

**UNIVERSIDAD INTERNACIONAL DE LAS  
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**SCHOOL OF EDUCATION AND FOREIGN LANGUAGES**

**Analysis and Translation of the documents *Plan  
Estrategico 2022-2025 Final* from Spanish to English for The  
Madre Verde Foundation and *What is Non-profit  
Fundraising (NPO) General and Non-profit Board Member  
Essential Certificate-TCCR* from English to Spanish for  
Talita Cumi**

**Thesis Submitted to Obtain the Licentiate Degree in English with Concentration in Translation**

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## **Dedication**

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### **Abstract**

The research work of translating documents from English to Spanish was carried out to investigate and inquire about the effects of the procedures and methods used to translate the documents of the “*Plan Estrategico 2022-2025 Final* from Spanish to English for The Madre Verde Foundation and *What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR* from English to Spanish for Talita Cumi.” These documents were prepared using the qualitative method. However, the research was successful since the sample of the results is found in the translation part to the target language provided to both the Madre Verde Foundation and the Talita Cumi organization, demonstrating all the procedures and methods used in the translation process, where the changes and differences from one language to another are observed. The researcher concluded that each procedure is essential to meticulously complete a translation and that the method is beneficial and effective in obtaining an accurate translation.

## Resumen

El trabajo de investigación de traducción de documentos del inglés al español se realizó para investigar e indagar sobre los efectos de los procedimientos y métodos utilizados para traducir los documentos del *Plan Estratégico 2022-2025 Final* from Spanish to English for The Madre Verde Foundation and *What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR* from English to Spanish for Talita Cumi, estos documentos fueron elaborados mediante el método cualitativo. Sin embargo, la investigación fue exitosa ya que la muestra de los resultados se encuentra en la parte de traducción al idioma de destino proporcionada tanto a la Fundación Madre Verde como a la organización Talita Cumi, demostrando todos los procedimientos y métodos utilizados en el proceso de traducción, donde se observan los cambios y diferencias de un idioma a otro. La investigadora concluyó que cada procedimiento es fundamental para completar meticulosamente una traducción y que el método es beneficioso y eficaz para obtener una traducción precisa.

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## **Chapter I**

### **Introductory Framework**

The introductory framework is a section of the thesis work whose function is to develop arguments you will use. However, these arguments are intended to establish a sequence to explain and support their research. According to Fermín (2019), "the introduction fulfills the function of guiding the user through the text so that they reach the end (para. 4)". For this reason, it is important to know that the introductory framework contextualizes the reader of the topic and method that will be worked on. Finally, the researcher chose an introductory framework as the first point to let the reader know what it is about and the sequence that the research analysis takes along with the topic of translation processes and methods.

#### **1.1 Problem Statement**

Through collaboration with the Madre Verde Foundation and the Talita Cumi association, the researcher has taken on the task of contributing through thesis work with the translation of the documents *Plan Estrategico 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English into Spanish for Talita Cumi* to apply translation procedures and methods to obtain an understanding of the document in a foreign language.

Now, achieving a good translation is not only about taking the document and translating it word by word; Otherwise, it is applying linguistics and specialized knowledge to a translation. This is why, Olga Pérez (2021) says, that before delivering a translation, you must always explain to the client the processes that are

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followed to provide them with an adequate translation. Likewise, the necessary phases to provide a quality translation will be investigated. Besides, this research helps the researcher understand the processes used when researching and analyzing a textual translation. In addition, future students of English with an emphasis on translation will have help for future research or work that requires this information.

Furthermore, this analysis and investigation of these documents awakened the interest in providing the Madre Verde Foundation and the Talita Cumi association with a quality translation since, when working with foreign places and people, they find it difficult to communicate clearly and naturally, the information from both places. Likewise, it directly affects its rating. However, the researcher will give them greater clarity with the knowledge acquired in English and Spanish.

Addressing this problem will have practical and theoretical benefits for the student in training and will contribute to communicating documents to the places mentioned above. Consecutively, the research question of this research is: What is the effect of the procedure and methods used to translate the documents *Plan Estrategico 2022-2025 Final* from Spanish to English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR from English to Spanish for Talita Cumi?

### **1.2 Objectives of the Investigation**

#### **1.1.1 General Objective**

To analyze the effect of the procedures and methods used to translate the documents *Plan Estrategico 2022-2025 Final* from Spanish into English for The Madre Verde Foundation and *What is Non-profit Fundraising (NPO) General and*

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*Non-Profit Board Member Essential Certificate-TCCR* from English into Spanish for Talita Cumi

### 1.1.2 Specific Objectives

- To translate the documents *Plan Estrategico 2022-2025 Final* from Spanish into English for The Madre Verde Foundation and *What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR* from English to Spanish for Talita Cumi
- To apply various translation techniques to the documents in order to achieve communicative texts
- To evaluate the effect of the translation techniques applied to the documents.
- To create a glossary with the most relevant terminology found in both texts

### 1.3 Justification of the Study

The investigation of procedures and methods used to translate the documents of the *Plan Estrategico 2022-2025 Final from Spanish to English for the Madre Verde Foundation and what a non-profit fundraising (NPO) General and Non-Profit Board Member Essential Certificate- TCCR* from English to Spanish for Talita Cumi will allow you to determine the importance of the translation processes when transferring a message to another language. On the other hand, a professional translation service is essential to obtain and provide a higher understanding of a foreign language message. That is why the translator collaborated with the Madre Verde and Talita Cumi foundations. In both places, a translation work of excellence could be provided, and thus, the documents could be translated for the most accurate and concise possible benefit.

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Then, the investigator's skills regarding translation processes and methods should be increased with the documents provided by the Madre Verde Foundation and the Talita Cumi Association. The results of this translation work will allow the student to train as a professional translator. In addition, various translation techniques that favor their integration and collaboration with better development in training among those translation training obstacles with the use and understanding of the language should be implemented. The results of this translation work will increase the translator's academic and professional training in the translation world. In addition, the translation techniques, processes, and methods that will be applied will facilitate the translation process.

Furthermore, the cognitive process will allow the translator to train to adapt to the new forms of translation. The analysis and translation of the documents *Plan Estrategico 2022-2025 Final*, as well as the non-profit fundraising (NPO) *General and Non-Profit Board Member Essential Certificate- TCCR*, are convenient to enrich the cognitive process of the translator. In this way, better translation bases and techniques are developed to develop comprehension, communication, expression, writing, and empathy skills, both personal and work-related. In addition, the acquired linguistic knowledge of foreign and native languages will favor academic and professional development.

Now, the one who benefits from the translated documents provided will be the Madre Verde and Talita Cumi Foundation since it provides a greater breadth of communication and understanding to the populations they address since, in both places, they work and collaborate with foreign people, That is why the researcher considers that having contact with the Madre Verde Foundation and the Talita Cumi

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association opens other perspectives and forms of communication with the world, which awaken the curiosity, empathy, and social skills necessary to develop effective communication.

The *Plan Estrategico 2022-2025 Final, what a non-profit fundraising (NPO) General and Non-Profit Board Member Essential Certificate- TCCR* documents are relevant for both places since they explain the objectives and purpose with which their foundation and association were created. That is why the translator emphasized that the Foundation Madre Verde and Talita Cumi should reach an international population in both. Therefore, the translator is responsible for helping break down language barriers so that both places can achieve their objectives in foreign countries. Considering current documents, this work becomes interesting, given the study of achieving communicative texts together with translation processes and methods. The linguistic barriers presented by both documents can be translated to a larger population, enabling the communication and development of both foundations. In this way, not only language barriers could be avoided, but also social ones. Nevertheless, this research and translation work is carried out because there is a need to improve understanding and communication in the documents mentioned above. Through the analysis of the documents, the effect of the procedures and methods used for translation will be developed using a glossary of relevant terminology found in both texts.

The development of glossaries and the application of translation procedures and methods for each document will help the researcher demonstrate the validity and reliability of the translated document. In addition, it is material that can be used for other translation works and will provide knowledge and understanding of the

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terminology to whoever reads it. Finally, this research proposes to validate the researcher's linguistic knowledge of the techniques applied in both translations. Furthermore, through the development of the translation and with the support of the tutor and translation professionals, the techniques, procedures, glossaries, and methods used in the research will be evaluated to enrich the understanding and translation of documents in a foreign language.

### **1.4 Antecedents**

Francisco Javier Vargas Gómez (2020) developed an investigation of six research proposals at the National University to develop research processes as an essential component for those who study translation. He first developed knowledge of translated literary texts, translation of business administrative terminology, error analysis, solutions applied to a specific problem, and the local market for professional translation services. Also, he investigated the translation of humor in literary texts, where he highlights that there cannot be a single interpretation for this type of text and delegated by the author to defend that the message was not captured in an ideal way, or an equivalence was not found. As a second proposal, he developed an entry into the field of terminological translation, where he created a Bilingual English-Spanish glossary. Likewise, Francisco Vargas (2020) states that "these are translation-logical problems, since within business environments they could ruin effective communication by creating confusion and ambiguity among the company's collaborators" (p.29). This awakened in the researcher the importance of constant communication with clients to always provide a good result in a translation job. Consecutively, Vargas mentions that his main objective is to show translation applicants thematic, theoretical, and methodological aspects to prepare a translation correctly. Furthermore, this research aimed to instruct and motivate its readers in a

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didactic manner and thereby obtain information rich in knowledge to carry out this translation work.

In addition, Elena Velarde (2017), a student at the University of Seville (2017), conducted research on the categorization of translation problems. To do this, Elena used monolingual English dictionaries, Dropbox, and Google Drive for online help to indicate whether online factors were causing problems for the translator. Furthermore, she opted for sources such as Pinterest, Google Maps, and Facebook as a positive preliminary study of the problematic aspects of the translator's content. According to Elena Velarde (2017), "the categories identified as localization problems are not constant universal problems, but rather they are elements that have the potential to generate problems due to the linguistic context" (p. 219). However, the researcher thought it was important to highlight her way of covering possible linguistic misunderstandings in a closer and more direct way with modern language in this work. Finally, she explored methodological issues related to online problems for translators that the reader of her work may consider before hiring online help for a translation job.

Then, Yiqun Sum (2019), a student at the Autonomous University of Barcelona, conducted a descriptive study on the acceptability of translation techniques among readers. Its objective was to show future translators through the study of different technical translation procedures and the methods of foreignization and domestication in translation into Spanish. Furthermore, Yiqun Sum (2019) said that "the questions were based on the techniques used in different translations and the expectations of readers" (p. 206). This aroused great interest in the researcher since it seems vital to him to know and understand the questions that lead other translators to translate work more precisely and accurately, in addition to knowing the recipient's

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understanding of the original text and the translation. He used tables and statistics to compare the original text with its most accurate translation. At the end of his research, he observed that he had different but positive responses to her work.

On the other hand, Karina Roldán Segura (2017) researched the translation of Anglicisms in the Costa Rican written press at the National University. This study aimed to conduct logical translation research and quantitative diagnoses and propose translation options regarding lexical Anglicisms. In her study, she considered Anglicism as a translation and writing error and demonstrated translation solutions, such as placing Anglicism in parentheses and translating it. Likewise, Karina Roldán (2017) says, "In some cases, authoritative sources such as RAE dictionaries decide to formally include a foreign word in Spanish, either in its raw form or adapting it to the orthographic norm of the receiving language" (p.76). Likewise, the researcher agrees that when searching in sources such as the RAE, Google, and Linguee, among other research sources for a translator, it is important to know the type of word used to make a decision based on the most appropriate term for the meta translation. However, in this way, she obtained and provided a communicative factor without leaving aside the translation aspect.

Finally, the background of the researcher Brigitte Lépinette (1997), when she investigated the history of translation and current translation, was the reflection based on the history of translation: models, objects, and techniques of analysis both at a sociological and descriptive. However, the objective of her topic presentation was to show the history of translation, allowing her to develop different approaches, perspectives, and precisions when translating a document. On the other hand, she was in charge of exploring primary sources in a sociological and cultural context in meta-translational research with the justification for making dual works of translations.

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Consequently, Brigitte Lépinette (1997) states that "as regards the descriptive-contrastive model of our typology, studies can be integrated that lead, through the analysis of the decisions of those responsible for the target text, to the establishment of manifesto of their translation strategies" (p. 10). Without a doubt, she investigated the development of translation in Spain and today leaves satisfactory and enriching work for those who seek to determine the history of translation. Thus, she provides knowledge of cultural relations between countries and her own country. Additionally, she gained the satisfaction of encouraging more translators to research the history of translation in multiple fields. As a result, in her work, she demonstrates that translation is a discipline that has existed for a long time and continues to evolve and change over the years.

### **1.5 Scope**

This scope analyzes the translation procedures and methods used in the documents Strategic Plan 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR from English into Spanish for Talita Cumi to provide precise work for the translation of said documents.

1. To translate the documents mentioned above, apply the translation processes and methods.
2. To apply various translation techniques to documents to provide a clear and accurate translation to the Madre Verde Foundation and the Talita Cumi Association.
3. To Evaluate the effect of the translation techniques applied to the documents to demonstrate whether the translation processes can influence the readability of the translated texts compared to the original texts.

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4. To develop a glossary so that future students can access the specific terminology used in both documents faster.
5. To provide a greater understanding of the information in both documents so that foreign people who communicate or want to participate either for the Madre Verde Foundation or the Talita Cumi Association can access their native language, English or Spanish.

## Chapter II Theoretical Framework

A theoretical framework supports carrying out research work. According to Angelica Salomão (2023), "It is a structure or framework of ideas that are used to guide the research process, and it helps to organize and define the key concepts that are being studied" (par.3). On the other hand, without carrying out a Theoretical framework, the research would not be detailed. Therefore, the researcher sees it appropriate to add it to the research to explain and contextualize the analysis's processes, methods, and techniques.

In addition, the theoretical framework plays a crucial role in research by simplifying the concepts to be developed as in the problem and the reason for investigating the problem. On the other hand, this section demonstrates knowledge of the topic's fundamental processes, concepts, and methods under development. However, since it helps the researcher organize ideas better and provides various dimensions of the concepts, it also defines the vision the researcher must adopt after analyzing and interpreting the information collected. Finally, the theoretical framework determines how the researcher perceives, develops, and interprets the research information. Likewise, it supports both the reader and the researcher in clarifying and defining in an understandable way the limitations and alternative theories that challenge the researcher's criteria by proposing that the facts of their research are obtained from authors of previous research.

The research and translation work of the documents *Plan Estrategico 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English into Spanish for Talita Cumi* is to know how

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translation procedures and methods are used when translating a document from its original language to the target language. Consequently, techniques are applied to carry out precise work in translation, aiming to enrich the researcher's knowledge and provide the foundation and association with the results of translation work. This will allow the translator-in-training to introduce themselves to translating from one language to another in writing. This may incorporate the effects of said documents, the glossaries used, and the translated versions that will help expand information, understanding, and communication to a diverse population that requires performance in their native language, Spanish or English.

Finally, this thesis work arises from the research interest in the Madre Verde Foundation and the Talita Cumi Association, which provide their services in comprehensive development to promote the knowledge and happiness of those who need it. According to the translation of documents, this interest in collaborating for both places revolves around helping, supporting, and providing broad communication to their national and international life purposes. Likewise, after analyzing the various translation procedures, the purpose is to enhance the researcher's academic, social, and personal skills.

### **2.1 Text Analysis**

Text analysis is the study of the translation process of a document from English to Spanish using the researcher's knowledge and technological help. According to Katarína Seresová (2019), "An important basis for creating a translation (of the target text) is the knowledge of the text communication function and its place in a particular situation, before the translator enters the productive phase of translation (para. 2)". Likewise, this allows the researcher to analyze the content to make crucial

decisions in the translation. However, for translation purposes, the text analysis includes text styles that will be developed below.

### **2.1.1 Text Styles.**

Text styling helps the translator improve the design and presentation of the document. As Saldanha (2005) mentions in her research, "In this sense, 'style' is usually applied to the linguistic characteristics of a particular writer, genre, period, school of writing, but hardly ever to the work of a translator (p. 30)". Furthermore, text style concerning translation refers to the source text and its author from the translator's point of view. Also, it is usually directed to the type of document on which the translator will work, such as narrative, description, discussion, and dialogue. However, a translator is not traditionally an original writer; if not a person who carries out his translation work, he should not have his own style since his task is to reproduce the style of the original text as faithfully as possible.

### **2.1.2 Stylistic Scales.**

In this part of the research, the three types of stylistic scales are mentioned: formality, generality or difficulty, and emotional tone scale. However, first, let us define stylistic scales. They help the translator identify the importance of stylistic features in the original text and determine whether their equivalence is accurate in the translated text.

#### ***2.1.2.1 Scale of Formality.***

According to Newmark (1988), the formality scale is composed of eight categories: officialese, official, formal, neutral, informal, colloquial, and slang. Thus, officialese formality texts are used for laws or government documents. Official formality texts are the same as official formality texts, only they are focused on a

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more informative purpose. Formal texts are used where the documentation requires a more complex language, such as commercial or company documents.

On the other hand, neutral formality refers to texts with persuasive messages that are understandable to anyone. Informal is characterized by providing flexible language that is understandable for any educational level. Then, the colloquial text contains colloquialisms. Finally, slang is also an informal text; the difference is that it is aimed at a specific population that uses that language.

However, it can be challenging to explain the level of formality of a target language in translation, as problems can arise when translating a language with different formality levels. Certainly, formality can vary significantly depending on the language. Although there are languages that have well-defined formal modes, such as Spanish, which separates "tú" from "usted" or, on the contrary, as in English, there are no pronouns that mark these differences since only the pronoun "you" is used. You must rely on the context to express and understand the message. That is why, through analysis, the translator must decide on the level of formality of a text at the time of translating since it could cause a misunderstanding to whoever reads it.

### **2.1.2.2 Scale of Generality or Difficulty.**

According to Newmark (1988), the generality or difficulty scale measures the level of difficulty of a text; he provides the following list in which this scale is divided into simple, popular, neutral, educated, and technical. First, simple complexity in texts is basically texts with low terminology difficulty. Second, popular complexity means that the context of the text contains vocabulary from everyday life. Third, neutral complexity in the text is when there is a balance of difficulty in its context, neither too complex nor too simple. Then, texts of educated complexity are used for educational or instructional purposes, most of which are used in universities or schools. Finally, texts

that contain technical vocabulary are found in documents such as manuals, medicine, and finances, among others.

### **2.1.2.3 Scale of Emotional Tone.**

According to Newmark (1988), the tone scale can be divided into intense, warm, and factual tones. Newmark mentions that the intense tone in the texts focuses on transmitting the message using intensifiers. Then, the warm tone provides a message with a friendly vocabulary. Finally, the factual tone combines intense and warm tones, with the difference that this aims to convey the message in a soft way. That is why the scale emotional tone plays a main role in the translation since the researcher must capture and transmit all those emotions in the exact way the original text wants to express to the target text.

### **2.1.3 Text Function.**

The function of the text, according to Newmark (1988), defines what the purpose of the text is or what intention the text has. Newmark explained that three main functions are informative, vocative, and expressive. On the other hand, the translator must adapt to the functional conditions of the text that prevail in the target culture and the communicative intentions. That is, the translator must ensure both the text's functionality and loyalty. Furthermore, the text function aims to attract the reader using its specific characteristics that must be adapted to the purpose of the source text.

#### **2.1.3.1 Informative.**

The informative function refers to a specific topic of knowledge in the field of translation. According to Smith (2021), "The information text is a type of written text whose purpose is, as its name says, to inform. Its function is to transmit to the reader certain information, data, descriptions, real facts, or knowledge of any nature" (para.1). This function seems to be in the text where something is reported objectively. However,

these types of texts must follow a standard format such as textbooks, newspapers, or technical scientific documents. In addition, it is important to mention two aspects that must be made when describing the informative function. Most informational texts are found in international organizations, multinationals, private companies, or translation agencies. Second, most of them need more adequate grammatical structures, making it a task for the translator to correct them.

### **2.1.3.2 Expressive.**

On the other hand, the function is where the ideas of the statement's speaker, writer, and author are expressed to express feelings without the intention of receiving a response. Newmark (1988) explains that, for translation purposes, expressive texts can be divided into three types of text: serious imaginative literature, authoritative statements, autobiographical essays, and personal correspondence.

Likewise, imaginative literature is characterized by texts such as lyric poetry, stories, novels, or plays. For authoritative statements, Newmark (1988) says that "these are texts of any nature that derive their authority from the high status or reliability and linguistic competence of their authors" (p. 39). This type of function is reflected more in government documents since it uses formal vocabulary. Furthermore, according to Christiane Nord (2006), "the expressive function refers to the attitude of the sender towards the objects and phenomena to which the text refers" (p. 49). This means that the role of expressiveness in the text is to translate the text in a way that the reader understands. Finally, personal correspondence is expressive when readers relate to the author's background.

### **2.1.3.3 Vocative.**

Vocative texts are directed at readers to persuade them with a message. This function is called this because it sends a message for readers to react to a specific topic. According to Newmark (1988), for translation purposes, the vocative function is seen in "notices, instructions, advertising, propaganda, persuasive writings (applications, cases, theses) and possibly popular frictions, whose purpose is to sell the book/entertain the reader, as the typical "Vocative text" Newmark (1988) (p. 41)". According to John Gomez (2009) "the Latin vocative corresponded to the appellative function (the call) and the expressive function (invocations and exclamations)" (p. 315). However, the vocative is a grammatical tool intended to attract the reader's attention.

### **2.1.4 Translation Methods.**

In this section, the researcher will present two translation methods: semantic and communicative. According to Mambrol (2020), the translation method is "a method of foreign or second language teaching which uses translation and grammar study as the main teaching and learning activities. (para. 1). However, they are methods used to learn grammatical rules of the foreign language and try to apply those rules to the native language to replicate them when translating.

#### **2.1.4.1 Semantic translation.**

Semantic translation uses the exact meaning of the source language and translates this same message considering the grammatical structure of the target language. It is important to mention that the main objective of all semantic translations focuses on meaning. However, naturalness and aesthetics are considered in this translation method. According to Newmark (1982), "semantic translation attempts to represent, as faithfully as the semantic and syntactic structures of the second language allow the exact contextual meaning of the original" (p. 39). The objective is for the

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translator, every time he uses semantic translation, to keep in mind the ideas and thoughts of the authors.

However, semantic translations are addressed to a single reader; most of the time, they are addressed to the writer of the text in the source language. Newmark's (1982) view is that "a semantic translation is always inferior to its original since it involves loss of meaning" (p. 42). In addition, the objective of translation is "meaning"; it is very important to study the theory of meaning. That is why semantics is responsible for studying meaning. Therefore, semantics are fundamental in translation.

On the other hand, semantics provides the skills and practical knowledge necessary to provide better translation jobs. This type of translation is written at the author's linguistic level, is economical, and is generally used for "expressive" texts. However, it is convenient to know that semantics provides both theories and methods to understand the meanings of words, which are very useful in translation.

### **2.1.4.2 Communicative translation.**

In the communicative translation method, the only part of the meaning considered is the understanding part of the message in the target language. Furthermore, communicative translation attempts to produce a reaction in the target language reader that is equal to the reaction provided in the original text. This translation method is subjective because it aims to achieve a possible effect on readers. Newmark (1982) explained that "in general, a communicative translation is likely to be more fluid, simpler, clearer, more direct, more conventional, will conform to a particular linguistic register, and will tend to under translate, that is, to use more generic terms" and encompassing" terms in difficult passages" (p.39). This quote better explains the purpose of communicative translation, mentioning that it is clearer and

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simpler than the original version because it aims to clarify further the source text's message for the target language reader.

However, communicative translation intends to overcome language barriers and cultural differences. According to Sutanto (2016), "Translation transforms source text into target text, so that the understanding of source culture can be achieved in the target culture, and thus facilitating intercultural communication" (p.1). Likewise, we must consider the diversity between both languages, which requires a rapprochement with the other; since this translation facilitates interculturality between languages and the people who read it.

On the other hand, Hongping Chen (2022) explained that "communicative translation pays attention to transmitting information according to the language, culture and pragmatic mode of the target language, rather than faithfully reproducing the text of the original" (para. 6). He even mentioned that to achieve a communicative purpose in the text, the language barriers in the original text must be broken and to do so, translators must both interpret the original text and correct the author's errors with a communicative translation.

Then, Meidasari (2014) "To translate most effectively, the translator should analyze the messages; to do so, he/she should have some tools at hand; such tools can be the well-known communication strategies which prevent communication from disruption" (p.183). Likewise, given that communication is essential for a translator, it is vital to ensure that both the source and target texts are easily understandable for their original purpose.

## **2.2 Translation Procedures.**

According to Waliński (2015), translation procedures are all the methods translators use when formulating an equivalence of transferring elements of meaning from the Source Text to the Target Text. Newmark (1988) said, "While translation methods relate to whole texts, translation procedures are used for sentences and the smaller units of language" (p. 81). This means that its approach consists of understanding the original text's meaning and translating it into the target language as long as it retains the same meaning. Translators use these procedures to provide greater accuracy to the original and target text.

### **2.2.1 Transposition.**

Transposition is the first process a translator uses to change a sentence's grammatical structure. According to Simon (2016), "It is actually operating at a grammatical level and consists of replacing the word with another word without changing the meaning of that word (para. 2)". It could be said that this translation process encourages the translator to carry out a free translation to find the equivalence of the text. However, this section has two techniques in this category: double transposition and cross transposition. In general, transposition consists of changing the grammatical structure of one language to another, although the message and vocabulary do not change. It is crucial to mention that choosing the best way suits the context. Next, the researcher will present the two transposition techniques. Double transposition comprises two grammatical categories in the source language and two different grammatical categories in the target language. This means that double transposition consists of two applications of transposition in one message. Cross transposition is a variant of translation techniques that changes the grammatical categories of two elements in a cross-way.

### **2.2.2 Modulation.**

The term modulation according to Rahmatillah (2017), refers to "a variation through a change of point of view, of perspective and very often of a category of thought (p.70)". In other words, they are changes from passive voice to active voice. The modulation process is carried out only when the translator does not find the equivalence in the translation, so he must use modulation. In addition, according to Chiara Grassilli (2016), "modulation is often used within the same language. Expressions easy to understand and not complicated to understand are relevant examples of modulation" (para. 2). This means that in both texts, both the source and the destination, the message must be communicated easily. Furthermore, this procedure helps the translator to reaffirm the exact way of saying things in their language. However, modulation is divided into two categories: mandatory and free.

To conclude, modulation allows for a better and more natural translation. Free modulation, as the word says, is a free translation procedure used to clarify meaning or create equivalence in the target language. Then, Machali (2000) studied that modulation is obligatory if the source language's word, phrase, or structure does not have its equivalent in the target language. It should be noted that modulation can become mandatory when its use is very frequent.

### **2.2.3 Omission**

According to Dimitriu (2010), the omission replaces less precise or unnecessary definitions and contexts according to the message that is to be translated since naturalness is always sought in the text. However, omission can be used as long as it keeps what the original message is trying to say. In addition, before making any omission, the translator must consider that an equivalence must generally accompany the omission. This means that omission is a procedure by which the originality and

naturalness of the original text must always be followed. To do this, the translator must trust his linguistic knowledge since he has the freedom to do it. Likewise, if used incorrectly, it can harm the text. Then, it is crucial to know that the central idea of this procedure is not to violate the original version of the text but rather to seek clarity of the message in the target language. To conclude, omission can occur in situations such as redundancies or repetition of words. An example of omission, according to Samantha Méndez (2015), is: "She smiled that beautiful smile" "Tuvo una maravillosa sonrisa."

#### **2.2.4 Amplificación.**

The amplification technique, according to Darmayanti (2019), refers to "the addition of information in the target language (p. 45)". This process consists of adding details not mentioned in the original text and necessary for the translation so that the meaning is clear and correct. According to Tina (2011), "Generally speaking, there are two types of amplification conditions. One is adding a word that was "omitted" in the original sentences, while its meaning is clearly expressed through the context. Those are lexical expansions" (para.2). On the other hand, it also mentions that amplification is the extension of sentences or paragraphs, that is, adding the syntactic component omitted in the source text to complete the meaning of the target text.

Furthermore, the translator must ensure his or her linguistic knowledge to make the text more understandable for the target language reader. Likewise, this technique gives the same amount of information readers receive from the source text. However, more words may appear in the target text due to the source language. According to Mahmud (2021), "this does not mean that the information given in the target language is more than the information given in the source language text" (p. 452). Likewise, this procedure seeks to be natural and closest to the message.

### **2.2.5 Explicitation.**

According to Blum-Kluka (1986), the term explicitation in translation studies is when the translation and interpretation of the source text with the target text express some concept explicitly. On the other hand, Séguinot (1988) further states that "therefore, in translation studies, explanation should be reserved for additions in a translated text" text that cannot be explained by structural, stylistic, or rhetorical differences between the two languages" (p.108). On the other hand, this process occurs when the translator takes some meaning from the source text and replaces it with another meaning in the target text to make the message more specific.

Some types of explicitation found by Viktor Becher (2011) are mentioned below. First, there is the mandatory explicitation due to the language of both languages. Secondly, optional explicitation is due to stylistic preferences between the source and target languages. Third, pragmatic explicitation is when there are differences in cultural knowledge due to the origin and destination of the text. Finally, as a fourth point, the explicitation inherent to translation is caused by nature in the translation process (p. 22). In this way, the concept of explicitation is the message that is intended to be transmitted intentionally and accurately.

### **2.2.6 Traducción literal.**

Literal translation is commonly known for directly translating a text without changes. According to Alicia Gonzales (2015), "A literal translation is a bad translation when it is translated word for word and does not take into account the context, culture or other references" (para. 5). This type of translation is only allowed in legal texts such as scientific and technical ones. On the other hand, when it is decided to opt for this translation process, the absence of equivalence or naturalness

of the language can be found in the text since this translation method is associated with the complete fidelity of the original text regardless of the reader's understanding.

However, if the translator opts for a literal translation, it will probably be full of errors since the translator has yet to make an effort to transfer the message. That is why, in these cases, a skilled and experienced professional is required to determine the best way to translate the text since in this type of translation, technical, scientific, legal, technological, and even medical translations are usually worked on; therefore, it is an extremely detailed and delicate translation procedure. Likewise, due to the complexity of the content of these documents, they are not recommended for use. According to Liraz Postan (2023), "In order to reach international audiences, businesses cannot rely on literal translation. Translations should be done by professional translators who can adapt the text to resonate with a local audience's language and culture" (para.9). Furthermore, literal translations are generally difficult to read and understand. That is why this translation usually needs to improve the meaning of the message of the original text.

### **2.2.7 Punctuation changes.**

Punctuation plays a crucial role in the interpretation of a text. Since its role is to indicate pauses or emphasis in the text. Furthermore, it helps strengthen the arguments. They are all those signs, such as the comma, period, semicolon, and colon, among others, used in writing. Otherwise, not properly using the appropriate punctuation changes in a translation can lead the reader to a poor understanding of the text, so the translator must consider the importance of punctuation, considering all the punctuation marks in the language in which is translating. According to Mogahed (2012), "translator does not need to imitate the source text in translation, but he/she

has to observe the norms and context of the target text" (p.16). That is why the writer/translator should consider the value of punctuation marks in a translation.

On the other hand, a translator must know the role of punctuation in translation. That is why it must be kept in mind in this research how punctuation marks have both a semantic and pragmatic load, and if they are not used properly, they can be problematic in translation. However, there are many differences between languages in terms of punctuation marks, specifically in Spanish and English, that translators must consider. As a brief example, in English, the comma, period, or semicolon has some additional functions in English, such as indicating omitted words or adding emphasis to the text. In Spanish, it is different since these punctuation marks are used to create small or longer pauses.

To conclude, Gerard Salton (1958) said that "conventional textbooks on grammar generally classify punctuation marks in accordance with their function within a given sentence" (p.17). In other words, punctuation changes are an indicator for translators where knowledge and use of the language are demonstrated. Likewise, it shows the interrelation of meaning between the sentence and the meaning that the context has and how that meaning is transmitted between the elements of the text. That is why translators must have the knowledge and be sure when deciding to make a punctuation change since this could change the intention of the source text.

### **2.2.8 Compensation.**

Compensation is a translation process used to add information from one text to another that has been lost during translation. According to Klaudy (2008), "Compensation in translation is a standard lexical transfer operation whereby those meanings of the SL text, which are lost in the process of translation, are rendered in the TL text in some other place or by some other means" (p. 1). This means that this

technique adds the understandability of the text to the absence of an element or ends up reinforcing the information in the document.

In other words, compensation develops when the source text cannot be translated exactly into the target language. Bryant Hillas (2009) gave as an example that "English does not express the gender of definite articles as Spanish does (el gato, la gata) and, therefore, a translator would need to compensate in kind by referring." somewhere that clarifies this point" (para. 3). It is for these cases that compensation is sought in the translation since one language can express an idea as similar as possible if this compensation exists in the other language, as usually occurs between English and Spanish.

#### **2.2.9 Equivalence.**

Equivalence is a translation from the original language to the target language so that the translation expresses the same message in the target language. The equivalence is intended to indicate in both texts, both the source and the destination, a type of precision or similarity. According to Panou (2013), "the concept of equivalence has been of particular concern to translation scholars since it has been inextricably linked with both definitional and practical aspects of translating" (p. 2). Likewise, the translator must look for the most natural and most precise equivalent to the translation. However, as equivalence with equivalence, the aim is to transmit the same message through a different expression.

On the other hand, for a translator to perform an equivalence, he or she must be familiar with all linguistic units. According to Lotfollah Karimi (2006), "If a specific linguistic unit in one language carries the same intended meaning/message encoded in a specific linguistic medium in another, then these two units are considered to be equivalent" (para. 7). Therefore, the translator must create the same

meaning to the target text linguistically. Equivalence is undoubtedly the common difficulty in translation. However, equivalence is a tool to advance the analysis of the translation.

### **2.2.10 Adaptation.**

Adaptation is a translation process in which the translator encounters a cultural term and cannot find an equivalence. However, except in these cases, the translator replaces the cultural term with one from the target culture. According to Alex (2015), "When adapting a message, we are not translating it literally. This does not mean, however, that when adapting a message or idea we are being unfaithful to the original message, or that we are not doing our job well" (para. 2). However, given the cultural differences between countries and their speakers, translations can lead to confusion that can be difficult to understand. That is why adapting a message should not be translated literally since it loses its context. Likewise, an adaptation can be similar to an equivalence since what is sought is a more precise term for the message in the target language.

### **2.2.11 Borrowing.**

Borrowing is where the translator takes words or expressions from the source language directly from the text and translates them into the target language. According to Situmorang (2022), "the technique is pure borrowing, so there is no change in the word or expression. In naturalized borrowing, however, the spelling of the word or expression may be somewhat modified to agree to the target language's rules" (p.48). However, in the translation process, it is used when there is no equivalent in the target language, which is why borrowing can help preserve the cultural context of the source text.

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It is worth mentioning that the main purpose of the loan is to reproduce the message using a term or phrase from the original language to the target language. According to Chiara Grassilli (2015), "This technique also allows the translator to put a text clearly within a particular cultural context through the register of the vocabulary it uses. Certain terms allow people belonging to communities of similar interests to transcend linguistic boundaries "(para. 1). This means that regardless of the cultural barriers of a language, this translation process helps to use the same words or context from the original language to the target language.

On the other hand, in this procedure, we must remember that, generally, there are linguistic borrowings between cultures. For example, Spanish borrows from English, and English tends to borrow from French. However, Chiara Grassilli (2015) said that "borrowing in translation is not always justified by the lexical gap in the target language, but it can mainly be used as a way to preserve the local color of the word" (para. 3). This is because on some occasions borrowed words tend to have different semantic meanings than those of the original language. However, loanwords propose a way to preserve the word's originality and maintain its cultural aspects in its translation.

To conclude, when making a loan, you must respect the loan. According to Grassilli (2015), who explains that if a loan is taken from another language or culture, it is taken naturally and must respect both the grammatical rules and the pronunciation in the target language. Without a doubt, this translation process is currently one of the most used due to the need to balance or add the non-existent word in the target language. Many loanwords are used in everyday life without being aware that they are loanwords that come from other languages.

### **2.2.12 Calque.**

Calque translation is used to borrow a phrase or word where the structure of the message of the target language is translated exactly. In other words, calque is a construction of words or phrases through a literal translation. According to Postan (2020), "can be defined as a word-for-word translation from one language into another" (para. 1). In the view of translation professionals, this can be interpreted as a lack of experience and knowledge of the translator in the target language. As mentioned above, the calque is a type of literal translation. However, this procedure can be both a useful and dangerous way. That is why, before translating, the translator must verify that the translation makes sense and ensure that the translation does not have any hint of foreignness in the target language. Otherwise, when translators use a calque, they create a neologism in the target language by adopting the structure of the source text.

### **2.2.13 Sentence inversion.**

An inverted sentence is when the location of an element of a sentence is changed, for example, the verb before the subject of a sentence as if it were a question. According to Beare (2018), "Inverted sentences are required with certain grammar structures or used as a means of sentences stress or emphasis" (para. 3). This procedure seeks a better direction of understanding and naturalness in the sentence in the translation of the target language.

### 2.3 Glossaries.

A glossary is a collection of definitions and explanations of words on specific topics organized alphabetically. In this research section, the researcher will be able to investigate, compare, and discuss the development of a glossary in their thesis work: how it is developed, its characteristics, and its differences. In this way, the research will be provided with feasible data to carry out the objectives and goals indicated for its development.

First, the definition of a glossary will be discussed. According to Tegan George (2022), "A glossary is a collection of words pertaining to a specific topic. In your thesis or dissertation, it's a list of all terms you use that may not immediately be obvious to your reader" (para. 1). Likewise, a glossary is a piece of writing that contains terms that the reader is probably not familiar with. Generally, a glossary should be used when the text contains various technical terms or specific topics. This is intended to give the reader a better understanding and readability of the text.

Then, consider that a glossary is all the words related to a specific topic. Generally, for thesis research papers, glossaries are all the terms used during the research and may need to be more easily understood by the reader. That is why it is suggested that glossaries be at the beginning of the document. On the other hand, according to Matt Ellis (2023), "because glossaries include only the words that appear in a work, readers can look them up faster than in a dictionary, which has an entire language's worth of words" (para. 6). Likewise, glossaries become a tool for translators. However, they are only suitable for some types of documents. They are handy for introducing the translator and the reader to definitions or expressions to make the reading more understandable.

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For this research work, it is essential to be clear about the difference between a dictionary and a glossary. That is why the dictionary term will be covered first.

According to Cambridge Dictionary (n.d), a dictionary is "a book of words listed alphabetically with definitions explaining what they mean." Second, as mentioned above, a glossary expresses knowledge of the target language so that it can be used correctly. According to Matt Ellis (2023), "Unlike dictionaries, glossaries define only the words used in a work. A glossary comes at the end of a book or paper, so readers can find it easily when they need it while reading" (para.4). The glossary is the support for readers so that they can quickly look up the definition of the term without consulting a dictionary.

In fact, for translators, having a glossary nearby is very useful. Savvy Newcomer (2019) states that "the benefits of creating and maintaining your glossaries cannot be understated, from increased productivity to better translation quality. They are essential tools for all translators that should be put to use on every single project" (para. 1.). Furthermore, for translators, using their glossaries helps ensure consistency and high quality in translation work.

On the other hand, the use of glossaries brings benefits to the translator. Some of its benefits are that it helps you work better and faster, they are easy to create, it avoids risking your reputation, and its creation can be monetized. However, we must remember that glossaries will always be continuously changing because as the years go by, some terms evolve, and the glossary does, too. According to Savvy Newcomer (2019), "As you, your clients, your areas of expertise, and your knowledge evolve, your glossary will undoubtedly grow, change, and improve, too." (para.6). Likewise,

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as time goes by, for both the translator and the clients, having a glossary created and keeping it updated from time to time could become the golden mark of your work.

Below are some of the steps to take to create a glossary. According to Jade Zheng (2021), Firstly, you must extract terminology; this means that because experts in the field review all the reference materials, it is crucial that the translator, together with the client, review the terminology to determine its relevance and define whether they will add it or prefer to remove it from the glossary. Second, localize the glossary; this is done once the terms are identified since the localization team oversees translating them into the target language. As a third point, review and approve the terms, the local reviewers are in charge of reviewing the localized glossaries to approve them or make recommendations. Once approved, glossaries are uploaded to the client's terminology memory database to ensure accuracy and consistency across all future projects.

However, its preparation, management, and use must be considered to create a glossary. Glossaries can be created on any platform, such as Word, Microsoft Word, One Note, and Excel, among others... The crucial thing is that the translator and the client define the terminology they want to analyze for the translation and, from there, work on it... After writing the glossary and being sure of the definitions of the terms, you must ensure that the glossary format is correct so that it is polished and easy to read.

To conclude, a glossary increases productivity and quality throughout the translation process. This is because it is easier for translators to find the terms, and they will not need to waste time searching and translating the terms you have included in your translation glossary since they can be easily seen. Besides, glossaries help the

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translator save time in the editing phase since the terms have already been determined.

In effect, this helps the translator work more efficiently.

### **Chapter III**

#### **Methodological Framework**

A methodological framework is a set of steps used in research to formulate and solve the research question. According to Nicola McMeekin (2019), "Background A methodological framework is a structured guide to completing a process or procedure" (p. 2). This section will develop the problem statement, research objectives, and the theory for its development. That said, in the methodological framework, the procedures and techniques applied in the research are developed and explained. In addition, it presents a qualitative approach to analyzing translated texts.

The objective of this thesis work is to analyze the effect of procedure and methods used to translate the documents *Plan Estratégico 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-profit Profit Board Member Essential Certificate-TCCR from English into Spanish for Talita Cumi*. This methodological framework will investigate the procedure and methods used to translate the documents. In addition, the historical and academic compilation support its execution.

#### **3.1 Research Approach**

In this section, the researcher will develop the methods used in the research. First, the qualitative method will be discussed. According to Pritha Bhandari (2020), "Qualitative research involves collecting and analyzing non-numerical data (e.g., text, video, or audio) to understand concepts, opinions, or experiences. It can be used to gather in-depth insights into a problem or generate new ideas for research"(para.1). Likewise, qualitative research focuses on the qualitative; This means it is not countable. This strengthens the processes and methods used in the translation of this investigation.

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In this way, qualitative research contributes significantly to research, providing both the researcher and the reader with a perspective on the meaning of text analysis for an excellent translation. According to Vibha Pathak (2013), "Qualitative studies should be well-designed and the aims, procedures of the study should be meticulously adjudicated. Study should have pre-determined methods to nullify research bias" (para. 4). However, this method helps the researcher understand the reason for his research. It guides him in solving the problem and stating the research objectives.

Immediately afterward, what is understood by quantitative research will be announced. Pritha Bhandari (2020) states, "Quantitative research is the process of collecting and analyzing numerical data. It can be used to find patterns and averages, make predictions, test causal relationships, and generalize results to wider populations" (para. 1). Contrary to qualitative research, quantitative research collects and analyzes all the data numerically. Quantitative research will not be developed for this research. However, the researcher considers it necessary to know the definition and characteristics of quantitative research to provide the reader with a direct approach to qualitative research in developing the collection of instruments.

On the other hand, both qualitative and quantitative research will be compared. Raimo Streefkerk (2019) said: "When collecting and analyzing data, quantitative research deals with numbers and statistics, while qualitative research deals with words and meanings. Both are important for acquiring different types of knowledge" (para. 1). Therefore, the researcher considers it necessary to understand both types of research. In one, the researcher collects the necessary information according to the processes and methods used in the translation. On the other, he relies

## ANALYSIS AND TRANSLATION

on quantitative research to put into practice what was learned in the compilation to create the glossary and the translation in general.

That said, as mentioned above, the researcher will develop the research qualitatively, where the focus will mainly be on investigating opinions, theses, and translation theories to delve deeper into the objectives' results. Furthermore, this will be carried out by planning qualitative research, allowing for realistic and practical data collection. This means identifying the research problem and objectives along with the expected results.

### **3.2 Research Design**

In this section, it is crucial to make clear the purpose of a research design. According to Kassu Jilcha (2019), research design aims to "provide an appropriate framework for a study." A very important decision in the research design process is the choice that must be made regarding the research focus, as it determines how relevant the information is to a study. Will be obtained" (para. 3). Since this section forms a crucial part of the research, the researcher will next discuss the development of the research design.

The researcher will use the qualitative method that will collect all the information and knowledge necessary to translate the documents "Final Strategic Plan 2022-2025 from Spanish to English for The Madre Verde Foundation and What is Non-Profit Fundraising (NPO) General and Essential Certificate of Member of the Board of Directors of a non-profit organization-TCCR from English to Spanish for Talita Cumi". Likewise, the qualitative method supports the researcher in carrying out translation techniques and attaching the results of the translations of said documents. Above, the researcher will use the qualitative research design, where the translation

will be carried out through the analysis of the text and relevant observations that answer the research question.

### **3.3 Information Sources**

The researcher took the research source of theoretical contents related to translation processes and methods. However, due to the analysis and development of the thesis research, the researcher took on the task of using several sources that are related to the topic of document translation. That way, use professional sources, academic publications, thesis, and other online resources to reinforce your knowledge about translation. Next, the term information source will be defined, according to MD. Ashikuzzaman (2018) "refers to the origins or channels from which individuals obtain data, facts, knowledge, or insights" (para 2). This is to provide a greater understanding of all translation processes and expand the translator's content bases for an accurate translation. Likewise, providing reliability with a higher degree of precision in the final translation.

#### **3.3.1 Primary Sources**

Various types of information sources can be used in a written work; these are categorized as primary, secondary, tertiary sources, and so on. For this section, Raimo Streefkerk (2018) described primary sources as "Providing raw information and first-hand evidence. Examples include interview transcripts, statistical data, and works of art. Primary research gives you direct access to the subject of your research" (para 1). In this way, the researcher used the Theses of other researchers as his first source to rely on in his research work.

### **3.3.1.1 Thesis**

The researcher will use the thesis data collection to facilitate the understanding of concepts, specific terms, and articles about translation processes and methods. In this way, acquire and update in detail the concepts and theories of the topic and necessary information, thus facilitating the research process with the necessary knowledge for a precise and detailed approach to translation into a target language, in this case, English and Spanish. In addition, this will help the researcher develop comparative translation tables, translation procedures divided into colors, tables with translation procedures, and a glossary of approximation of definitions.

### **3.3.2 Secondary Source**

Secondly, the researcher used a second source: the analysis or interpretation of data. Raimo Streefkerk (2018) states, "Secondary sources provide second-hand information and commentary from other researchers. Examples include journal articles, reviews, and academic books. Thus, secondary research describes, interprets, or synthesizes primary sources" (para 2). With this, the researcher focuses the investigation on precise information for its final translation.

#### **3.3.2.1 Analysis or interpretation of data.**

For secondary data collection, the researcher will use a list as a glossary of the documents to be translated to establish a broad understanding of the topic. Furthermore, this analysis and interpretation of the source text to the target text will allow information to be collected on translation processes, methods, and techniques related to the topic investigated. Finally, develop comparative translation tables and translation procedures called color coding.

### **3.4 Analysis Categories**

Qualitative content analysis refers to all the research's key concepts, characteristics, and terms. In addition, the researcher, through the analysis of the documents "*Plan Estrategico 2022-2025 Final from Spanish to English for the Madre Verde Foundation and What is Non-Profit Fundraising (NPO) General and Non-Profit Member of the Board of Directors Essential Certificate-TCCR from English to Spanish by Talita Cumi*". This means the researcher intends to use this quantitative method to extract the information from the translation techniques. The analysis category could be defined, according to Tan Dang (2023), as " the process of transforming raw data into meaningful insights that can help us make better decisions, solve problems, and improve performance. However, not all data analysis is the same" (para 1). The analysis categories are used as a strategy to help the researcher address doubts, better manage their ideas, and adequately organize the processes for translation.

#### **3.4.1 Text analysis**

For this research work, it is essential to be clear about the meaning of text analysis. Shikhar Sachdeva (2023) indicated that "It involves analyzing and processing text data to extract meaningful information. It can be done manually, by reading and interpreting the text, or it can be done computationally using various algorithms" (para 1). The research will be carried out through this category of text analysis as the first part.

### **3.4.2 Translation**

The Cambridge Dictionary defines translation as "something that is translated, or the process of translating something, from one language to another (n.d.)." In this way, a translation's value, quality, and accuracy from one language to another is implicit. The researcher will immediately continue with the translation of the document after analyzing the texts since it is a fundamental part of the written work and as a final work.

### **3.4.3 Translation procedures**

Likewise, translation processes are crucial for research work since, according to Anna Gil Bardaji (2009), "is all the procedural knowledge, conscious or unconscious, automatic or controlled, heuristic or algorithmic, that makes up the transfer process which takes place when we translate (para 4)". Considering and understanding all the translation processes will make it easier for the translator to provide reliability and accuracy.

### **3.4.4 Glossaries**

On the other hand, in this category, the researcher will use glossaries. As Matt Ellis (2023) indicates, "A glossary is a section at the end of a written work that defines confusing, technical, or advanced words" (para 1). This section is of great value for translation as it guides the reader to understand possible words or terms that need to be clarified in the translation in the target language better.

## **3.5 Data Collection Instruments**

Through the collection of instruments, the researcher has selected certain instruments to carry out his research work: text analysis charts, color coding, and glossaries. These will be applied in the final translation work as part of the translation process and method used by the researcher to obtain a clear and precise translation.

## ANALYSIS AND TRANSLATION

Next, the researcher will comment broadly on the selection and use of these instruments.

### 3.5.1 Text Analysis Chart

As the first instrument selected, the researcher will use the text analysis chart based on the information obtained through Newmart, among other authors, putting into practice what was learned. This way, the selected texts will be analyzed, covering the translation processes and methods such as transposition, modulation, and omission. Likewise, for this section, the researcher will use a table divided into two sections: the first section will show the aspects to be analyzed towards the target text, and the other section will show the original texts. With this, the researcher seeks to provide greater clarity than the steps used for the translation.

### 3.5.2 Color coding

As a second instrument, the researcher will use color coding to show and analyze the different translation processes found in the texts. For this section, the researcher will use 15 paragraphs from Talita Cumi's document in English and 15 paragraphs from the Fundación Madre Verde document in Spanish, using approximately 120/150 words to analyze each one. In addition, a table will be provided where the color system will be shown to identify each translation process. Next, the researcher will attach the color assigned to each process.

Translation Procedure	Color Assigned
Transposition	Yellow
Modulation	Light Blue
Omission	Red
Amplification	Pink
Explicitation	Light Green
Literal translation	Orange
Compensation	Blue
Equivalence	Purple
Adaptation	Green

## ANALYSIS AND TRANSLATION

*Table 1 Shows the color representing each technique in the color-coding instrument-researcher's creation*

### **3.5.3 Glossaries**

As a third instrument, the researcher will use two glossaries. One glossary will be divided into terminology in English and another in Spanish. Each glossary will have a minimum of 25 words to provide greater consistency in the translation and understanding to the reader, helping them become familiar with the terminology. In addition, both glossaries will have their respective translation into the target language, definition, and grammatical category.

## **3.6 Collection Data Process and Data Analysis**

### **3.6.1 Text Analysis**

In this section of the investigative work, the researcher will indicate what he will do for his thesis work. As a first step, the researcher will conduct a detailed analysis of both texts using the documents provided by Talita Cumi and the Madre Verde Foundation. His objective is to understand both texts and then perform their proper translation. This implies carrying out both translations separately since one will be translated into Spanish and the other into English.

### **3.6.2 Color Coding**

Next, the researcher, using what Newmark learned after a text analysis, suggests creating a color code to demonstrate and understand all the translation processes. On the other hand, through analysis and interpretation of data, the researcher will compile the previously researched information to carry out the analysis of the text, in which the researcher will use the color code to underline and separate the methods used in the translation of the documents.

### **3.6.3 Glossary of Approximation of Definitions**

Finally, through data analysis, the researcher will use a glossary based on the documents of the Madre Verde Foundation and the Talita Cumi Association. After selecting the 25 words for each glossary in its respective document, the researcher will be tasked with carrying out its respective translation and researching each terminology to attach to the translated document to familiarize its readers with the terminology.

## Chapter IV

### Documents Translations

#### 4.1 Translation from English into Spanish

##### 4.1.1 What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR, Talita Cumi.

#### **Nonprofit Board Member Essentials Certificate**

##### **1. The Role of a Board**

Establishes the nonprofit's mission, strategy, and goals

Serves as a fiduciary acting in the nonprofit's best interest

Stewards success and sustainability by...

- Adopting sound governance practices/financial management policies

- Ensuring adequate resources

- Staying focused on the strategic plan .

- Hiring, firing, supporting, and evaluating the CEO/Executive Director

- Overseeing all actions and decisions

##### **Example:**

At the 1980 Winter Olympic Games at Lake Placid, New York, a young, outmatched United States Hockey team shocked the world by defeating a larger, more experienced Soviet Union team 4-3 to advance to the gold medal round.

Why was the United States able to pull off what was described as the "miracle on ice?" The main reason for the victory was because the coaches spent over a year carefully selecting members that were knowledgeable, skilled, enthusiastic, and committed to working as one unit to achieve their mission of winning a gold medal.

Much like sports teams, a nonprofit board must also thoughtfully select its members. They should be passionate about the nonprofit's cause and willing to contribute their time, talent, and treasure to achieving the mission. Let's explore this in greater detail.

## ANALYSIS AND TRANSLATION

### Passion

- Board members must be passionate.
- Exceed board expectations,
- participate enthusiastically,
- share new ideas
- Persevere during challenging times
- Advocate for the mission.

It's also important to be receptive to unique perspectives and methods which can help you gain new knowledge and skills as well as challenge your assumptions in a variety of areas.

### Time

You must be willing to dedicate a substantial amount of time:

- Preparing for and attending meetings and other events
- Participating on committees
- Getting to know fellow members.

### Talent

Must be willing to utilize your background, knowledge, and skills to:

- Generating creative ideas,
- Solving problems
- Stewarding the nonprofit's success.

So, don't be afraid to speak up. Your membership might be the piece of the puzzle that the board has been missing.

### Treasure

Must be willing to:

- Make a meaningful financial donation each year. One hundred percent of a board is expected to donate at some level.
- You will also engage in fundraising by identifying and soliciting friends, family, and colleagues with the financial capacity to be major donors.

## ANALYSIS AND TRANSLATION

### Consider your reasons for joining..

#### Are they primarily about the nonprofit?

1. Passion for the cause
2. Desire to serve others
3. Have knowledge/skills to help the nonprofit thrive

#### Be sure to research the nonprofit's...

1. Mission statement and strategic plan
2. Financial information (IRS Form 990, audits)
3. Legal policies:
  - Conflict of interest
  - Directors and officers insurance
4. Legal concerns
5. Reputation of board and staff

## 2. Types of Boards

A typical nonprofit is governed by a single board, while some may have more than one including a hybrid of the various types.

### Advisory Board

- Members are typically appointed and not elected.
- Provides advice and support to the executive director, but NO governance or operational support
- Might serve as an honorary board for past board members who are term-limited or not interested in active board service
- Recognizes prior service and keeps them connected

### Fundraising Board

- Members are typically appointed and not elected.
- Also called Junior Board or Auxilliary Board
- Sole function is to raise money

### Working Board

- Members are elected.
- Typical of small nonprofits with minimal or no paid staff
- Manages, governs, and performs the nonprofit's daily work

### Governance Board

Members are elected.

- Serves as a fiduciary of the nonprofit
- Provides strategic direction and oversight
- Evaluates progress and results

## ANALYSIS AND TRANSLATION

- Empowers executive director and staff to do their jobs successfully

### **GOVERNANCE**

Mission

Strategy

Oversight

Accountability

**MANAGEMENT** Daily implementation of mission and strategy

Boards should focus on GOVERNANCE

Executive director and staff manage the nonprofit

### **RESPONSIBILITIES**

#### **Board Governance Responsibilities**

- Maintaining mission focus
- Providing the strategic framework for the nonprofit
- Monitoring general activities, fiscal health, and ethical behavior
- Setting overall fiscal policies and ensuring appropriate internal controls
- Ensuring legal obligations are met
- Approving the annual budget
- Participating in fundraising efforts (shared responsibility with operations staff)
- Hiring, firing, supporting, evaluating, and compensating the CEO/Executive Director
- Ensuring the board's composition reflects the...
- Diversity of the nonprofit's community and its beneficiaries
- Nonprofit's needs

**Operations Staff Responsibilities**

- Implementing the goals and objectives of the strategic plan
- Managing daily operations
- Hiring staff and delegating operational responsibilities
- Approving staff compensation
- Evaluating staff performance
- Managing and monitoring daily cash flow
- Participating in fundraising efforts (shared responsibility with board)

**Boards should NOT recruit members to simply fill empty seats.**

**Should select members thoughtfully with respect to the strategic plan.**

**Example:** If strategic plan goal is open a community kitchen then suitable board member is a person with experience managing a restaurant kitchen.

### **3. Basic Board & Leadership Responsibilities**

#### **Strategic Responsibility**

To commit to and advocate for the mission

To partner with CEO/ED to set strategic direction

To ensure fulfillment of mission and achievement of goals

To research and study things related to the nonprofit's mission:

Governmental actions

Trends

Other public data

#### **Fiscal and Financial Responsibility**

To protect assets and provide financial oversight

To ensure there are sufficient resources to operate

To make a meaningful personal donation and engage in fundraising

#### **Legal Responsibility**

To act in the public interest by....

Abiding by the charter and bylaws

Establishing policies and procedures for the good of the nonprofit while ensuring legal and ethical integrity

#### **Duty of CARE**

Specifies a level of competence a board member must exhibit as a steward of the nonprofit

This involves such things as:

## ANALYSIS AND TRANSLATION

Attending and actively participating in board meetings and orientations

Reading and responding to all communication promptly

Reviewing and understanding information sent prior to board meetings. Contacting the board chair to discuss anything confusing

Staying up to date on the nonprofit's work

Respecting confidentiality

• Supporting board action

Participating in fundraising

Respecting the nonprofit's physical assets or those of other organizations (buildings, etc)

### Duty of LOYALTY

Specifies the allegiance a board member must give the nonprofit when making decisions affecting it

This involves such things as:

Avoiding and disclosing perceived, potential, and actual conflicts of interest

Refraining from using information for personal gain

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Ensuring resources are only used and reinvested to fulfill its mission Ensuring that potential programs, funding sources, services fit the mission

Consulting bylaws, grantors, regulators for guidance when contemplating new programs/services

## ANALYSIS AND TRANSLATION

### **Governance responsibility**

Set strategic direction and delegate implementation to staff.

### **Personal Responsibility**

To be active, informed, and engaged...

Behaving in a respectful, courteous manner Completing assigned responsibilities

Collaborating effectively

Communicating professionally

### **Leadership role responsibilities**

#### **Board Chair**

Serving as the principal officer and contact person

Setting the board's goals and objectives

Creating the agenda and presiding at all meetings

Ensuring the accountability of all members, committees, etc.

Communicating between the board and staff

Serving on all committees established by the board

#### **Secretary**

Responsible for ensuring that the following is done...

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Recording/distributing board meeting notes

Managing documents

Helping to ensure member accountability

## ANALYSIS AND TRANSLATION

### **Treasurer**

Responsible for ensuring that the following is done...

Monitoring...

o Control, receipt, and custody of all nonprofit assets

Disbursements as authorized by the board

Reporting on the receipt, use, and disbursements of all assets

Leading and guiding development of long-term financial plan

Preparing budgets

Facilitating audits

Interpreting and using financial statements

Serving as finance committee chair (if it exists)

#### 4. Rewards and challenges of Board Participation

CHALLENGES	REWARDS
<ul style="list-style-type: none"> <li>● Managing time demands</li> <li>● Managing significant fundraising expectations including the expectation that you will donate</li> <li>● Understanding your speech/actions have legal consequences such as conflicts of interest</li> <li>● Remembering to speak as one voice and support board decisions</li> </ul>	<ul style="list-style-type: none"> <li>● Developing deeper empathy and caring for others</li> <li>● Contributing to a community and improving lives</li> <li>● Collaborating with others and knowing that your thoughts and opinions are valued</li> <li>● Acquiring new knowledge, skills, and perspectives</li> <li>● Expanding your social and professional network</li> </ul>

Two aspects of board service that I find personally fulfilling are:

1. The connections you make with other board members of various backgrounds
2. The shared passion and commitment we have to make a difference in the community and individual lives.

Two areas that I have found challenging are:

1. A clear path to fundraising
2. The onboarding of new board members.

I'm sure the fundraising arena is challenging for many nonprofits and board members. However, boards can eliminate any fundraising confusion and disorganization by providing defined goals, objectives, and direction. Moreover, it will benefit boards to provide an onboarding packet to new members that contains a summary of the sub- committees and the committee's expectations and point of contact. This will help a member be more effective in their committee role.

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#### 4.1.2 Translation Version

### **Certificado de conceptos básicos para miembros de la junta directiva de una organización sin fines de lucro**

1. El papel de una junta  
Establece la misión, la estrategia y los objetivos de la organización sin fines de lucro.

Sirve como fiduciario que actúa en el mejor interés de la organización sin fines de lucro.

Gestionamos el éxito y la sostenibilidad mediante...

Adoptar buenas prácticas de gobernanza/ políticas de gestión financiera.

Garantizar recursos adecuados

Mantenerse enfocado en el plan estratégico.

Contratar, despedir, apoyar y evaluar al CEO/ director ejecutivo

Supervisar todas las acciones y decisiones.

Ejemplo:

En los juegos olímpicos de invierno de 1980 en Lake Placid, Nueva York, un joven y superado equipo de hockey de los Estados Unidos conmocionó al mundo al derrotar al equipo más grande y experimentado de la Unión Soviética por 4-3 para avanzar a la ronda de la medalla de oro.

¿Por qué Estados Unidos pudo realizar lo que se describió como el “milagro sobre el hielo”? La razón principal de la victoria fue que los entrenadores pasaron más de un año seleccionando cuidadosamente miembros que tuvieran conocimientos, habilidades, entusiasmo y compromiso para trabajar como una unidad y así lograr su misión de ganar una medalla de oro.

## ANALYSIS AND TRANSLATION

Al igual que los equipos deportivos, una junta directiva sin fines de lucro también debe seleccionar cuidadosamente a sus miembros. Deben sentir pasión por la causa de la organización sin fines de lucro y estar dispuestos a contribuir con su tiempo, talento y tesoro para lograr la misión. Exploremos esto con mayor detalle.

### Pasión

- Los miembros de la junta deben ser apasionados
- Superar las expectativas de la junta directiva
- Participar con entusiasmo
- Compartir nuevas ideas
- Perseverar en tiempos difíciles
- Abogar por la misión.

También es importante ser receptivo a perspectivas y métodos únicos que pueden ayudarle a adquirir nuevos conocimientos y habilidades, así como a desafiar sus suposiciones en una variedad de áreas.

### Tiempo

Debes estar dispuesto a dedicar una cantidad sustancial de tiempo:

- Preparación y asistencia a reuniones y otros eventos
- Participar en comités
- Conocer a otros miembros.

Talento

Debe estar dispuesto a utilizar su experiencia, conocimiento y habilidades para:

- Generar ideas creativas
- Resolver problemas
- Administrar el éxito de la organización sin fines de lucro.

Así que no tengas miedo de hablar. Su membresía podría ser la pieza del rompecabezas que le faltaba a la junta.

Tesoro

Debe estar dispuesto a:

## ANALYSIS AND TRANSLATION

- Hacer una donación financiera significativa cada año. Se espera que el cien por ciento de una junta done en algún nivel.

- Participar en la recaudación de fondos identificado y solicitando amigos, familiares y colegas con la capacidad financiera para ser donantes importantes.

### **Considere sus razones para unirse**

¿Se refieren principalmente a organizaciones sin fines de lucro?

1. Pasión por la causa
2. Deseo de servir a los demás
3. Tener conocimiento/ habilidades para ayudar a que la organización sin fines de lucro prospere.

Asegúrese de investigar las organizaciones sin fines de lucro...

1. Declaración de misión y plan estratégico
2. Información financiera (formulario 990 del IRS, auditorías)
3. Políticas legales:
  - Conflicto de intereses
  - Seguro de directores y funcionarios
4. Preocupaciones legales
5. Reputación de la junta directiva y del personal.

## 2. Tipos de Juntas

Una organización sin fines de lucro típica se rige por una sola junta, mientras que algunas pueden tener más de uno que incluya un híbrido de los distintos tipos.

### **Junta asesora**

- Los miembros normalmente son nombrados y no elegidos.
- Proporciona asesoramiento y apoyo al director ejecutivo, pero NO proporciona gobierno ni apoyo operativo.
- Podría servir como junta honoraria para ex miembros de la junta que tienen un mandato limitado o no están interesados en presentar servicio activo en la junta.
- Reconoce el servicio anterior y los mantiene conectados.

### **Junta de recaudación de fondos**

- Los miembros normalmente son nombrados y no elegidos.
- También llamado Junta Junior o Junta Auxiliar.
- La única función es recaudar dinero.

### **Junta de trabajo**

- Se eligen los miembros.
- Típico de pequeñas organizaciones sin fines de lucro con personal mínimo o sin remuneración.
- Administrativa, gobierna y realiza el trabajo diario de la organización sin fines de lucro.

### **Junta de gobierno**

Se eligen los miembros

- Sirve como fiduciario de la organización sin fines de lucro.
- Proporciona dirección y supervisión estratégicas
- evalúa el progreso y los resultados.
- Capacita al director ejecutivo y al personal para que realicen su trabajo con éxito.

### **GOVERNANCIA**

Misión

Estrategia

Vigilancia

Responsabilidad

GESTION implementación diaria de la misión y estrategia.

Las juntas deben centrarse en la GOBERNANZA

El director ejecutivo y el personal administran la organización sin fines de lucro.

### **RESPONSABILIDADES**

#### **Responsabilidades de gobierno de la junta**

- Mantener el enfoque en la misión.

## ANALYSIS AND TRANSLATION

- Proporcionar el marco estratégico para la organización sin fines de lucro.
- Monitoreo de actividades generales, salud fiscal y comportamiento ético.
- Establecer políticas fiscales generales y garantizar controles internos adecuados.
- Garantizar que se cumplan las obligaciones legales.
- Aprobar el presupuesto anual.
- Participar en esfuerzos de recaudación de fondos (responsabilidad compartida con el personal de operaciones)
- Contratar, despedir, apoyar, evaluar y remunerar al CEO/ director ejecutivo.
- Garantizar que la composición del consejo refleje...
- Diversidad de la comunidad de la organización sin fines de lucro y sus beneficiarios.
- Necesidad de las organizaciones sin fines de lucro.

### **Responsabilidad del personal de operaciones**

- Implementar las metas y objetivos del plan estratégico.
- Gestión de operaciones diarias.
- Contratar personal y delegar responsabilidades operativas.
- Aprobar la remuneración del personal.
- Evaluación del desempeño del personal.
- Gestión y seguimiento del flujo de caja diario.
- Participar en esfuerzos de recaudación de fondos (responsabilidad compartida con la junta directiva)

**Las juntas directivas NO deben reclutar miembros para simplemente llenar los puestos vacíos.**

**Debe seleccionar a los miembros cuidadosamente con respecto al plan estratégico.**

**Ejemplo:** Si el objetivo del plan estratégico es abrir una cocina comunitaria, entonces el miembro adecuado de la junta directiva es una persona con experiencia en la gestión de la cocina de un restaurante.

## **3. Responsabilidades básicas de la junta directiva y del liderazgo Responsabilidad estratégica**

**Comportarse y defender la misión.**

Asociarse con el CEO/ED para establecer una dirección estratégica

Para asegurar el cumplimiento de la misión y el logro de las metas.

Para investigar y estudiar aspectos relacionados con la misión de la organización sin fines de lucro:

Acciones gubernamentales

Tendencias

Otros datos públicos

**Responsabilidad fiscal y financiera**

Proteger los activos y proporcionar supervisión financiera.

Para garantizar que haya suficientes recursos para operar.

Hacer una donación personal significativa y participar en la recaudación de fondos.

**Responsabilidad legal**

Actuar en interés público mediante...

Cumplir con los estatutos y estatutos

Establecer políticas y procedimientos para el bien de la organización sin fines de lucro y al mismo tiempo garantizar la integridad legal y ética.

Obligación de cuidar

## ANALYSIS AND TRANSLATION

Especifica el nivel de competencia que un miembro de la junta debe exhibir como administrador de la organización sin fines de lucro.

Eso implica cosas tales como:

Asistir y participar activamente en reuniones y orientaciones de la junta directiva.

Leer y responder a todas las comunicaciones con prontitud.

Revisar y comprender la información enviada antes de las reuniones de la junta directiva. Contactar al presidente de la junta para discutir cualquier tema confuso.

Mantenerse actualizado sobre el trabajo de la organización sin fines de lucro- respetar la confidencialidad.

- Apoyar la acción de la junta directiva  
Participando en la recaudación de fondos

Respetar los activos físicos de la organización sin fines de lucro o de otras organizaciones (edificios, etc)

### Deber de LEALTAD

Especifica la lealtad que un miembro de la junta debe brindar a la organización sin fines de lucro al tomar decisiones que la afectan.

Esto implica cosas tales como:

Evitar y revelar conflictos de intereses percibidos, potenciales y reales.

Abstenerse de utilizar información para beneficio personal.

### Deber de BUENA FE

Especifica la fidelidad que un miembro de la junta debe mostrar a la misión de la organización.

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Esto implica cosas tales como:

Garantizar que los recursos sólo se utilicen y reinviertan para cumplir su misión.

Garantizar que los programas potenciales, las fuentes de financiación y los servicios se ajusten a la misión.

Consultar estatutos, otorgantes y reguladores para obtener orientación al contemplar nuevos programas/servicios.

### **Responsabilidades de gobernanza**

Establecer la dirección estratégica y delegar la implementación al personal

### **Responsabilidad personal**

Estar activo, informado y comprometido...

Comportarse de manera respetuosa y cortés.

Cumplir con las responsabilidades asignadas.

Colaborar eficazmente

### **Responsabilidades del rol de liderazgo**

#### **Presidente de la Junta**

Actuar como funcionario principal y persona de contacto

Establecer las metas y objetivos de la junta

Crear la agenda y presidir todas las reuniones.

Garantizar la rendición de cuentas de todos los miembros, comités, etc.

Comunicación entre la junta directiva y el personal.

## ANALYSIS AND TRANSLATION

Servir en todos los comités establecidos por la junta.

### **Secretario**

Responsable de garantizar que se haga lo siguiente....

Programar reuniones de la junta directiva

Preparar a los miembros para las reuniones (enviar la agenda/ otros elementos necesarios)

Grabación / distribución de compañeros de reuniones de la junta directiva

Gestionar documentos

Ayudar a garantizar la responsabilidad de los miembros

### **Tesorero**

Responsable de garantizar que se haga lo siguiente...

Supervisión...

O control, recepción y custodia de todos los activos sin fines de lucro.

Desembolsos autorizados or la junta

Informes sobre la recepción, uso y desembolsos activos.

Liderar y orientar el desarrollo del plan financiero a largo plazo.

Preparar presupuestos

Facilitar las auditorias

Interpretación y uso de estados financieros.

Servir como presidente del comité de finanzas (si existe)

#### 4. Recompensas y desafíos de la participación en la Junta

Retos	Recompensas
<ul style="list-style-type: none"> <li>• Gestión de las demandas de tiempo</li> <li>• Gestionar expectativas significativas de recaudación de fondos, incluida la expectativa de que usted haga una donación.</li> <li>• Comprender que su discurso o sus acciones tienen consecuencias legales, como conflictos de intereses.</li> <li>• Recordad hablar con una sola voz y apoyar las decisiones de la junta directiva.</li> </ul>	<ul style="list-style-type: none"> <li>• Desarrollar una empatía más profunda y preocuparse por los demás.</li> <li>• Contribuir a una comunidad y mejorar vidas.</li> <li>• Colaborar con otros y sabiendo que sus pensamientos y opiniones son valorados</li> <li>• Adquirir nuevos conocimientos, habilidades y perspectivas.</li> <li>• Ampliar su red social y profesional</li> </ul>

Dos aspectos del servicio en la junta directiva que encuentro personalmente satisfactorios son:

1. Las conexiones que establece con otros miembros de la junta directiva de diversos orígenes.
2. La pasión y el compromiso compartidos que tenemos para marcar la diferencia en la comunidad y en las vidas individuales.

Las áreas que encuentro desafiantes son:

1. Un camino claro hacia la recaudación de fondos
2. La incorporación de nuevos miembros del consejo.

Estoy seguro de que el ámbito de la recaudación de fondos es un desafío para muchas organizaciones sin fines de lucro y miembros de juntas directivas. Sin embargo, las juntas pueden eliminar cualquier confusión y desorganización en la recaudación de fondos al proporcionar metas, objetivos y dirección definidos. Además, beneficiaría a las juntas directivas proporcionar un paquete de incorporación a los nuevos miembros que contenga un resumen de los subcomités y las expectativas y puntos de contacto del comité. Esto ayudaría a un miembro a ser más eficaz en su función en el comité.

## ¿Qué es la recaudación de fondos para organizaciones sin fines de lucro?

### Introducción

Las organizaciones sin fines de lucro no operan para obtener ganancias financieras o generar ganancias para inversionistas o individuos privados, pero aun así necesitan dinero para financiar sus operaciones generales y lograr los objetivos del programa.

Para lograrlo, las organizaciones sin fines de lucro dependen del proceso de recaudación de fondos de individuos, empresas y fundaciones mediante una combinación de métodos digitales y más tradicionales:

### 1. Fuentes clave de recaudación de fondos (fuentes más comunes de financiación sin fines de lucro):

#### 1.1: Donantes principales / individuales:

Depende de usted y de la organización determinar el monto específico en dólares que hace que alguien pase de ser un individuo a ser un donante importante.

<b>Donante principal</b>	<b>Donante individual</b>
<ul style="list-style-type: none"><li>• Representa la mayor parte de la financiación. Ejemplo: una organización sin fines de lucro podría definir a un donante importante como alguien que dona</li></ul>	<ul style="list-style-type: none"><li>• Alguien que dona menos de la cantidad de gif principal identificada.</li><li>• Debería recibir una atención mas generalizada a través</li></ul>

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<p>\$1000 al año, otro \$10,000 y otro \$25000.</p> <ul style="list-style-type: none"><li>• Monto de designación determinado por cada organización sin fines de lucro.</li><li>• Generalmente, ese monto en dólares está determinado por el 10-20% de los donantes que brindan el 80% o más del apoyo total a la organización sin fines de lucro en la categoría de donante individual.</li></ul>	<p>de eventos más grandes o correo electrónico directo.</p>
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### 1.2: Ilamamiento/ Campaña Anual

- Solicite una donación anual, generalmente por correo electrónico u otra comunicación.
- Donación realizada a tanto alzado o a plazos.
- Apoya las operaciones generales, salarios, suministros y equipados.

### 1.3: Donaciones planificadas

- Es una donación concertada en el presente pero realizada en una fecha futura.

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- Legados, fideicomisos benéficos remanentes, anualidades de donaciones caritativas y pólizas de seguro.
- A veces se dispersa tras la muerte del donante (donación heredada)
- Requiere conocimiento y habilidades especializados para gestionar

### 1.4: Instituciones / fundaciones

- Corporaciones, fundaciones, iglesias y organizaciones cívicas.
- Brindar apoyo a través de un proceso de subvención.

### 1.5: Campaña de capital

Ocurre durante un periodo de tiempo definido para adquirir/ mejorar un activo físico

como:

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- Construir un nuevo edificio
- Comprar un equipo

### **1.6: Evento especial**

#### **Los eventos especiales pueden incluir:**

- Desayunos, almuerzos y cenas.
- Eventos deportivos ( torneos de golf, carreras divertidas)
- Subastas
- La financiación proviene de patrocinadores, participantes o asistentes.

### **1.7: Punto a Punto**

Los partidarios sin fines de lucro participan en un maratón, caminata o evento similar y obtienen donaciones de familiares, amigos y colegas que apoyan la participación de la persona en el evento.

### **1.8: Entidades Gubernamentales**

- Los gobiernos municipales, estatales y locales brindan apoyo.
- Las organizaciones sin fines de lucro celebran un contrato con una entidad para proporcionar un programa o servicio.

### **1.9: Ventas a tarifa de servicio**

Vender un producto ( tienda de ropa Goodwill) o prestar un servicio (formacion em diversidad). Em algunos casos, las organizaciones sin fines de lucro reciben financiación mediante pagos por servicios. Eso sucede cuando:

- El cliente sin fines de lucro paga una parte del servicio.
- Tarifa de la cliente aplicada al presupuesto operativo de la organización sin fines de lucro.
- Saldo del presupuesto operativo obtenido mediante recaudación de fondos.
- Ejemplo: Presupuesto operativo: \$1.000.000 USD

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Honorarios recibidos : \$200,000 UDS

Equilibrado mediante recaudación de fondos: \$800,000 USD

### 2. Financiamiento restringido y no restringido:

Fondos restringidos	Fondos sin restricciones
<ul style="list-style-type: none"><li>• Se utiliza para fines específicos definidos por el donante.</li><li>• Las restricciones deben documentarse por escrito para fines de auditoría y del Servicio de Impuestos Internos (Estados Unidos).</li><li>• No respetar los deseos de un donante podría tener consecuencias legales.</li><li>• Las subvenciones y los obsequios legales suelen estar restringidos.</li><li>• Menos flexibilidad de uso.</li></ul>	<ul style="list-style-type: none"><li>• Son donaciones utilizados para cualquier fin legal que elija la organización sin fines de lucro.</li><li>• Normalmente, los fondos se aplican a operaciones generales, como el pago de salarios, facturas de servicios públicos o gastos de programas.</li><li>• Este es el regalo ideal ya que ofrece más flexibilidad en cómo se dirigen los fondos a las distintas áreas de una organización sin fines de lucro.</li></ul>

### 3. Planes de recaudación de fondos

La recaudación de fondos eficaz requiere un plan para lograr con éxito el objetivo de financiación:

#### 3.1: Metas:

- Metas a corto y largo plazo para el año actual y años posteriores.
- Requiere aportes de los equipos de finanzas y liderazgo y de la junta directiva.
- Monto determinado requerido para financiar todos los aspectos de la organización sin fines de lucro.

• Tener metas y submetas principales.  
Objetivo principal: Recaudar: \$100,0000 UDS

Subobjetivos:

- \$500.00 USD de donantes importantes
- \$250,000 USD de donantes nos importantes

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- \$175.000 USD de fundaciones
- \$75,000 USD de iglesias y corporaciones

### **3.2 Base de Financiamiento:**

Lista de los mayores donantes actuales y potenciales en cada categoría de financiación

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Necesita diversas fuentes de financiación (y diversidad dentro de las fuentes):

- Individuos
- Instituciones
- Entidades gubernamentales
- Cimientos
- Eventos especiales

### **3.3 Actividades de recaudación de fondos:**

Las actividades se realizan para:

Llevar a cabo un plan

Identificar, construir y mantener relaciones positivas con los donantes

Solicitar donaciones

### 3.4 Costos:

Gastos asociados a la recaudación de fondos...

Salarios del personal de desarrollo

Lugares para eventos especiales

Materiales

Envíos

### **3.5 Software de recaudación de fondos:**

- Tecnología que hace que la recaudación de fondos se más eficaz
- Captura y rastrea la información y las interacciones de los donantes.

Ejemplos:

Recaudación de fondos

Gestión de relaciones con los constituyentes (CRM) y bases de datos

De igual a igual

Texto para dar

Donaciones planificadas

Subasta

Procesando pago

Contabilidad

Presentación de formulario de impuestos

### **4. Responsabilidades básicas de recaudación de fondos.**

Existen responsabilidades importantes asociadas con el desarrollo y ejecución de un plan de recaudación de fondos exitoso, tales como:

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#### **4.1: Identificar/ Cultivar / administrar: Esto implica las siguientes tareas:**

Identificar donantes actuales y potenciales

Realización de actividades de cultivo con donantes.

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Realizar actividades de administración con los donantes después de realizar las donaciones.

Gestionar las relaciones con los donantes.

Asistir a la reunión si un donante requiere una conexión de alto nivel (presidente de la junta, presidente / director ejecutivo de una organización sin fines de lucro)

Reunión con donantes que desean apoyar un área específica de la organización sin fines de lucro.

### **4.2: Proporcionar liderazgo y apoyo:**

Iniciar contacto y comunicaciones con donantes / miembros de la junta directiva y voluntarios.

Liderar y/o apoyar reuniones de donantes (presentar información, hacer/ responder preguntas)

Determinar cómo cultivarse y cuándo y cómo pedir apoyo.

Apoyar al personal interno de otros departamentos con su trabajo de recaudación de fondos.

### **4.3: Educar**

- Educar al personal / junta / voluntarios / donantes sobre el programa, el trabajo y las necesidades de financiación de la organización sin fines de lucro.

- Educar al personal / junta / voluntarios sobre características de los donantes:

  - Principales contribuyentes o no

  - Participación e interacciones pasadas

  - Soporte previo

## ANALYSIS AND TRANSLATION

Enfoque de a mejor manera

Áreas del programa para resaltar o evitar.

### **4.4: Inspirar:**

Alentar al personal, la junta directiva y los voluntarios a realizar el trabajo de recaudación de fondos con entusiasmo.

Celebrando los éxitos

Emocionar a los donantes sobre el impacto de sus donaciones para promover donaciones futuras.

### **5. Participación de la Junta/ Voluntarios:**

Los miembros de su junta directiva y los posibles voluntarios deben desempeñar papeles importantes en el proceso de recaudación de fondos cuando sea posible, como por ejemplo:

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#### **5.1 Donantes y modelos a seguir:**

Todos los miembros de la junta (y voluntarios) deben hacer una donación para demostrar su compromiso con la misión,

#### **5.2 Identificadores:**

a los miembros de la junta y a los voluntarios involucrados en la recaudación de fondos se les debe proporcionar una lista de 10 a 20 donantes potenciales.

Luego deben identificar a 1 o 2 personas que conozcan personalmente y que estén dispuestos a cultivar.

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Esto les ayuda a comprender el perfil de los donantes deseados que pueden utilizar para descubrir otros potenciales que se ajusten a este perfil.

### **5.3 Cultivadores**

Los miembros de la junta utilizan su relación con donantes actuales y potenciales para establecer oportunidades para compartir el mensaje de su organización sin fines de lucro.

### **5.4 Solicitantes de donaciones**

Idealmente, los miembros de la junta directiva y los voluntarios deberían ser quienes soliciten donaciones porque apoyan a la organización sin fines de lucro por razones altruistas en lugar de recibir un pago.

Un miembro del personal debe estar presente cuando se realiza la solicitud de donación.

### **5.5 Comisionarios:**

Los miembros de la junta y los voluntarios ayudan a garantizar que los donantes sean agradecidos, se sientan apreciados y comprendan el valor y el impacto de su apoyo.

## **6. Tendencias actuales de recaudación de fondos:**

### **6.1: Uso de las redes sociales:**

Twitter, Facebook, Instagram y otras plataformas permiten a los miembros de la junta, los voluntarios y el personal compartir:

- Imágenes
- Videos
- Noticias
- Historias personales
- Configurar campañas de donaciones

Los donantes también pueden compartir y aportar comentarios.

### **6.2: Donaciones en línea fáciles:**

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La página en línea debe ser fácil de usar/ navegar y accesible desde un teléfono inteligente / tableta.

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Se sugiere incluir:

- Razón conveniente para donar
- Cantidad de donación sugerida
- Opciones de pago

### 6.3: Uso de Vídeo:

- **El 60% de las personas prefiere ver un vídeo antes que leer un post.**
- **El 51% de los especialistas en marketing consideran que los vídeos producen el mayor retorno de la inversión.**
- **El 95% de un mensaje se retiene cuando se mira, pero se reduce al 10% cuando se lee.**
- Involucre a los donantes creando videos cortos usando teléfonos inteligentes o cámaras portátiles.

### 6.4: Personalización:

Comunicarse con los donantes de forma personal. Conozca sus preferencias a través de encuestas o preguntándoles.

- Utilice un nombre real en la correspondencia (Querida Angelina vs Querido amigo)
- Usó su método de comunicación preferido (teléfono/correo electrónico/texto)
- Mencionar participación previa (eventos asistidos, comités)
- Envíe información relevante sobre sus donaciones y sus antecedentes (si un donante apoya su programa de cuidado infantil, envíe información sobre cómo los programas apoyan a los clientes)
- ¿Quieren reconocimiento o no? ¿Qué tipo? (certificado/placa/listado)
- ¿Cómo quieren ser identificados? (Muestra de Michael y Edna o Muestra del Sr. y Sra. Michael)
- ¿Prefieren ciertos aspectos del programa sobre otros?

### 6.5: Programa Recurrente:

## ANALYSIS AND TRANSLATION

Establecer programas de donaciones mensuales para garantizar donaciones constantes y sostenibles.

Las personas que donan a través de deducciones de nómina o tarjetas de débito/crédito generalmente donan un 20% más durante un promedio de 7 años.

### **6.6: Centrándose en el impacto:**

Medir y articular el impacto es fundamental para **construir relaciones significativas con los donantes.**

Ayuda a los donantes a **comprender el impacto de sus donaciones.**

<b>Mensaje de bajo impacto</b>	<b>Mensaje de alto impacto</b>
<i>Ayudamos a mascotas abandonadas a encontrar un hogar</i>	<i>Hemos ayudado a mejorar significativamente las vidas de perros y gatos abandonados de dos maneras mensurables. Primero, hemos esterilizado o castrado a 200 perros y gatos, lo que reduce tanto los posibles problemas de salud como los futuros animales sin hogar. También hemos encontrado con éxito hogares felices para más de 500 animales, reduciendo así el número de animales sacrificados en un 80%.</i>

### **7. Ciclo de desarrollo de la recaudación de fondos.**

Las cuatro etapas del ciclo de recaudación de fondos son:

#### **7.1: Identificación:**

Identifique donantes actuales y potenciales dentro de las áreas de recaudación de fondos, como individuos, corporaciones y entidades gubernamentales.

#### **7.2: Cultivo:**

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A continuación, cultivará su relación con los principales donantes dentro de cada fuente de financiación, para que conozcan más sobre su misión, programa e impacto antes de solicitar una donación.

### 7.3: Solicitud:

Luego solicitará o solicitará directamente su apoyo financiero.

### 7.4: Mayordomía

Al igual que en las ventas, los clientes actuales son sus mejores clientes, por lo que debe trabajar para administrar a sus donantes actuales o mostrarles su agradecimiento y mantenerlos comprometidos.

## 1. ¿Qué es una subvención?

La financiación de la subvención la proporciona una fuente específica denominada otorgante a una organización sin fines de lucro calificada llamada beneficiario.

<b>Concesión</b>	<b>Gran proposición</b>	<b>Decisión de subvención</b>
<ul style="list-style-type: none"><li>● La subvención apoya las operaciones generales o un programa o iniciativa del beneficiario, como la búsqueda de hogares para perros y gatos abandonados.</li><li>● <b>Otorgante:</b> proporciona financiación.</li><li>● <b>Beneficiario:</b> recibe financiación</li></ul>	<ul style="list-style-type: none"><li>● Para calificar para una subvención, una organización sin fines de lucro debe demostrar por escrito que puede cumplir y cumplir con los requisitos específicos del otorgante. Esto se hace a través de una propuesta de subvención o un escrito de subvención.</li></ul>	<p>Cedente:</p> <ul style="list-style-type: none"><li>● Puede solicitar más información</li><li>● Aprueba o deniega la subvención</li></ul>

Objeto de una subvención:

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1. Soporte operativo general sin restricciones: se utiliza para **cualquier propósito legal** que elija la organización sin fines de lucro.

2. Apoyo restringido al programa: Se utiliza para un propósito específico descrito en la propuesta y definido por el otorgante.

3. Apoyo de Capital: Se utiliza para compras de capital específicas definidas en la propuesta:

- Renovación, construcción y adquisición de edificios.
- Compra de terrenos
- Tecnología
- Establecer una dotación.

### 2. ¿Estás listo para la subvención?

<b>Beneficios</b>	<b>Desafíos</b>
<ul style="list-style-type: none"><li>● Proporciona una financiación sustancial que normalmente no se puede conseguir por otros medios.</li><li>● Financia las operaciones de su organización y programas.</li><li>● Apoya programas que benefician a las comunidades.</li><li>● Mejora la visibilidad y credibilidad de su organización sin fines de lucro ante los financiadores, las organizaciones sin fines de lucro y la sociedad en general.</li><li>● <b>Solicitar más subvenciones aumenta las posibilidades de recibir una.</b></li></ul>	<ul style="list-style-type: none"><li>● Requiere dedicación del personal al proceso.</li><li>● Consume mucho tiempo</li><li>● Localizar oportunidades de subvenciones que coincidan con su misión, ubicaciones y programas.</li><li>● Requiere un enfoque hábil y sistemático</li><li>● Viene con requisitos para calificar, gastar e informar</li><li>● Los plazos pueden ser breves y requerir que las organizaciones sin fines de lucro repitan el proceso de solicitud.</li><li>● Establecer relaciones con los otorgantes requiere tacto y perseverancia.</li><li>● Proceso competitivo con muchas organizaciones sin fines de lucro compitiendo por subvenciones.</li></ul>

### 3. ¿Cuáles son las fuentes comunes de subvención?

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*¿Preguntas que le ayudarán si la organización sin fines de lucro está lista?*

*¿Calificamos para recibir financiación?*

Tener un agente fiscal que pueda aceptar el dinero en su nombre y luego entregárselo.

*¿Tenemos suficiente personal?*

Determine si su personal actual es suficiente para gestionar todos los aspectos del proceso de subvención. ¿Están dispuestos a hacer el trabajo? ¿Es una opción contratar más personal o contratar servicios externos?

*¿Estamos dispuestos y somos capaces de invertir el tiempo?*

Asegúrese de poder cumplir con las demandas y los plazos asociados con el proceso de subvención, especialmente aquellos asociados con el seguimiento y la presentación de informes. ¿Valdrá la pena el retorno de su inversión?

*¿Somos financieramente responsables?*

Esté preparado para mostrar cómo administra el dinero con éxito. Deberá enviar una **hoja de trabajo de presupuesto** para la organización sin fines de lucro y el programa que requiere financiamiento, así como también tener un sistema de contabilidad para rastrear el financiamiento de varias fuentes de subvenciones.

*¿Tenemos una visión?*

Ser capaz de definir objetivos específicos a corto y largo plazo para su organización y los programas que requieren financiamiento. Debe demostrar el impacto que el programa está teniendo en sus beneficiarios.

*¿Somos capaces de mostrar éxitos pasados?*

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Esté preparado para transmitir el impacto de su programa con **datos e historias significativas**.

*¿Está clara la necesidad de financiación?*

Asegúrese de saber qué aspectos de un programa requieren financiación y cuánto.

¿Buscará dinero de una sola fuente o de una combinación de fuentes?

*Fundaciones Privadas:*

- Fuente y suministro de financiación más común
- Creado a partir de una única donación primaria de un individuo o una empresa.
- Fondos y programas administrados por fideicomisarios/directores
- Puede tener personal remunerado para trabajar con organizaciones sin fines de

lucro, así como para revisar y presentar propuestas a la junta.

- Genera ingresos invirtiendo su donación inicial y, a menudo, desembolsa la mayor parte de sus ingresos de inversión cada año en actividades benéficas deseadas.

*Corporaciones*

- Formar fundaciones para administrar y apoyar a organizaciones sin fines de lucro.
- Proporcionar financiación a cambio de reconocimiento y asociación con causas

valiosas.

- Puede otorgar premios que no sean en efectivo, como equipos, muebles, suministros, servicios y experiencia.

*Otro:*

Ejemplo de otras fuentes:

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- Agencias de las Naciones Unidas
- Iglesias
- clubes rotarios
- Universidades
- Dar círculos.

Giving Circle es una entidad filantrópica donde grupos de personas donan su propio dinero a un fondo mancomunado.

### *Gobierno:*

- Locales, estatales y federales
- Proporciona financiación para programas y costos operativos y administrativos.
- A menudo requiere el cumplimiento de reglas y regulaciones detalladas.

### *La vía unida:*

- Recaudar dinero mediante campañas en el lugar de trabajo y deducciones de nómina.
- Distribuir fondos a organizaciones locales sin fines de lucro y sus propios programas de servicio.
- Administrado y gobernado localmente por la junta directiva

### **Proceso de subvención**

- Una organización sin fines de lucro envía una propuesta.
- Gran fuente potencial de subvenciones para pequeñas organizaciones sin fines de lucro.

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Voluntarios capacitados:

Visita organizaciones sin fines de lucro

Hacer recomendaciones al liderazgo de la Universidad de Washington sobre quién recibe fondos.

### 4. ¿Quién participa en la búsqueda de subvenciones?

El personal de las organizaciones sin fines de lucro lleva a cabo diversas funciones en el proceso de búsqueda de subvenciones. El alcance de su participación varía según el tamaño de la organización sin fines de lucro. Por ejemplo, las organizaciones sin fines de lucro más pequeñas suelen tener una persona que realiza todas las actividades, mientras que las organizaciones sin fines de lucro más grandes pueden tener varias personas que contribuyen al proceso.

#### Funciones realizadas por el personal de la organización sin fines de lucro

<b>Identificar/cultivar</b>	<b>Solicitar/mayordomo</b>
<ul style="list-style-type: none"><li>● Investigar e identificar grandes oportunidades potenciales.</li><li>● Obtener historias de éxito de los beneficiarios.</li><li>● Realización de actividades de cultivo con otorgantes.</li></ul> a: Determinar la idoneidad Entender sus objetivos Obtener un aliado en el proceso de búsqueda de subvenciones	<ul style="list-style-type: none"><li>● Contribuir al <b>proceso de redacción de propuestas e informes.</b></li><li>● Determinar metas, objetivos, éxitos pasados y necesidades de financiación.</li><li>● Contribuir al presupuesto de la propuesta.</li><li>● Comprender el presupuesto general del programa, incluidas partidas específicas.</li><li>● Descubrir si el presupuesto fue preciso y compartir las razones del gasto excesivo o insuficiente.</li><li>● Confirmar si la organización sin fines de lucro logró las metas y objetivos del programa de subvenciones.</li><li>● Determinar el nivel de apoyo del CEO/Junta directiva y obtener cualquier aprobación.</li><li>● compilar datos</li><li>● Montaje de los componentes necesarios.</li><li>● Redacción, revisión y edición.</li></ul>

<b>Oficial de Programas</b>	<b>Miembros de la Junta</b>
<ul style="list-style-type: none"> <li>● Colaborar con organizaciones sin fines de lucro para:               <ol style="list-style-type: none"> <li>1) Determinar el ajuste</li> <li>2) Proporcionar los formularios, procesos, enlaces, requisitos y asesoramiento necesarios para subvenciones.</li> <li>3) Revisar las propuestas de subvención</li> <li>4) Obtener la información solicitada por la junta</li> <li>5) Reúna informes</li> <li>6) Comunicar preguntas/preocupaciones a la organización sin fines de lucro después de la adjudicación.</li> <li>7) Informar a las organizaciones sin fines de lucro de la aceptación o rechazo de su propuesta.</li> </ol> </li> <li>● Presentar propuestas e informes de financiación a su junta directiva y responder cualquier pregunta.</li> </ul>	<ul style="list-style-type: none"> <li>● Establecer la dirección, la estrategia y el enfoque de las subvenciones y las prioridades de financiación, a menudo de acuerdo con los deseos de un “financiador”.</li> <li>● Proporcionar dirección y supervisión a la fundación y aprobar recomendaciones de subvención.</li> <li>● Revisar, informar y garantizar la administración adecuada de las subvenciones.</li> </ul>

**5. ¿Cuáles son las fases del proceso de subvención?**

**1. Fase previa a la adjudicación 2. Fase de adjudicación 3. Fase posterior a la adjudicación**

Otorgantes:

- Planificar, anunciar,

promover subvenciones

oportunidades.

- Apoyar a organizaciones sin fines de lucro:

Asegurar el ajuste

Proveer información

Revisar y presentar

Propuestas

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Otorgantes:

- Notificar y

anunciar la subvención

destinatarios

- Negociar la final

acuerdo garantizado

(términos)

Otorgantes:

- Revisar la situación financiera/narrativa.

informes.

- Haga preguntas de seguimiento

- Realizar visitas/auditorías al sitio

Organizaciones sin fines de lucro:

- Agradecer y reconocer a los otorgantes

- Presentar informes formales/informales.

- Implementar y realizar un seguimiento de la financiación.

## **6. ¿Qué es el ciclo de búsqueda de subvenciones?**

### **1. Identificación (Pre-adjudicación):**

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Realice investigaciones para identificar oportunidades de subvenciones que coincidan con la misión, los valores y las necesidades de su organización sin fines de lucro.

### **2. Cultivo (Pre-adjudicación):**

Comprenda sus objetivos y prioridades de financiación y si su organización sin fines de lucro se ajusta a estas prioridades.

Determinar el proceso de subvención (procedimientos de solicitud, revisión y selección).

Cree una conexión personal para que su organización sin fines de lucro sea vista como algo más que una simple propuesta. A los otorgantes les podría resultar más fácil rechazar una propuesta sin esta conexión.

### **3. Solicitud (Pre-adjudicación):**

Reúna los documentos de respaldo requeridos. Redactar, revisar, editar y enviar propuestas. Prepare al oficial del programa para presentar su propuesta a su junta.

### **4. Administración (posterior a la adjudicación):**

Agradezca a los otorgantes por la subvención.

Cumpla con los requisitos posteriores a la adjudicación.

Documentar el progreso del programa.

Presentar el informe requerido.

## **4.2 Translation from Spanish into English**

### **4.2.1 *Plan Estrategico 2022-2025 Final* from Spanish to English for The Madre Verde Foundation**

## ANALYSIS AND TRANSLATION

## I. INTRODUCCION:

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La Fundación Madre Verde (FMV) es una organización No gubernamental, sin fines de lucro, constituida legalmente con la cédula jurídica número 3-006-261053 el 03 de enero del 2000, su órgano máximo lo representa la Asamblea General integrada por 116 socios (as) patrocinadores. Su compromiso desde su creación es con la conservación y protección del medio ambiente enfocado propiamente en el recurso hídrico, teniendo como motivación la Reserva Natural Madre Verde, un parche de bosque de 31 has, símbolo de los últimos remanentes de bosque del sector sureste de los Montes del Aguacate, sitio importante para la conservación del recurso hídrico del cantón de Palmares. Pero también, es una organización que participa en otros espacios a nivel regional y nacional donde considere que puede brindar su aporte, como es el caso del Comité Local del Corredor Biológico Montes del Aguacate y la Red de Reservas Privadas de Costa Rica.

Desde el 2004 la FMV se ha preocupado por contar con un plan estratégico (PE) de acción que defina sus objetivos de corto, mediano y largo plazo y marque la ruta para el alcance de los resultados y fines de la organización. Igualmente ha realizado al fin de cada periodo un ejercicio participativo de evaluación para definir la línea base para la construcción de su siguiente PE.

El presente documento representa el resultado del proceso participativo de evaluación del PE 2019-2021 y la construcción del plan para el siguiente periodo 2022-2025.

## II. FUNDACIÓN MADRE VERDE

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### SU HISTORIA

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La Fundación Madre Verde nace como una idea en 1990 cuando en una reunión de Asamblea General de la Asociación de Desarrollo Integral de la Granja de Palmares, un grupo de personas expresó su preocupación por el recurso hídrico del distrito y su posible escasez futura; las

acciones para su protección debían ser inmediatas. Es así como la Asociación de Desarrollo crea la comisión encargada del diseño y desarrollo de un proyecto de conservación del recurso; que iniciaría con la propuesta de la compra de las tierras propiedad de La FEYBA de Palmares S.A., por su alto potencial hídrico, belleza escénica y un arraigado sentimiento de pertenencia de parte de los vecinos. Estas eran tierras dedicadas a la producción de café y ganado, con pequeños reductos de bosque y charrales.

Esta comisión inicia la búsqueda de fondos para la adquisición de la finca, ante el gobierno nacional y local, instituciones, cooperantes internacionales y sector privado. El precio de la finca ascendía a €24.000.000 (veinticuatro millones de colones), por lo que se ofrece al propietario un adelanto como señal de trato de €200.000 colones. Este monto fue recaudado entre los vecinos de la comunidad, sin embargo, al no poder levantar los fondos restantes, la comisión se desintegra y desiste de la idea de compra (1991-1993). Este representó el primer intento de adquirir la finca.

No es sino hasta 1998 que, ante la amenaza del interés del IDA (Instituto de Desarrollo Agrario) de parcelar y otorgar esas tierras a agricultores, un grupo de personas de la zona se organizan nuevamente para la compra, ya con fines de conservación. Esta iniciativa se fortalece cuando el IDA desiste de la idea de parcelar gracias a que estudios, realizados por su equipo de ingenieros, revelaron que el 85% de las tierras eran de vocación forestal y solo un 15% podían dedicarse a la agricultura. Esta decisión desencadenó una serie de protestas de los parceleros, que llevaron entre otras cosas a la quema de la finca. (Campos, 2013). Es en ese momento que el Ing. Carlos Suarez Badilla recomienda constituir una fundación ya que consideraba que era el tipo de figura legal que contaba con mayor credibilidad ante los donantes internacionales. Es así como nace la Fundación Madre Verde, el 3 de enero de 2000, una Organización No Gubernamental, sin fines de lucro. Creada con fines científicos e investigación para la conservación y el desarrollo sostenible; la cultura y la educación.

Una de las primeras actividades que le dio vida a la Fundación, fue la campaña para obtener los fondos para comprar la propiedad donde hoy se asienta la Reserva Natural Madre Verde. Lo que representó todo un reto ya que sus propietarios habían incrementado el precio a €100.000.000

(Cien millones de colones). Como no se encontró ningún donante dispuesto a invertir esa suma, asesorados por el Señor Emel Rodríguez, en ese entonces Coordinador del Proyecto Corredor Biológico Mesoamericano, realizan un intercambio con la Fundación Monte Alto para aprender del proceso de adquisición de la Reserva Natural Monte Alto. Con este insumo, deciden emprender una campaña similar a la de Monte Alto, que consistía en captar los fondos a través de certificados que se ofrecieran a la población Palmareña, que a su vez los convirtiera en aliados de este esfuerzo ambiental. El primer contacto fue la Asociación Cívica Palmareña (ACP) y otras instituciones como COOPAVEGA y COOPEPALMARES. La ACP no solo aportó dinero sino que también negoció con el propietario una rebaja en el precio; por lo que logra que se reduzca el monto a la mitad (¢50.000.000) y además que esta suma no fuera de contado sino que se pudiera pagar a tres años plazo.

Para lograr este objetivo, la ACP aportó un total de ¢30.000.000 (Treinta millones de colones) que pagaría en 3 años en cuotas de diez millones (¢10.000.000) más interés sobre los saldos; COOPAVEGA R.L contribuyó con tres millones de colones (¢3.000.000), mismos que se usaron para el enganche de compra y COOPEPALMARES R.L con un millón de colones (¢1.000.000). Más de 500 palmareños comprometidos con la causa donaron para tal fin, logrando así la meta y en menor tiempo. (Campos, 2013)

Al momento de su constitución la Fundación fue integrada por 28 socios fundadores y de acuerdo con los estatutos a partir de ese año en cada Asamblea General, nuevos socios se pueden incorporar hasta máximo de 10 socios patrocinadores por año (estas son personas colaboradoras y amigas de la Fundación que desean continuar trabajando por el medio ambiente), actualmente se cuenta con un total de **116** socios (as) patrocinadores, de los cuales 43 son mujeres, 70 son hombres, 2 Cooperativas y 1 asociación comunal. A esto se suman cerca de 50 voluntarios/as activos, y 30 empresas donantes.

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### ORGANIGRAMA:

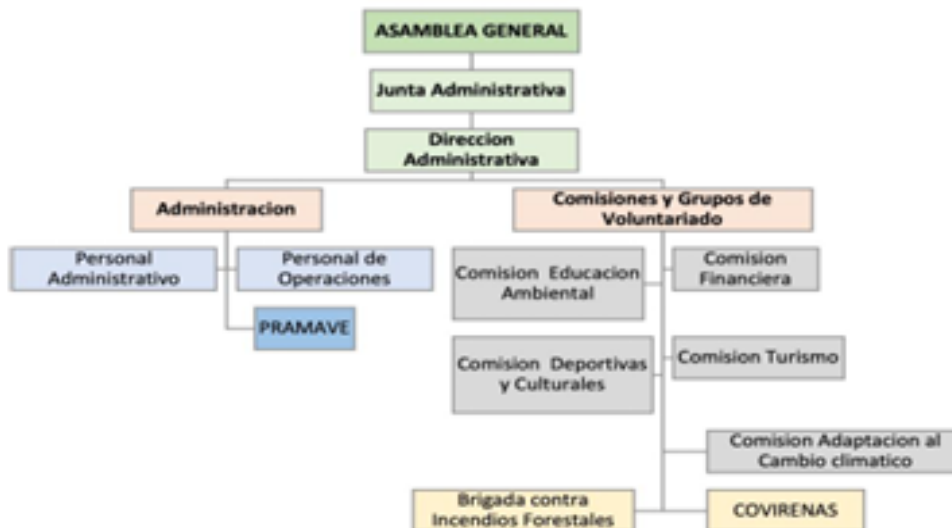
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La FMV funciona bajo la figura jurídica de Fundación. Según la Ley 5338, las fundaciones son entes privados de utilidad pública, que se establecen sin fines de lucro y con el objeto de realizar o

## ANALYSIS AND TRANSLATION

ayudar a realizar, mediante el destino de un patrimonio, actividades educativas, benéficas, artísticas o literarias, científicas, y en general todas aquellas que signifiquen bienestar social. Estas no tienen finalidades comerciales. Sin embargo, podrán realizar operaciones de esa índole para aumentar su patrimonio, pero los ingresos que obtengan deberán destinarlos exclusivamente a la realización de sus propios objetivos. La administración y dirección de las fundaciones estará a cargo de una Junta Administrativa.

Sin embargo, la FMV ha decidido contar con una estructura de gobernanza democrática y participativa por lo que tiene como órgano máximo la Asamblea General que se reúne una vez al año, y es coordinada por una Junta Administrativa compuesta por una presidencia y cuatro directores, de los cuales la asamblea elige a 3 directores y los otros dos son nombramientos especiales: uno por la Municipalidad de Palmares y otro por el Poder Ejecutivo. Cuenta además con una estructura administrativa integrada por un(a) Delegada(o) Ejecutiva(o), un (a) Asistente Administrativo(a) ambos en planilla y devengando salario, y una persona encargada del mantenimiento de la Reserva. Las comisiones están integradas, de manera voluntaria, por socias y socios, amigos (as) y miembros de la comunidad Palmareña, su estructura operativa para el periodo 2022-2025, será la siguiente:



### III. DESCRIPCIÓN DEL ENTORNO

El área de acción inmediata de la Fundación Madre Verde está representada por la Reserva Natural Madre Verde, el cantón de Palmares, extendiéndose al sector del Corredor Biológico Montes del Aguacate-CBMA, este último incluye los cantones de San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Provincia de Alajuela); y los cantones de Esparza y Montes de Oro - Provincia de Puntarenas- (IGN, 2009).

#### RESERVA NATURAL MADRE VERDE

La Reserva Natural Madre Verde se encuentra geográficamente en los altos del distrito de la Granja de Palmares, específicamente 1 km al oeste y 500 m. sur de la Escuela Ermida Blanco, del cantón de Palmares, provincia de Alajuela. A través de los años, este parche de bosque se ha ido repoblando de árboles por reforestación y regeneración natural.

El plano de la Reserva realizado en el 2020 demostró que tiene una extensión de 31 hectáreas, y no de 40 has como se había pensado hasta entonces. En el análisis FODA se identificaron algunas amenazas que persisten como la invasión de los límites de la reserva, por lo que era importante contar un plano catastrado.

La Reserva representa un recurso valioso para la educación ambiental, el esparcimiento, y la realización de actividades que le permiten a la FMV generar ingresos para su operación y el desarrollo de sus actividades. Es un sitio de importancia para la protección del recurso hídrico, 3 de sus



nacientes cuentan con declaratoria. Cuenta con un Plan de Manejo, además de otros estudios de la flora y fauna.

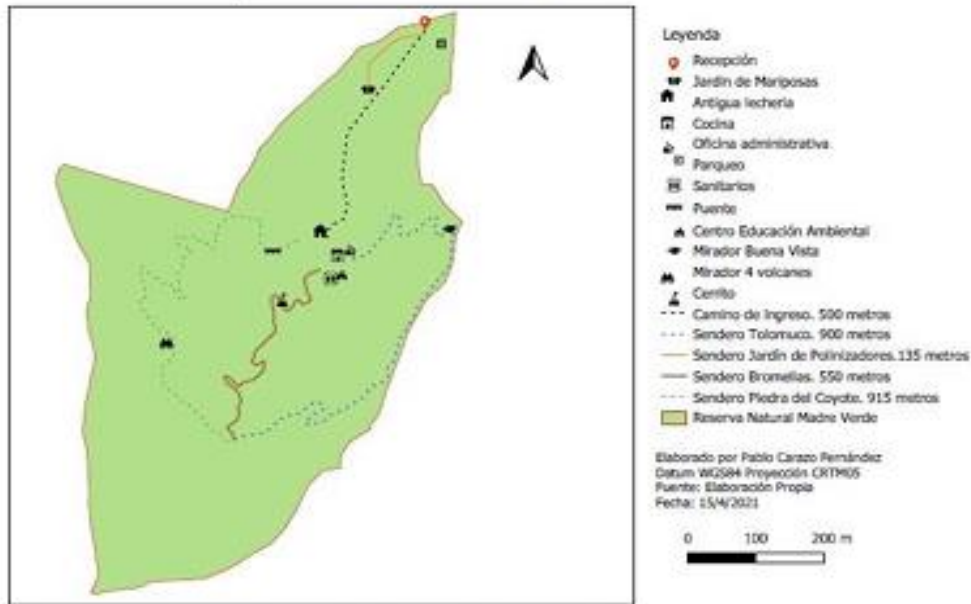
Posee varios atractivos que pone a disposición del visitante para la recreación y educación ambiental, entre ellos:

- Senderos de diferente nivel de dificultad con aproximadamente 3 kilómetros de extensión en total, en donde se puede disfrutar aire puro y una gran diversidad de plantas y animales.
- Un área recuperada por regeneración natural y reforestación.
- Espacios para la recreación, con facilidades para que las familias disfruten del aire puro, paz y tranquilidad que ofrece el lugar.
- Un Jardín de polinizadores y dos miradores
- Instalaciones donde operó una antigua lechería.
- Un alojamiento

También, el sitio se ha provisto de las facilidades suficientes para la realización de actividades turísticas, voluntariado, educación ambiental y operaciones de la FMV, cuenta con:

- Un Centro de Educación Ambiental con un área de 100 m<sup>2</sup>, acondicionado para la realización de talleres, capacitaciones, charlas de tipo ambiental, entre otros.
- Servicios sanitarios.
- Oficina donde se encuentra la administración de la Fundación, y casa multifuncional en la entrada.
- Un comedor y una cocina con capacidad para 150 personas.
- Una casita verde, que se utiliza para hospedar a familia que ayuda con vigilancia
- Área para parqueo de vehículos livianos.
- Área para parqueo de vehículos 4x4.
- Electricidad agua potable e internet en la zona de ingreso (dentro de la Reserva como tal, no hay señal de internet estable)

Mapa ubicación turística Reserva Natural Madre Verde



## CANTON DE PALMARES

Palmares es el séptimo cantón de la provincia de Alajuela, esta ubicado en la zona occidental del Valle Central, y situado en la Zona Intertropical del Pacífico. Al ser un espacio de transición es afectado por los vientos alisios, húmedos y cálidos, que le dan una temperatura promedio de 25,6 °C. La época seca, entre noviembre y abril, es más cálida y menos lluviosa que los meses de agosto a octubre. El cantón nació producto de la migración de campesinos de zonas aledañas y su nombre surgió debido a la gran cantidad de palma real que existía en la zona antes de que esta área fuese poblada, su población actual (2022) es de 41.805 habitantes de acuerdo a los datos del INEC-Instituto Nacional de Estadísticas y Censos.

Limita al norte y al oeste con San Ramón, al sur con Atenas, y al este con el cantón de Naranjo. Cuenta con una extensión de 38,93 km<sup>2</sup>, y 7 distritos organizados políticamente de la siguiente

manera: Palmares (1,19 km<sup>2</sup>), Zaragoza (8,43 km<sup>2</sup>), Buenos Aires (6,84 km<sup>2</sup>), Santiago (7,96 km<sup>2</sup>), Candelaria (4,72 km<sup>2</sup>), Esquipulas (5,40 km<sup>2</sup>), y La Granja (4,39 km<sup>2</sup>).

El cultivo del café y el tabaco fueron desde los comienzos, una base importante en el desarrollo del cantón, además de otras actividades como la fabricación de muebles de madera, el cultivo de plantas ornamentales para la exportación, la industria textil y la producción de otros granos (maíz, frijol negro) y frutas (tomate, chile), que también son parte de su economía. En el distrito central se concentra la mayor parte del comercio, dedicándose, en un gran porcentaje, a la venta de abarrotes, comidas, zapatos, ropa, joyería y accesorios en general. En el resto de los distritos el auge de este tipo de comercio es menor, aunque con el pasar del tiempo se ha visto el surgimiento de restaurantes, bares, empresas pequeñas y centros de entretenimiento en distintos lugares, que atraen a diferentes tipos de visitantes. En Enero de cada año se celebran, en este cantón, una de las fiestas cívicas más reconocidas del país, tradición que data de principios del siglo pasado (1900), y que año con año convoca a visitantes nacionales e internacionales.

Palmares cuenta con todos los servicios de comunicaciones, red de telefonía celular y fija, además de internet de banda ancha y fibra óptica, proporcionados por empresas de cobertura nacional como ICE, Kolbi, CableTica, Tigo y SKY. En cuanto a transporte público, el distrito central cuenta con conexiones de autobuses hacia todos los distritos del cantón, también hacia San Ramón, Naranjo y San José, utilizando la autopista Bernardo Soto, la cual forma parte de la Carretera Interamericana Norte. Palmares está a 36 km del Aeropuerto Internacional Juan Santamaría en Alajuela (aproximadamente de 30 a 45 minutos de viaje por carretera).

El Índice de Desarrollo Humano publicado en el [Atlas Cantonal de Desarrollo Humano 2021](#), lo ubica en la posición número 32 de 82 cantones, con un índice de 0,813 en 2019, sin variación con relación al 2018, por debajo de Orotina, Alajuela, San Ramón, Grecia y Atenas a nivel provincial ([ver tabla](#)). Aplicando el índice de Desigualdad de Género ocupa la posición 33 con un índice de

0,178. A pesar de los datos anteriores, el Índice de Pobreza Multidimensional cantonal del 2020, lo ubica en el sexto a nivel nacional y número uno a nivel de provincia, con un índice de 0,026.

**Tabla 1. Índice de Pobreza Multidimensional 2020 (Fuente: INEC)**

Cantón	Índice de pobreza multidimensional	Incidencia	Pobres	Intensidad de la privación	Severidad	Vulnerabilidad	Desigualdad	Contribución de las privaciones en Educación	Contribución de las privaciones en Vivienda	Contribución de las privaciones en Salud	Contribución de las privaciones en Protección Social	Población	Clasificación según IPM
Montes de Oca	0,016	5,40%	3.386	28,90%	0,10%	6,10%	0,003	35,80%	25,40%	17,30%	21,50%	62.533	1
Flores	0,019	6,60%	1.637	29,10%	0,10%	6,00%	0,003	39,10%	25,90%	11,70%	23,30%	24.886	2
Moravia	0,023	7,80%	4.880	29,90%	0,10%	9,60%	0,003	40,30%	25,60%	13,30%	20,80%	62.669	3
San Isidro	0,025	8,90%	1.975	29,60%	0,20%	9,60%	0,004	34,30%	27,70%	11,60%	26,40%	23.230	4
Santo Domingo	0,026	8,90%	4.344	29,10%	0,20%	10,20%	0,004	39,80%	27,10%	12,90%	20,30%	49.045	5
<b>Palmares</b>	<b>0,026</b>	<b>8,70%</b>	<b>3.580</b>	<b>29,50%</b>	<b>0,30%</b>	<b>11,90%</b>	<b>0,004</b>	<b>31,50%</b>	<b>28,70%</b>	<b>14,90%</b>	<b>25,00%</b>	<b>40.828</b>	<b>6</b>
Baños	0,027	9,10%	2.400	29,80%	0,30%	8,80%	0,005	37,90%	24,90%	15,90%	21,30%	26.459	7
San Pablo	0,029	9,90%	3.089	28,80%	0,20%	12,20%	0,003	41,30%	25,10%	10,70%	22,90%	31.200	8
Vilqueza de Coronado	0,029	9,90%	7.101	29,60%	0,20%	8,60%	0,004	36,20%	28,20%	13,30%	22,40%	71.663	9
San Rafael	0,03	10,20%	5.636	29,10%	0,10%	11,00%	0,003	38,20%	26,80%	13,60%	21,40%	95.269	10
Baños	0,03	10,20%	4.771	29,30%	0,20%	14,00%	0,004	41,70%	23,00%	12,60%	22,80%	47.002	11
Santa Ana	0,036	12,40%	7.525	29,20%	0,30%	13,70%	0,004	40,40%	26,60%	11,70%	21,30%	60.453	12
Atenas	0,039	13,10%	3.839	29,60%	0,50%	14,20%	0,005	38,10%	22,00%	18,40%	21,50%	29.340	13
Tibás	0,039	12,60%	10.704	31,30%	0,70%	9,20%	0,006	36,00%	25,40%	19,70%	18,90%	84.873	14
Cumitabat	0,04	13,10%	10.412	30,60%	0,40%	10,60%	0,005	36,10%	26,70%	14,60%	22,50%	79.577	15
Herrera	0,04	13,20%	18.965	30,30%	0,40%	12,40%	0,005	35,70%	30,60%	15,10%	18,60%	143.298	16
Santa Bárbara	0,042	14,80%	6.343	28,40%	0,20%	18,10%	0,003	41,10%	21,90%	15,30%	21,70%	42.778	17
Tacachi	0,044	14,60%	10.238	29,80%	0,30%	13,60%	0,004	35,80%	28,80%	17,90%	17,50%	70.054	18
Desamparados	0,044	14,70%	36.152	29,80%	0,40%	14,20%	0,004	38,50%	26,40%	14,10%	20,90%	245.298	19

Como datos importantes, Palmares cuenta con un [Plan Cantonal de Desarrollo Humano](#) para el periodo 2016-2026, aunque aún no existe un Plan Regulador acorde con las necesidades del cantón, esto es algo que se ha venido postergando.

## CORREDOR BIOLÓGICO MONTES DEL AGUACATE

La Reserva Natural Madre Verde se encuentra dentro del Corredor Biológico Montes del Aguacate, lo que ha llevado a que la labor de la FMV de protección y conservación de los recursos naturales se extienda al ámbito geográfico del Corredor, participando de manera activa en su Consejo Local y otros eventos en el marco del Corredor, como lo es el manejo del fuego, trabajando con las brigadas comunitarias contra incendios.

Fue creado el 30 de mayo de 2006 por Decreto Ejecutivo N° 33106-MINAE (Ministerio de Ambiente), con el objetivo de “aumentar la conectividad entre las áreas protegidas del CBMA, con la participación de todos los actores interesados en la gestión del territorio”.

Abarca los cantones de San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Provincia de Alajuela); y los cantones de Esparza y Montes de Oro -Provincia de Puntarenas. Geográficamente, se localiza al oeste del Valle Central, incluye las serranías de los Montes del Aguacate y se extiende desde el límite sur de la Reserva Biológica Alberto Manuel Brenes, atravesando el Cerro Azahar (1.598 m.s.n.m.), continuando hacia sureste pasando por el sector conocido como Cambronero, sigue por el Cerro la Tinajita (Lana) con 1234 m.s.n.m. Extendiéndose hacia el Cerro Pata de Gallo (Berlín) a 1.541 m.s.n.m. Siguiendo luego hacia el cerro El Alto de la Cruz (1.443 m.s.n.m.), Cerro Lorito (1.418 m.s.n.m.), Cerro Mondongo, Cerro Pelón (882 m.s.n.m.), Cerro Chompipe (663 m.s.n.m.), Cerro San Pablo; y finaliza en los límites administrativos del Cantón de Atenas. La conectividad con el Parque Nacional Carara se da a través de las estribaciones de los Cerros Turrubares, Cerro Las Palmas (1.215 m.s.n.m.) y Cerro Crisanto (1.183 m.s.n.m.), localizados en el Corredor Biológico Paso de las Lapas en ACOPAC (ACCVC 2013).



**Potencial hídrico.** Dentro del CBMA, existe una cantidad de nacientes que dan origen a ríos importantes, como es el río La Paz, San Lorenzo, Barranquilla, Río Grande de San Ramón, Jesús María, entre otros, los cuales forman parte de las cuencas hidrográficas del Río Grande de Tárcoles, Barranca, Jesús María, San Carlos. Asimismo existe una serie de nacientes, cuyas aguas son captadas, para el suministro de agua potable de acueductos de comunidades aledañas a él, como dentro del mismo, tales como: Asada de Rincón de Zaragoza, la de Candelaria, Francisco y La Guaria, Piedades Sur, San Isidro, Atenas, Morazán, Asada Piedades Sur y otros.

Según el análisis situacional interno y externo de la FMV, existe una oportunidad de trabajo conjunto a través de una alianza estratégica, que a su vez crea la oportunidad de gestionar fondos de cooperación tomando en cuenta las fortalezas de ambas organizaciones y las que lo

integran (CBMA y FMV). La FMV ve al CBMA como un socio relevante para el logro de sus objetivos, de ahí la importancia de fortalecer esta relación mediante el establecimiento de objetivos comunes de manera consciente.

### IV. MAPA DE ACTORES

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Los actores claves de una organización son usualmente aquellos que pueden influenciar positiva o negativamente una intervención, o se les reconoce como importantes para que una situación o cambio suceda. Para este ejercicio se utilizó el modelo de “escalera de compromiso”, dado que la FMV lo que busca es contar con una red de “amigos” comprometidos que confían y creen en el trabajo que realiza la organización y su importancia.

Las organizaciones son sistemas sociales abiertos que interactúan con el medio que las rodea, muchas basan sus estrategias de sostenibilidad y financiera en el establecimiento de alianzas a nivel local, nacional o internacional, utilizando medios como la filantropía comunitaria y la corporativa. Sin embargo, para que esto sea posible se debe crear confianza para mantener relaciones colaborativas de largo plazo con los aliados (socios) que se van sumando.

La Escalera de Compromiso obliga a hacer este análisis, divide a los actores en dos niveles, en el **nivel “inferior”** (primeros escalones) se ubican aquellos actores ocasionales, la relación es más de poder y control, formal, meramente operacional (adquieren o se benefician de los productos o servicios que ofrece la organización), la relación generalmente es de corto plazo y por tiempo limitado, se pueden considerar clientes, compradores o eventuales.

En el **nivel “superior”** se posicionan los aliados que confían y defienden a la Fundación, están comprometidos con su misión, es una relación de largo plazo, informal entre amigos, y por esta razón invierten en ella, califican como socios, defensores o seguidores de la FMV.

### Escalera de compromiso de la FMV:

#### Nivel superior:

- COVIRENA
- Donantes de Empresa Privada-Local
- Brigada de Bomberos Forestales Voluntarios
- ASADA [Santiago](#)
- [Liceo Experimental Bilingue](#) de Palmares.
- [Red de Reservas](#) Públicas y Privada del Corredor Biológico Montes del Aguacate.
- Universidades: Universidad de Costa Rica (Occidente), [UMCA](#)-Universidad Castro Carazo, [UTUR](#)-Universidad del Turismo, [UTN](#)-Universidad Técnica Nacional, [ULATINA](#)-Universidad Latina, [UNA](#)-Universidad Nacional.
- [Coopavegra](#)
- Ministerio de Ambiente/Sistema Nacional de Áreas de Conservación (SINAC)
- SINAC/Area de Conservacion Central, sede San Ramon
- Comité de Corredores Biológicos
- Fundación Internacional para el Árbol.
- Ministerio de Educación Pública
- Programa Bandera Azul ([BAE](#))Programa de Pequeñas Donaciones del PNUD ([PPD](#))
- [CoopePalmares](#)-Cooperativa de Caficultores y Servicios Múltiples de Palmares
- [INLEX](#) Voluntariado- Integrated Learning Experiences
- Asociación Cívica Palmareña
- Cámara de Comercio de Palmares

#### Nivel Inferior:

- COFUTPA
- UCR-Conservatorio de Música de la UCR
- UNED-Universidad Estatal a Distancia Sede Palmares
- Cruz Roja Costarricense

## ANALYSIS AND TRANSLATION

- Ministerio de Seguridad Pública
- Instituto Costarricense de Electricidad-ICE
- AYA-Instituto de Acueductos y Alcantarillados
- Mueblería Nalakalu
- Pastoral Ecológica
- ASADA Rincon
- ICT-Instituto Costarricense de Turismo
- INA-Instituto Nacional de Aprendizaje
- Asociación de Desarrollo Integral de la Granja
- Municipalidad de Palmares
- Guías Scouts de Costa Rica

### V. EVALUACIÓN DE LOS ALCANCES DEL PLAN ESTRATÉGICO ANTERIOR (2019-2021)

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Resumen de los resultados del ejercicio de evaluación participativo, realizado durante el mes de febrero del 2022 en la Reserva Natural Madre Verde, con relación a los alcances del PE-2019-2021:

OBJETIVOS	LOGROS
1. Gestionar adecuadamente la Reserva Natural Madre Verde, mediante el fortalecimiento de su Programa de Voluntariado y el manejo de la Reserva.	<ul style="list-style-type: none"><li>● Un Programa de Voluntariado elaborado y en ejecución. Este documento ha permitido llevar adelante de una manera más organizada y sistematizada los voluntarios que recibe la Fundación, y direccionar este recurso a las necesidades de la organización.</li><li>● Un plano de la Reserva Natural Madre Verde actualizado y registrado. El plano actualizado dejó en evidencia que el</li></ul>

OBJETIVOS	LOGROS
	<p>área real actual de la Reserva es de 31 has y no 40 has como inicialmente se suponía.</p> <ul style="list-style-type: none"> <li>● Un Plan de Manejo y Reglamento de Uso de la Reserva vigente y en aplicación.</li> <li>● Mejora continua de la Reserva en infraestructura, servicios (agua, electricidad, internet), senderos, puentes, bodega y rótulos. Igualmente se ha invertido en un Jardín de Polinizadores.</li> <li>● Investigaciones realizadas, pero no se cuenta con una base de datos o reservorio de la información centralizada y accesible. Se requiere también identificar las necesidades de investigación.</li> </ul>
<p>2. Lograr la sostenibilidad operativa y financiera de la FMV, mediante el fortalecimiento de los instrumentos y herramientas utilizadas hasta el momento.</p>	<ul style="list-style-type: none"> <li>● Un plan de desarrollo turístico de la Reserva, en proceso.</li> <li>● Permiso de operación por parte del Ministerio de Salud.</li> <li>● Declaratoria Turística del Instituto Costarricense de Turismo.</li> <li>● Capacitaciones en turismo. Aunque el equipo de la FMV ha recibido capacitaciones en este tema, estas han sido esporádicas. Se requiere que se asuma de manera planificada y direccionada de acuerdo con las necesidades de los servicios turísticos a ofrecer por la Fundación. Pendiente de establecer contacto y solicitar colaboración de la Carrera de Turismo Ecológico de la Universidad de Costa Rica-Recinto de Grecia.</li> <li>● Presentación de proyectos ante diferentes cooperantes internacionales como el Programa de Pequeñas Donaciones-PPD, Fundación Internacional de los Árboles-FIA, la Fundación Interamericana-IAF, y la Embajada de</li> </ul>

OBJETIVOS	LOGROS
	<p>Japón. De estos se ha logrado la aprobación de al menos tres con la FIA y el PPD.</p> <ul style="list-style-type: none"> <li>● Venta de productos y servicios. Ha priorizado la oferta de servicios ofrecidos a través de PRAMAVE aumentando su cartera de clientes y los servicios y acompañamiento que ofrece a las empresas y organizaciones.</li> <li>● Aumento en los ingresos de la Fundación a través de la generación de recursos financieros propios, como actividades filantrópicas, venta de servicios y productos; así como sus ingresos por filantropía comunitaria, fortaleciendo su relación con sus donantes a través de una comunicación asertiva y la rendición de cuentas. Aunque no se cuenta aún con un Plan de Recaudación de Fondos, la FMV ha avanzado en algunas acciones como identificación y visitas a nuevos donantes, la apertura de una cuenta PayPal para facilitar la captación de donaciones. También ha realizado un análisis de las actividades filantrópicas que le generan mayor rendimiento y descartado las que no.</li> <li>● Inscripción en el RIARD-Registro de Instituciones Aptas para Recibir Donaciones, esto le ha permitido recibir algunas donaciones de equipo de instituciones del Estado como el SINAC.</li> </ul>
<p>3. Posicionar a la FMV en el quehacer de la comunidad, creando un Programa de Comunicación y</p>	<ul style="list-style-type: none"> <li>● Plan de comunicación elaborado y bajo implementación. La FMV cuenta con una nueva imagen y ha fortalecido su presencia en las redes sociales como Facebook e Instagram, y WhatsApp empresarial. Ha desarrollado videos institucionales y de la Reserva que se han divulgado</li> </ul>

OBJETIVOS	LOGROS
<p>fortaleciendo su presencia en los diferentes espacios de toma de decisiones.</p>	<p>a través de las redes y medios de comunicación locales y nacionales.</p> <ul style="list-style-type: none"> <li>● Una oficina dentro de la Reserva. Aunque estaba previsto en el PE contar con una oficina en Palmares centro, la que se logró establecer en el primer año, no fue posible mantenerla por efecto de la pandemia. Se optó por instalarla dentro de la Reserva mejor acondicionada, y posicionando la Reserva como su centro de operaciones.</li> <li>● Un convenio con el Sistema Nacional de Áreas de Conservación-SINAC, en proceso.</li> <li>● Participación activa en el Consejo Local del Corredor Biológico Montes del Aguacate y la Red de Corredores Biológicos.</li> </ul>
<p>4. Fomentar la participación ciudadana en la gestión ambiental y la adaptación al cambio climático, creando un Programa de Educación Ambiental Integral y mejorando la coordinación con las diferentes instituciones y organizaciones en el tema.</p>	<ul style="list-style-type: none"> <li>● Se cuenta con un Programa de Educación Ambiental Integral, aunque se vio limitado en su implementación debido a la pandemia y las restricciones establecidas para las actividades presenciales grupales y masivas. Igualmente aun se requiere contar con una póliza del Instituto Nacional de Seguros. Sin embargo, se vio en la virtualidad un medio para alcanzar y ampliar la población objetivo, como por ejemplo Facebook Live.</li> <li>● Participación en la Comisión Cantonal de Ambiente convocada por la Municipalidad de Palmares.</li> <li>● Coordinación con la ASADA de Santiago y realización de actividades conjuntas.</li> <li>● Trabajo conjunto con universidades como la Universidad de Costa Rica, Universidad del Turismo, Universidad</li> </ul>

OBJETIVOS	LOGROS
	Técnica Nacional, Universidad Castro Carazo, Universidad Latina. Esto ha permitido contar con el apoyo de estudiantes para la realización de diferentes investigaciones y prácticas para el desarrollo de herramientas planificadas para la Fundación.

## VI. ELEMENTOS DEL PLAN ESTRATÉGICO

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El PE constituye la carta de navegación de una organización, es la guía que le permitirá alcanzar sus objetivos enmarcados en su misión y visión, estos últimos representan su razón de ser y hacia dónde se dirige o quiere llegar en el largo plazo. Para lograr establecer una estrategia clara, efectiva y eficiente, la organización debe conocer su situación actual (fortalezas y debilidades) y el entorno en que se desenvuelve y opera (oportunidades y amenazas); y con todos estos elementos diseñar las estrategias y acciones que le indiquen el cómo alcanzar sus objetivos. Los siguientes son la misión, visión y valores de la FMV:

<b>MISION</b>	Somos una organización socio-ambiental que promueve y ofrece espacios para el conocimiento y la felicidad en el marco de la sostenibilidad.
<b>VISION</b>	Ser una organización socio-ambiental referente y auto-sostenible, que contribuye con el desarrollo integral de la comunidad.
<b>VALORES IMPULSORES</b>	<ul style="list-style-type: none"> <li>● <b>Honestidad:</b> Honramos y defendemos el patrimonio de la Fundación y somos transparentes en nuestro accionar.</li> <li>● <b>Compromiso:</b> Damos nuestro mejor esfuerzo para conseguir los objetivos de la organización.</li> <li>● <b>Respeto:</b> Trato considerado hacia toda forma de vida.</li> </ul>

## VII. ANÁLISIS DE SITUACIÓN ORGANIZACIONAL Y DE SU ENTORNO

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El análisis situacional y de contexto intenta averiguar la posición de la organización respecto a su entorno y los grupos de interés (oportunidades y amenazas), así como evaluar sus propios recursos y capacidades (fortalezas y debilidades). Todas las personas analizan su contexto, reciben señales de su entorno, y realizan su propia interpretación. Las conclusiones servirán de base para la definición y formulación de las estrategias del PE de la organización.

Para este análisis se tomó como base la información generada del ejercicio de evaluación 2019-2021.

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### INTERNO:

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El diagnóstico correcto de los males que aquejan a la organización depende en gran medida de la evaluación que se haga de los recursos con que cuenta. Así, se determina si se han tomado las decisiones estratégicas adecuadas (si se está haciendo lo que se debe hacer) y si estas decisiones han sido puestas en marcha de manera eficiente (si se está haciendo correctamente). La evaluación interna está enfocada en encontrar estrategias para capitalizar las fortalezas y neutralizar las limitaciones.

La FMV a través de los años se ha mantenido como una organización estable basando su mayor fortaleza en su recurso humano, sin embargo, esta cualidad también se ha convertido en su “talón de Aquiles” ya que resulta insuficiente para el desarrollo de las acciones que requiere para alcanzar sus metas. Las siguientes son las Fortalezas y Debilidades identificadas:

#### **Fortalezas:**

- Existe una buena comunicación entre la Junta Administrativa y el equipo de trabajo.
- Hay un alto compromiso y capacidad del equipo administrativo y de trabajo de la organización, así como de su Junta Administrativa y equipo complementario.

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- Capacidad de la organización y su equipo para la innovación, el desarrollo y la gestión de proyectos.
- Buena distribución de funciones a través de las Comisiones de trabajo.
- El alto compromiso de algunos de los asociados con la organización y con la planificación estratégica.
- Existe apertura para el relevo generacional (existencia), facilita y toma en cuenta la participación de la juventud, y promueve su liderazgo.
- Capacidad de convocatoria para atraer voluntariado.
- Apertura a nuevas alianzas para el trabajo conjunto y coordinado, así como para buscar la sostenibilidad de la organización.
- Credibilidad ante los organismos de cooperación y donantes. La FMV cuenta con una buena imagen que le da credibilidad, reputación, posicionamiento, es un referente.
- Transparencia en el manejo de la información y los recursos. La FMV cuenta con procesos estandarizados, ordenados y documentados (sistematizados).
- Se cuenta con una estructura administrativa fortalecida. La FMV ha invertido en mejoras para tener una oficina, con el equipo necesario, y servicios como internet.
- FMV como primera organización que ofrece servicios turísticos en Palmares. Ha mejorado e invertido en infraestructura dentro de la Reserva.
- RNMV rica en diversidad biológica. Se ha documentado a través de algunos estudios elaborados por estudiantes universitarios.

### **Debilidades:**

- La organización aún no es sostenible financieramente, continua dependiendo de las actividades filantrópicas que realiza, la cooperación internacional, y la filantropía comunitaria y corporativa.
- Equipo de trabajo con saturación de funciones (Administradora). Esto se debe a que su recurso humano es insuficiente, como el contar con un (a) Community Manager.
- No se cuenta con un manual de puestos, no existen perfiles para cada uno.

- No se cuenta con un plan turístico, ni un plan para incidir en las políticas públicas que le afectan o que requiere.
- No existe una estrategia de recaudación de fondos, que le permita a la FMV desarrollar actividades y gestiones planificadas para levantar los recursos que requiere para su operación.
- Vacíos en el acta constitutiva/no existe un reglamento. /Cantidad de socios inactivos que no se pueden sacar.
- Falta visión de negocio.
- No se cuenta con un servidor para centralizar la información.

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### EXTERNO

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Las organizaciones funcionan como sistemas abiertos, lo que implica que están en permanente contacto con su alrededor, ésta es una variable importante que inevitablemente influye en el funcionamiento de la organización condicionando, con ello, el logro de sus objetivos. Identificar las oportunidades que la organización puede aprovechar para el cumplimiento de sus objetivos y las amenazas que pueden obstaculizar su desempeño, brinda una orientación en la definición de las estrategias.

La Fundación no se ha mantenido geográficamente estática, dada la experiencia y su buen desempeño ha ido siendo reconocida como una organización líder en materia ambiental en la región, es por eso que ha ampliado su rango de acción, incrementando no solo las oportunidades que le ofrece el entorno, sino también las amenazas a las que tiene que poner atención para no verse impactada de manera negativa.

Las siguientes son las oportunidades y amenazas analizadas:

**Oportunidades:**

- Posicionamiento del país en materia turística. Costa Rica fue reconocida como “Destino Líder” de turismo en la categoría regional México y Centroamérica durante la gala de los “World Travel Awards 2021”. Además, [National Geographic](#) seleccionó al país entre los 25 viajes más increíbles del mundo para el 2022.
- Declaratoria de Sostenibilidad Turística-[CST](#) (categoría espacios protegidos). El propósito fundamental de la CST es convertir el concepto de sostenibilidad en algo real, práctico y necesario en el contexto de la competitividad turística del país, con miras a mejorar la forma en que se utilizan los recursos naturales y sociales.
- [Red de Turismo del CBMA](#)-Corredor Biológico Montes del Aguacate. La FMV es parte de la iniciativa Red de Reservas Privadas del CBMA.
- Demanda potencial de servicios turísticos, y el reconocimiento del turismo de montaña reconocido como turismo seguro (a nivel mundial), así como la posibilidad de vincular el turismo con la cultura local.
- Las líneas estratégicas de algunos cooperantes son afines a las de la FMV.
- Las Universidades públicas y privadas están dispuestas e interesadas en establecer alianzas con la FMV. No solo las universidades, sino que también existen otros actores que podrían ser potenciales aliados de la FMV.
- Fondos de DINADECO a través de las ADI-Asociaciones de Desarrollo Integral, [reforma a la ley 3859](#)/artículo 18-19, declaratoria como organizaciones de utilidad pública. La reforma menciona que: *“las ADI, podrán ser declaradas de utilidad pública cuando los ingresos que generen sean reinvertidos en su totalidad en proyectos de interés social, comunal y para el Estado...”*
- Reconocimiento a Costa Rica, como uno de los países a nivel mundial que mejor manejó la pandemia.
- Declaratoria OMEC- Otras Medidas Efectivas de Conservación.
- Certificación Bandera Azul Ecológica. Por varios años consecutivos la RNMV ha mantenido la certificación BAE.

- Existen a nivel regional y nacional clientes potenciales para los servicios que ofrece PRAMAVE-Promotora Ambiental Madre Verde. En esta misma línea, aprovechar el esquema de Responsabilidad social y ambiental de las empresas.
- Cambio de Gobierno de la República, se identifica tanto como oportunidad como amenaza, su impacto positivo o negativo dependerá de las políticas públicas que promueva e impulse.

**Amenazas:**

- A nivel de la RNMV existen amenazas tales como: Ingresos de personas de manera ilegal, presión sobre sus recursos naturales (cazadores), animales domésticos que ingresan a la Reserva (perros) e impactan la biodiversidad, los Incendios forestales (que van en aumento), el mal uso de suelo en su zona de amortiguamiento, y la Invasión de sus límites (robo de terreno).
- La población desinformada. Las personas suelen estar muchas veces desinformadas, desconocen la labor y la importancia del trabajo de la Fundación, lo que redundará en poco apoyo y desinterés en torno a la Reserva.
- Un departamento de Gestión Ambiental en la Municipalidad de Palmares que no ejerce su rol, y que más bien obstaculiza el trabajo de la FMV.
- A nivel de país, el cambio de gobierno de la República, que probablemente desencadene un cambio en políticas públicas. Y no se puede obviar, la corrupción latente de funcionarios públicos.
- La pandemia de la COVID-19 que se ha prolongado por más de 2 años y un aumento en el costo de la vida creciente.
- Fuera de las fronteras de Costa Rica, eventos como la Guerra en Ucrania, que llegan a impactar la economía primordialmente, y a nivel mundial el cambio climático que es cada vez más latente.

## VIII. COMPONENTES, OBJETIVOS ESTRATÉGICOS Y RESULTADOS 2022-2025

La FMV ha definido cuatro componentes: Fortalecimiento organizacional, sostenibilidad económica, protección y conservación de la Reserva Natural Madre Verde, y sensibilización y acción social, para cada uno de estos se ha establecido al menos un objetivo estratégico y resultados de impacto:

<b>Componentes</b>	<b>Objetivos Estratégicos</b>	<b>Resultados de Impacto</b>
I. Fortalecimiento Organizacional	1. Mejorar el desempeño operativo mediante el fortalecimiento de las capacidades de la organización y su recurso humano.	1.1 La FMV cuenta con los recursos idóneos para su desempeño administrativo y operativo, incluye recurso humano (personal con su respectivo perfil y roles definidos, equipo de oficina, infraestructura y otras herramientas indispensables)
		1.2. El Recurso humano está capacitado y en condiciones óptimas para el desarrollo de su trabajo
		1.3. Se documenta y mantiene informada a la Junta Administrativa y la Asamblea de la Fundación, y se comparte con socios estratégicos los avances y logros.
II. Sostenibilidad Económica	2. Diversificar los ingresos de la FMV que permita	2.1. La FMV es una organización financieramente autosostenible, que

Componentes	Objetivos Estratégicos	Resultados de Impacto
	su sostenibilidad financiera en el largo plazo.	cuenta con los recursos necesarios para su operación.
III. Protección y conservación de la Reserva Natural Madre Verde	3. Gestionar adecuadamente la Reserva mediante la implementación de un plan de manejo (incluye: seguimiento y evaluación).	<p>3.1. La Fundación cuenta con un plan de manejo bajo implementación, al que se le da seguimiento y evalúa periódicamente.</p> <p>3.2. Las amenazas sobre la Reserva se han reducido, tales como el ingreso de personas sin autorización, la cacería, el ingreso de animales domésticos, los Incendios forestales, y las actividades de mal uso de suelo en su zona de amortiguamiento.</p>
IV. Sensibilización y Acción Social	4. Aumentar la participación ciudadana en la protección y conservación de los recursos naturales, y para su sensibilización.	4.1 Ciudadanos involucrados en la protección y conservación de los recursos naturales y en las actividades que desarrolla la FMV.

**COMPONENTE 1: FORTALECIMIENTO ORGANIZACIONAL**

Objetivo 1: Mejorar el desempeño operativo mediante el fortalecimiento de las capacidades de la organización y su recurso humano.

Resultados de Impacto	Actividades Principales	Indicadores
1.1 La FMV cuenta con los recursos idóneos para su desempeño administrativo y operativo, incluye recurso humano (personal con su respectivo perfil y roles definidos, equipo de oficina, infraestructura y otras herramientas indispensables)	1.1.1 Realizar un diagnóstico para la identificación de necesidades de recursos (recurso humano, infraestructura, equipos, un servidor para centralizar la información, plan de incidencia, etc.)	<ul style="list-style-type: none"> <li>➤ 1 Diagnóstico realizado</li> <li>➤ Personas nuevas que se integran al equipo.</li> <li>➤ No. de personas que componen el equipo administrativo y operativo.</li> <li>➤ Equipo y herramientas tecnológicas.</li> </ul>
	1.1.2 Elaborar un plan para la atención de necesidades identificadas, implementarlo, dar seguimiento y evaluar periódicamente.	<ul style="list-style-type: none"> <li>➤ 1 plan de atención a necesidades.</li> <li>➤ Reuniones de seguimiento y evaluación.</li> <li>➤ % Avance del Plan</li> <li>➤ Herramientas desarrolladas</li> </ul>
	1.1.3. Revisar el acta constitutiva de la Fundación y hacer reglamento.	<ul style="list-style-type: none"> <li>➤ 1 reglamento</li> <li>➤ Socios que siguen el reglamento.</li> </ul>
	1.1.4. Desarrollar un manual de	<ul style="list-style-type: none"> <li>➤ 1 manual de puestos y</li> </ul>

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<b>Resultados de Impacto</b>	<b>Actividades Principales</b>	<b>Indicadores</b>
	puestos con sus respectivos perfiles.	perfiles.
	1.1.5. Actualizar plan de comunicación, implementarlo y evaluarlo (dirigido a diferentes públicos meta: población en general, ciudadanos de Palmares, colindantes de la RNMV, visitantes, etc.)	<ul style="list-style-type: none"> <li>➤ Personas alcanzadas.</li> <li>➤ # Reuniones de seguimiento y evaluación</li> </ul>
1.2. Recurso humano capacitado y en condiciones óptimas para el desarrollo de su trabajo.	1.2.1. Elaborar e implementar plan de capacitación para el equipo administrativo y operativo (en administración, formulación y gestión de proyectos, filantropía comunitaria, movilización y gestión de fondos, mecanismos de financiamiento, comunicación asertiva, etc.)	<ul style="list-style-type: none"> <li>➤ 1 plan de capacitación</li> <li>➤ Capacitaciones impartidas o recibidas</li> <li>➤ Funcionarios capacitados.</li> </ul>
1.3. Se documentan todos los procesos y se mantiene informada a la Junta Administrativa y la Asamblea de la Fundación y se comparte con socios	1.3.1. Documentar los procesos y actividades realizadas.	➤ procesos y actividades documentadas
	1.3.2. Realizar reuniones de Junta Administrativa	➤ reuniones de Junta Administrativa
	1.3.3. Elaborar informes	➤ Informes financieros.

<b>Resultados de Impacto</b>	<b>Actividades Principales</b>	<b>Indicadores</b>
estratégicos los avances y logros.	financieros mensuales	
	1.3.4. Elaborar informes anuales sobre las actividades y ejecución de presupuesto (operativos y financieros) y presentarlos ante la Asamblea.	<ul style="list-style-type: none"> <li>➤ Informes anuales operativos y financieros</li> </ul>
	1.3.5. Realizar Asamblea ordinaria de socios anualmente, y extraordinarias cuando sean convocadas.	<ul style="list-style-type: none"> <li>➤ Asambleas ordinarias</li> <li>➤ Asambleas extraordinarias.</li> <li>➤ socios que participan</li> </ul>
	1.3.6. Compartir información con socios y aliados estratégicos de la organización.	<ul style="list-style-type: none"> <li>➤ boletines informativos a los socios y aliados estratégicos (digitales)</li> </ul>

**COMPONENTE 2: SOSTENIBILIDAD ECONÓMICA**

Objetivo 2: Diversificar los ingresos de la FMV que permita su sostenibilidad financiera en el largo plazo.

<b>Resultados de Impacto</b>	<b>Actividades Principales</b>	<b>Indicadores</b>
2.1. La FMV es una organización financieramente sostenible,	2.1.1. Crear e implementar un plan de desarrollo turístico (identificación y desarrollo de	<ul style="list-style-type: none"> <li>➤ % de ejecución del Plan de Desarrollo Turístico</li> <li>➤ Productos</li> </ul>

<b>Resultados de Impacto</b>	<b>Actividades Principales</b>	<b>Indicadores</b>
que cuenta con los recursos necesarios para su operación.	productos, estrategias de comercialización, etc.).	desarrollados que se comercializan ➤ \$ Ingresos por turismo.
	2.1.2. Diversificar la cartera de clientes y servicios para aumentar las ventas de PRAMAVE-Promotora Ambiental Madre Verde (tanto empresas como organizaciones).	➤ Servicios adicionales comercializados ➤ Cantidad de clientes ➤ Ingresos x venta de servicios PRAMAVE
	2.1.3. Estructurar una estrategia de venta y diversificación de la línea de productos eco-amigables.	➤ % de aumento de ventas ➤ Cantidad de productos a comercializar ➤ \$ ingresos por venta de productos eco amigables.
	2.1.4. Desarrollar actividades para la recaudación de fondos (un rojo por madre verde, carrera de atletismo, caminata nocturna, misa de acción de gracias.	➤ Cantidad de actividades realizadas y monto recaudado ➤ Personas/empresas/or ganizaciones que participan
	2.1.5 Alquilar instalaciones, viviendas, y brindar alojamiento.	➤ Tiempo alquilado ➤ cantidad de clientes

Resultados de Impacto	Actividades Principales	Indicadores
		<ul style="list-style-type: none"> <li>adquiriendo el servicio</li> <li>➤ monto recaudado por ese concepto</li> </ul>
	<p>2.1.6. Formulación y presentación de proyectos ante donantes internacionales o nacionales.</p>	<ul style="list-style-type: none"> <li>➤ Cooperantes identificados Cantidad de proyectos presentados</li> <li>➤ Cantidad de proyectos financiados y monto recaudado</li> </ul>
	<p>2.1.7. Implementar un Plan de recaudación de fondos de donantes (personas físicas y jurídicas, Responsabilidad social y ambiental, etc.).</p>	<ul style="list-style-type: none"> <li>➤ Plan de recaudación de fondos (filantropía comunitaria)</li> <li>➤ Cantidad de donantes y monto recaudado</li> </ul>
	<p>2.1.8. Mantener al día las autorizaciones del Ministerio de Hacienda para recibir donaciones en efectivo y en especie.</p>	<ul style="list-style-type: none"> <li>➤ Inscripciones al día</li> <li>➤ Monto donaciones en efectivo recibidas.</li> <li>➤ Cantidad de donaciones en especie recibidas.</li> </ul>
	<p>2.1.9. Identificar, valorar y llevar a la práctica otras oportunidades</p>	<ul style="list-style-type: none"> <li>➤ Nuevas oportunidades</li> </ul>

Resultados de Impacto	Actividades Principales	Indicadores
	de consecución de recursos (crowdfunding, voluntariado, Amigos of Costa Rica, etc.).	<ul style="list-style-type: none"> <li>identificadas y valoradas</li> <li>➤ Mecanismos implementados</li> <li>➤ Fondos recaudados</li> </ul>
	2.1.10 Realizar talleres temáticos (campamentos creativos, etc.)	<ul style="list-style-type: none"> <li>➤ Cantidad de talleres realizados personas que participaron y monto recaudado</li> </ul>
	2.1.11. Evaluar estrategias de recaudación al menos dos veces al año.	<ul style="list-style-type: none"> <li>➤ Reuniones de seguimiento</li> <li>➤ Reuniones de evaluación</li> </ul>
	2.1.12. Mantener comunicación activa con los cooperantes, donantes individuales y corporativos, socios y aliados estratégicos, gobierno local, e instituciones (reuniones, correos electrónicos, llamadas, mensajes de texto, invitación a eventos, etc.)	<ul style="list-style-type: none"> <li>➤ Comunicaciones y reuniones con cooperantes, donantes, y aliados.</li> <li>➤ Cooperantes, donantes, y aliados alcanzados.</li> </ul>

**COMPONENTE 3: PROTECCION Y CONSERVACION DE LA RESERVA NATURAL MADRE VERDE**

Objetivo 3: Gestionar adecuadamente la Reserva mediante la implementación de un plan de manejo (incluye: seguimiento y evaluación).

Resultados de Impacto	Actividades Principales	Indicadores
3.1. La FMV cuenta con un plan de manejo actualizado en un solo documento, bajo implementación y con su respectivo seguimiento y evaluación	<p>3.1.1. Actualizar el plan de manejo.</p> <ul style="list-style-type: none"> <li>● Contratar consultor o coordinar una pasantía a través de alguna universidad.</li> <li>● Sesiones actualización del plan</li> </ul>	<ul style="list-style-type: none"> <li>➤ Plan de manejo actualizado en un solo documento.</li> </ul>
3.2. Las amenazas sobre la Reserva se han reducido.	<p>3.2.1. Implementar el plan de manejo actualizado. Esto incluye:</p> <ul style="list-style-type: none"> <li>● actividades para el mejoramiento de la infraestructura, senderos y voluntariado, además de los servicios que ofrece)</li> </ul>	<ul style="list-style-type: none"> <li>➤ % de ejecución de las actividades del Plan</li> <li>➤ Voluntarios apoyando</li> <li>➤ Brigada contra incendios</li> <li>➤ COVIRENA</li> <li>➤ nueva infraestructura o mejorada</li> <li>➤ nuevos servicios para el visitante</li> </ul>
	<p>3.2.1. Seguimiento y evaluación del plan de manejo. Incluye:</p> <ul style="list-style-type: none"> <li>● Reuniones de coordinación y seguimiento al menos cada 3 meses.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Cantidad de reuniones de coordinación y seguimiento</li> <li>➤ Sesiones de evaluación</li> </ul>

	<ul style="list-style-type: none"> <li>● Talleres (sesiones) de evaluación del plan una vez al año</li> </ul>	<p>realizados</p> <p>➤ cantidad de personas que participan</p>
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**COMPONENTE 4: SENSIBILIZACIÓN Y ACCIÓN SOCIAL**

Objetivo 4: Aumentar la participación ciudadana en la protección y conservación de los recursos naturales para su sensibilización.

Resultados de Impacto	Actividades Principales	Indicadores
4.1 Ciudadanos involucrados en la protección y conservación de los recursos naturales y en las actividades que desarrolla la FMV.	<p>4.1.1. Crear e implementar un programa de educación ambiental integral.</p> <ul style="list-style-type: none"> <li>● Coordinar apoyo a través de pasantías o consultoría</li> <li>● Talleres (sesiones) elaboración de PEAI</li> <li>● Reuniones de coordinación con instituciones como el MEP</li> <li>● Actividades y eventos con escuelas y colegios</li> <li>● Actividades y eventos con y en comunidades</li> <li>● Reuniones de seguimiento y monitoreo del PEAI</li> <li>● Sesiones de evaluación del</li> </ul>	<p>➤ Cantidad de reuniones, talleres, charlas y sesiones de trabajo,</p> <p>➤ Cantidad de personas participando</p> <p>➤ Sesiones de seguimiento y evaluación del PEAI realizadas.</p>

Resultados de Impacto	Actividades Principales	Indicadores
	PEAI al menos una al año	
	<p>4.1.2. Implementar campañas de sensibilización, incluyen:</p> <ul style="list-style-type: none"> <li>● limpieza de ríos,</li> <li>● información casa a casa acerca de la vida silvestre,</li> <li>● limpieza de calles,</li> <li>● campañas de reforestación,</li> <li>● recolección de residuos no valorizables</li> </ul>	<ul style="list-style-type: none"> <li>➤ Cantidad de Campañas de sensibilización</li> <li>➤ Cantidad de personas participando en los eventos</li> <li>➤ Area reforestada (hectáreas)</li> <li>➤ Arboles plantados</li> <li>➤ Volumen de residuos recolectados</li> </ul>

## IX. REQUERIMIENTO PRESUPUESTARIO Y FUENTES DE FINANCIAMIENTO

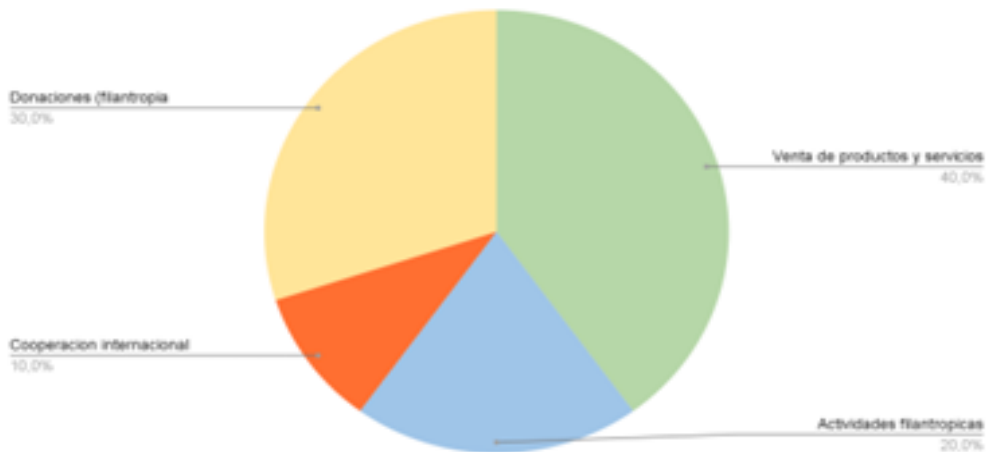
**El presupuesto** necesario anual para el desarrollo de las actividades operativas y administrativas, incluyendo el recurso humano actual y proyectado, se estima cercano a los \$55.000 (cincuenta y cinco mil dólares).

Durante el año 2021, los ingresos de la Fundación, en un 50% vinieron de la cooperación internacional, ya que durante el 2020 y 2021 (años de pandemia) los ingresos por actividades filantrópicas y la venta de servicios turísticos (entradas a la Reserva, alquiler de instalaciones, y campamentos) se vieron reducidos a 0 (cero) por las restricciones sanitarias. En el caso hipotético de que los ingresos provenientes de este tipo de actividades se hubieran dado en el 2021, el escenario de las fuentes de financiamiento hubiese sido distinto, del 100% de los

ingresos un 21% hubiera venido de la “venta de productos y servicios”, un 15% de “actividades filantrópicas”, un 42% de “donaciones a través de la filantropía comunitaria”, y sólo un 22% se hubiera requerido de fondos de la “cooperación internacional”. Aun en este escenario hipotético, la dependencia de los fondos de cooperación seguiría siendo riesgosa, ya que lo ideal es que las fuentes de fondos irrestrictos (aquellos donde la Fundación determina la mejor manera de invertirlo en la comunidad o para el fortalecimiento de la organización) tengan el mayor peso dentro de su presupuesto.

¿Cuál sería un escenario conveniente para la Fundación Madre Verde? Uno que le permita a la organización ser sostenible en el largo plazo, que podría ser el siguiente, donde los fondos restringidos (cooperación internacional) solo tengan una porción del 10%. Esto no quiere decir que definitivamente la organización tenga que prescindir de este tipo de fondos, sino que su presencia o no, no influya negativamente en la permanencia de la organización :

Escenario 1: Distribución de Ingresos según Fuente



## X. PLAN DE EVALUACIÓN

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Contar con un plan de evaluación de la implementación de un plan estratégico es tan importante como la definición de los componentes del mismo. Esta se realiza utilizando los indicadores de impacto intermedios y finales, ya establecidos que medirán los objetivos y resultados alcanzados.

El seguimiento o monitoreo debe efectuarse de forma continua a lo largo de la implementación del Plan y va a permitir "controlar" y "medir" en tiempo real la evolución y el desarrollo de las estrategias; pudiendo corregir y subsanar posibles carencias en su implementación, aprobando nuevas metas a partir de los resultados obtenidos (cambiar de rumbo de ser necesario).

La evaluación es el proceso que permite medir los resultados, y ver cómo estos van cumpliendo los objetivos específicos y líneas de actuación planteados. La evaluación permite hacer un "corte" en un cierto tiempo y comparar el objetivo planteado con la realidad.

Lo recomendable es que el seguimiento y monitoreo se realice mensualmente, las revisiones cada 6 meses y las evaluaciones cada año.

	MES											
AÑO I	1	2	3	4	5	6	7	8	9	10	11	12
Seguimiento/monitoreo	x	x	x	x	x	x	x	x	x	x	x	x
Revisiones												x
Evaluación Intermedia												
AÑO II	1	2	3	4	5	6	7	8	9	10	11	12
Seguimiento/monitoreo	x	x	x	x	x	x	x	x	x	x	x	x
Revisiones						x						x
Evaluación Intermedia						x						

## 4.2.2 Translation Version

### Introduction

The Madre Verde Foundation (FMV) is a nongovernmental, non-profit organization, legally constituted with legal identification number 3-006261053 on January 3, 2000. It is represented by the General Assembly, which is made up of 116 colleagues sponsors. It is committed, since its creation, to the conservation and protection of the environment focused mainly on the hydric resource, with the Madre Verde Natural Reserve as motivation, a 31-hectare patch of forest in the southeastern sector of the Montes del Aguacate, an important site for the conservation of the hydric resource of the canton of Palmares. However, it is also an organization that participates in other spaces at the regional and national level, where it is considered that it can provide a contribution, as is the case of the Local Committee of the Montes del Aguacate Biological Corridor and the Network of Private Reserves in Costa Rica. Since 2004, the FMV has been concerned with the need of ~~having~~ a strategic action plan (PE) that defines its short, medium, and long-term objectives and marks the route to achieve the results and purposes of the organization. Likewise, at the end of each period, it ~~has~~ carries out a participatory evaluation exercise to define the baseline for the construction of the next PE. This document is the result of the participatory evaluation process of the PE 2019-2021 and the construction of the plan for the period 2022- 2025.

### II. Fundation Madre Verde

#### OUR HISTORY

The Madre Verde Foundation born as an idea in 1990, when at a General Assembly meeting of the Palmares farm Comprehensive Development Association, a group of people expressed their concern about the district's hydric resource and its possible future shortage; the actions

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for their protection must be immediate. This is how the Development Association created the commission in charge of the design and development of a resource conservation project, with the purpose of designing the proposal to purchase the land owned by FEYBA of Palmares S.A, due to their high hydric potential, scenic beauty, and a deep-rooted feeling of belonging on the part of the neighbors. These lands were dedicated to the production of coffee and livestock, with small pockets of forest and plots of land covered with underbrush.

This commission began the search for funds for the acquisition of the property, with before the national and local government, institutions, international donors, and the private sector. The price of the property amounted to \$24.000.000 (twenty-four million colones), for which the owner was offered a down payment of \$200.000 colones. This amount was raised from the neighbors of the community; however, as it was not possible to collect the remaining funds, the commission disintegrated and gave up the purchase idea (1991-1993). This represented the first attempt to acquire the property.

It was not until 1998 that, faced with the threat of the interest from the IDA (Institute of Agrarian Development) to parcel out and grant these lands to farmers, a group of people from the area organized themselves to purchase the property, now for conservation purposes already for concentration purchase. This initiative was strengthened when the IDA gave up the idea of parceling because studies carried out by its team of engineers, revealed that 85% of the land was suitable for forestry and only 15% could be used for agriculture. This decision triggered a series of protests by the landowners, which led, among other things, to the burning of the property (Campos, 2013). It is at the time that Engineer Carlos Suarez Badilla recommended establishing a foundation, since he considered it to be the type of legal figure with the greatest credibility in the eyes of international donors. This is how the Madre Verde Foundation was born on January 3, 2000, a non-governmental, non-profit organization. It was

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created for scientific purposes and research for conservation and sustainable development, culture, and education.

One of the first activities that gave life to the foundation was the campaign to obtain the funds to purchase the property where the Madre Verde Natural Reserve is located today. This ~~Which~~ represented a challenge, since its owners had increased the price to \$100,000,000 (one hundred million colones). Since no donor was found willing to invest that amount, advised by Mr. Emel Rodriguez, at that time Coordinator of the Mesoamerican Biological Corridor Project, they carried out an exchange with the Monte Alto foundation to learn about the acquisition process of the Monte Alto Natural Reserve. With this input, they decided to undertake a campaign similar to that of Monte Alto, which consisted of raising funds through certificates offered to the Palmareña population, which in turn would made them into allies of this environmental effort. The first contact was the Palmareña Civic Association (ACP) and other institutions such as COOPAVEGA and COOPEPALMARES. The ACP not only contributed money, but it also negotiated a price reduction with the owner; Therefore, the amount was reduced by half (\$50,000,000) and also that this sum was not paid in cash, but it could be paid over three years.

To achieve this objective, the ACP contributed a total of \$30,000,000 (thirty million colones) to be paid in 3 years in installments of then million (\$10,000,000) plus interest on the balances; COOPEPALMARES R.L contributed three million colones (3,000,000), which were used for the down payment, and COOPEPALMARES R.L with one million colones (\$1,000,000). More than 500 Palmareños committed to the cause donated for this purpose, thus achieving the goal and in less time (Campos, 2013).

At the time of its constitution, the foundation was made up of 28 founding members and, in accordance with the statutes, in each General Assembly, new members can join up to a

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maximum of 10 sponsoring members per year (these are collaborators and friends of the foundation who wish to continue working for the environment). There are currently a total of 116 sponsoring members, of which 43 are women, 70 are men, 2 Cooperatives, and 1 community association. In addition, there are nearly 50 active volunteers and 30 donor companies.

### ORGANIZATION CHART

The FMV operates under the legal figure of a Foundation. According to Law 5338, foundations are private entities of public utility, which are established on a non-profit basis and with the aim of carrying out or helping to carry out, through the use of assets, educational, charitable, artistic or literary, scientific, and, in general, all those activities that mean social well-being. These do not have commercial purposes. However, they may carry out operations of this nature to increase their assets, but the income they obtain must be used exclusively to achieve their own objectives. The administration and management of the foundations will be in charge of a Board of Trustees.

However, the FMV has decided to have a democratic and participatory governance structure, whose highest body is the General Assembly, which meets once a year, and it is coordinated by a Board of Directors composed of a president and four directors, three of whom are elected by the assembly and the other two are special appointments: one by the Municipalidad de Palmares and the other by the Executive Branch. It also has an administrative structure made up of an Executive Delegate, an Administrative Assistant, both on the payroll and earning a salary, and a person in charge of the maintenance of ~~the~~ Reserve. The commissions are made up, on a voluntary basis, of members, friends and members of Palmares community. Their operational structure for the period 2022-2025 will be as follows:

(Image pag 5)

### III. DESCRIPTION OF THE ENVIROMENT

The immediate area of action of the Madre Verde Foundation is represented by the Madre Verde Natural Reserve, the canton of Palmares, extending to the Biological Corridor sector Montes del Aguacate-CBMA, the latter includes the cantons of San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Provice of Alajuela); and the cantons of Esparza and Montes de Oro-Provice of Puntarenas-(IGN, 2009).

#### MADRE VERDE NATURAL RESERVE

The Madre Verde Reserve is geographically located in the highlands of the Granja de Palmares district, specifically 1 km to the west and 500 m south of the Ermida Blanco School, in the canton of Palmares, province of Alajuela. Over the years, this patch of forest has been repopulated by reforestation and natural regeneration.

The map of the Reserve, made in 2020, showed that it covers an area of 31 hectares, and not 40 hectares as previously thought. In the SWOT analysis, some threats that persist were identified, such as the invasion of the limits of the reserve; therefore, the importance of a Cadastral plan.

The Reserve represents a valuable resource for environment education, recreation, and activities that allow FMV to generate income for its activities. It is an important site for the protection of water resources, 3 of its tributaries have been declared. It has a Management Plan, in addition to other studies of the flora and fauna.

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It has several attractions that are available to visitors for recreation and environmental education, including:

- Trails of different levels of difficulty with approximately 3 kilometers in total, where you can enjoy fresh air and great diversity of plants and animals.
- An area recovered by natural regeneration and reforestation.
- Spaces for recreation, with facilities to enjoy the pure air, peace, and tranquility that the place offers.
- A Pollinator Garden and two viewpoints.
- Facilities where a former dairy operated.
- A lodge

In addition, the site has been provided with sufficient facilities for carrying out tourist activities, volunteering, environmental education, and FMV operations, it has:

- An Environmental Education Center with an area of 100m<sup>2</sup>, conditioned for workshops, training, environmental talks, among others.
  - Health services
  - Office where the Foundation's administration is located, and a multifunctional house at the entrance.
    - A dining room and a kitchen with capacity for 150 people.
    - A little green house, which houses the family who helps with security.
    - Parking area for vehicles.
    - Parking area for 4x4 vehicles.
    - Electricity, drinking water and internet in the entrance area (within the reserve as such, there is no stable internet signal)

(image pag 8)

### Canton of Palmares

Palmares is the seventh canton of the province of Alajuela. It is located in the western part of the Central Valley, in the Pacific Intertropical Zone. Being a Transition area, it is affected by the humid and warm trade winds, which give it an average temperature of 25.6 °C. The dry season, between November and April, is warmer and less rainy than the months of August to October. The canton was born as a result of the migration of farmers from surrounding areas and its name arose due to the large amount of royal palm that existed in the area before this

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area was populated. Its current population (2022) is 41, 805 inhabitants according to data from INEC-National Institute of Statistics and Censuses.

It limits to the north and west with San Ramón, to the south with Atenas, and to the east with the canton of Naranjo. It has an area of 38.93 Km<sup>2</sup>, and 7 districts organized politically as follows: Palmares (1.19km<sup>2</sup>), Zaragoza (8.43Km<sup>2</sup>), Buenos Aires (6.84Km<sup>2</sup>), Santiago (7.96Km<sup>2</sup>), Candelaria (4.72Km<sup>2</sup>), Esquipulas (5.40Km<sup>2</sup>), and La Granja (4.39 Km<sup>2</sup>).

The cultivation of coffee and tobacco were, from the beginning, an important base in the development of the canton, in addition to other activities such as the manufacture of wood furniture, the cultivation of ornamental plants for export, the textile industry, and the production of other grains (corn, black beans) and fruits (tomato, sweet pepper), which are also part of its economy. Most of the commerce is concentrated in the central district, with a large percentage dedicated to the sales of groceries, food, shoes, clothing, jewelry and accessories in general. In the rest of the districts the rise of this type of commerce is smaller, although over time we have seen the emergence of restaurants, bars, small businesses, and entertainment centers in different places, which attract different types of visitors. In January of each year, one of the most recognized civic festivals in the country is celebrated in this canton, a tradition that dates back to the beginning of the last century (1900), and which attracts national and international visitors year after year.

Palmares has all the communication services, cellular and landline telephone networks, as well as broadband internet and fiber optics, provided by national coverage companies such as ICE, Kolbi; CableTica, Tigo, and SKY. In terms of public transportation, the central district has bus connections to all the districts of the canton, as well as to San Ramón, Naranjo and San José, using the Bernardo Soto highway, which is part of the North Inter-American

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Highway. Palmares is 36 Km from Juan Santamaría International Airport in Alajuela (approximately 30 to 45 minutes of road travel).

The Human Development Index published in the [Cantonal Atlas of Human Development 2021](#), places it in position number 32 out of 82 cantons, with an index of 0.813 in 2019, without variation compared to 2018, below Orotina, Alajuela, San Ramón, Greece and Athens at the provincial level (see table). Applying the Gender Inequality Index, it occupies position 33 with an Index of 0.178. Despite the Previous data, the 2020 cantonal Multidimensional Poverty Index places it sixth at the national level and number one at the provincial level, with an index of 0,026.

(Image)

As important data, Palmares has a Cantonal Human Development Plan for the period 2016-2026; although, there is still no Regulatory Plan in accordance with the needs of the canton, this is something that has been postponed.

### **MONTES DEL AVOCATE BIOLOGICAL CORRIDOR**

The Madre Verde Natural Reserve is located within the Montes del Aguacate Biological Corridor, which has led the FMV's work to protect and conserve natural resources to extend to the geographical area of the Corridor, actively participating in its Local Council and other events within the framework of the Corridor, such as fire management, working with community fire departments.

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It was created on May 30, 2006 by Executive Decree No.33106-MINAE (Ministry of Environment), with the objective of “increasing connectivity among the protected areas of the CBMA, with the participation of all stakeholders in the management of the territory.”

(Image)

It covers the cantons of San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Province of Alajuela); and the cantons of Esparza and Montes de Oro-Province of Puntarenas. Geographically, it is located west of the Central Valley, includes the mountain ranges of Montes del Aguacate and Extends from the southern limit of the Alberto Manuel Brenes Biological Reserve, crossing Cerro Azahar (1,598 meters above sea level), continuing towards the southeast passing through the sector known as Cambronero, it continues through Cerro la Tinajita (Lana) with 1234 meters above sea level. Extending towards Cerro Pata de Gallo (berlin) at 1,541 meters above sea level. Then continuing towards El Alto de la Cruz hill (1443 meters above sea level), Cerro Lorito (1,418 meters above sea level), Cerro Mondongo, Cerro Pelón (882 meters above sea level), Cerro Chompipe (663 meters above sea level), Cerro San Pablo; and ends at the administrative limits of the Canton of Athens. Connectivity with the Carara National Park occurs through the foothills of Cerros Turrubares, Cerro Las Palmas (1, 215 meters above sea level), located in the Paso de Las Biological Corridor in ACOPAC (ACCVC 2013).

**Water potential.** Within the CBMA, there are a number of springs that give rise to important rivers, such as La Paz River, San Lorenzo, Barranquilla, Rio Grande de San Ramón, Jesús María, among others, which are part of the hydrographic basins of the River Grande de Tárcoles, Barranca, Jesús María, San Carlos. Likewise, there is a series of springs, whose waters are captured for the supply of drinking water from aqueducts of neighboring

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communities, such as: Asada de Ricón de Zaeagoza, Candelaria, Francisco and La Guaria, Piedades Sur, San Isidro, Atenas, Morazán, Asada Piedades Sur and others.

According to the internal and external situational analysis of the FMV, there is an opportunity to work together through a strategic alliance, which in turn creates the opportunity to manage cooperation funds taking into account the strengths of both organizations and those that make up it (CBMA and FMV). The FMV sees the CBMA as a relevant partner for achieving its objectives; hence, the importance of strengthening this relationship by consciously establishing common objectives.

## IV. MAP OF ACTORS

The key stakeholders of an organization are usually those who can positively or negatively influence an intervention or who are recognized as important for a situation or change to happen. For this exercise, the “ladder of commitment” model was used, given that the FMV seeks to have a network of committed “friends” who trust and believe in the work carried out by the organization and its importance.

The organizations are open social systems that interact with the environment that surrounds them; many base their sustainability and financial strategies on the establishment of alliances at the local, national or international level, using means such as community and corporate philanthropy. However, for this to be possible, trust must be created to maintain long-term collaborative relationships with the allies (partners) that are joining.

The Ladder of Commitment requires this analysis, it divides the actors into two levels, at the “**lower**” level (first steps) are those occasional actors, the relationships is more of power and control, formal, merely operational (they acquire or benefit from the products or services

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offered by the organization), the relationship is generally short-term and for a limited time, they can be considered clients, buyers, or eventual clients.

At the “**higher**” level are the allies who trust and defend the Foundation, are committed to its mission, **it** is a long-term, informal relationship between friends, and for this reason they invest in it, they qualify as partners, defenders, or followers of the FMV.

### **FMV commitment Ladder:**

Upper level:

- COVIRENA
- Private-local Company Donors
- Volunteer Forest Fire Brigade
- ASADA Santiago
- Palmares Experimental Bilingual High School
- Network of Public and Private Reserves of the Montes del Aguacente

Biological Corridor

- Universities: Universidad de Costa Rica (Occidente), UMCA-Universidad Castro Carazo, UTUR-Universidad del Turismo, UTN-Universidad Técnica Nacional, ULATINA-Universidad Latina, UNA-Universidad Nacional

- Coopavegra
- Ministerio de Ambiente/Sistema Nacional de Áreas de Conservación

(SINAC)

- SINAC/Area de Conservacion Central, sede San Ramon
- Comité de Corredores Biológicos
- Fundación Internacional para el Árbol
- Ministerio de Educación Pública
- Programa Bandera Azul (BAE) Programa de Pequeñas Donaciones del

PNUD (PPD)

- CoopePalmares-Cooperativa de Caficultores y Servicios Múltiples de Palmares

- INLEX Voluntariado- Integrated Learning Experiences
- Asociación Cívica Palmareña
- Cámara de Comercio de Palmares

Lower level

- COFUTPA
- UCR-Conservatorio de Música de la UCR
- UNED-Universidad Estatal a Distancia Sede Palmares
- Cruz Roja Costarricense

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- Ministry of Public Security
- Costan Rican Institute of Electricity – ICE
- AYA- Institute of Aqueducts and Sewers
- Nalakalu Furniture Store
- Ecological Pastoral
- ASADA Rincon
- ICT-Costa Rican Intitute of Tourism
- INA- National Learning Intitute
- Comprehensive Farm Development Association
- Municipality of Palmares
- Girl Scouts of Costa Rica

## V. EVALUATION OF THE SCOPE OF THE PREVIOUS STRATEGIC PLAN (2019-2022)

Summary of the results of the participatory evaluation exercise, carried out during the month of February.

2022 in the Madre Verde Natural Reserve, in relation to the scope of the PE-2019-2021:

<b>Objectives</b>	<b>Achievements</b>
1. Properly manage the Madre Verde Natural Reserve by strengthening its Volunteer Program and the management of the Reserve.	<ul style="list-style-type: none"><li>• A Volunteer Program developed and implemented. This document has made it possible to carry out in a more organized and systematized way the volunteers received by the Foundation and to direct this resource to the needs of the organization.</li><li>• An updated and registered map of the Madre Verde Natural Reserve. The updated plan made it clear that the current real area of the Reserve is 31 hectares and not 40 hectares as initially assumed.</li><li>• A Management Plan and Regulations for the Use of the Reserve in force and in application.</li><li>• Continuous improvement of the Reserve in infrastructure, services (water, electricity, internet), trails, bridges, warehouse, and signs. Likewise, investment has been made in a Pollinator Garden.</li></ul>

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	<ul style="list-style-type: none"> <li>• Research carried out, but there is no centralized and accessible database or repository of information. It is also necessary to identify research needs.</li> </ul>
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<p>2. Achieve the operational and financial sustainability of the FMV, by strengthening the instruments and tools used to date.</p>	<ul style="list-style-type: none"> <li>• A tourist development plan for the Reserve is in process.</li> <li>• Operation permit from the Ministry of Health.</li> <li>• Tourism Declaration of the Costa Rican Tourism Institute</li> <li>• Tourism training. Although the FMV team has received training on this topic, it has been sporadic. It is required that it be assumed in a planned and directed manner in accordance with the needs of the tourist services to be offered by the Foundation. Pending to establish contact and request collaboration with the Ecological Tourism Career of the University of Costa Rica-Greece Campus.</li> <li>• Presentation of projects to different international donors such as the Small Donations Program-PPD, International Tree Foundation FIA, the Inter-American Foundation-IAF, and the Embassy of Japan. Of these, at least three have been approved with the FIA and the PPD.</li> </ul>
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	<ul style="list-style-type: none"> <li>• Sale of products and services. It has prioritized the supply of services offered through PRAMAVE, increasing its client base and the services and support it offers to companies and organizations.</li> <li>• Increase in the Foundation's income through the generation of its own financial resources, such as philanthropic activities, sale of services and products; as well as its income from community philanthropy, strengthening y its</li> </ul>
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	<p>relationship with donors through assertive communication and accountability. Although, there is no Fundraising Plan the FMV has made progress in some actions such as identifying and visiting new donors and opening a PayPal account to facilitate the collection of donations. He has also carried out an analysis of the philanthropic activities that generate the greatest returns and discarded those that do not.</p> <ul style="list-style-type: none"> <li>• Registration in the RIARD-Registry of institutions Suitable to Receive Donations, this has allowed it to receive some donations of equipment from State institutions such as SINAC.</li> </ul>
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<ul style="list-style-type: none"> <li>• 3. Position the FMV in the community's work, creating a Communication Program and strengthening its presence in different decision-making spaces.</li> </ul>	<ul style="list-style-type: none"> <li>• Communication plan developed and under implementation. The FMV has a new image and has strengthened its presence on social networks such as Facebook and Instagram, and business WhatsApp. It has developed institutional and Reserve videos that have been disseminated through local and national networks and media.</li> <li>• An office within the Reserve. Although, it was planned in the EP to have an office in Palmares, which was established in the first year; however, it was not possible to maintain it <del>id</del> due to the pandemic. It was decided to install it within the Reserve, best equipped and positioned as its center of operations.</li> <li>• An agreement with the National System of Conservation Areas- SINAC is in process.</li> <li>• Active participation in the Local Council of the Montes del Aguacate Biological Corridor and the Network of Biological Corridors.</li> </ul>
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<p>4. Promote citizen participation in environmental management and adaptation to climate change, creating a Comprehensive Environmental Educational Program and improving coordination with different institutions and organizations on the subject.</p>	<ul style="list-style-type: none"> <li>• There is a Comprehensive Environmental Education Program; although, its implementation was limited due to the pandemic and the restrictions established for group and mass in-person activities. Likewise, it is still required to have a policy from the National Insurance Institute. However, virtuality was seen to reach and expand the target population, such as Facebook Live.</li> <li>• Participation in the Cantonal Environment Commission convened by the Municipality of Palmares.</li> <li>• Coordination with the ASADA of Santiago and carrying out joint activities.</li> <li>• Joint work with universities such as the University of Costa Rica, University of Tourism, National Technical University, Castro Carazo University, Latin University. This has allowed us to have the support of students to carry out different research and practices for the development of tools planned for the Foundation.</li> </ul>
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## VI. ELEMENTS OF THE STRATEGIC PLAN

The PE constitutes the navigation chart of an organization, it is the guide that will allow it to achieve its objectives framed in its mission and vision; the latter representing its reason for being and where it is going or wants to go in the long term. To establish a clear, effective, and efficient strategy, the organization must know its current situation (strengths and weaknesses) and the environment in which it develops and operates (opportunities and threats); and with all these elements, design the strategies and actions that tell how to achieve the objectives.

The following are the mission, vision, and values of the FMV:

<b>Mission</b>	We are a socio-environmental organization that promotes and offers spaces for
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	knowledge and happiness within the framework of sustainability.
<b>Vision</b>	To be a leading and self-sustaining socio-environmental organization that contributes to the comprehensive development of the community.
<b>Driving values</b>	<ul style="list-style-type: none"><li>• <b>Honesty:</b> We honor and defend the assets of the Foundation and we are transparent in our actions.</li><li>• <b>Commitment:</b> We give our best to achieve the organization's objectives.</li><li>• <b>Respect:</b> We treat all forms of life with consideration.</li></ul>

## VII. ANALYSIS OF THE ORGANIZATIONAL SITUATION AND ITS ENVIRONMENTAL

The situational and contextual analysis attempts to ascertain the position of the organization with respect to its environment and stakeholders (opportunities and threats), as well as evaluate its own resources and capabilities (strengths and weaknesses). All people analyze their context, receive signals from their environment, and make their own interpretation. The conclusions will serve as a basis for the definition and formulation of the organization's PE strategies.

For this analysis, the information generated from the 2019-2021 evaluation exercise was taken as a basis.

### INTERNAL:

The correct diagnosis of the ills that afflict the organization depends largely on evaluating the available resources. Thus, it is determined whether the appropriate strategic decisions (whether the right things are being done) and whether these decisions have been implemented

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efficiently (whether it is being done correctly). The Internal evaluation is focused on finding strategies to capitalize on the strengths and neutralize limitations.

The FMV, through the years, has remained a stable organization, basing its greatest strength in its human resources; however, this quality has also become its “Achilles heel,” since it is insufficient for the development of the actions required to achieve its goals. The following are the Strengths and Weaknesses identified:

### **Strengths:**

- There is good communication between the Administrative Board and the work team.
- There is a high commitment and capacity of the administrative and work team of the organization, as well as its Administrative Board and complementary team.
- Capacity of the organization and its team for innovation, development, and project management.
- Good distribution of functions through the Working Committees.
- The high commitment of some of the associates with the organization and with strategic planning.
- There is openness for generational change (existence), it facilitates and takes into account the participation of youth and promotes their leadership.
- Ability to attract volunteers.
- Openness to new alliances for joint and coordinated work and to seek the organization's sustainability.
- Credibility with cooperation organizations and donors. The FMV has a good image that gives it credibility, reputation, and positioning, and it is a point of reference.

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- Transparency in the management of information and resources. The FMV has standardized, orderly, and documented (systematized) processes.
- There is a strengthened administrative structure. The FMV has invested in improvements to have an office, with the necessary equipment, and services such as internet.
- FMV is the first organization that offers tourist services in Palmares. It has improved and invested in infrastructure within the Reserve.
- RNMV is rich in biological diversity. It has been documented through some studies carried out by university students.

### **Weaknesses:**

- The organization is not yet financially sustainable, it continues to depend on the philanthropic activities it carries out, international cooperation, and community and corporate philanthropy.
- Work team with saturation of functions (Administrator). This is because their human resources are insufficient, such as having a Community Manager.
- There is no job manual, there are no profiles for each position.
- There is no tourism plan, nor a plan to influence the public policies that affect or require it.
- There is no fundraising strategy that would allow the FMV to develop planned activities and efforts to raise the resources it requires for its operation.
- Gaps in the articles of incorporation/there are no regulations /amount of inactive members that cannot be removed.
- Lack of business vision.
- There is no server to centralize the information.

## EXTERNAL

Organizations function as open systems, which implies that they are in permanent contact with their surroundings; this is an important variable that inevitably influences the functioning of the organization; thereby, conditioning the achievement of its objectives.

Identify the opportunities that the organization can take advantage of to meet its objectives and the threats that may hinder its performance guides in the definition strategies.

The Foundation has not remained geographically static, given its experience and good performance, it has been recognized as a leading organization in environmental matters in the region, which is why it has expanded its range of action, increasing not only the opportunities offered by the environment, but also the threats to which it must pay attention in order not to be negatively impacted.

The following are the opportunities and threats analyzed:

### **Opportunities:**

- Positioning of the country in tourism. Costa Rica was recognized as a “Leading Destination” for tourism in the Mexico and Central America regional category during the “World Travel Awards 2021” gala. In addition, the National Geographic selected the country among the 25 most incredible trips in the world for 2022.
- Tourism Sustainability Declaration-CST (protected spaces category). The fundamental purpose of the CST is to turn the concept of sustainability into something real, practical, and necessary in the context of the country's tourism competitiveness, with a view to improving the way in which natural and social resources are used.
- Tourism Network of the CBMA-Montes del Aguacate Biological Corridor. The FMV is part of the CBMA's Private Reserve Network initiative.

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- Potential demand for tourism services and the recognition of mountain tourism as safe tourism (worldwide), as well as the possibility of linking tourism with local culture.
- The strategic lines of some cooperating partners are similar to those of the FMV.
- Public and private universities are willing and interested in establishing alliances with FMV. Not only universities, but other actors that could be potential allies of FMV.
- DINADECO funds through the ADI Comprehensive Development Associations, reform of law 3859/article 18-19, declaration as public utility organizations. The reform mentions that: “ADIs may be declared of public utility when the income they generate is reinvested in its entirety in projects of social, communal and State interest...”
- Recognition of Costa Rica, as one of the countries in the world that best managed the pandemic.
- OMEC Declaration - Other Effective Conservation Measures.
- Ecological Blue Flag Certification. For several consecutive years, the RNMV has maintained the BAE certification.
- There are potential clients, at the regional and national level, for the services offered by PRAMAVE-Promotora Ambiental Madre Verde. Along these same lines, take advantage of the social and environmental responsibility scheme of the companies.
- A change in the Government of the Republic is identified as both an opportunity and a threat; its positive or negative impact will depend on the public policies that it promotes.

### **Threats:**

- At the level of the RNMV, there are threats such as illegal entry of people, pressure on its natural resources (hunters), domestic animals that enter the Reserve (dogs) and impact

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biodiversity, forest fires (which are increasing), the poor use of land in its buffer zone, and the invasion of its limits (theft of land).

- The uninformed population. People are often uninformed and unaware of the work and importance of the Foundation's work, which results in little support and a lack of interest in the Reserve.
- An Environmental Management department in the Municipality of Palmares that does not exercise its role, and rather hinders the work of the FMV.
- At the country level, the change in government of the Republic, will probably trigger a change in public policies. Moreover, the latent corruption of public officials cannot be ignored.
- The COVID-19 pandemic that has lasted for more than 2 years and a rising cost of living.
- Outside the borders of Costa Rica, events such as the War in Ukraine, which primarily impacts the economy, and climate change at a global level, which is increasingly latent.

## VIII. COMPONENTS, STRATEGIC OBJECTIVES AND RESULTS 2022-2025

The FMV has defined four components: Organizational strengthening, economic sustainability, protection and conservation of the Madre Verde Natural Reserve, and awareness and social action, for each of these at least one strategic objective and impact results have been established:

<b>Components</b>	<b>Strategic Objectives</b>	<b>Impact Results</b>
I. Organizational Strengthening	1. Improve operational performance by strengthening the	1.1 The FMV has the appropriate resources for its administrative and

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	capabilities of the organization and its human resources.	operational performance, including human resources (personnel with their respective profile and defined roles, office equipment, infrastructure, and other essential tools) 1.2. The human resources are trained and in optimal conditions to carry out their work. 1.3. The Administrative Board and Assembly of the Foundation are documented and kept informed, and progress and achievements are shared with strategic partners.
II. Economic Sustainability	2. Diversify the income of the FMV that allows its financial sustainability in the long term.	2.1. The FMV is a financially self-sustainable organization, which has the necessary resources for its operation.
II. Protection and conservation of the Madre Verde Natural Reserve	3. Adequately manage the Reserve through the implementation of a management plan (that includes: monitoring and evaluation).	3.1. The Foundation has a management plan under implementation, which is monitored and evaluated periodically.  3.2. Threats to the Reserve have been reduced, such as the entry of people without authorization, hunting, the entry of domestic animals, forest fires, and activities such as poor land use in its buffer zone.
IV. Awareness and Social Action	4. Increase citizen participation in the protection and conservation of natural resources, and to raise awareness	4.1 Citizens are involved in the protection and conservation of natural resources and in the activities carried out by the FMV.

## COMPONENT 1: ORGANIZATIONAL STRENGTHENING

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Objective 1: Improve operational performance by strengthening the capabilities of the organization and its human resources.

Impact Results	Main activities	Indicators
<p>1.1 The FMV has the appropriate resources for its administrative and operational performance, including human resources (personnel with their respective profile and defined roles, office equipment, infrastructure, and other essential tools)</p>	<p>1.1.1 Carry out a diagnosis to identify resource needs (human resources, infrastructure, equipment, a server to centralize information, incident plan, etc.)</p> <p>1.1.2 Develop a plan to address identified needs, implement it, follow up, and evaluate periodically.</p> <p>1.1.3. Review the articles of incorporation of the Foundation and make regulations.</p> <p>1.1.4. Develop a job manual with their respective profiles.</p> <p>1.1.5. Update communication plan, implement and evaluate it (aimed at different target audiences: general population, citizens of Palmares, residents of the RNMV, visitors, etc.)</p>	<ul style="list-style-type: none"> <li>➤ 1 Diagnosis performed</li> <li>➤ New people joining the team.</li> <li>➤ No. of people that make up the administrative and operational team.</li> <li>➤ Technological equipment and tools</li> <li>➤ One plan of attention to needs.</li> <li>➤ Follow up and evaluation.</li> <li>➤ % Progress of the Plan</li> <li>➤ Tools developed</li> <li>➤ One regulation</li> <li>➤ Members who follow the regulations.</li> <li>➤ ➤ One manual of positions and profiles.</li> <li>➤ People reached</li> <li>➤ # of follow up and evaluation meetings</li> </ul>
<p>1.2. Trained human resources in optimal conditions for the development of their work.</p>	<p>1..2.1. Prepare and implement a training plan for the administrative and operational team (in administration, project formulation and management, community philanthropy, fund mobilization and management, financing mechanisms, assertive communication, etc.)</p>	<ul style="list-style-type: none"> <li>➤ One training plan</li> <li>➤ Training given or received</li> <li>➤ Staff members trained</li> </ul>
<p>1.3. All processes are documented, and the Administrative Board and Assembly are kept informed, and progress and</p>	<p>1.3.1. Document the processes and activities carried out.</p> <p>1.3.2. Hold Administrative Board meetings.</p>	<ul style="list-style-type: none"> <li>➤ Documented processes and activities</li> <li>➤ Administrative Board meetings</li> <li>➤ Financial reports</li> </ul>

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<p>achievements are shared with strategic partners.</p>	<p>1.3.3. Prepare monthly financial reports.                      1.3.4. Prepare annual reports on activities and budget execution (operational and financial) and present them to the Assembly.                      1.3.5. Hold an ordinary shareholders' meeting annually, and extraordinary when called.                      1.3.6. Share information with partners and strategic allies of the organization.</p>	<ul style="list-style-type: none"> <li>➤ Annual operational and financial reports</li> <li>➤ Ordinary assemblies</li> <li>➤ Extraordinary assemblies</li> <li>➤ Participating partners</li> <li>➤ newsletters to partners and strategic allies (digital)</li> </ul>
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## COMPONENT 2: ECONOMIC SUSTAINABILITY

Objective 2: Diversify the income of the FMV that allows its financial sustainability in the long term

Impact Results	Main activities	Indicators
<p>2.1. The FMV is a financially sustainable organization that has the necessary resources for its operation.</p>	<p>2.1.1. Create and implement a tourism development plan (identification and development of products, marketing strategies, etc.).</p> <p>2.1.2. Diversify the portfolio of clients and services to increase sales of PRAMAVE-Promotora Ambiental Madre Verde (both companies and organizations).</p> <p>2.1.3. Structure a sales and diversification strategy of the eco-friendly product line</p> <p>2.1.4. Develop fundraising activities (a</p>	<ul style="list-style-type: none"> <li>➤ % execution of the Tourism Development Plan</li> <li>➤ Developed products that are marketed</li> <li>➤ \$ Income from tourism.</li> <li>➤ Additional services marketed</li> <li>➤ Number of clients</li> <li>➤ Income from sales of PRAMAVE services</li> <li>➤ % increase in sales</li> <li>➤ Quantity of products to be marketed</li> <li>➤ \$ income from the sale of eco-friendly products.</li> <li>➤ Number of activities carried out and amount collected</li> <li>➤ People/companies/organizations that participate</li> <li>➤ Rented time</li> <li>➤ number of clients acquiring the service</li> </ul>

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	<p>thousand colones for Madre Verde a green mother, track race, night walk, thanksgiving mass)</p> <p>2.1.5. Rent facilities, housing, and provide accommodation.</p> <p>2.1.6. Formulation and presentation of projects to international or national donors.</p> <p>2.1.7. Implement a Fundraising Plan from donors (individuals and legal persons, Social and Environmental Responsibility, etc.).</p> <p>2.1.8. Keep the authorizations of the Ministry of Finance up to date to receive donations in cash and in kind.</p> <p>2.1.9. Identify, value, and put into practice other opportunities to obtain resources (crowdfunding, volunteering, Friends of Costa Rica, etc.).</p> <p>2.1.10. Conduct thematic workshops (creative camps, etc.)</p> <p>2.1.11. Evaluate fundraising strategies at least twice a year.</p> <p>2.1.12. Maintain active communication with donors, individual and corporate donors, strategic partners and allies, local government, and institutions (meetings, emails, calls, text messages,</p>	<ul style="list-style-type: none"> <li>➤ amount collected for that concept</li> <li>➤ Identified donors and number of projects submitted</li> <li>➤ Number of projects financed and amount collected</li> <li>➤ Fundraising plan (community philanthropy)</li> <li>➤ Number of donors and amount raised</li> <li>➤ Registrations up to date</li> <li>➤ Amount of cash received in donations.</li> <li>➤ Amount of donations received in kind.</li> <li>➤ New opportunities identified and valued</li> <li>➤ Implemented mechanisms</li> <li>➤ Funds raised</li> <li>➤ Number of workshops held by people who participated, and amount raised</li> <li>➤ Follow-up meetings</li> <li>➤ Evaluation meetings</li> <li>➤ Communications and meetings with cooperators, donors, and allies.</li> <li>➤ Cooperators, donors, and allies reached.</li> </ul>
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	invitations to events, etc.)	
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### COMPONENT 3: PROTECTION AND CONSERVATION OF THE MADRE VERDE NATURAL RESERVE

Objective 3: Adequately manage the Reserve through the implementation of a management plan (includes: monitoring and evaluation).

Impact Results	Main activities	Indicators
3.1. The FMV has an updated management plan in a single document, under implementation and with its respective monitoring and evaluation.	3.1.1. Update the management plan. <ul style="list-style-type: none"> <li>● Hire a consultant or coordinate an internship through a university.</li> <li>● Sessions to update the plan</li> </ul>	<ul style="list-style-type: none"> <li>➤ Updated management plan in a single document.</li> </ul>
3.2. Threats to the Reserve have been reduced.	3.2.1. Implement the updated management plan. This includes: <ul style="list-style-type: none"> <li>● activities to improve infrastructure, trails and volunteering, in addition to the services it offers)</li> </ul> 3.2.1. Monitoring and evaluation of the management plan. Includes: <ul style="list-style-type: none"> <li>● Coordination and follow up meetings at least every 3 months.</li> <li>● Workshops (sessions) to evaluate the plan once a year</li> </ul>	<ul style="list-style-type: none"> <li>➤ % implementation of Plan activities</li> <li>➤ Volunteers supporting</li> <li>➤ Fire Brigade</li> <li>➤ COVIRENA</li> <li>➤ new or improved infrastructure</li> <li>➤ new services for visitors</li> <li>➤ Number of coordination and follow-up meetings</li> <li>➤ Evaluation sessions carried out</li> <li>➤ number of people participating</li> </ul>

### COMPONENT 4: AWARENESS AND SOCIAL ACTION

Objective 4: Increase in citizen participation in the protection and conservation of natural resources to raise awareness.

Impact Results	Main activities	Indicators
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<p>4.1 Citizens involved in the protection and conservation of natural resources and in the activities carried out by the FMV.</p>	<p>4.1.1. Create and implement a comprehensive environmental education program.</p> <ul style="list-style-type: none"> <li>● Coordinate support through internships or consulting</li> <li>● Workshops (sessions) elaboration of PEAI</li> <li>● Coordination meetings with institutions such as the MEP</li> <li>● Activities and events with schools and colleges</li> <li>● Activities and events with and in communities</li> <li>● PEAI follow-up and monitoring meetings</li> <li>● PEAI evaluation sessions at least one a year</li> </ul> <p>4.1.2. Implement awareness campaigns, including:</p> <ul style="list-style-type: none"> <li>● river cleaning,</li> <li>● house-to-house information about wildlife,</li> <li>● street cleaning,</li> <li>● reforestation campaigns,</li> <li>● collection of non-recoverable waste</li> </ul>	<ul style="list-style-type: none"> <li>➤ Number of meetings, workshops, talks and work sessions,</li> <li>➤ Number of people participating</li> <li>➤ PEAI monitoring and evaluation sessions carried out.</li> <li>➤ Number of awareness campaigns</li> <li>➤ Number of people participating in the events</li> <li>➤ Reforested area (hectares)</li> <li>➤ Trees planted</li> <li>➤ Volume of waste collected</li> </ul>
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## IX. BUDGETARY REQUIREMENTS AND SOURCES OF FINANCING

The necessary annual budget for the development of the operational and administrative activities, including the current and projected human resources, is estimated to be close to \$55,000 (fifty-five thousand dollars).

During 2021, 50% of the Foundation's income came from international cooperation, since during 2020 and 2021 (pandemic years) income from philanthropic activities and the sale of tourism services (entrance fees to the Reserve, facility rentals, and camps) were reduced to 0

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(zero) due to health restrictions. In the hypothetical case that the income from these types of activities would have been generated in 2021, the scenario of the financing sources would have been different, of 100% of the income, 21% would have come from the “sale of products and services,” 15% from “philanthropic activities,” 42% from “donations through community philanthropy,” and only 22% would have required funds from “international cooperation.” Even in this hypothetical scenario, dependence on cooperation funds would continue to be risky, since the ideal is that unrestricted sources of funds (those where the Foundation determines the best way to invest it in the community or to strengthen the organization) have the greatest weight within your budget.

What would be a convenient scenario for the Madre Verde Foundation? One that allows the organization to be sustainable in the long term, which could be the following, where restricted funds (international cooperation) only have a 10% share. This does not mean that the organization definitely has to do without this type of funds, but rather that its presence or not will not negatively influence the permanence of the organization:

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## X. EVALUATION PLAN

Having a plan for evaluating the implementation of a strategic plan is as important as defining its components. This is carried out using the intermediate and final impact indicators, already established, that will measure the objectives and results achieved.

Follow-up or monitoring must be carried out continuously throughout the implementation of the plan and will allow "control" and "measure" in real time the evolution and development of the strategies; being able to correct possible shortcomings in its implementation, approving new goals based on the results obtained (change course if necessary)

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Evaluation is the process that allows measuring the results and see how they are meeting the specific objectives and lines of action proposed. Evaluation allows us to make a "cut-off" and compare the stated objective with reality.

It is recommended that follow-up and monitoring be carried out monthly, reviews every 6 months, and evaluations every year.

## **Chapter V**

### **Data Analysis**

For this section, the researcher will put into practice the translation methods and processes learned previously, applying them to the documents of Talita Cumi and the Bandera Madre Verde Foundation. The purpose of this is to guarantee the researcher's training by providing both collaborators with a final translation into the target language with the intention that they can expand their work abroad. That is why, in this section, the document translation techniques will be developed visibly through tables, such as the color coding of the original text and the target text, along with the glossaries corresponding to each translation.

#### **5.1 Analysis and interpretation of the results**

In this data analysis section, the researcher will demonstrate the results studied and mentioned above using the instruments selected for this qualitative research work. However, the analysis and interpretation of the data collected in the previous chapters consists of using three instruments that will help both the reader to be part of and understand how the translation was carried out and the researcher to conclude. As the first instrument, the text analysis table will be used, which will facilitate the translation process since it will be classified into different types of texts, such as the style of the text, the function, the formality and difficulty scale, and the emotional tone scale. And the translation method. Next, the color-coding instrument will be applied to assign the translation procedure to each selected document, along with a color established by the researcher to help the reader identify the procedures carried out in the translation. Finally, the third instrument is a glossary that has 25 words from each document to provide the reader of the target language with terminologies that are difficult to understand.

### 5.1.1 Text Analysis

In this section, the researcher will analyze the documents Plan Estratégico 2022-2025 Final from Spanish to English for Fundación Madre Verde and What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English to Spanish for Talita Cumi. In this section, the researcher created a table to explain the analysis reached

**Table 2**

Text analysis	<i>“What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English to Spanish for Talita Cumi”</i>	<i>“Plan Estratégico 2022-2025 Final from Spanish to English for Fundación Madre Verde”</i>
Text Style	Descriptive	Descriptive
Text function	Informative	Informative
Scale of formality	Formal and official	Formal and official
Scale of Generality or difficulty	Neutral and educated	Neutral and educated
Scale of Emotional tone	Warm and understatement	Warm and understatement
Translation method	Semantic and Communicative	Semantic and Communicative

*Table 2 Shows the researcher’s instrument for analyzing the text under study  
Researcher’s creation*

### 5.1.2 Color Coding

For color coding, the researcher will apply various translation techniques to the documents to obtain communicative texts. She will then take the translation and divide it according to the color code.

**Table 3**

Translation Procedure	Color Assigned
Transposition	Yellow
Modulation	Blue
Omission	Red
Amplification	Pink
Explicitation	Green

Literal translation	
Compensation	
Equivalence	
Adaptation	

*Table 3 shows each technique with corresponding colors in the color-coding systematic procedure. Researchers' creation*

### 5.1.2.1.1 Color coding of texts from English into Spanish

#### ***“What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English to Spanish for Talita Cumi”***

##### **Paragraph 1**

At the 1980 Winter Olympic Games at Lake Placid, New York, a young, outmatched United States Hockey team shocked the world by defeating a larger, **more** experienced Soviet Union team 4-3 to advance to the gold medal round. Why **was the** United States able to pull off what was described as the "miracle on ice?" The main reason for the victory was **because** the coaches spent over a year carefully selecting members that were knowledgeable, skilled, enthusiastic, and committed to working as one unit **to** achieve their mission of winning a gold medal. Much like sports teams, a nonprofit board must also thoughtfully select its members. **They** should **be** passionate about the nonprofit's cause and willing to contribute their time, talent, and treasure to achieving the mission.

En los **juegos olímpicos de invierno de 1980** en Lake Placid, Nueva York, un joven **y superado** equipo **de hockey de los Estados Unidos** **conmocionó** al mundo al **derrotar a un equipo más grande y experimentado de la Unión Soviética** **por** 4-3 para avanzar a la **ronda de la medalla de oro**. ¿Por qué Estados Unidos pudo **realizar lo que se describió** como el “milagro sobre el hielo”? La **razón principal** de la victoria fue **que** los entrenadores pasaron **más de un año seleccionando cuidadosamente** miembros que **tuvieran conocimientos,** habilidades, entusiasmo y compromiso para trabajar como una unidad **y así** lograr su misión

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de ganar una medalla de oro. Al igual que los equipos deportivos, una junta directiva sin fines de lucro también debe seleccionar cuidadosamente a sus miembros. Deben sentir pasión por la causa de la organización sin fines de lucro y estar dispuestos a contribuir con su tiempo, talento y tesoro para lograr la misión.

### Paragraph 2

**It's** also important **to** be receptive to unique perspectives and methods which can help **you** gain new knowledge and skills as well as challenge your assumptions in a variety of areas.

**You** must be willing to dedicate a substantial amount of time. Must be willing to utilize your background, knowledge, and skills to. So, don't be afraid to speak **up**. Your membership might be the piece of the puzzle that the board **has been** missing. Make a meaningful financial donation each year. One hundred percent of a board is expected **to** donate at some level. **You will also** engage in fundraising by identifying and soliciting friends, family, and colleagues with the financial capacity to be major donors. Consider your reasons for joining.

También **es** importante ser receptivo a **perspectivas y métodos únicos** que pueden **ayudarle a** **adquirir** nuevos conocimientos y habilidades, así como **a desafiar** sus suposiciones en una variedad de áreas. Debes estar dispuesto a dedicar una **cantidad sustancial** de tiempo. Debe estar dispuesto a utilizar su **experiencia**, conocimiento y habilidades para. Así **que** no **tengas** miedo de hablar. Su membresía podría ser la pieza del rompecabezas que le **faltaba a la junta**. Hacer una **donación financiera significativa** cada año. **Se espera que el** cien por ciento de una junta done en algún nivel. **Participar** en **la** recaudación de fondos identificado y solicitando amigos, familiares y colegas con la **capacidad financiera** para ser **donantes importantes**. Considere sus razones para unirse.

### Paragraph 3

A typical nonprofit is governed by a single board, while some may have more than one, including a hybrid of the various types. Members are typically appointed and not elected. Provides advice and support **to** the executive director, but **NO** governance or operational support. Might serve as **an** honorary board for past board members who **are** term-limited or not interested in active board service. Recognizes prior service and keeps them connected. Members **are** typically appointed and not elected. Also called Junior Board or Auxiliary Board. The sole function is **to** raise money. Members **are** elected. Typical of small nonprofits with minimal or no paid **staff**. Manages, governs, and performs the nonprofit's daily work. Serves as **a** fiduciary of the nonprofit. Provides strategic direction and oversight.

Una organización sin fines de lucro típica se **rige** por una sola junta, mientras **que** algunas pueden tener más de uno **que** **incluya** un híbrido de los distintos tipos. **Los** miembros **normalmente** son nombrados y no elegidos. Proporciona **asesoramiento** y apoyo al **director ejecutivo**, pero **NO** **proporciona** gobierno ni **apoyo operativo**. Podría servir como **junta honoraria** para **exmiembros de la junta que tienen un mandato limitado o no están** interesados en **presentar servicio activo en la junta**. Reconoce **el servicio anterior** y **los mantiene** conectados. **Los** miembros **normalmente** son nombrados y no elegidos. También llamado **Junta Junior** o **Junta Auxiliar**. **La** única función es recaudar dinero. **Se eligen los** miembros. Típico de pequeñas organizaciones sin fines de lucro con **personal mínimo** o **sin remuneración**. Administra, gobierna y realiza el **trabajo diario de la organización sin fines de lucro**. Sirve como fiduciario de la organización sin fines de lucro. Proporciona **dirección y supervisión** estratégicas.

#### Paragraph 4

Maintaining mission focus. Providing the strategic framework for the nonprofit. Monitoring general activities, fiscal health, and ethical behavior. Setting overall fiscal policies and ensuring appropriate internal controls. Ensuring legal obligations are met. Approving the annual budget. Participating in fundraising efforts (shared responsibility with operations staff). Hiring, firing, supporting, evaluating, and compensating the CEO/Executive Director. Ensuring the board's composition reflects **the**... Diversity of the nonprofit's community and its beneficiaries. Nonprofit's needs. Operations Staff Responsibilities. Implementing the goals and objectives of **the** strategic plan. Managing daily operations. Hiring staff and delegating operational responsibilities. Approving staff compensation. Evaluating staff performance. Managing and monitoring daily cash flow. Participating in fundraising efforts (shared responsibility with board) Boards should NOT recruit members to simply fill empty seats.

Mantener el enfoque en la misión. Proporcionar el marco estratégico para la organización sin fines de lucro. Monitoreo de actividades generales, salud fiscal y comportamiento ético. Establecer políticas fiscales generales y garantizar controles internos adecuados. Garantizar que se cumplan las obligaciones legales. Aprobar el presupuesto anual. Participar en esfuerzos de recaudación de fondos (responsabilidad compartida con el personal de operaciones). Contratar, despedir, apoyar, evaluar y remunerar al CEO/ director ejecutivo. Garantizar que la composición del consejo refleje... Diversidad de la comunidad de la organización sin fines de lucro y sus beneficiarios. Necesidad de las organizaciones sin fines de lucro. Responsabilidad del personal de operaciones. Implementar las metas y objetivos del plan estratégico. Gestión de operaciones diarias. Contratar personal y delegar responsabilidades operativas. Aprobar la remuneración del personal. Evaluación del desempeño del personal. Gestión y seguimiento del flujo de caja diario. Participar en

esfuerzos de recaudación de fondos (responsabilidad compartida con la junta directiva).

Las juntas directivas NO deben reclutar miembros para simplemente llenar los puestos vacíos.

## Paragraph 5

Basic Board & Leadership Responsibilities. Strategic Responsibility. **To** commit **to** and advocate **for** the mission. **To** partner with CEO/ED to set strategic direction. To ensure fulfillment of mission and achievement of goals. To research and study things related **to** the nonprofit's mission. Governmental actions. Trends. Other public data. Fiscal and Financial Responsibility. **To** protect assets and provide financial oversight. To ensure there are sufficient resources to operate. **To** make a meaningful personal donation and engage in fundraising. Legal Responsibility. **To** act in **the** public interest by... Abiding by the charter and bylaws. Establishing policies and procedures for the good of the nonprofit while ensuring legal and ethical integrity. Specifies **a** level of competence a board member must exhibit as **a** steward of the nonprofit.

Responsabilidades básicas de la junta directiva y del liderazgo. Responsabilidad estratégica. **Comportarse** y **defender** la misión. **Asociarse** con **el** CEO/ED para establecer **una** dirección estratégica. Para asegurar **el** cumplimiento de **la** misión y **el** logro de **las** metas. Para investigar y estudiar **aspectos** relacionados **con** la **misión de la** organización sin fines de lucro. **Acciones gubernamentales.** **Tendencias.** **Otros datos públicos.**

**Responsabilidad fiscal y financiera.** Proteger **los** activos y proporcionar **supervisión** financiera. Para garantizar **que haya** suficientes recursos para operar. Hacer una **donación** personal significativa y participar en **la** recaudación de fondos. **Responsabilidad legal.** Actuar en **interés público** mediante... **Cumplir con** los estatutos y estatutos. **Establecer** políticas y procedimientos para el bien de la organización sin fines de lucro **y al mismo**

tiempo garantizar la integridad legal y ética. Especifica el nivel de competencia que un miembro de la junta debe exhibir como administrador de la organización sin fines de lucro.

### Paragraph 6

Attending and actively participating in board meetings and orientations. Reading and responding to all communication promptly. Reviewing and understanding information sent prior to board meetings. Contacting the board chair to discuss anything confusing. Staying up to date on the nonprofit's work. Respecting confidentiality. Supporting board action. Participating in fundraising. Respecting the nonprofit's physical assets or those of other organizations (buildings, etc. Duty of LOYALTY. Specifies the allegiance a board member must give the nonprofit when making decisions affecting it. This involves such things as. Avoiding and disclosing perceived, potential, and actual conflicts of interest. Refraining from using information for personal gain. Duty of GOOD FAITH. Specifies the faithfulness a board member must show to the organization's mission. This involves such things as.

Asistir y participar activamente en reuniones y orientaciones de la junta directiva. Leer y responder a todas las comunicaciones con prontitud. Revisar y comprender la información enviada antes de las reuniones de la junta directiva. Contactar al presidente de la junta para discutir cualquier tema confuso. Mantenerse actualizado sobre el trabajo de la organización sin fines de lucro. Respetar la confidencialidad. Apoyar la acción de la junta directiva. Participando en la recaudación de fondos. Respetar los activos físicos de la organización sin fines de lucro o de otras organizaciones (edificios, etc). Deber de LEALTAD. Especifica la lealtad que un miembro de la junta debe brindar a la organización sin fines de lucro al tomar decisiones que la afectan. Esto implica cosas tales como. Evitar y revelar conflictos de intereses percibidos, potenciales y reales. Abstenerse de utilizar la

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información para beneficio personal. Deber de BUENA FE. Especifica la fidelidad que un miembro de la junta debe mostrar a la misión de la organización. Esto implica cosas como.

### Paragraph 7

Ensuring resources are only used and reinvested to fulfill its mission. Ensuring that potential programs, funding sources, services fit the mission. Consulting bylaws, grantors, regulators for guidance when contemplating new programs/services. Governance responsibility. Set strategic direction and delegate implementation to staff. Personal Responsibility. To be active, informed, and engaged... Behaving in a respectful, courteous manner. Completing assigned responsibilities. Collaborating effectively. Communicating professionally. Leadership role responsibilities. Board Chair. Serving as the principal officer and contact person. Setting the board's goals and objectives. Creating the agenda and presiding at all meetings. Ensuring the accountability of all members, committees, etc. Communicating between the board and staff. Serving on all committees established by the board. Secretary. Responsible for ensuring that the following is done.

Garantizar que los recursos sólo se utilicen y reinviertan para cumplir su misión. Garantizar que los programas potenciales, las fuentes de financiación y los servicios se ajusten a la misión. Consultar estatutos, otorgantes y reguladores para obtener orientación al contemplar nuevos programas/servicios. Responsabilidades de gobernanza. Establecer la dirección estratégica y delegar la implementación al personal. Responsabilidad personal. Estar activo, informado y comprometido... Comportarse de manera respetuosa y cortés. Cumplir con las responsabilidades asignadas. Colaborar eficazmente. Comunicarse profesionalmente. Responsabilidades del rol de liderazgo. Presidente de la Junta. Actuar como funcionario principal y persona de contacto. Establecer las metas y objetivos de la junta. Crear la agenda y presidir todas las reuniones. Garantizar la rendición de cuentas de

todos los miembros, comités, etc. **Comunicación** entre la junta **directiva** y **el personal**.

**Servir** en todos **los comités** establecidos por la junta. Secretario. Responsable de **garantizar** que **se haga** lo siguiente.

### Paragraph 8

Responsible for ensuring that **the** following is done... Monitoring... o Control, receipt, and custody of all nonprofit assets. Disbursements **as** authorized **by** the board. Reporting on the receipt, use, and disbursements **of all** assets. Leading and guiding development of long-term financial plan. Preparing budgets. Facilitating audits. Interpreting and using financial statements. Serving as finance committee chair (if **it** exists). Managing time demands. Managing significant fundraising expectations including the expectation that **you will** donate. Understanding your speech/actions have legal consequences such as conflicts of interest. Remembering **to** speak as one voice and support board decisions. Developing deeper empathy and caring for others. Contributing to a community and improving lives. Collaborating with others and knowing that your thoughts and opinions are valued.

Responsable de garantizar que **se haga** lo siguiente... **Supervisión**... O control, recepción y custodia de todos **los activos sin fines de lucro**. Desembolsos autorizados **o** la junta. **Informes** sobre la recepción, uso y desembolsos activos. **Liderar** y **orientar** el desarrollo del **plan financiero a largo plazo**. **Preparar** presupuestos. **Facilitar** **las** auditorías. **Interpretación** y **uso de** estados financieros. **Servir** como **presidente del comité de finanzas** (si existe). **Gestión de las demandas de tiempo**. **Gestionar** **expectativas significativas de recaudación de fondos**, **incluida** la expectativa **de** que usted **haga una** donación. **Comprender** **que** su discurso o **sus** acciones tienen **consecuencias legales**, como conflictos de intereses. **Recordar** hablar con una **sol**a voz y apoyar **las decisiones de la junta directiva**. **Desarrollar** **una empatía más profunda** y **preocuparse** por **los** demás. **Contribuir** a una

comunidad y mejorar vidas. Colaborar con otros y sabiendo que sus pensamientos y opiniones son valorados.

### Paragraph 9

Two aspects of board service that I find personally fulfilling are: 1. The connections you make with other board members of various backgrounds. 2. The shared passion and commitment we have to make a difference in the community and individual lives. Two areas that I have found challenging are: 1. A clear path to fundraising. 2. The onboarding of new board members. I'm sure the fundraising arena is challenging for many nonprofits and board members. However, boards can eliminate any fundraising confusion and disorganization by providing defined goals, objectives, and direction. Moreover, it will benefit boards to provide an onboarding packet to new members that contains a summary of the sub-committees and the committee's expectations and point of contact. This will help a member be more effective in their committee role.

Dos aspectos del servicio en la junta directiva que encuentro personalmente satisfactorios son: 1. Las conexiones que establece con otros miembros de la junta directiva de diversos orígenes. 2. La pasión y el compromiso compartidos que tenemos para marcar la diferencia en la comunidad y en las vidas individuales. Dos áreas que é encontrado desafiante son: 1. Un camino claro hacia la recaudación de fondos. 2. La incorporación de nuevos miembros del consejo. Estoy seguro de que el ámbito de la recaudación de fondos es un desafío para muchas organizaciones sin fines de lucro y miembros de juntas directivas. Sin embargo, las juntas pueden eliminar cualquier confusión y desorganización en la recaudación de fondos al proporcionar metas, objetivos y dirección definidos. Además, beneficiara a las juntas directivas proporcionar un paquete de incorporación a los nuevos miembros que contenga un resumen de los subcomités y las expectativas y puntos de

contacto del comité. Esto ayudara a un miembro a ser más eficaz en su función en el comité.

### Paragraph 10

Non-profits **do** not operate for financial gain or to generate a profit for investors or private individuals, but **they** still require money to fund their general operations and achieve program goals. To do **that**, nonprofits rely on the process of raising funds from individuals, companies, and foundations through a combination of digital and more traditional **methods**:

1. Key Fundraising Sources (most common sources of non-profit funding): 1.1:

Major/Individual Donors: It is up to you and the organization to determine the specific dollar amount that **moves** someone from being an Individual to a Major Donor. Ask for yearly donation typically via email or other communication. Donation made in lump sum or installments. Supports general operations, salaries, supplies and equipment. Is a donation arranged in the present but made on a future date.

Las organizaciones sin fines de lucro no operan para obtener ganancias financieras o generar ganancias para inversionistas o individuos privados, pero aun así necesitan dinero para financiar sus operaciones generales y lograr los objetivos del programa. Para lograrlo las organizaciones sin fines de lucro dependen del proceso de recaudación de fondos de individuos, empresas y fundaciones mediante una combinación de métodos digitales y más tradicionales: 1. Fuentes clave de recaudación de fondos (fuentes más comunes de financiación sin fines de lucro): 1.1: Donantes principales / individuales: Depende de usted y de la organización determinar el monto específico en dólares que hace que alguien pase de ser un individuo a ser un donante importante. Solicite una donación anual, generalmente por correo electrónico u otra comunicación. Donación realizada a tanto alzado o a plazos.

Apoya las operaciones generales, salarios, suministros y equipados. Es una donación concertada en el presente pero realizada en una fecha futura.

### Paragraph 11

Bequests, charitable remainder trusts, charitable gifts annuities, and insurance policies. Sometimes dispersed upon donor's death (legacy gift). Requires specialized knowledge and skills to manage. 1.4: Institutions/Foundations. Corporations, foundations, churches and civic organizations. Provide support through a grant process. 1.5: Capital Campaign. Occurs over a defined period of time to acquire/improve a physical asset such as: Construct a new building. Purchase an equipment. 1.6: Special Event. Special events can include: Breakfasts, lunches and dinners. Sporting events (golf tournaments, fun run). Auctions. Funding comes from sponsors, participants or attendees. 1.7: Peer-to-Peer. Non profit supporters participate in a marathon, walkathon or similar event and obtain donations from family, friends and colleagues who support the person's event participation. City, state and local governments provide support.

Legados fideicomisos benéficos remanentes, anualidades de donaciones caritativas y pólizas de seguro. A veces se dispersa tras la muerte del donante (donación heredada).

Requiere conocimiento y habilidades especializados para gestionar. 1.4: Instituciones / fundaciones. Corporaciones, fundaciones, iglesias y organizaciones cívicas. Brindar apoyo a través de un proceso de subvención. 1.5: campaña de capital. Ocurre durante un periodo de tiempo definido para adquirir/ mejorar un activo físico como: Construir un nuevo edificio. Comprar un equipo. 1.6: Evento especial. Los eventos especiales pueden incluir: Desayunos, almuerzos y cenas. Eventos deportivos (torneos de golf, carreras divertidas). Subastas. La financiación proviene de patrocinadores, participantes o asistentes. 1.7: Punto

a Punto. Los partidarios sin fines de lucro participan en un maratón, caminata o evento similar y obtienen donaciones de familiares, amigos y colegas que apoyan la participación de la persona en el evento. Los gobiernos municipales, estatales y locales brindan apoyo.

## Paragraph 12

Identify/Cultivate/Steward: This involves the following tasks: Identifying current and potential donors. Conducting cultivation activities with donors. Conducting stewarding activities with donors after gifts **are** made. Managing donor relationships. Attending meeting if a donor requires a high-level connection (Board President, Nonprofit President/CEO). Meeting with donors **wanting to** support a specific area of the Nonprofit. Provide leadership and support: Initiating contact and communications with donors/board members and volunteers. Leading and/or supporting donor meetings (present information, ask/answer questions). Determine how to cultivate and when and how to ask for support. Support internal staff members in other departments with their fundraising work. Educate: Educating the staff/board/volunteers/donors about the nonprofit's program, work and funding needs. Educating staff/board/volunteers about donor characteristics: Major contributors or not. Past involvement and interactions.

Identificar/ Cultivar / administrar: Esto implica las siguientes tareas. Identificar donantes actuales y potenciales. Realización de actividades de cultivo con donantes. Realizar actividades de administración con los donantes después de realizar las donaciones. Gestionar las relaciones con los donantes. Asistir a la reunión si un donante requiere una conexión de alto nivel (presidente de la junta, presidente / director ejecutivo de una organización sin fines de lucro). Reunión con donantes que desean apoyar un área específica de la organización sin fines de lucro. Proporcionar liderazgo y apoyo: Iniciar contacto y comunicaciones con donantes / miembros de la junta directiva y voluntarios.

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Liderar y/o apoyar reuniones de donantes (presentar información, hacer/ responder preguntas). Determinar cómo cultivarse y cuándo y cómo pedir apoyo. Apoyar al personal interno de otros departamentos con su trabajo de recaudación de fondos. Educar. Educar al personal / junta / voluntarios / donantes sobre el programa, el trabajo y las necesidades de financiación de la organización sin fines de lucro. Educar al personal / junta / voluntarios sobre características de los donantes: Principales contribuyentes o no. Participación e interacciones pasadas.

### Paragraph 13

All board members (and volunteers) should give a donation to demonstrate commitment to the mission. Board members and volunteers involved in fundraising should be provided a list of 10-20 potential donors. They should then identify 1-2 people they personally know and be willing to cultivate. This helps them to understand the profile of desired donors that they can use to discover other potential who fit this profile. Board members use their relationship with current and potential donors to establish opportunities for sharing your nonprofit's message. Ideally, board members and volunteers should be the ones asking for donations because they support the nonprofit for altruistic reasons rather than being paid. A staff member should be present when the donation request is made.

Todos los miembros de la junta (y voluntarios) deben hacer una donación para demostrar su compromiso con la misión. A los miembros de la junta y a los voluntarios involucrados en la recaudación de fondos se les debe proporcionar una lista de 10 a 20 donantes potenciales. Luego deben identificar a 1 o 2 personas que conozcan personalmente y que estén dispuestos a cultivar. Esto les ayuda a comprender el perfil de los donantes deseados que pueden utilizar para descubrir otros potenciales que se ajusten a este perfil. Los miembros de la junta utilizan su relación con donantes actuales y potenciales para establecer

oportunidades para **compartir el mensaje de su organización sin fines de lucro**. Idealmente, **los miembros de la junta directiva** y **los** voluntarios deberían ser quienes **soliciten** donaciones porque apoyan **a la organización sin fines de lucro por razones altruistas en lugar de recibir un pago**. Un **miembro del personal** se debe estar presente cuando **se realiza la solicitud de donación**.

#### Paragraph 14

Communicate with the donors **in a** personal way. Learn their preferences through surveys or **by asking them**. Use an actual name in correspondence (Dear Angelina vs Dear Friend).

Used their preferred method of communication (phone/email/text). Mention previous involvement (events attended, committees). Send relevant information to their giving and background (if a donor supports your childcare, program, send information on how programs support clients). **Do they** want recognition or not? What type?

(certificate/plaque/listing). How **do they** want **to** be identified? (Michael and Edna sample or Mr. and Mrs. Michael Sample. **Do they** prefer certain program aspects over another?

Recurring Program: Establish monthly giving programs to ensure steady and sustainable giving. People donating through payroll deductions or debit/credit cards generally give 20% more **for** an average of 7 years.

Comunicarse con los donantes **de forma personal**. **Conozca** sus preferencias a través de encuestas o preguntándoles. Utilice un **nombre real** en **la** correspondencia (Querida Angelina vs Querido amigo). Usó su **método de comunicación preferido** (teléfono/correo electrónico/texto). Mencionar **participación previa** (eventos asistidos, comités). Envíe **información relevante sobre** sus **donaciones** y **sus antecedentes** (si un donante apoya su **programa de cuidado infantil**, envíe información **sobre** cómo **los** programas apoyan **a los** clientes). ¿Quieren reconocimiento o no? ¿Qué tipo? (certificado/placa/listado). ¿Cómo

quieren ser identificados? (Muestra de Michael y Edna o Muestra del Sr. y Sra. Michael. ¿Prefieren ciertos aspectos del programa sobre otros? Programa Recurrente: Establecer programas de donaciones mensuales para garantizar donaciones constantes y sostenibles. Las personas que donan a través de deducciones de nómina o tarjetas de débito/crédito generalmente donan un 20% más durante un promedio de 7 años.

### Paragraph 15

Nonprofit staff carry out various functions in the grant seeking process. The extent of their involvement varies depending upon a nonprofit's size. For example, smaller nonprofits often have one individual performing all activities, while larger nonprofits may have several individuals contributing to the process. Understand their goals and funding priorities and if your nonprofit fits these priorities. Determine the grant process (application, review and selection procedures. Create a personal connection so your nonprofit is viewed as more than just a proposal. Grantors might find it easier to deny a proposal without this connection. Gather required supporting documents. Write, review, edit, and submit proposals. Prepare the program officer to present your proposal's to its board. Thank grantors for the grant. Follow through with post-award requirements.

El personal de las organizaciones sin fines de lucro lleva a cabo diversas funciones en el proceso de búsqueda de subvenciones. El alcance de su participación varía según el tamaño de la organización sin fines de lucro. Por ejemplo, las organizaciones sin fines de lucro más pequeñas suelen tener una persona que realiza todas las actividades, mientras que las organizaciones sin fines de lucro más grandes pueden tener varias personas que contribuyen al proceso. Comprenda sus objetivos y prioridades de financiación y si su organización sin fines de lucro se ajusta a estas prioridades. Determinar el proceso de subvención (procedimientos de solicitud, revisión y selección). Cree una conexión personal para que

su organización sin fines de lucro sea vista como **algo** más que una **simple** propuesta. **A los** otorgantes **les** podría **resultar** **más** fácil rechazar una propuesta sin esta conexión. Reúna **los documentos de respaldo** requeridos. Redactar, revisar, editar y enviar propuestas. Prepare al **oficial del programa** para presentar su propuesta a su junta. Agradezca **a los** otorgantes por la subvención. **Cumpla con los requisitos posteriores a la adjudicación.**

#### 5.1.2.1.2 “Plan Estratégico 2022-2025 Final from Spanish to English for Fundación Madre Verde”

##### Paragraph 1

La Fundación Madre Verde (FMV) es una organización No gubernamental, sin fines de lucro, constituida legalmente con **la** cédula jurídica número 3-006-261053 el 03 **de** enero **del** 2000, su **órgano máximo lo** representa la Asamblea General integrada **por** 116 socios **(as)** patrocinadores. Su compromiso desde su creación es con la conservación y protección del medio ambiente enfocado propiamente en el recurso hídrico, **teniendo como** motivación la Reserva Natural Madre Verde, un parche de bosque de 31 has, símbolo de los últimos remanentes de bosque del sector sureste de los Montes del Aguacate, sitio importante para la conservación del recurso hídrico del cantón de Palmares. **Pero** también, es una organización que participa en otros espacios a nivel regional y nacional donde considere que puede brindar su aporte, como es el caso del Comité Local del Corredor Biológico Montes del Aguacate y **la** Red de Reservas Privadas **de** Costa Rica.

The **Madre Verde Foundation** (FMV) is a **non-governmental, non-profit organization**, **legally constituted** with **legal identification** number 3-006261053 on **January 3, 2000**. It **is represented** by the **General Assembly**, **which is made up of** 116 colleague sponsors. It **is committed**, since its creation, is **to** the conservation and protection of **the** environment focused mainly on the **hydric resource**, with the **Madre Verde Natural Reserve** as

motivation, a 31-hectare patch of forest in the southeastern sector of the Montes del Aguacate, an important site for the conservation of the hydric resource of the canton of Palmares. However, it is also an organization that participates in other spaces at the regional and national level, where it is considered that it can provide a contribution, as is the case of the Local Committee of the Montes del Aguacate Biological Corridor and the Network of Private Reserves in Costa Rica.

## Paragraph 2

La Fundación Madre Verde nace como una idea en 1990 cuando en una reunión de Asamblea General de la Asociación de Desarrollo Integral de la Granja de Palmares, un grupo de personas expresó su preocupación por el recurso hídrico del distrito y su posible escasez futura; las acciones para su protección debían ser inmediatas. Es así como la Asociación de Desarrollo crea la comisión encargada del diseño y desarrollo de un proyecto de conservación del recurso; que iniciaría con la propuesta de la compra de las tierras propiedad de La FEYBA de Palmares S.A., por su alto potencial hídrico, belleza escénica y un arraigado sentimiento de pertenencia de parte de los vecinos. Estas eran tierras dedicadas a la producción de café y ganado, con pequeños reductos de bosque y charrales.

The Madre Verde Foundation born as an idea in 1990, when at a General Assembly meeting of the Palmares farm Comprehensive Development Association, a group of people expressed their concern about the district's hydric resource and its possible future shortage; the actions for their protection must be immediate. This is how the Development Association created the commission in charge of the design and development of a resource conservation project, with the purpose of designing a the proposal to purchase the land owned by FEYBA of Palmares S.A, due to their high hydric potential, scenic beauty, and a

deep-rooted feeling of belonging on the part of the neighbors. These lands were dedicated to the production of coffee and livestock, with small pockets of forest and plots of land covered with underbrush.

### Paragraph 3

Esta comisión inicia la búsqueda de fondos para la adquisición de la finca, ante el gobierno nacional y local, instituciones, cooperantes internacionales y sector privado. El precio de la finca ascendía a ¢24.000.000 (veinticuatro millones de colones), por lo que se ofrece al propietario un adelanto como señal de trato de ¢200.000 colones. Este monto fue recaudado entre los vecinos de la comunidad, sin embargo, al no poder levantar los fondos restantes, la comisión se desintegra y desiste de la idea de compra (1991-1993). Este representó el primer intento de adquirir la finca. El presente documento representa el resultado del proceso participativo de evaluación del PE 2019-2021 y la construcción del plan para el siguiente periodo 2022-2025. II. FUNDACIÓN MADRE VERDE. SU HISTORIA.

This commission begins the search for of funds for the acquisition of the property, with before the national and local government, institutions, international donors cooperators, and the private sector. The price of the property amounted to \$24.000.000 (twenty-four million of colones), for which so the owner was offered a down payment advance of \$200.000 colones. This amount was raised from among the neighbors of the community; however, as it was not possible to collect the remanding funds, the commission disintegrated and gave up the purchase idea (1991-1993). This represented the first attempt to acquire the property. This document is the result of the participatory evaluation process of the PE 2019-2021 and the construction of the plan for the period 2022- 2025. II. Foundation Madre Verde. Our history.

**Paragraph 4**

No es sino hasta 1998 que, ante la amenaza del interés del IDA (Instituto de Desarrollo Agrario) de parcelar y otorgar esas tierras a agricultores, un grupo de personas de la zona **se** organizan **nuevamente** para **la** compra, ya **con** fines de conservación. Esta iniciativa **se** fortalece cuando el IDA desiste **de** la idea de parcelar **gracias a que** estudios, realizados por su equipo de ingenieros, revelaron que **el** 85% de las tierras eran de vocación forestal y solo **un** 15% podían dedicarse **a** la agricultura. Esta decisión desencadenó una serie de protestas de los parceleros, que llevaron entre otras cosas a la quema de la finca. (Campos, 2013). Es en ese momento que **el** Ing. Carlos Suarez Badilla recomienda constituir una fundación ya que consideraba **que** era el tipo de figura legal **que contaba** con mayor credibilidad ante los donantes internacionales.

It was not until 1998 that, **faced** with the threat of **the** interest from **the** IDA (Institute of Agrarian Development) to parcel **out** and grant these lands to farmers, a group of people from the area **organized** themselves to purchase **the property**, now **for conservation purposes**. This initiative **was strengthened** when the IDA **gave up** the idea of **parceling** because studies carried out by its team of engineers revealed that 85% of the land was **suitable for forestry** and only 15% could **be used for** agriculture. This decision triggered a series of protests **by** the landowners, which led, among other things, to the **burning** of the property (Campos, 2013). It is at **the** time that Engineer Carlos Suarez Badilla **recommended** **establishing** a foundation, since he considered **it to** be the type of **legal figure** with **the** greatest credibility **in the eyes of** international donors.

**Paragraph 5**

Como no **se** encontró **ningún** donante dispuesto a invertir esa suma, asesorados por **el** Señor Emel Rodríguez, en ese entonces Coordinador del Proyecto Corredor Biológico Mesoamericano, realizan un intercambio con la Fundación Monte Alto para aprender del proceso **de** adquisición de la Reserva Natural Monte Alto. Con este insumo, deciden emprender una campaña similar a la de Monte Alto, que consistía en captar **los** fondos a través de certificados **que se** ofrecieran a la población Palmareña, que a su vez **los** convirtiera en aliados de este esfuerzo ambiental. El primer contacto fue la Asociación Cívica Palmareña (ACP) y otras instituciones como COOPAVEGA y COOPEPALMARES. La ACP no solo aportó dinero sino **que** también negoció con el propietario **una** rebaja **en el** precio.

Since no **donor** **was found** willing to invest that amount, advised by **Mr.** Emel Rodriguez, at that time Coordinator of **the** **Mesoamerican Biological Corridor Project**, **they** carried out an exchange with the **Monte Alto foundation** to learn **about the** **acquisition process** of the **Monte Alto Natural Reserve**. With this **input**, **they** decided **to** undertake a campaign similar to **that** of Monte Alto, **which** consisted **of raising** funds through certificates offered to the **Palmereña population**, **which** **in turn** **would** **made** **them into** allies of this **environmental effort**. The first contact was the **Palmareña Civic Association** (ACP) and other institutions **such as** COOPAVEGA and COOPEPALMARES. The ACP not only contributed money, **but it** also negotiated **a** **price reduction** with the owner.

### Paragraph 6

Para lograr este objetivo, la ACP aportó un total de ¢30.000.000 (Treinta millones **de** colones) que pagaría en 3 años en cuotas de diez millones (¢10.000.000) más interés sobre los saldos; COOPAVEGA R.L contribuyó **con** tres millones **de** colones (¢3.000.000), **mismos** que **se** usaron para el enganche **de** compra y COOPEPALMARES R.L con un millón de colones (¢1.000.000). Más **de** 500 palmareños comprometidos **con** la causa donaron para tal fin, logrando así la meta y en menor tiempo. (Campos, 2013). actualmente **se cuenta con** un total de 116 socios (**as**) patrocinadores, de los cuales 43 son mujeres, 70 son hombres, 2 Cooperativas y 1 asociación comunal. **A** esto se suman cerca **de** 50 voluntarios/**as** activos, y 30 empresas donantes. ORGANIGRAMA:

To achieve this objective, the ACP **contributed** a total of \$30,000,000 (thirty million colones) **to be paid** in 3 years in installments of ten million (\$10,000,000) plus interest **on** the **balances**; COOPEPALMARES R.L contributed three million colones (3,000,000), which **were** used for the down payment, and COOPEPALMARES R.L with one million colones (\$1,000,000). More **than** 500 Palmareños committed **to** the cause donated for **this purpose**, **thus** achieving the goal and in less time (Campos, 2013). **There are** currently a total of 116 **sponsoring members**, **of which** 43 are women, 70 are men, 2 Cooperatives, and 1 **community association**. **In addition, there are** nearly 50 **active volunteers** and 30 **donor companies**. ORGANIZATION CHART:

### Paragraph 7

La FMV funciona bajo la figura jurídica de Fundación. Según la Ley 5338, las fundaciones son entes privados de utilidad pública, que **se** establecen sin fines de lucro y con el objeto de realizar o ayudar a realizar, mediante el destino de **un** patrimonio, **actividades** educativas, benéficas, artísticas o literarias, científicas, y en general todas aquellas que signifiquen

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bienestar social. Estas no tienen finalidades comerciales. Sin embargo, podrán realizar operaciones de esa índole para aumentar su patrimonio, pero los ingresos **que** obtengan deberán destinarlos exclusivamente a **la** realización **de** sus propios objetivos. La administración y dirección de las fundaciones estará a cargo de una Junta Administrativa. Las comisiones están integradas, **de manera** voluntaria, por socias y socios, amigos (**as**) y miembros de la comunidad Palmareña, su estructura operativa para el periodo 2022-2025, será la siguiente:

The FMV **operates** under the **legal figure** of a Foundation. According to Law 5338, foundations are **private entities** of **public utility**, **which are** established **on a non-profit basis** and with the **aim** of **carrying out** or **helping to carry out**, through the **use** of **assets**, educational, charitable, artistic or literary, scientific, and, in general, all those **activities** that mean **social well-being**. These **do not** have **commercial purposes**. However, **they may carry out** operations of this **nature** to increase their **assets**, but the income **they** obtain must **be** used exclusively to **achieve** their own objectives. The administration and management of the foundations **will** be in charge of a Board **of** Trustees. The commissions are **made up**, **on a** voluntary **basis**, of members, friends and members of **Palmareña community**. Their **operational structure** for the period 2022-2025 **will** be **as** follows:

### Paragraph 8

El área de acción inmediata de la Fundación Madre Verde está representada por la Reserva Natural Madre Verde, el cantón de Palmareña, extendiéndose al sector del Corredor Biológico Montes del Aguacate-CBMA, este último incluye los cantones de San Ramón, Atenas, San Mateo, Naranjo, Palmareña, Orotina (Provincia de Alajuela); y los cantones de Esparza y Montes de Oro Provincia de Puntarenas- (IGN, 2009). La Reserva Natural Madre Verde se encuentra geográficamente en los altos del distrito de la Granja de Palmareña,

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específicamente 1 km al oeste y 500 m. sur de la Escuela Ermida Blanco, del cantón de Palmares, provincia de Alajuela. A través de los años, este parche de bosque **se** ha ido repoblando **de árboles** por reforestación y regeneración natural.

The **immediate area of action** of the **Madre Verde Foundation** is represented by the **Madre Verde Natural Reserve**, the canton of Palmares, extending to **the Biological Corridor sector Montes del Aguacate-CBMA**, **the** latter includes the cantons of San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Province of Alajuela); and the cantons of Esparza and Montes de Oro-Province of Puntarenas-(IGN, 2009). The **Madre Verde Reserve** is **geographically located** in the highlands of **the Granja de Palmares district**, specifically 1 km to **the** west and 500 m south of the **Ermida Blanco School**, **in** the canton of Palmares, province of Alajuela. Over the years, this patch of forest has been repopulated by reforestation and **natural regeneration**.

### Paragraph 9

El plano de la Reserva realizado en **el** 2020 demostró que tiene **una** extensión de 31 hectáreas, y no de 40 has como **se** había pensado **hasta entonces**. En el análisis FODA **se** identificaron algunas amenazas que persisten como la invasión de los límites de la reserva, por lo que **era** importante **contar** un plano catastrado. La Reserva representa un recurso valioso para **la** educación ambiental, **el** esparcimiento, y **la realización de** actividades que **le** permiten **a la** FMV generar ingresos para su **operación y el desarrollo** de sus actividades. Es un sitio de importancia para la protección del recurso hídrico, 3 de sus nacientes cuentan **con** declaratoria. Cuenta con un Plan de Manejo, además de otros estudios de la flora y fauna.

The map of the Reserve, made in 2020, showed that it **covers an area** of 31 hectares, and not 40 **hectares** as **previously** thought. In the **FODA analysis**, some threats that persist **were**

identified, such as the invasion of the limits of the reserve; therefore, the importance of a Cadastral plan. The Reserve represents a valuable resource for environment education, recreation, and activities that allow FMV to generate income for its activities. It is an important site for the protection of water resources, 3 of its tributaries have been declared. It has a Management Plan, in addition to other studies of the flora and fauna.

### Paragraph 10

Palmares es el séptimo cantón de la provincia de Alajuela, esta ubicado en la zona occidental del Valle Central, y situado en la Zona Intertropical del Pacífico. Al ser un espacio de transición es afectado por los vientos alisios, húmedos y cálidos, que le dan una temperatura promedio de 25,6 °C. La época seca, entre noviembre y abril, es más cálida y menos lluviosa que los meses de agosto a octubre. El cantón nació producto de la migración de campesinos de zonas aledañas y su nombre surgió debido a la gran cantidad de palma real que existía en la zona antes de que esta área fuese poblada, su población actual (2022) es de 41.805 habitantes de acuerdo a los datos del INEC-Instituto Nacional de Estadísticas y Censos.

Palmares is the seventh canton of the province of Alajuela. It is located in the western part of the Central Valley, in the Pacific Intertropical Zone. Being a Transition area, it is affected by the humid and warm trade winds, which give it an average temperature of 25.6 °C. The dry season, between November and April, is warmer and less rainy than the months of August to October. The canton was born as a result of the migration of farmers from surrounding areas, and its name arose due to the large amount of royal palm that existed in the area before this area was populated. Its current population (2022) is 41, 805 inhabitants according to data from INEC-National Institute of Statistics and Censuses.

**Paragraph 11**

Palmares cuenta con todos los servicios **de** comunicaciones, red **de** telefonía celular y fija, además **de** internet de banda ancha y fibra óptica, proporcionados por empresas de cobertura nacional como ICE, Kolbi, CableTica, Tigo y SKY. En cuanto a transporte público, el distrito central cuenta con conexiones **de** autobuses hacia todos los distritos del cantón, también hacia San Ramón, Naranjo y San José, utilizando la autopista Bernardo Soto, la cual forma parte de **la** Carretera Interamericana Norte. Palmares está **a** 36 km del Aeropuerto Internacional Juan Santamaría en Alajuela (aproximadamente **de** 30 a 45 minutos de viaje **por** carretera). A pesar de los datos anteriores, el Índice **de** Pobreza Multidimensional cantonal del 2020, **lo** ubica **en** el sexto a nivel nacional y número uno a nivel de provincia, con un índice de 0,026.

Palmares has all the **communication services**, cellular and **landline** telephone **networks**, **as well as** **broadband internet** and fiber optics, provided by **national coverage companies** such as ICE, Kolbi, CableTica, Tigo, and SKY. **In terms of** **public transportation**, the **central district** has **bus connections** **to** all the districts of **the** canton, **as well as** to San Ramón, Naranjo and San José, using the **Bernardo Soto highway**, which is part of the **North Inter-American Highway**. Palmares is 36 Km from **Juan Santamaría International Airport** in Alajuela (approximately 30 to 45 minutes of **road** travel). Despite the **Previous data**, the **2020 cantonal Multidimensional Poverty Index** **places** it sixth at **the** national level and **number one** at the provincial level, with an index of 0,026.

**Paragraph 12**

La Reserva Natural Madre Verde se encuentra dentro del Corredor Biológico Montes del Aguacate, **lo** que ha llevado **a que** la labor de la FMV de protección y conservación **de los** recursos naturales **se** extienda al ámbito geográfico del Corredor, participando de manera activa en su Consejo Local y otros eventos en el marco del Corredor, como lo es el manejo del fuego, trabajando con **las** brigadas comunitarias **contra** incendios. Fue creado el 30 **de** mayo **de** 2006 por Decreto Ejecutivo N° 33106-MINAE (Ministerio de Ambiente), con el objetivo de “aumentar **la** conectividad entre las áreas protegidas del CBMA, con la participación de todos los actores interesados en la gestión del territorio”. Abarca los cantones de San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Provincia de Alajuela).

The Madre Verde Natural Reserve is located within the Montes del Aguacate Biological Corridor, which has led the FMV's work to protect and conserve natural resources to extend to the geographical area of the Corridor, actively participating in its Local Council and other events within the framework of the Corridor, such as fire management, working with community fire departments. It was created on May 30, 2006, by Executive Decree No.33106-MINAE (Ministry of Environment), with the objective of “increasing connectivity among the protected areas of the CBMA, with the participation of all stakeholders in the management of the territory.” It covers the cantons of San Ramón, Atenas, San Mateo, Naranjo, Palmares, Orotina (Province of Alajuela).

**Paragraph 13**

Potencial hídrico. Dentro del CBMA, existe una cantidad de nacientes que dan origen a ríos importantes, como es el río La Paz, San Lorenzo, Barranquilla, Río Grande de San Ramón, Jesús María, entre otros, los cuales forman parte de las cuencas hidrográficas del Río Grande de Tárcoles, Barranca, Jesús María, San Carlos. Asimismo, existe una serie de nacientes, cuyas aguas son captadas, para el suministro de agua potable de acueductos de comunidades aledañas a él, como dentro del mismo, tales como: Asada de Rincón de Zaragoza, la de Candelaria, Francisco y La Guaria, Piedades Sur, San Isidro, Atenas, Morazán, Asada Piedades Sur y otros. La FMV ve al CBMA como un socio relevante para el logro de sus objetivos, de ahí la importancia de fortalecer esta relación mediante el establecimiento de objetivos comunes de manera consciente.

Water potential. Within the CBMA, there are a number of springs that give rise to important rivers, such as La Paz river, San Lorenzo, Barranquilla, Rio Grande de San Ramón, Jesús María, among others, which are part of the hydrographic basins of the Río Grande de Tárcoles, Barranca, Jesús María, San Carlos. Likewise, there is a series of springs, whose waters are captured for the supply of drinking water from aqueducts of neighboring communities, such as: Asada de Ricón de Zaeagoza, Candelaria, Francisco and La Guaria, Piedades Sur, San Isidro, Atenas, Morazán, Asada Piedades Sur and others. The FMV sees the CBMA as a relevant partner for achieving its objectives; hence, the importance of strengthening this relationship by consciously establishing common objectives.

**Paragraph 14**

Los actores claves de una organización son usualmente aquellos que pueden influenciar positiva o negativamente una intervención, **o se les** reconoce como importantes para **que** una situación o cambio suceda. Para este ejercicio **se** utilizó **el** modelo de “escalera de compromiso”, dado que la FMV **lo que** busca **es** contar **con** una red de “amigos” **comprometidos que** confían y creen en el trabajo que realiza la organización y su importancia. Las organizaciones son sistemas sociales abiertos que interactúan con el medio que **las** rodea, muchas basan sus estrategias **de** sostenibilidad y financiera en el establecimiento de alianzas a nivel local, nacional o internacional, utilizando medios como **la** filantropía comunitaria y la corporativa. Sin embargo, para **que** esto sea posible **se** debe crear confianza para mantener relaciones colaborativas **de** largo plazo con los aliados (socios) que **se van** sumando.

The **key stakeholders** of an organization are usually those **who can** **positively or negatively influence** an intervention or **who are recognized** as important for a situation or change **to** happen. For this exercise, **the** “ladder of commitment” model **was used**, given that the FMV seeks to have a network of **committed “friends” who** trust and believe in the work **carried out by** the organization and its importance. The organizations are **open social systems** that interact with the **environment** that surrounds **them**; many base their **sustainability and financial strategies** on the establishment of alliances at **the** **local, national or international level**, using means such **as** **community and corporate philanthropy**. However, for this **to** be possible, **trust** must **be created** to maintain **long-term collaborative relationships** with the allies (partners) that **are joining**.

### Paragraph 15

La Escalera de Compromiso obliga **a hacer** este análisis, divide **a** los actores en dos niveles, en el nivel “inferior” (primeros escalones) **se ubican** aquellos actores ocasionales, la relación es más de poder y control, formal, meramente operacional (adquieren o **se** benefician de los productos o servicios **que** ofrece la organización), la relación generalmente **es de** corto plazo y por tiempo limitado, **se** pueden considerar clientes, compradores o eventuales. En el nivel “superior” **se posicionan** los aliados que confían y defienden **a** la Fundación, están comprometidos **con** su misión, es una relación de largo plazo, informal entre amigos, y por esta razón invierten en ella, califican como socios, defensores o seguidores de la FMV. Red de Reservas Públicas y Privada del Corredor Biológico Montes del Aguacate.

The Ladder of Commitment requires this analysis, **it** divides the actors into two levels, at the “**lower**” level (first steps) are those **occasional actors**, the relationships is more of power and control, formal, merely operational (**they** acquire or benefit from the products or services offered **by** the organization), the relationship **is** generally short-term and for **a limited time**, **they** can **be considered** clients, buyers, or eventual **clients**. At the “**higher**” level are the allies **who** trust and defend the Foundation, are committed **to** its mission, **it** is a **long-term, informal relationship** between friends, and for this reason **they** invest in **it**, **they** qualify as partners, defenders, or followers of the FMV. Network of **Public and Private Reserves** of **the Montes del Aguacate Biological Corridor**.

### 5.1.3 Glossary

The glossary will obtain the most relevant terminology found in both texts. In this section, the researcher will create the glossary in this way: term from the source language and term from the target language, description and its grammatical category to provide a greater understanding of the terminology to the reader.

**Table 4**

*Table 4 Glossary of the Talita Cumi association*

English term	Spanish term	Definition	Grammatical category
Budget	Presupuesto	A plan to show how much money a person or organization will earn and how much they will need or be able to spend	Noun
CEO	Director Ejecutivo	The person with the most important position in a company	Noun
Disbursements	Desembolsos	The act of paying out money, especially from an amount that has been collected for a particular purpose	Noun
Skilled	Habilidades	An ability to do an activity or job well, especially because you have practised it	Noun
Empower	Autorizar	To give someone official authority or the freedom to do something	Verb
Fiscal	Fiscal	Relating to money spent or earned by governments	Adjective
Governance	governance	The way that organizations or countries are managed at the highest level, and the systems for doing this	Noun
Fundraising	Recaudaciones de fondos	The act of collecting or producing money for a particular purpose, especially for a charity.	Noun
Network	Red	A large system consisting of many similar parts that are connected to allow movement or communication between or along the parts, or between the parts and a control centre.	Noun

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Nonprofit	sin fines de lucro	(Of an organization) not for the purpose of making a profit.	Adjective
Outmatch	Aventajar	To be superior to; surpass; outdo	Verb
Rewards	recompensa	Something given in exchange for good behaviour or good work	Noun
Setting	entorno	A position on the controls of a machine or device	Noun
Steward	administrador	A person who serves passengers on a ship or aircraft	Noun
Treasure	Tesoro	To take great care of something because you love it or consider it very valuable.	Verb
Supporters	Partidarios	Someone who supports a particular idea, group, or person	Noun
Walkathon	Caminata	An organized event in which people walk a long distance in order to raise money for charity.	Noun
Worksheet	Hoja de trabajo	A piece of paper.	Noun
Coaches	Entrenadores	Someone whose job is to provide training for people or to help prepare them for something.	Noun
Committed	Compromiso	To promise or give your loyalty, time, or money to a particular principle, person, or plan of action.	Verb
Onboarding	Incorporación	The process in which new employees gain the knowledge and skills they need to become effective members of an organization	Noun
Steady	Garantizar	Work that is likely to continue for a long time and for which you will be paid regularly	Adjective
Spayed	Esterilizado	Of a female animal having had its ovaries removed so that it cannot produce young animals.	Adjective
Neutered	Castrado	(Of an animal) having had part of its sexual organs removed so that it cannot produce young animals.	Adjective

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Deadlines	Plazo de Tiempo	A time or day by which something must be done.	Noun
Investment	Inversión	The act of putting money or effort into something to make a profit or achieve a result.	Noun

**Table 5**

*Table 5 Glossary of the Madre Verde Foundation*

Spanish term	English term	Definition	Grammatical category
Cuotas	Installments	One of several parts into which a story, plan, or amount of money owed has been divided, so that each part happens or is paid at different times until the end or total is reached.	Noun
Asamblea	Assembly	Meeting to discuss common issues.	Noun
Altos	Highlands	Document that certifies registration in a body, organization, profession, association.	Noun
Brigades	Departments	Organized group of people gathered for a specific job.	Noun
Comision	Commission	Set of people with the power to influence specific matters.	Noun
Actores	Stakeholders	Plaintiff or accuser.	Noun
Socios	Partners	One of two people who do something together or are	Noun

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		closely involved in some way.	
Intenta	Attempts	The act of trying to do something, especially something difficult.	Verb
Hidrico	Water	Of or relating to water as an element of nature	Adjective
Aquejan	Afflict	A problem or illness afflicts a person or thing.	Verb
Fortaleza	Strengths	The ability to do things that need a lot of physical or mental effort.	Noun
Neutralizer	Neutralize	To stop something or someone from having an effect.	Verb
Material	Matters	A situation or subject that is being dealt with or considered.	Noun
Amenazas	Threats	A suggestion that something unpleasant or violent will happen, especially if a particular action or order is not followed.	Noun
Currencias	Shortcomings	A fault or a failure to reach a particular standard.	Noun
Alcanzados	Achieved	To succeed in finishing something or reaching an aim, especially after a lot of work or effort.	Verb
Indicadores	Indicators	A sign or signal that shows something exists or is true, or	Noun

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		that makes something clear.	
Filantropicas	Philanthropic	Helping poor people, especially by giving them money.	Adjective
Componentes	Components	One of the parts of a system or process.	Noun
Rumbo	Course	The often gradual development of something, or the way something happens, or a way of doing something.	Noun
Seguimiento	Follow-up	To find out more about something, or take more action connected with it.	Phrasal verb
Porción	Share	To have or use something at the same time as someone else.	Verb
Decir	Mean	To express or represent something, such as an idea, thought, or fact.	Verb
Sostenible	Sustainable	Able to continue over a period of time.	Adjective
Recurso	Resource	A useful or valuable possession or quality of a country, organization, or person.	Noun

## Chapter VI

### Conclusions and Recommendations

#### 6.1 Purpose of the Conclusion

This thesis aims to investigate and learn more about translation procedures and methods. The documents *Plan Estrategico 2022-2025 Final for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from Talita Cumi*, allowed the researcher to investigate the original language to obtain a greater understanding of the document in a foreign language. Without a doubt, the processes and various translation methods allowed for greater understanding and information that was necessary and used to carry out the translations. Therefore, it is valuable to show the research results throughout this chapter through the collection of information.

#### 6.2 Conclusions

To carry out this research, specific objectives were supported to obtain guidance and better understand the processes and methods used in the documents. On the other hand, the collaboration with the Madre Verde Foundation and the Talita Cumi association helped the researcher to present the results obtained from the translations *Plan Estrategico 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising ( NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English into Spanish for Talita Cumi*, along with the conclusion of the research question and the processes, and methods used.

**6.2.1 To translate the documents Plan Estrategico 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English to Spanish for Talita Cumi**

As a first specific objective, the researcher focused on translating the documents Strategic Plan 2022-2025 Final from Spanish into English for The Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-Profit Board Member Essential Certificate-TCCR from English to Spanish for Talita Cumi. To provide both the foundation and the organization with documents translated into the target language to make them for international public use and thus provide both places with greater reach to those interested in participating in their mission and requiring these documents. The translation into your native language.

The analysis of the Final 2022-2025 *Plan Estretegico for the Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR for Talita Cumi*. This allowed the researcher to investigate and learn about translation procedures and methods. Furthermore, for this section, the researcher gave himself the task of going deeper into translating and really understanding and learning about the foundation and organization to understand and have a purpose beyond the translation from one language to another.

The researcher concludes this specific objective by reading, investigating the topic, and translating both documents from their native language to the target language. As Chapter IV shows, this was demonstrated through the translation of the documents of Talita Cumi and Fundacion Madre Verde. As a result, the researcher carried out both translations carefully and thus obtained an approach translation into the target language that is understandable for whoever reads it.

**6.2.2 To apply various translation techniques to the documents in order to achieve communicative texts**

Along with the second specific objective, the researcher considered it essential to analyze the text for each document. This provides the researcher and the person reading this research work with precise information about what has been done. This means that in this way, the reading and analysis time of the documents for their final result is evidenced. Furthermore, as part of this section, the researcher selected the translation method, also considering its function, style, formality scale, generality or difficulty, and emotional tone scale.

To carry out this section, the researcher considered it essential to reach each conclusion of the analysis of the text, read the text several times once the document is understood, and investigate the translation methods and their techniques to be later defined in the table observed in the previous chapter. Certainly, this facilitates the translation process since you become familiar with the concepts and what the text wants to express before being translated and delivered to those who belong. To conclude the text analysis, the researcher, after investigating and learning how to perform a text analysis to demonstrate and define them in the analysis table finally, can say that this section is delayed by the repetition time of reading the documents to take them to their final classification. However, the researcher undertook the task of classifying it in the most accurate and closest way.

**6.2.3 To evaluate the effect of the translation techniques applied to the documents.**

As a third specific objective, the researcher evaluated and put into practice the translation techniques by applying them in the documents Plan Estretegico for the Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-profit Board Member Essential Certificate-TCCR for Talita Cumi. Once the documents

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were translated, the researcher was in charge of selecting 15 paragraphs from each document and then, together with the translation, demonstrated the processes used in the target language translation.

For the color coding, the researcher used the processes of literal translation, omission, transposition, equivalence, adaptation, modulation, amplification, compensation, and equivalence to be demonstrated in the translation of the target language. The researcher assigned a specific color for each procedure to make it clearer and more organized when, how, and where said previously studied and learned processes were used. The researcher concluded that each language has different translation processes. In addition, be cautious and safe when classifying procedures.

### **6.2.4 To create a glossary with the most relevant terminology found in both texts**

Finally, as the last point of the specific objectives, the researcher created a glossary, creating a table containing 25 words from each document so that whoever reads the translations can become familiar with the terminology that may be difficult to understand in the language. Original to the target language. However, this table was created to thoroughly understand the terminology mentioned in the documents of Talita Cumi and Fundación Madre Verde.

Furthermore, for this section, the researcher considered as a primary part not only the translation of the word but also its definition along with the classification of its grammatical category, giving the reader a deeper understanding of the context and the terminology. Nevertheless, it is a free-to-use tool for enjoying reading. Once the choice of words and their adequate definition were made, the researcher concluded that they are useful and necessary words to understand the texts deeply. However, having a section in the research work showing the terminology was enriching for the researcher

to carry out an accurate translation and for the reader's understanding of the target language.

### **6.3 Restatement of the Research Question**

Taking into account that the research question on which this research and translation work was based was to investigate the effect of the procedures and methods used to translate the Final 2022-2025 Strategic Plan documents from Spanish to English for the Madre Verde Foundation and What is Non-profit Fundraising (NPO) General and Non-profit Board Member Certificate Essential Certificate-TCCR from English to Spanish for Talita Cumi, to make these documents a contribution to both places and make these translations a public use for your benefit own.

However, by exploring the translation procedures and methods, she successfully resolved the question, so no changes were necessary. On the other hand, the question is adequately answered in the evidence of the results in both Chapter IV and Chapter V since notable aspects were highlighted throughout the research in these documents, such as the changes and differences from one language to another.

### **6.4 Recommendations**

The researcher's main recommendation is to look for a non-profit organization or foundation that seeks help in expanding its projects to foreign people or even that has agreements in other countries. In addition, if it is a place that needs help in a foreign language, feeling identified with its missions and purposes will help you satisfy and enrich the work in a personal way, not only for academic fulfillment, since it will keep you interested and committed to its community.

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On the other hand, the researcher recommends maintaining good communication with non-profit organizations. This will not only keep the organizations included in the research work process but also benefit the researcher by helping them understand more broadly what the organization wants to make known and how they would like their information to be expressed or translated. Message. Once the documents have been delivered, the process and the intention to translate them will be facilitated.

As a third recommendation, once the organizations give you the documents, it is essential to evaluate the text's complexity level and commit or not to the continuation of the translation development. Once the work has been evaluated and accepted, it is necessary to read the documents several times and highlight relevant topics, questions, terminologies, places, and data. This will make it easier for you to carry out the process and accurately translate.

As a fourth recommendation, pay meticulous attention to each terminology per document. This will allow you to familiarize yourself with the terms and understand the context of the message since, to carry out an accurate translation, you must repeat reading and fully understand the text to be translated. The researcher wants future researchers and translators to take this into account to mitigate possible obstacles that may arise when creating the color code.

However, as a recommendation for the color code, the researcher considers it essential to know and become familiar with the translation procedures and methods before carrying out the color code. Once familiar with and understand the use of each procedure, assigning a legible color for each translation procedure is essential since this

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will help distinguish it in the text. In addition, it will be essential to pay attention to each word to assign the procedure with the assigned color.

As another recommendation, for the creation of the glossary, the researcher considers that once reading the document, make a list of words and terms that are difficult for the reader to understand; once covering and investigating their definition, they must look for reliable sources for the accurate translation in the document—target language. A minimum of 25 words is recommended to cover all the terminology and thus make the glossary a complete and organized work. For this, creating a table divided into mother tongue and target language, along with its definition and grammatical category, is favorable so that the future reader understands the meaning of the words in depth.

Finally, the last recommendation is to carry out a detailed and in-depth review of all the work. This way, you will be able to correct and perfect your work before delivering your final version. For this section, it must be considered that as the research and translation progress, several versions, commonly called drafts, will be made to perfect and deliver a unique and precise version to the organizations.

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and the expressive function (invocations and exclamations)" (p. 315). However, the vocative is a grammatical tool intended to attract the reader's attention

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