EF-to-EF Mentorship program between Mexican Fund for the Conservation of Nature, A.C. and Patrimonio Natural Fund

Project K: RedLAC-CAFÉ Knowledge for Action Project

Mentor Fund:

Mexican Fund for the Conservation of Nature, A.C.

Mentee Fund:

Patrimonio Natural Fund

Theme:

Strengthening between Funds

Date of elaboration:

2016-2018

EF-to-EF Mentorship program between Mexican Fund for the Conservation of Nature, A.C. and Patrimonio Natural Fund

1. Introduction

Background and justification

The Environmental Funds (EF) are institutions that were born in the nineties[1], in view of the need to manage, administer and provide financial resources for the conservation of natural resources to other organizations in a more effective manner. These initiatives have oriented their main efforts to ensure that the recurrent expenses of protected areas (PAs) are covered, and to finance projects for the conservation and sustainable use of natural resources and the strengthening of the civil and community organizations that collaborate with them. After two decades of operation, the EFs have diversified their actions, assuming diverse roles in the face of changing political, social, economic and technological scenarios. The multiplicity and innovation of strategies and actions in different situations makes the systematization and transmission of experiences among EFs a priority, in order to strengthen and create new capacities in the short and medium term.

Faced with this challenge, the Network of Environmental Funds of Latin America and the Caribbean (RedLAC), and the Consortium of Environmental Funds of Africa (CAFÉ), designed Project K, Knowledge for Action: improving global conservation through exchanges between peers and knowledge management. It is an initiative that aims to improve the portfolio of innovation of the Funds; diversify funding sources to face conservation challenges; and promote knowledge and the replication of good practices through peer-to-peer learning and the use of digital tools.
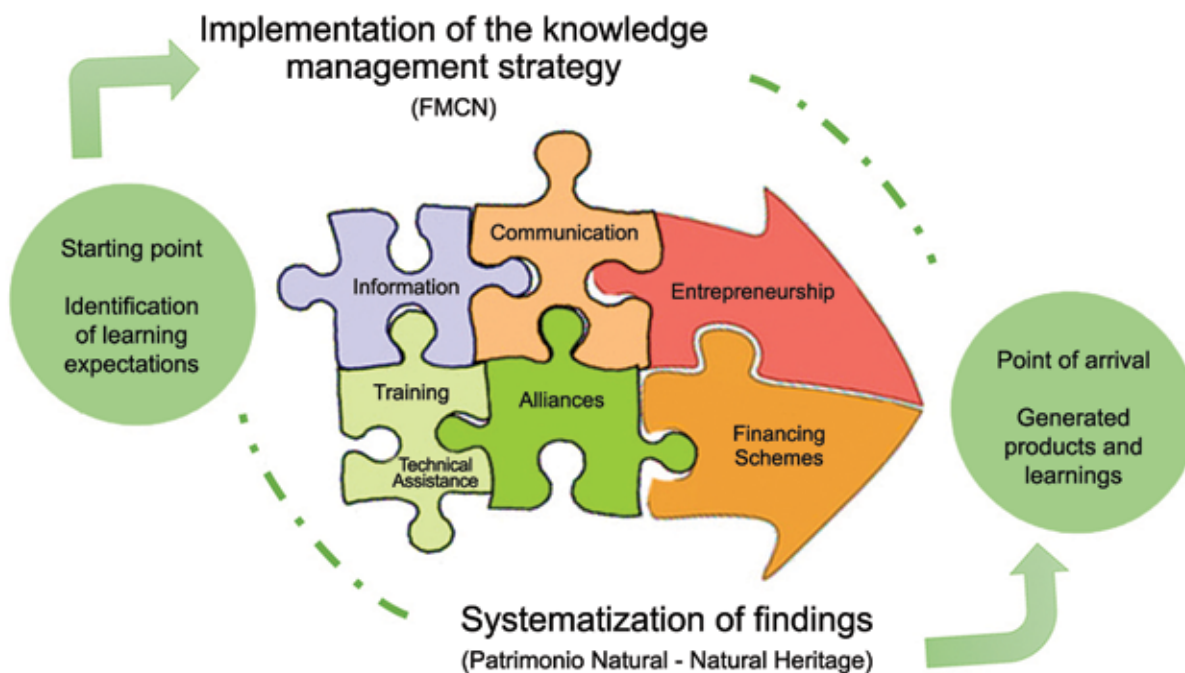
In this sense, Strengthening between funds recovers and disseminates the most significant experience and learning of the Peer-to-Peer Virtual Presence Project supported by the Mexican Fund for the Conservation of Nature, A.C. (FMCN) and the Patrimonio Natural Fund of Colombia (PN).

---

1 One of the results of the agreements of the Earth Summit, held in Rio de Janeiro, Brazil in 1992.

Participatory systematization in the construction of the case study

For the construction of this case, the objectives and general guidelines presented in the publication Case Studies for Sharing Experiences of Environmental Funds (RedLAC, 2014)[2],and the sociological perspective of knowledge as practice (Gherardi, 2006)[3] were considered. Accordingly, the commitment to participatory systematization required that the processes of production, recovery, reflection and systematization of shared information and instrumented training activities were in the hands of the participants themselves, since from beginning to end it was kept in mind that only what is put into practice is learned.

Graph 1: Participatory Systematization Model

2. Case study

Objective

"Strengthen the capabilities of Patrimonio Natural and FMCN through the joint design of a knowledge management strategy, around strategic issues that make viable the financial sus-tainability of Colombia's protected areas."

The intention of the project was to recover the experience and share the most significant knowledge generated in FMCN in more than 23 years, in order for PN to reduce its organizational and technical learning gap to advance solidly in the institutional excellence and financial sustainability of both its organization and the protected areas of Colombia.

Participants And Roles

Mexican Fund for the Conservation of Nature, A.C.

Non-profit organization with nearly 25 years of experience that, through the mobilization of financial resources, the creation of alliances and decision-making focused on the conservation and use of natural capital, seeks to build a sustainable future for Mexico. To achieve this, it has conservation and innovation programs that are carried out in areas of importance for the conservation of biological diversity.

2 *Case Studies to Share Experiences of Environmental Funds*. RedLAC. 2014.
3 Gherardi, S. *Organizational knowledge: the texture of workplace learning.* Blackwell Publishing. Oxford. 2006.

Mission

To converge with other participants and sectors in strategic technical and financial sup-port to conserve Mexico's patrimonio natural.

Vision

Our ecosystems recover their health and provide their services to the population in perpetuity.

The specific role of FMCN for this project was that of tutor, which entailed:

a) Facilitating learning to ensure the creation of a collaborative space between peers.
b) Approaching the history and institutional development of PN, in order to understand its organizational culture.
c) Sharing tools and experiences of (self) evaluation of organizational capacities to facilitate the identification of points to strengthen and consolidate in PN.
d) Designing and implementing a knowledge management strategy to encourage the creation of innovative financing and institutional development schemes.
e) Following up and giving specific advice in accordance with learning demands or specific exchanges in institutional and technical matters.
f) Fostering the systematization culture in PN, so that the learning generated in the face-to-face visits could be shared with other areas of the institution.
g) Evaluating the results of the instrumented knowledge management strategy.
h) Following up the process until its completion and institutional agreement to generate the results and products.
i) Actively contributing to the construction and dissemination of the case, through a participatory systematization consultancy.
j) Building and feeding a virtual microsite with the materials generated and adapted during the life of the project.

> **For the joint design of a knowledge management strategy, FMCN contributed some of the approaches that have gradually made the operation of its programs and funding schemes, cutting-edge benchmarks at the level**

Patrimonio Natural (Natural Heritage)

Fondo Patrimonio Natural started its activities in 2005 as a result of an alliance between the public sector and the private sector, with the mission of promoting investments in companies, government and society for the conservation of natural areas throughout Colombia. The instru-ments used by Patrimonio Natural to achieve financial sustainability of its initiatives are the design of economic and financial mechanisms, the development and management of financing policies and the administration and management of projects. It also manages patrimonial and extinguishable funds, manages calls to co-finance projects at the same time that it strengthens the capacities of its partners, on the other hand, it also executes directly.

Mission

Promote strategic investments in and with businesses, government and society for the conservation of the country's natural areas and the services they provide; contributing at the same time to the improvement of the quality of life and the development of capacities of the local communities.

Vision

The Fund is the leading institution in strategic investments for the conservation of the natural heritage of Colombians, financially consolidated, with a transparent governance system and responds effectively to the country's conservation and financing objectives.

The role of PN for this project was that of tutored, which entailed:

a) Transforming its role from a passive tutored to an active agent responsible for its learn-ing according to the collaborative knowledge management strategy proposed by FMCN.
b) Approaching the history and institutional development of FMCN, in order to know the internal elements and context of their organizational culture.
c) Identifying and establishing its needs for advice and strengthening.
d) Validating, enriching, and providing feedback to the knowledge management strategy proposed by FMCN.
e) Documenting and sharing with FMCN the most significant aspects of face-to-face and virtual meetings.
f) Assessing and sharing the results of the knowledge management strategy.
g) Contributing to the development of the virtual microsite with the materials generated and adapted during the project.

Focus and model

For the joint design of a knowledge management strategy, FMCN contributed some of the approaches that have gradually made the operation of its programs and funding schemes, cutting-edge benchmarks at the level:
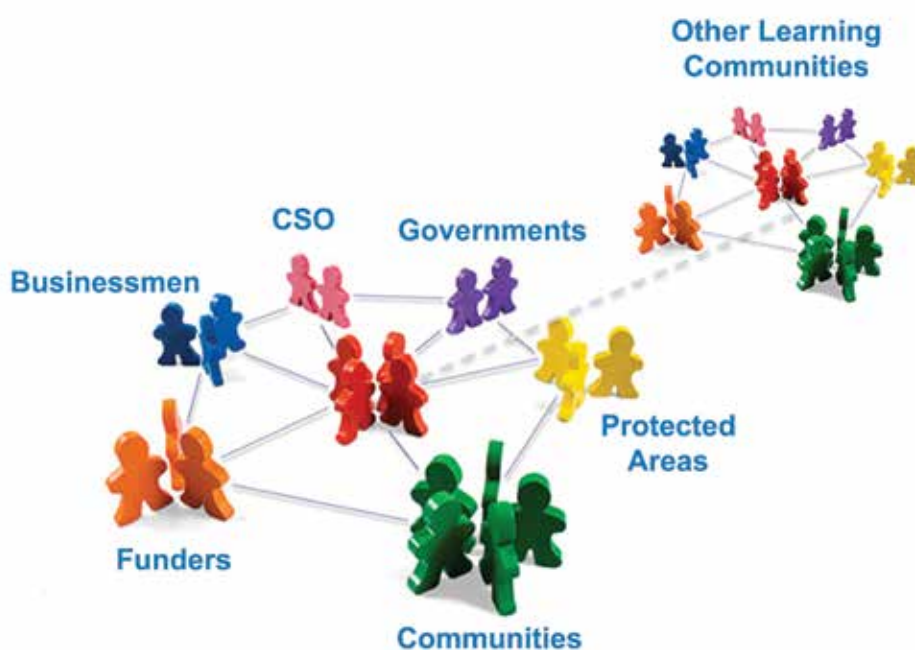
Graph 2: FMCN work model

Learning community with work skills approach

The Learning Communities are spaces for reflection, discussion, exchange and training that allow the linking and strengthening of participants who share common objectives or interests. Between its characteristics it emphasizes the dialogical learning; that is, a dialogue between peers who value their contrasts without trying to reconcile all their differences.

Graph 3: Learning Community

"This spirit values the relevance and effectiveness of knowledge management, in terms of the knowledge, skills and abilities developed and/or strengthened in PN, according to its specific context."

This spirit values the relevance and effectiveness of knowledge management, in terms of the knowledge, skills and abilities developed and/or strengthened in PN, according to its specific context. Therefore, more than a tutor-tutored scheme, FMCN and Patrimonio Natural are recognized as different pairs that learn from each other permanently. To enhance it, FMCN used the methodology of training for work skills, based on the use of a flexible instrument that evolves with learning, making it possible to reprogram actions, add new resources and modify teaching strategies together, and with reference to what works. Our ecosystems recover their health and provide their services to the population in perpetuity.

Organizational evaluation culture

After recognizing that better organizations make better projects, FMCN has encouraged the development of the culture of organizational evaluation among its partners, so this experience was no exception. For this, it adapted and shared the Institutional Effectiveness Index (IEI) tool.

The IEI is an instrument that evaluates, through 61 indicators, the connections and bonds of solidarity between the parts of an organizational structure, which strengthen the group identity, facilitate coexistence, and favor the coordinated and effective work with the agents of the environment. This tool was built with the learning about the processes of institutional development of the main FMCN partners, and with some significant references on institutional development, such as Social Capital: The Missing link? (Grootaert, 1998)[4], and the Regional Program for the Development of Organizational Competences (FOMIN/BID)[5].

PN carried out the exercise with its personnel in Colombia, supported by an expert consultant in systematization and institutional development. This activity was key to identifying the areas of interest and opportunity reflected in its "institutional semaphore".

Table 1: Hierarchical Organization of PN strengthening areas with the IEI

Human resources management	3.19
Communication and image	3.28
Technical capacity	3.43
Financial management and administration	3.50
External linkage and synergy	3.50
Leadership, management, and strategic planning	3.65
Institutional design	3.83

---

[4] Grootaert, C. *Social Capital: The Missing link?* World Bank. 1998.
[5] The approach can be found at: www.cebem.org/cmsfiles/cursos/Resumen_Programa_s_p__2008.pdf.

Sustainable entrepreneurship

The search for solutions to the problems related to the conservation and sustainable use of natural resources raises the model of sustainable entrepreneurship, as a viable alternative to traditional models of non-repayable or non-refundable financing. FMCN has understood the relationship between entrepreneurship and creativity and has shared with PN the opportunity to participate in the creation of new conservation schemes that allow the responsible use of natural resources without compromising the profitability of investments, guided by the articulation of the following components:
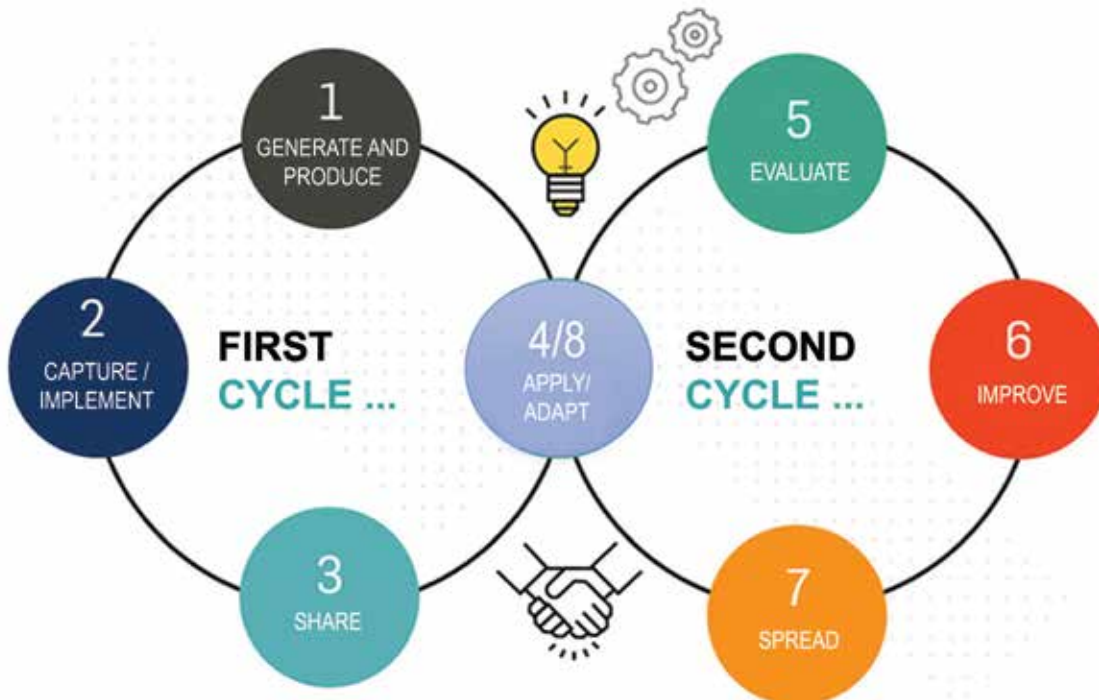
Graph 4: Articulated model of sustainable entrepreneurship

| Organizational Maturity | Operational Process | Commercial Development | Environmental Impact | Social Impact |

Knowledge management

Knowledge results from a set of experiences, wisdom, values, information and perceptions and ideas that, in turn, facilitate the creation of certain structures in subjects and organizations, allowing them to evaluate and incorporate new competencies. Therefore, more than a concept, the knowledge management for this project was implemented as a planned process of continuous transformation, with the purpose of strengthening and consolidating the identified learning axes for each one.
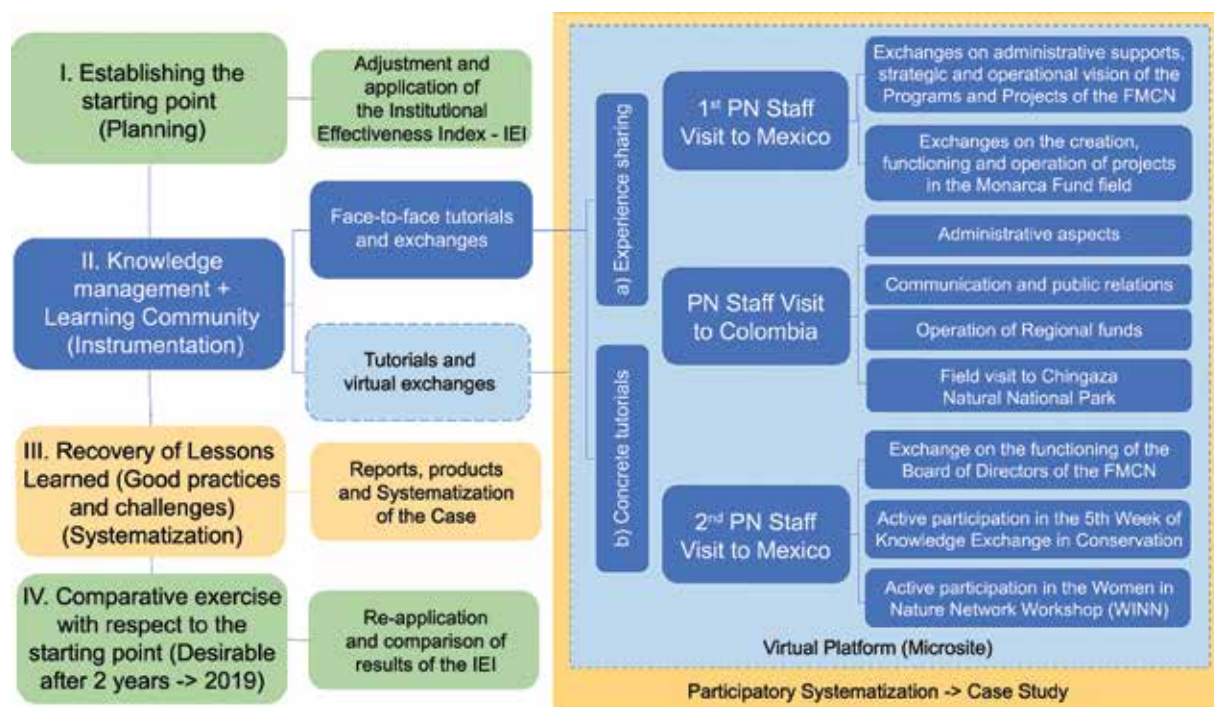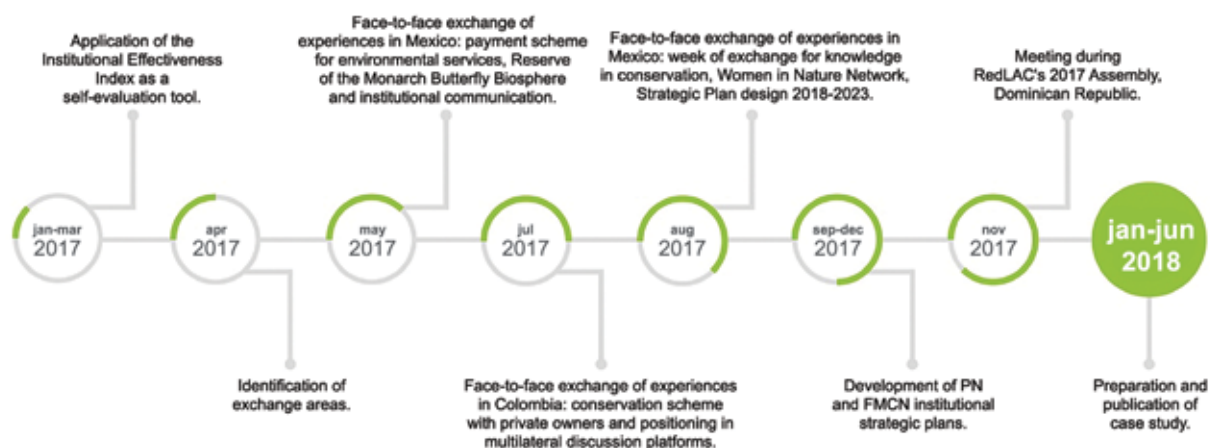
Graph 5: Knowledge management

Knowledge management instrumented strategy

The design and implementation of the knowledge management strategy guided by FMCN, formally contemplated the first three phases, and was characterized by using modalities of face-to-face and virtual exchange.

Graph 6: Phases of the project's knowledge management strategy.

Graph 7: Timeline of implementation of the knowledge management strategy.

Establishing the starting point: identified demands

The subjects ratified for the implementation of the knowledge management strategy were:

a) Financial management and resource management

This learning axis focused on sharing experiences and generating reflections on the processes of innovation, projection, procurement and supervised execution of the financial and material resources necessary for the achievement of established goals.

In this framework, proposals for Payment for Environmental Services (PES), patrimonial funds, investment projects and other co-financing mechanisms were discussed in detail.

b) External linkage and synergy

This axis refers to the promotion of strategic alliances, agreements and operational policies of mutual benefit among multiple participants. In order to consolidate it, the Executive Directorate of PN was invited to learn first-hand and participate in inter-institutional and cross-sectional synergy processes led by the FMCN.

c) Communication and image

This axis refers to the establishment of quality relationships between the institution and the target audiences. At the beginning of the project, PN was restructuring the communications department and reinforcing its internal communication, so the exchanges in this field were really significant.

Face-to-face modality

The two visits of the PN management staff to Mexico, held in April and August 2017, allowed the exchange of information and experiences through meetings with the members of the Council, operational teams and local partners of FMCN, and participation in spaces of training with the spirit of a learning community.

During both meetings, existing materials within FMCN were analyzed, such as the presentation and progress in updating the strategic institutional planning, the fact sheet, the organization chart, the annual report, and the counselor's manual and specific studies developed by the institution. At the structural level, the directors of each FMCN program[6] presented their field operation mechanisms, methods for channeling resources and printed documents on specific high-value experiences such as learning communities (LC)[7], Payment by Environmental Services (PES) and collaborative networks on the regional scale (RED Monarca). Also, meetings were held with representatives of government and civil society partners that support the implementation of the Monarca Fund (National Commission of Natural Protected Areas and Alternare, A.C.).

Results of these visits are the article *Mosaics, Butterflies and Exchanges* (Cavelier, 2017); the strengthening of the powers of the Executive Directorate of PN thanks to its active participation in a meeting with the President of the Board of Directors of FMCN, the representatives of the Mexican Alliance of Biodiversity and Business (Amebin) and World Wildlife Fund Mexico; the development of the business vision thanks to the active participation in the Fifth Week of Knowledge Exchange for Conservation; and the publication of the article *Opportunities for financing sustainable development in Colombia* (Cubas, 2017), within the framework of the annual meeting "Women in Nature" (WiNN 2017)[8].

Likewise, the FMCN management met with the different PN departments in Colombia, to exchange best practices in legal, administrative, purchasing, general management aspects and field conservation projects, among others. During this visit, a meeting was also organized with various participants from public and private institutions, which presented the experience of payment for long-term environmental services in Mexico, as well as other foundations that illustrated the possible actions to be taken into account in public policy matters for water conservation. Additionally, Chingaza National Natural Park was visited to learn first-hand about the different conservation schemes and incentives for sustainable management with the participation of local owners.

Virtual mode

The follow-up and feedback talks continue to be conducted via Skype, and the exchange of information and materials through platforms and digital media (Dropbox folders and email, mainly). A microsite that houses information, knowledge and experiences generated by PN and the FMCN for this project was also built: https://fmcn.org/patrimonio-natural-fmcn-2/

---

[6] FMCN operates under four Conservation Programs: 1. Protected Natural Areas, 2. Seas and Coasts, 3. Forests and Watersheds and 4. Special Projects and Innovation.

[7] The Learning Communities promote the development of capacities, the exchange of information and the dissemination of experiences in the management of fire, watersheds and protected natural areas. Currently, five communities are active: 1. Fire Management; 2. Seas and Coasts; 3. Watersheds and Cities; 4. Protected Areas; and 5. EmFoCo and Development.

[8] WiNN, is a network to share experiences and support women's leadership on the issue of conservation. The event included presentations by experts in gender to establish links with organizations dedicated to the theme and experiences in women's careers at different stages of their lives. The agenda included workshops on leadership, on visualizing the network of women who support the participants and storytelling as a tool to achieve conservation objectives.

Generated products

Below, the most significant products of this experience are listed, which can be consulted in the virtual microsite.

- Inputs for updating the Strategic Patrimonio Natural Plan 2018-2022 (in development).
- Comprehensive Knowledge Management Plan FMCN-PN in the framework of Project K.
- Mosaics, butterflies and exchanges - Fact sheet (Inés Cavelier, 2017).
- Systematization of Payment for Environmental Services, Basins and Cities - PN (Inés Cavelier, 2017).
- "Opportunities for financing sustainable development in Colombia" (Cubas, 2017).
- Seeds of the Learning Community spirit planted in PN, AP and its local partners.
- Sketch of a FMCN-PN development plan.
- WEB microsite with an information bank.

Challenges

Faced

Establishing a horizontal exchange process between FMCN and PN required facing a set of challenges of different types:

- **Identification of contexts**. Initially, it was essential to develop an effort by the participants to identify the features of the context, in which each of the institutions develops its conservation and sustainable development efforts. Among the main topics of interest, we can refer to the relations with the government institutions, the operating conditions of the civil organizations, the financial and fiscal situations in the national scale, besides the culture of participation of the participants involved in the conservation and management of natural resources in Mexico and Colombia.
- **Creation of a common language**. It was necessary to establish a shared language for FMCN and PN, in order to make clear the interests, orientations and scope of the assistance and exchange process. This process implied a space of knowledge and recognition of the abilities and aptitudes existing in each institution.
- **Creation of an environment of trust**. Considering that the project involves the review of sensitive areas of the institutions, and even internal and confidential information, we managed to create a trusting environment that mitigated uncertainties for the collaborative work.

- **Formalization of legal instruments**. In order to formalize the institutional arrangements and the institutional cooperation process, FMCN and PN were able to elaborate and formalize legal instruments that gave order to the joint activities and the flow of institutional and financial resources.

Future

At the end of the project, some challenges to the future remain pending; among the most significant are:

- **Monitoring of advances in Institutional Effectiveness**. In the case of PN, there is a valuable opportunity to update the reading of the Institutional Effectiveness Index and monitor progress in the areas of human resource management, communication and image, and technical capacity.
- **Replica of the mentoring experience**. FMCN and PN are challenged to replicate the mentoring and exchange experience with other RedLAC organizations and at the scale of their respective countries.
- **Strategic communication**. The project partners will face the challenge of communicating to their directors and partners the opportunities, benefits and learning derived from the RedLAC project.

3. Conclusions and lessons learned

The mentioned approaches and spirit, allow us to conceive the systematization of this case as a point of caption of a process that continues open. Undoubtedly, the creation, valorization and adjustment of the different capitals mobilized under the spirit of the learning community, will continue to produce knowledge structures for organizational development in both environmental funds. However, and as an anticipated conclusion but not closed, we can affirm that the strengthening experience promoted by RedLAC has been enriching for all involved, since it goes beyond the initially set objectives.

Based on its implementation, in PN, reflections were generated on the best administrative, financial and technical practices, which will be reflected in the objectives and goals of the new strategic plan. Likewise, participation in various forums and collaborative learning spaces pointed out to the PN the need to promote, maintain and increase inter-institutional relations in networks dedicated to conservation, the management of productive landscapes and the sustainable use of biodiversity. With this purpose, since January 2018, the concept and practice of learning communities, both internally and with external allies, is being developed in order to improve the management of biodiversity at different scales and with different capacities related to the challenges to face.

For its part, FMCN reaffirmed that the role of facilitator also generates learning because it requires it to identify and reflect with its peers on the effectiveness of the practices it has developed over the years. In addition, it recognized in PN an ally with which to start thinking about macro-regional development plans and financing schemes, and to outline future learning strategies in more technical subjects. The systematization of experiences and work tools allowed FMCN to identify new areas of opportunity for institutional work and in the conservation of Mexico's patrimonio natural, before the start of the institution's new Strategic Plan 2018-2023.

The best practices identified during the execution of the project refer to the need to articulate the strategic aspects of the institutions with the operating processes, within a framework of continuous improvement. Some of the best practices installed with project support consist of:

- Incorporate instruments for evaluating institutional effectiveness and the areas of im-provement that the work of organizations should address.
- Refine strategic planning exercises and achieve their internalization in the activities of the institution in the short and long term.
- Achieve the participation of the management and operational cadres in the areas of reflection and analysis, as well as in the implementation of institutional improvement measures.
- Initiate exchange processes and collaborative work with peer institutions in the country itself and with others involved in the area of influence of RedLAC.
- Have strategic communication actions and assess the effects on the image and profile of the organization.
- Integrate a map of the peer organizations with which the potential collaboration offers mutual benefits. Integrate roadmaps to achieve rapprochement, communication and collaboration with the institutions with the best potential, according to the strategic vision of the participating institutions.

Synthesizing, *strengthening between funds* highlights that broad and constructive collaboration under the principles of a true learning community will be an increasingly effective opportunity, to the extent that it spreads and adds other Environmental Funds.

First visit of PN to FMCN

Public places in FMCN

Peasant settlers of the Monarca Reserve