

Travelers' Philanthropy Short Course

- Cornerstones & main principles of TP.
- How companies can establish & manage giving programs

Jane Crouch

Responsible Travel Manager, Intrepid Travel

Wednesday 20th July 2011



The Intrepid Foundation

- **Established in 2002 by Intrepid Travel.**
- **Raises funds from travelers and Intrepid Travel which bring support to:**
 - > 50 organisations working in areas including: health care, education, human rights, child welfare, sustainable development, environmental and wildlife protection.
 - The Intrepid Community Project Fund
 - The Intrepid Perpetual Fund Account
- **Intrepid Travel matches all public donations dollar for dollar and pays all the administration costs.**
- **Since 2002, donated over AU\$2.5m to over 60 NGOs**



www.theintrepidfoundation.org



**What are the cornerstones
and main principles of
travelers' philanthropy?**

1) Know thyself and learn about and with the community

- Evaluate what you know & don't know
- Know the community well its beliefs, values and practices.
- What are their needs, priorities and hopes for the future?
- Who are the stakeholders, the leaders, the change agents, established institutions?
- How do they see tourism can benefit them?

Kiau community example:

- How can we best help?
- Visible needs vs less obvious
- Listening
- Opportunity for traveler participation



2) Continuous observation and engagement

- Manager of business or key staff involved with the TP should visit the community or project often.
- Interview people informally.
- Check on progress.
- Keep in touch and contactable.

3) Respond to the symptoms and the causes

- In selecting what to support, trace symptoms back to bigger picture causes.
- Prevention is always more effective than cures.
- Chichubamba
Peru example:



4) Diversify your strategies

- No silver bullets for change
- Look for a variety of opportunities for improvements.
- Ex: educating kids – need:
 - teachers, school supplies
 - good nutrition
 - incentives
 - Living Heart eg



5) Do your Due Diligence

- Prepare a plan
- Set criteria of how you want a need to be addressed, then if you are seeking an NGO to partner with – use the criteria to assess them.
- The Ocean Foundation has a 22 point due diligence check list.
- The Intrepid Foundation has 11 criteria + 5 additional considerations.

6) Enhance giving through visitor experiences

- Much easier to entice visitors to give if they had a hands on experience or 'seeing is believing' moment.
- Visits must be appropriate
- Directed by community or NGO, not at call of the travel business or the traveler.

Traveler experience enables fund-raising for training equipment for eye doctors in Danang, Vietnam.



HIV Aids epidemic – support for a project not visited.



Thusanani Children's Foundation, South Africa

- working to prevent and treat developmental delay in orphaned and vulnerable children, aged 0-6, in children's homes.

7) Organise the 'ask' – make it an 'offer'

- Be prepared for your guests desire to 'give back'
- Offer them a choice of ways
- Tell them about it several times, for example, before, during and after their trip
- Catch them when their emotions are fired, memories are fresh

8) Monitoring and evaluation

- Securing agreement with grantees requires work – need to specify measurable outcomes needed to achieve goals.
- Performance indicators or specific deliverables – quantitative or qualitative.
- Outcomes communicated to donors via your communications methods such as website, newsletters etc

9) Honour the work of those on the ground

- Treat community / local NGOs fairly and with respect.
- Communicate clearly and in a timely way – just as you would want and hope them to do.
- Listen and seek to understand their changing needs and situation.

10) Celebrate the outcomes and communicate these clearly

- Communicate to your guests the results of what you are supporting – photos, reports. An illustrated annual report or similar can help travelers to see what collectively can be achieved.
- Independent accountant review of your financial records or an audit.
- Find out what method of communications your donors prefer.

How companies can establish & manage giving programs

Q 1 Is it necessary? Could bringing a business opportunity instead be more empowering? Could you help the community lobby government or write proposals?

Identify geographic area or community and issues you would like to address with your TP project

- Poverty alleviation
- Education
- Health
- Food & nutrition
- Wildlife / animal conservation / welfare
- Environmental or heritage protection



Weigh up pros and cons of supporting an existing NGO or developing your own project.

- Are there existing orgs doing what you want to do in the community?
- What can you realistically achieve – evaluate your resources – staff, expertise, time.
- How can you avoid creating dependency?
- How will you avoid scams and corrupt practices?

Identify and consult ALL stakeholders widely and in a number of forums, over time.

- List them all and identify linkages and power relationships.
- There will be people with different agendas who will want buy-in.
- Decide who you can trust and feel confident is well respected by majority.
- Take note of the voices you are not hearing and try and seek a different forum for them to be heard.

Set objectives and parameters for your project

- Decide clearly what you wish to try and achieve in realistic time frame.
- Decide what you are not
- Prepare a mission statement &/or clear set of objectives. Define the boundaries.
- Set your criteria or 'due diligence' check list.
- Clarify who will benefit.
- Set realistic time lines + some extra time!

Establishing your criteria - examples

- Not-for-profit
- Community based
- Focused on... poorest or marginalized people; improving health, education, human rights, animal welfare etc
- Environmentally sustainable
- Becomes sustainable within x years eg income generation project.
- Set your measures for success.

Traveler involvement

- Visit
- Hands on?
- Faced with the issue - emotions aroused
- Can they see where their \$\$ might go...
- Continued involvement
- Education



Amani Children's Home



Beijing Huiling, China



NGOs that help educate us...



We actively discourage the participation of Intrepid groups in activities which exploit animals - wild or domestic.





or ECPAT
internationally



Work to prevent the
exploitation of children
in tourism.

DEAR TOURIST:

In Costa Rica sex with children
under 18 is a serious crime.
Should you engage in it, we will drive
you to jail.

We mean it.



Seven principles for managing donated funds

- Receiving
- Distributing
- Reporting



Principle

1) All activities conducted with integrity, honesty & openness. Safeguard your company/org name and the trust of the public

- Have clear policies and procedures and comply with them.
- Accurate information in fund-raising materials
- Privacy – privileged or confidential info must not be disclosed to unauthorised parties.

Every dollar donated to the Intrepid Foundation, Intrepid Travel matches.*

So this one dollar becomes two donated dollars in order to better support grassroots community organizations all around the world.

Intrepid Travel is happy not only to match donations, but cover 100% of the Intrepid Foundation's administration costs so travelers can rest assured that every cent they donate reaches the organizations we support.

Since 2002, the Intrepid Foundation has donated over AUD \$2.5 million dollars to over 60 organizations tackling health care, human rights, child welfare, sustainable development and environmental and wildlife protection.

Travelers making a difference.

www.theintrepidfoundation.org

*Up to AUD \$400,000 in each financial year and a maximum of AUD \$5,000 total per donor in each financial year.



*** Up to
AUD\$400,000 in
each financial
year and a
maximum of
AUD\$5,000 total
per donor in each
financial year.**

Principle

2) Philanthropic goal must be put above personal gain

- Management /board members experience & relevant credentials disclosed
- Disclose any potential or actual conflicts of interest.

Principle

3) Foster empowerment, self-determination, tolerance and treat all people with respect

- Aim at developing self-reliance / avoid encouraging dependancy
- Strengthen broad community participation.
- Promote human rights
- Create employment opportunities
- Ensure activities do not support any unethical or inappropriate activity.

Principle

4) Follow all applicable laws and regulations

- In the community/country where project is.
- Fundraising activities
- Ensure key players are not involved in an inappropriate activity eg racist, sexually exploitive, illegal

Principle

5) Ensure fairness, accountability and transparency in all actions and activities.

- Clear receipting and recording of all donations & gifts.
- Donations must be used according to donors' intentions.
- A full description of projects and how donations are to be used.
- Maintain very accurate accounting records.
- Third party audited.

Principle

6) Take care of your donors

- Offer them choice of options where possible
- Keep good records of their name and contact details
- Reply promptly and courteously
- Keep them informed about what you are doing.
- Thank them.

Principle

7) Measure success & effectiveness

- Set realistic timelines – aim for longevity
- Establish monitoring system – periodic contact or reporting
- Evaluation process – against project aims.



Never lose sight of the best interests
of the beneficiary communities.