarding social enterprises to support early childhood education and orphans
- Advising Nosara Civic Association regarding the donation of a \$5MM property
- Advising Del Mar Academy and other schools regarding the IRS policies around donations for scholarships and avoiding “earmarking”
- Working with Ticos y Nicas Somos Hermanos on a fundraising strategy in the framework of the crisis in Nicaragua
- Engaging Amigos Board Member Maureen Jaeger to provide feedback on a GCF Capital Campaign



Lifeguards call for help in Costa Rica:
support their work in Osa

Perry Gladstone - Oct 20, 2018



How to help the victims of Tropical Storm
Nate in Costa Rica

Katherine Stanley - Oct 09, 2017



Creating new opportunities in Costa Rica's
Central Pacific

The Tico Times - Jul 20, 2018



Former U.S. Ambassador launches
campaign for cancer awareness, funding in
Costa Rica



This week in the Peace Corps: Connecting
with the community, one goal at a time

The Tico Times - Sep 03, 2018



Nosara Animal Care raises funds for
animals in need

The Tico Times - Apr 19, 2018

Nonprofit Capacity Building: *Improving the on-the-ground solutions we offer donors*

Every nonprofit solution that interacts with us can apply for access to a range of tools and opportunities:

1. Amigos affiliation - to help outstanding nonprofits reach U.S. donors
2. Networking - through our Costa Rica Changemakers group or direct connections, we connect nonprofits with like-minded organizations, leaders and donors to share best practices and find support
3. Publicity - through the CRUSA-sponsored Costa Rica Changemakers section at The Tico Times, Costa Rica's leading English-language news source (ticotimes.net/changemakers); the Changemakers section provides added publicity for Amigos' specific fundraising campaigns by publishing related articles, particularly during disaster relief efforts
4. Funding - through our Catalyst Donations program (see page 4)

Catalyst Donations Program January-October 2018

Overview: The Catalyst Donations Program offers grants of up to \$10,000 for non-recurring expenditures that strengthen the internal capacity of legally registered nonprofit organizations in Costa Rica. By doing this, the program seeks to expand the impact of nonprofit solutions while testing ideas with potential for scalability, and increase the nonprofits' capacity to attract funding via grants and individual donors.

2018 Summary (Jan. 1-Oct. 20): \$123,343 disbursed to 16 nonprofit initiatives nationwide.

Selection Process: Applications are evaluated using an 18-point rubric that assesses them on six elements: clarity of objectives; alignment with CRUSA goals and priorities; budget feasibility; organizational capacity to carry out; realistic and measurable impact on organizational capacity; and scalability.

2019 Follow-Through: Completion of grant activities is assessed through a post-implementation report. Each recipient's progress toward its long-term (2-5 years) impact indicators for increased internal capacity will be assessed every six months through virtual meetings and site visits. Best practices that can be shared/scaled will be incorporated into our growing training program/nonprofit incubator concept.

Our January-October* Grantees:

*Updated through Oct. 20, 2018

Asociación Guardavidas de la Zona Sur

Short-term objective: Create website/marketing for Southern Zone traveler's philanthropy

Long-term impact indicators: # monthly visits to website, \$ donated by private sector/tourists

Potential for scalability: Model that could be implemented in tourist destinations nationwide



New grant program seeks to boost Costa Rican nonprofits

The Tico Times - Apr 04, 2018

Asociación Pro Guanacaste Integrado

Short-term objective: Provide onsite project management training and support to nine districts in the canton of Santa Cruz

Long-term impact indicators: % community groups trained, % projects approved by the Municipal Council of Santa Cruz

Potential for scalability: Significant potential for integration into CRUSA's existing municipal efficiency programs, improving local budget planning/execution and project management

Asociación Voz de Guanacaste

Short-term objective: Train a network of local informants for solutions journalism that promotes community/nonprofit solutions to local issues, and can be shared with potential donors

Long-term impact indicators: % advanced toward desired impact indicators identified in local journalists' community assessments of local problems, # connections made between NGOs and local donors in workshops, \$ raised by local initiatives as direct result of solutions journalism

Potential for scalability: Model that could be used by local and national media

Cámara de Comercio, Industria y Turismo de los Cantones del Sur

Short-term objective: Create investment guide for five cantons in partnership with CINDE

Long-term impact indicators: # new chamber members, # jobs generated

Potential for scalability: A successful guide would be replicable by other proactive chambers

CORCLIMA

Short-term objective: Train guides as climate change fundraisers and develop communications training tools useable by CORCLIMA and other nonprofits (tools will apply to any topic)

Long-term impact indicators: # guides successfully implementing tools, # replicable workshops developed, # organizations successfully using communications tools

Potential for scalability: Target for this grant is 100 nonprofits successfully using these materials nationwide; tools will be offered to all Amigos affiliates

Costa Rican Electricity Institute

Short-term objective: Translation services so that participants from throughout the Americas can visit the Reventazón Project and Caribbean wetlands and take best practices to COP meeting in Dubai

Long-term impact indicators: Inclusion of related wetlands accord in international public policy

Potential for scalability: Example of how CRUSA-Amigos can promote Costa Rica's role as the world's laboratory for sustainable development by sharing best practices

Ecology Project International (EPI)

Short-term objective: Create BioXplorer Box, a virtual toolkit for educational research that can be sold to increase revenue-generating capacity of training arm

Long-term impact indicators: # participants, \$ raised from sale of toolkit, % budget covered by sale of kit

Potential for scalability: Successful model can

be used by other education/research NGOs, especially biological research stations facing budget issues

Fundación Acción Joven

Short-term objective: Build online system for project management and beneficiary tracking

Long-term impact indicators: % reduction in staff time invested in beneficiary tracking (goal: 50%), % reduction in staff time to prepare donor reports (goal: 75%)

Potential for scalability: Framework replicable for other nonprofits nationwide

Fundación SOMOS

Short-term objective: Develop a nonprofit sustainability training consultancy that can be sold to other nonprofits as a new source of income for the foundation

Long-term Impact Indicators: # organizations trained; \$ amount earned through consultancies

Potential for scalability: Structure that other nonprofits (including nonprofits that move up the scale and are trained as replicators of the SOMOS module) can use for similar income

Fundación Veragua

Short-term objective: Improve Las Brisas Community Center so it can take advantage of existing agreements with cruise ship companies, and receive tourists in the community

Long-term impact indicators: # cruise ship visitors received, \$ earned by community as a result

Potential for scalability: Best practices can be shared in Limón and Puntarenas

Fundación Voces Vitales Costa Rica

Short-term objective: Creation of a Development Unit to support institutional sustainability

Long-term impact indicators: # partnerships created, \$ raised for the organization

Potential for scalability: Project includes creation of best practices guide for creating development units as basis for CRUSA training module for other nonprofits

Mar a Mar

Short-term objective: Training for tour-guides on coast-to-coast community tourism initiative

Long-term impact indicators: # guides trained, # visitors received, \$ generated for participating communities/microbusinesses

Potential for scalability: Best practices/training modules can be shared with trail-based community tourism initiatives in Osa and Monteverde

Nosara Civic Association

Short-term objective: Purchase a drone for monitoring of protected forests and as shared resource for local NGOs, including for emergency response planning

Long-term impact indicators: # scans and mapping exercises complete, # research projects developed, # NGO trainings completed

Potential for scalability: Exemplifies the resource sharing among NGOs that CRUSA seeks to promote for greater cost-efficiency and impact

OSACOOP

Short-term objective: Develop project to grow and sell native Osa plants to protect biodiversity while creating a new income stream

Long-term impact indicators: \$ generated for OSACOOP member families through plant sales and gastronomic festivals

Potential for scalability: A successful model would be replicable in other rural/indigenous areas

Universidad para la Cooperación Internacional

Short-term objective: Carry out a planning event with international experts, CR government

Long-term impact indicators: # people trained, # farms that have incorporated regenerative techniques, % improvement in biodiversity and carbon capture

Potential for scalability: Initial workshop specifically designed to scale up to three territories



Katherine Stanley is CRUSA's Coordinator for Leadership in Philanthropy. She has lived in Costa Rica for 14 years, working in nonprofit management, fundraising, public sector partnership building, journalism and education, and is the Managing Editor of The Tico Times. kstanley@crusa.cr / +(506) 8483-1992



Emily Arnold is the Executive Director of Amigos of Costa Rica. She has over 10 years of experience working in sustainable development in Costa Rica and is the Associate Director of the Osa and Golfito Initiative (INOOGO) at the Stanford Woods Institute for the Environment. emily@amigosofcostarica.org / +(301) 717-8791



Mariana Cortes is CRUSA's Administrative Officer. With more than 10 years' experience in project management, she leads the administrative and financial management of all of CRUSA's projects, including all Catalyst Donations. She also manages CRUSA's Scholarship Program. mcortes@crusa.cr / +(506) 8822-5532

The CRUSA-Amigos Changemakers section appears online and in every national print edition of The Tico Times.

2017-2018 HIGH SEASON SPECIAL EDITION

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Shining a light on good deeds: Costa Rica USA Foundation launches Tico Times philanthropy news section



The Costa Rica USA Foundation for Cooperation (CRUSA) and our U.S. counterpart, Amigos of Costa Rica, are proud to sponsor this new philanthropy news section so that The Tico Times can share the stories of individuals and organizations that are creating change in Costa Rica. CRUSA and Amigos are nonprofit organizations working to encourage philanthropy, facilitate information exchange among changemakers, and help people connect with the Costa Rican causes they care about. In that spirit, we've created this space to shine a light on outstanding efforts of all kinds, from grassroots initiatives to international alliances.

We hope you enjoy this content, finding new information, connections, and inspiration to help you show your love for Costa Rica.

David Gutierrez, President, CRUSA Foundation

Muni Figueres, President, Amigos of Costa Rica

Visit the section at ticotimes.net/changemakers to read more about initiatives, programs, volunteer opportunities, corporate and school community service, and more around Costa Rica. Know a great program to nominate for our series? Contact us at kstanley@ticotimes.net. The CRUSA Foundation/Amigos of Costa Rica do not specifically endorse any program or fundraising effort that appears in the Changemakers section unless otherwise stated.

Former U.S. Ambassador launches campaign for cancer awareness, funding in Costa Rica

Former U.S. Ambassador S. Fitzgerald Haney – now known to millions of Costa Rican TV viewers as “Mr. Fitz” – surprised a few onlookers when he decided, following the end of his time at the Embassy in July, to join the cast of Channel 7’s “Dancing with the Stars.” However, once the show was underway, he revealed the cause that drove him to lace up his dancing shoes: he’s using the opportunity as a way to give back by raising awareness and funds for cancer in Costa Rica.

It’s a cause that is close to his family’s heart. His wife, Rabbi Andrea Haney, was diagnosed with Stage 3 breast cancer in 2015, right around the time that her husband was undergoing confirmation hearings. (Andrea Haney sat down with The Tico Times to speak about her treatment in October 2015, saying: “I don’t believe this happened for a reason, but I’ll make a good reason for this to have happened.”)

The Haney family used their exposure through Dancing with the Stars to increase awareness of the impact of the disease on patients and families, and to encourage donations to the Dr. Anna Gabriela Ross Foundation, created in 2003 to support cancer treatment and patients’ families. The couple has also created the Andrea and Fitz Haney Donor-Advised Fund to Support the Anna Ross Foundation; the fund, at the Costa Rica USA Foundation for Cooperation (CRUSA), is also inscribed at Amigos of Costa Rica in Washington, D.C., allowing donors to make contributions to the Haney Fund that are tax-deductible in the United States. Learn more at amigosofcostarica.org.



Guanacaste nonprofit raises money to install cost-saving solar panels

CEPIA, the Guanacaste-based organization that helps hundreds of at-risk children and families in its area, has taken a bold step to lower their operational costs in order to free up more money for assistance services.

With the goal of raising \$5,000, the organization plans to install 49 solar panels at its community center in Huacas, a move that will ultimately save \$4,740 a year – approximately 90% of their electrical expenses – and pay for itself in 5.9 years. Subsequently, these savings will help fund CEPIA’s many programs including classes, training and meal provisions for its constituents.



New country club launches reforestation program

The Santa Ana Country Club, which began construction in May and is expected to open in late 2018, has launched a two-year reforestation initiative to improve connectivity for local fauna between forested areas between Santa Ana and the hills of Escazú. The project is expected to create new sources of food and reproduction sites for birds, squirrels, bats and sloths, according to a statement from the club.

Bird species in particular will be studied as a key indicator of the project’s impact. The club carried out a base inventory in August and September and will repeat the process regularly to detect progress.

The reforestation initiative, called CEIBA, calls for more than 600 native species to be planted in the gardens, trails and forests of the club’s eight hectares, located next to Route 27 across from the Residencial Villa Real.





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