

**Summary of Sustainable Conservation Finance Retreat
St. Michaels Maryland, USA February 12-13, 2002**

By Patrick Maguire, The Nature Conservancy, on behalf of the Steering Committee

- Present at the retreat were **30 participants from 20 organizations** including many of the major international conservation NGOs, and several multilateral organizations (see appendix II for the attendance list for names, titles, organizations, addresses, etc.)
- On the first day, participating organizations **made presentations on their current and planned conservation finance activities**. TNC will produce a CD of these powerpoint presentations and distribute to all participants.
- Areas of overlap that emerged from these presentations included (i) **delivery systems** for going to scale (i.e. developing content such as that available in the training guide, developing targeted trainings for field practitioners, and providing hands-on technical assistance) (ii) **environmental services** related conservation finance mechanisms (carbon, water, etc.); and (iii) **biodiversity enterprise funds** and other financial tools to promote more sustainable enterprises and industries.
- The second day focused on the specific tasks that a **Conservation Finance Alliance** could more effectively accomplish together, and defined a preliminary Program of Action. It was decided to initially focus potential collaboration on "delivery systems".
- For the purposes of defining a **preliminary Program of Action** (see attached spreadsheet), "delivery systems" was sub-divided into three categories:
 1. **Informing and engaging the key constituencies**. In particular, we need to jointly craft *sophisticated and tailored* messages and materials articulating the importance of sustainable conservation finance, and to put these messages directly to government decision-makers and other important constituencies. We will carry these messages to target events, such as Biodiversity Convention meetings, GEF Assembly meeting, and the World Parks Congress. This work area will entail developing a Conservation Finance Communications Strategy – something which has never been done.
 2. **Training and technical assistance**. This would include sharing resources to define training needs and further collaboration on specific tools such as the CD-ROM training guide.
 3. **Mobilizing resources**. We decided a first necessary step was to *map conservation funding supply and demand*, and to correlate demand with execution capacity.
- For each proposed activity in the preliminary Program of Action a manager and task force was established (See appendix I)
- A **Statement of Purpose** was proposed:

"We will accelerate the delivery of conservation finance solutions by collaborating in areas where working together is more effective than working alone."

- A Conservation Finance Alliance **steering committee** was established comprised of: Alain Lambert, Ramsar; Carlos Quintela, WCS; Valerie Hickey, WCS; Sheldon Cohen, TNC; Dirk Kloss, TNC; Pat Maguire, TNC; other potential members include Esteban Brenes, WWF; Gunars Platais, World Bank; and Frank Vorhies, IUCN. (The first meeting of the steering committee proposed that the Chair of the Steering Committee would serve for one year and Carlos E. Quintela, WCS would serve as S.C. Chairman for the first year.)
- The steering committee will define a **one year work plan** based on the preliminary Program of Action.

Appendix I. Preliminary Program of Action

| Component | Task | Date | Task Manager | Task Force members |
|------------------------------|--|----------------------------|------------------------------|--|
| Inform/Engage | Communication strategy | 18-Mar | Jim Browne - Forest Trends | Carlos Quintela, Bruce Aylward, Valerie Hickey, Sheldon Cohen, Gunars Platais |
| | CBD/COP-6 The Hague, Apr. 8-26 | Apr-02 | Sheldon Cohen - TNC | Alain, Gunars, Claudio, Carlos, Yibin |
| | Katoomba Group - London, Mar. 13-14 | Mar-02 | Jim Browne - Forest Trends | Mike Jenkins, Carlos Quintela |
| | GEF Assembly, Beijing Oct. 13-18 | Oct-02 | TNC | WCS |
| | RedLAC Assembly | Oct-02 | Lorenzo Rosenzweig - RedLAC | Scott Lampman, Mary McClellan |
| | World Parks Congress - Durban Sept. 8-17, 2003 | Sep-03 | Carlos E. Quintela - WCS | Carlos Quintela, Randy Curtis, Randy Kramer |
| Training/Tech. Assist | New Ventures Forum (Monterrey) | 21-Jun | Lorenzo Rosenzweig - RedLAC | |
| | Training needs assessment | summary workplan by Mar-13 | Natasha Landell-Mills - IIED | Lorenzo Rosenzweig, Randy Curtis, Claudio Volonte, Randy Kramer, Sylvia Tognetti |
| | Training Guide | develop TOR by Mar-13 | Sheldon Cohen - TNC | Alain, Carlos, Valerie, Bruce, Esteban and/or Melissa, Natasha |
| Mobilize Resources | Mapping - start with 1 or 2 country pilots | Develop TOR by Feb. 20 | Gunars Platais | Lorenzo Rosenzweig, Randy Curtis, Melissa Moye, AID? |
| Themes | Coral reef / MPA initiative | 31-Mar-02 | Scott Smith | |

Appendix II. List of participants

| Participants | Title | Organization | E-mail address | Address | Phone number | Web Site |
|---------------|--|--------------|--------------------|--|----------------|------------------|
| Sheldon Cohen | Acting Director, Initiative for Innovative Conservation Finance (IICF) | TNC | scohen@tnc.org | 4245 North Fairfax Dr. Suite 100 Arlington, VA 22203-1606, USA | 1 703 841 2644 | www.nature.org / |
| Randy Curtis | Director, Conservation Finance and Policy, LACD | TNC | rcurtis@tnc.org | 4245 North Fairfax Dr. Suite 100 Arlington, VA 22203-1606, USA | 1 703 841 4864 | www.nature.org / |
| Scott Smith | Director, Conservation Finance and Policy, Asia/Pacific | TNC | ssmith@tnc.org | 4245 North Fairfax Dr. Suite 100 Arlington, VA 22203-1606, USA | 1 703 841 8175 | www.nature.org / |
| Dirk Kloss | Independent Consultant, IICF | TNC | dirk.kloss@gmx.net | 4245 North Fairfax Dr. Suite 100 Arlington, | 1 202 489 6718 | www.nature.org / |

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| Patrick Maguire | Project Coordinator, IICF | TNC | pmaguire@tnc.org | 4245 North Fairfax Dr. Suite 100 Arlington, VA 22203-1606, USA | 1 703 841 8170 | www.nature.org / |
| Mary McClellan | Senior Advisor for Conservation Finance, LACD | TNC | mmcclellan@tnc.org | 4245 North Fairfax Dr. Suite 100 Arlington, VA 22203-1606, USA | 1 703 841 5829 | www.nature.org / |
| Tamar Datan | Vice President and Director of Compatible Ventures Group | TNC | tdatan@tnc.org | 4245 North Fairfax Dr. Suite 100 Arlington, VA 22203-1606, USA | 1 703 841 4587 | www.nature.org / |
| Carlos Quintela | Director, Conservation Finance Program | WCS | cequintela@conservationfinance.org | 1700 Connecticut Ave. NW Suite 403 Washington, DC 20009, USA | 1 202 588 1108 | www.conservationfinance.org/ |
| Ray Victurine | Independent Consultant | WCS | rvicturine@conservationfinance.org | 1700 Connecticut Ave. NW Suite 403 Washington, DC 20009, USA | 1 206 343 9759 x103 | www.conservationfinance.org/ |
| Valerie Hickey | Program Associate | WCS | vhickey@conservationfinance.org | 1700 Connecticut Ave. NW Suite 403 Washington, DC 20009, USA | 1 202 588 1108 | www.conservationfinance.org/ |
| Jim Browne | Director of Communications | Forest Trends | jbrowne@forest-trends.org | 1050 Potomac St. NW Washington, DC 20007 | 1 202 298-3010 | www.forest-trends.org |
| Sylvia Tognetti | Independent Consultant, FLOWS project | FLOW S | stognetti@mindspring.com | 7004 Sycamore Ave. Takoma Park, MD 20912, USA | 1 301 270-1074 | www.flowsonline.org |
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| Gunars Platais | Economist -Policy, Economics, and Pollution Team, Env. Dept. | World Bank | gPlatais@worldbank.org | 1818 H Street NW Washington, DC 20433, USA | 1 202 473 2627 | www.worldbank.org/biodiversity |
| Stefano Pagiola | Sr. Environmental Economist - Environmental Dept. | World Bank | SPagiola@worldbank.org | 1818 H Street NW Washington, DC 20433, USA | 1 202 458 2997 | www-esd.worldbank.org/eei |
| Lorenzo Rosenzweig | Chair, Exec Ctee, RedLAC and Exec Director, Fondo Mexicano | RedLAC | laros@infosel.net.mx | Damas 49 San Jose Insurgentes Mexico D.F. 03900, Mexico | 52 83 43 1043 | www.fmcn.org www.redlac.org |
| Melissa Moyer | Senior Fellow, Center for Conservation Finance | WWF | melissa.moye@worldwildlife.org | 1250 24th St., NW Washington, DC 20037-1132, USA | 1 202-778-9676 | www.worldwildlife.org |
| Randy Kramer | Professor of Resource and Environmental Economics, Duke U. and Visiting Scholar IUCN | IUCN/ Duke U. | kramer@duke.edu | Duke University, Box 90328 Durham, NC 27708-0328, USA | 1 919 613 8072 | http://biodiversityeconomics.org / www.env.duke.edu |

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| Alain Lambert | Senior Advisor, Environment and Development Cooperation | RAMS AR | lambert@ramsar.org | Rue Mauverney 28 CH-1196 Gland, Switzerland | (41-22) 999 0181 | http://ramsar.org/ |
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| Scott Lampman | Acting Director, EAI/TFCA Secretariat | USAID | slampman@usaid.gov | G/ENV, Rm. 3.10-12 RRB 1300 Pennsylvania Ave., NW Washington, DC 20523, USA | 1 202 712 1954 | www.usaid.gov |
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