

CONSERVATION DIALOGUES SOUTHERN MESOAMERICAN REGION

A two-day gathering organized by the Rainforest Alliance

A total of 36 representatives from environmental projects in the southern Mesoamerican region (Panama, Costa Rica and Nicaragua), financed by the Critical Ecosystems Partnership Fund (CEPF), came together in San José on March 24 and 25, 2004, with representatives of the Rainforest Alliance, CEPF, and invited guests. They discussed:

- *Monitoring and evaluation of their projects' impacts*
- *Long-term financing and project sustainability*
- *Improving donor relationships*
- *Best ways to share lessons learned with one another*
- *Communicating with local stakeholders and with the media.*

The following is a summary of the discussions and presentations. When possible, speakers are identified. See the [list of participants](#), with their organizations and email addresses.

SUMMARY OF PROJECTS IN THE SOUTHERN MESOAMERICA HOTSPOT

As a way to introduce themselves and their projects to others, the participants mounted displays of their project profiles on the Rainforest Alliance's Eco-Index, along with maps, brochures, and photos, then gave brief presentations about their projects' objectives. Below, are summaries of these presentations; with links to the full project profiles on the Eco-Index.

Establishment of Maquenque National Park Giselle Monge, Olivier Chassot San Juan La Selva Biological Corridor Tropical Science Center Costa Rica

"The project's main purpose is to establish a national park in northern Costa Rica that will help biological connectivity between southeastern Nicaragua and northern Costa Rica. Two principal achievements are the publication of a decree establishing the preliminary boundaries and support from the Ministry of the Environment for this initiative. We have also done research and environmental education. The initiative uses the endangered green macaw as its flagship species. We have determined that the only way to avoid the macaw's extinction is to establish a protected area, with the remaining forests in this area. An alliance of around 15 participating organizations ran a national outreach campaign that promoted the establishment of this new protected area."

Creation of Botanical Training Centers (alternative medicine) Lauterio Rayo Asociación para la Medicina Tradicional Naso (Naso Traditional Medicine Association) Bocas del Toro Panama

“Our objective is to rescue Naso traditional medicine using a group of shamans, made up of three teachers and 36 students. They intend to preserve traditional culture and conserve the environment, a task they have been working on for eight years. They have a monarch: King Nasso.”

Weckso Ecotourism Project

Adolfo Villagra

Organización para el Desarrollo Sostenible del Pueblo Naso (Organization for the Sustainable Development of the Naso People)

Bocas del Toro

Panama

“Our project aims to incorporate ecotourism into the Nasso territory in a way that will help the economy of the indigenous population and the conservation and sustainable management of natural resources. We share this objective with Asociación para la Medicina Tradicional Naso.”

Environmental and Socio-economic Diagnostic of the Caño Negro and Kukra River Wetlands

Filiberto Hodgson

Fundación para el Desarrollo Sostenible (Foundation for Sustainable Development)

Southern Atlantic Autonomous Region

Nicaragua

“The project is conducting an environmental and socio-economic analysis of the Caño Negro and Kukra River wetlands. The project is located in the Cerro Silva Nature Reserve southeast of Bluefields. The objective is to become acquainted with the environmental situation of these wetland ecosystems and the socio-economic situation of the neighboring populations.”

Structure and Composition of a Fragmented Forest Landscape: A Tool for the Design of Biodiversity Conservation Strategies.

Zayra Ramos,

Centro Agronómico Tropical de Investigación y Enseñanza (Center for Tropical Agronomy Research and Training)

Costa Rica

“The research project’s objective was to find a methodology that would help decision-making by identifying areas for conservation and/or forest cover restoration in the San Juan-La Selva Biological Corridor, according to landscape ecology criteria. The project developed a model for evaluating landscapes, identified potential areas of ecological integrity, and connection routes that would help conservation and landscape connectivity.”

Environmental Monitoring in the Autonomous Regions of Nicaragua

Zarifeth Bolaños

Universidad de Las Regiones Autónomas de la Costa Caribe Nicaraguense

**(University of the Autonomous Regions of the Nicaraguan Caribbean Coast)
Nicaragua**

“The project will develop a proposal for the sustainable management of the protected areas in Rama indigenous territory on the Caribbean coast. We are implementing a management and training plan with the indigenous people for the administration of protected areas by landowners. The plan includes technical and administrative training, territorial demarcation, and land titling. The indigenous people have conflicts with colonizing ranchers and loggers entering the area. The project will provide the Rama with training so that they can be the administrators of their protected area, with the necessary legal tools.”

Restoration of Ecosystems in Critical Areas of the Agricultural Frontier in Cerro Silva Nature Reserve

Roder García,

**Universidad de Las Regiones Autónomas de la Costa Caribe Nicaraguense
(University of the Autonomous Regions of the Nicaraguan Caribbean Coast), Nueva Guinea university district
Southern Atlantic Autonomous Region
Nicaragua**

“Our objective is to increase natural-resource diversity in identified critical areas using a validation process with the communities for the conservation, planning, and management of natural resources. To fulfill this objective, we will encourage agro-forestry systems, as well as forest cover, by using genetic material from the remnant forests, including native plants and non-timber products for different uses, such as furniture. Farmers will also receiving training in biodiversity monitoring techniques.”

Management and Biodiversity Conservation with Local Participation in Five Communities along the Punta Gorda and Pejibaye Rivers

Félix García

**Asociación de Desarrollo y Promoción Humana de la Costa Atlántica (Association for Human Development and Promotion of the Atlantic Coast)
Southern Atlantic Autonomous Region of Nicaragua**

“We work on the Cerro Silva boundary with the Indio Maíz Reserve, where we hope to protect biodiversity in five local communities. We will spread the philosophy of the Mesoamerican Biological Corridor, prepare a work plan in each one of the five communities, and closely examine the potential and problems in order to develop a joint plan for environmental protection and conservation.”

Ecotourism Development in the Mahogany Wetlands Municipal Ecological Park

Francis Castro

**Bluefields Indian and Caribbean University
Nicaragua**

“Our project aims to conserve the biological resources of this area while contributing to the socio-economic development of five communities. The goal is to consolidate the area as a tourism destination.”

Strengthening Community Park Guards of the Mahogany Wetlands Municipal Ecological Park

Marcos González

Asociación de Guarda parques Comunitarios de Mahogany (Mahogany Community Park Guards Association)

Nicaragua

“We want to contribute to biodiversity conservation by strengthening the abilities of park guard to do surveillance, control, and monitoring. The area has problems due to the expansion of the agricultural frontier, illegal logging, hunting, fishing, and forest fires. We hope to control illegal activities such as setting fires on purpose and poaching. We’ve already acquired 50 percent of the equipment we need. This project is related to the the ecotourism project of Bluefields Indian and Caribbean University [above], because the park guards are going to work actively on the tourism project.”

Conservation and Monitoring of Biodiversity in the San Juan River Biosphere Reserve

Heydi Herrera

Fundación Amigos del Río San Juan (Friends of the San Juan River Foundation)

Nicaragua

“This project’s principal objective is to work on territorial management plans in southeastern Nicaragua. The biosphere reserve holds seven protected areas and we have participated in the preparation of management plans for four of them. The plan for the Indio Maíz Reserve, located in the heart of the biosphere reserve, is now underway. We have worked on uniting local organizations in the region. We have held workshops to exchange information, determine the groups’ different problems and continue the protected area’s zoning.”

The Manatee as a Tool for the Integrated Conservation of Wetlands and Forests of the San Juan River and the Tortuguero Plains

Carlos Espinoza

Fundación Manatí de Costa Rica (Manatee Foundation of Costa Rica)

“This binational project uses the manatee as a tool for forest conservation in the San Juan River and Tortuguero Plains. Project objectives focus on information generation -- community perception and attitudes toward the manatees and the manatees’ long-distance movements, distribution, and behavior. The information is to be used in the management of the protected areas and in designing outreach activities and materials for the communities. Puppets, comic books, and books for technicians and adults have been prepared. There is also an updated database on the San Juan River wetlands.

Guaranteeing Quality and Quantity in Sustainable Farming in Southeast Nicaragua
Abel Rivera
Sano y Salvo (Safe and Sound)

“In Nueva Guinea, which is in southeast Nicaragua, we are working to guarantee quality and quantity in ecological farming as a tool for conservation. We want to conserve natural resources in this critical hotspot area by providing an economic alternative. We will promote ‘best practices’ in coffee and cacao farming and tourism. We will also try to restore degraded areas and increase the income of families that are working in ecological agriculture. We work in three municipalities, Nueva Guinea, Rama and part of Bluefields. Our final objectives are diversified farms, more forest cover, and a population that is aware of the need to protect their lands.”

Eco-Index
Nuria Bolaños
Rainforest Alliance
Costa Rica

“The Eco-Index is a virtual database with bilingual information about conservation projects in Latin America and the Caribbean. Approximately 30,000 people consult the Eco-Index each month. Currently, it holds information about almost 800 projects, along with interviews and other helpful content related to biodiversity conservation in the Neotropics. We also create Web pages for NGOs that do not have them.”

Sustainable Alternatives in the El Quetzal Biological Corridor
Yendry Rojas
Asociación de Tres Colinas (Three Hills Association)
Potrero Grande, Buenos Aires de Osa
Costa Rica

“We work in the buffer area of La Amistad International Park, which extends into Panama. Among our goals are to encourage biological corridors and to live in harmony with the environment. We are starting a project on sustainable alternatives, with the goal of protecting the endangered quetzal. One possibility is growing organic blackberries.

Conservation of Biodiversity and Sustainable Production in the Osa Biological Corridor
José Rivera
Fundación Geotrópica (Neotropics Foundation)
Costa Rica

“For three years, this project has been collaborating with other associations working on the Osa Biological Corridor initiative between Piedras Blancas and Corcovado National Parks. Guidelines have been established and one of these is farming integrated with biodiversity conservation. We work with farmers who are involved in the government’s environmental services payment system, incentives to landowners for protecting forests. We hope to integrate incentives with farm management that is linked to forest conservation.”

Communal Environmental Management for Appropriate Natural Resources Use and Adoption of Sustainable Farming Practices in the La Amistad Biosphere Reserve Buffer Zone

Luis Olmedo

Fundación para el Desarrollo Integral del Corregimiento de Cerro Punta (Foundation for the Integrated Development of the Cerro Punta District)

Panama

“This is a community environmental management project that hopes to achieve appropriate natural resources use La Amistad Biosphere Reserve, working with farmers who will sustainably manage forest, water, and soil resources. The project will provide training and support to existing NGOs and will promote the creation of new organizations. Our organization is part of the Alianza para el Desarrollo Ambiental de Tierras Altas (Alliance for the Environmental Development of the Highlands), whose work to involve the public in protecting Barú National Park has support from the National Association for the Conservation of Nature.”

Campaign for Increasing Awareness about the Biological Importance of Barú National Park

Ernesto Ponce

Asociación Nacional para la Conservación de la Naturaleza (National Association for the Conservation of Nature)

Panama

“This project is strengthening the role of the public in the protection of Barú Volcano National Park, which is connected to La Amistad International Park by a biological corridor. Our struggle has created alliances among many environmental organizations, especially at the local level, for defending Barú from the construction of a government-supported road that would cross right through the park. The idea was to use legal and technical tools, along with outreach to the media, and we had very positive outcomes. The construction was halted due to pressure from the public.”

Promoting Traditional Conservation Practices in the Cabecar Indigenous Communities of Bajo Chirripó and Nairi Awari in the La Amistad Biosphere Reserve

Carlos Sevilla

Asociación de Desarrollo e Información Indígena Ixacavaa (Association for Indigenous Development and Information)

Costa Rica

“Our project works with the communities of Bajo Chirripó, Kekoldi and Punta Burica. It promotes the rescue of the indigenous communities’ traditional conservation practices, disseminates them to the communities, and ensures they are part of the protected wildlands’ management plans.”

Improvement of Biodiversity in the La Amistad Biosphere Reserve Buffer Zone through Conservation Management of Coffee Farms

Cinthia Granda
Tropical Science Center
Costa Rica

“This initiative is a continuation of the project known as “AMISCONDE,” which was implemented in the buffer zone of Chirripó National Park, and the AMISCONDE-La Marta project that is located in the buffer zone of the La Marta National Wildlife Refuge. Our project activities include environmental education, reforestation and promotion of biological corridors and social and institutional sustainability. We work with families that cultivate coffee, which is very important around the park and considered to be fundamental for the protection of the area.”

Conservation of Tapirs (*Tapirus bairdii*) and La Amistad International Park
Eduardo Gómez
Asociación Mejorando el Desarrollo Rural a Través de la Conservación de la Vida Silvestre (Association for Improving Rural Development through Wildlife Conservation)
Costa Rica

“We are doing a scientific study in La Amistad International Park to determine the tapir’s range of distribution and habitat preference. We are working with five indigenous communities in order to raise their awareness about these endangered animals. The information that we generate will help improve park management and tapir protection and will involve rural communities. The tapir is endangered due to hunting, and because it needs a large area of habitat to survive.”

Protecting and Increasing Biodiversity in La Amistad International Park and its Buffer Zone at the Costa Rica-Panama Border
Hernán Villalobos,
Fundación Agroecológica Cotobruseña y Grupo Ecologista de Renacimiento para la Protección del Parque Internacional La Amistad
(Coto Brus Agro-Ecological Foundation and the Reborn Ecologist Group for the Protection of La Amistad International Park)
Costa Rica and Panama

“We hope to protect and increase biodiversity in La Amistad International Park by mitigating threats to the protected areas through an alliance between a Costa Rican and a Panamanian NGO. These are grassroots groups of campesinos committed to the conservation of La Amistad International Park. Their objective is to seek sustainability in communities neighboring the park, educating people about the importance of conserving natural resources and by promoting the addition of products with value added into the marketing chain. We have a small organic coffee mill, are reforesting, and making organic fertilizers from coffee wastes. We produce high quality coffee on agro-ecological farms.”

Recovery of Manatee Populations (*Trichechus manatus*) in San San Pond Sack through Awareness-raising, Habitat and Ecosystem Conservation, and Monitoring of Environmental Conditions

Juan MacDonald

Asociación de Amigos y Vecinos de la Costa y La Naturaleza (Friends and Neighbors of the Coast and Nature Association)

Panama

“The goal of this project is to work with manatees in San San Pond Sack. Manatees are being poisoned by water pollution. The idea is to carry out research on the degree of contamination and how it affects the manatee. Our ultimate goal is to rescue the endangered manatee population.”

Environmental Education in the Palo Seco Protected Forest

Elvia Requena

Modelo de Comunidad Ecológica Los Valles (Los Valles Model Ecological Community)

Panama

“Our project is located in the buffer zone of La Amistad International Park, in the Palo Seco Protected Forest. We focus on environmental education with local residents, including 40 indigenous people of all ages, who are interested in knowing everything about Palo Seco. We start with the assumption that if we help the indigenous people become better acquainted with their surroundings, it will be easier to conserve biodiversity.”

Control and Protection Plan for Corcovado and Piedras Blancas National Parks and Adjacent Areas

Alejandra Monge

Fundación Corcovado

Costa Rica

“Ours is a new NGO that supports MINAE, the Ministry of the Environment, and natural resources protection in the Osa Conservation Area. We are part of the Osa Biological Corridor Technical Coalition. We have purchased fuel, food, and equipment to strengthen the efforts to protect Corcovado Park, and this project provided support to hire more park guards and strengthen an environmental education program. We have hired a full-time teacher for MINAE who is visiting the communities that are having the greatest impact on Corcovado Park.”

Biological Information Based on Conservation Targets for the Establishment of the Biological Boundaries of the Osa Biological Corridor

Vilma Obando, Instituto Nacional de Biodiversidad (National Biodiversity Institute)

Costa Rica

“This scientific project is also part of the Osa Biological Corridor Technical Coalition. Right now we have some idea of the ecosystems that are within the corridor, thanks to a project called ‘Ecomapas’ but we don’t have a clear idea of all the species that are found there. During the first stage of the project we will define the conservation targets in the corridor, then based on

this information we can clearly define the boundaries of the biological corridor that links Corcovado with Piedras Blancas National Park.”

Environmental Education for the Conservation of Species on the Osa Peninsula

Grace Wong

Proyecto Regional en Vida Silvestre de la Universidad Nacional (Regional Wildlife Project of the National University)

Costa Rica

“Corcovado National Park holds many large species of vertebrates, and these species are greatly affected by hunting. Many community residents work as guides to poachers. We are proposing an environmental education program in which we will work with community leaders. We will show them how they can benefit the community, using wildlife as a resource for development. In the first stage of the project, the educational needs of the community leaders will be determined.”

Strengthening Local Capacity for the Management of Natural Resources in the Damani Wetlands Reserve in the Ngöbe Buglé District

Fernando Ellington

Centro de Desarrollo y Asistencia Técnica Ngöbe (Ngöbe Indigenous People Development and Technical Assistance Center)

Panama

“Our proposal is to work with 13 indigenous communities on reforestation and environmental problems. There are 150 hectares [371 acres], and more than half is deforested. Deforestation pressure is continually increasing. The highway from Chiriquí to Almirante is exerting a lot of pressure because people come from outside the area to cut trees. Often the outsiders pay the local residents a pittance of \$5 or \$10, and they carry away the tree. Regrettably, the district authorities have not put a stop to this. Our group hope to have the support of the district authorities. The problem is urgent.”

Including the Inhabitants of the Communities of Alto La Gloria, Molejón, Los Chiricanos and La Conga into Natural Resources Conservation

Abdiel Gaitán

Asociación Comercial y Agropecuaria de Chiriquí Grande (Chiriquí Grande Trade and Farming Association)

Panama

“Linking the province of Bocas del Toro with the rest of the nation, via the Punta Peña-Almirante highway, caused a serious deforestation problem. This project will try to encourage the communities along the highway to become forces of change that will result in true nature conservation. The project has two components: reforestation near water sources to reduce the flow from the rural aqueduct and reforestation along the highway edges, near the marine bed. Strong rains cause surface runoff that affects marine biodiversity. In an agreement with the

Ministry of Education we will give one hour per week of environmental education at all levels to local schools. An agreement was also established with the National Environmental Authority for tree-cutting permits that require the purchase and conservation of two trees for every one tree that is cut. The idea is to show that more money can be obtained from conserving nature.”

Strengthening Local Capacity for Natural Resource Management in the Damani Wetlands Reserve in the Ngöbe Buglé District
Ausencio Palacios
Panama

“The indigenous territory has 112,000 residents. It was formed in 1991 when Escudo de Veraguas, a World Heritage Site island, was sold for a mega-tourism project. At that time, the association was created to protect the resources. Congress was asked to create a protected area for the people and so the Damani wetlands reserve was created with 11,460 hectares [28306 acres], including the island. We raised funds to increase local capacity for the protection and management of this area. We hope to start up ecotourism projects and establish a plan for the management and monitoring of the reserve area. The community will be organized, trained, and capable of administrating its own resources.”

Capacity Building for a Control and Prevention Program of the La Amistad International Park Integrated Management Plan
Mildred Jiménez
Tropical Science Center
Costa Rica

“La Amistad International Park protects Costa Rica’s largest primary forest surrounded by large indigenous territories. Our objective is to strengthen the park protection program against threats such as hunting, extraction of forest products, and forest fires, as well as to develop strategies with the indigenous and non-indigenous communities of the park so that they will collaborate with protection. We plan to create Natural Resource Watch Committees and use a Geographic Information System that will help us acquire biophysical information about the park.”

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SESSION 1
PROJECT MONITORING AND EVALUATION

Richard Margoluis, of Foundations of Success, gave a talk about the importance of measuring project impact, the kinds of project monitoring and evaluation that can be applied, and how to do adaptive management, which will allow verification of assumptions. The participants expressed concerns about how to measure the impact on biodiversity of short-term projects and how to evaluate aspects such as changes in the attitudes of local communities.

To see Margoluis's Power Point presentation: www.eco-index.org/search/pdfs/747report_3.pdf
(Spanish only)

Discussion:

Luis Murillo, Conservation International: How does one measure the impact on biodiversity that happens as a direct result of a project, for example, an environmental education program. It is very difficult to measure the impact on biodiversity if the process takes much longer than the duration of the project. Donors should also think about continuing support for the process until reaching the final result, truly measuring the impact on biodiversity.

Richard Margoluis, Foundations of Success: Evaluation must be included as part of the monitoring. We must educate donors so they understand that there will not be an impact from the project activities in the first two years and establish a possible timeline for changes that can be seen. We cannot see change from a project that is underway for a short time. What we can see are the changes that occur in that time period. Perhaps we cannot see a change in the threats but we can see one in the behavior or attitude of the people.

Michele Zador, Critical Ecosystem Partnership Fund (CEPF): The CEPF takes adaptive management very seriously and recognizes the time that it takes the projects to formulate proposals, logical frameworks, and define indicators. We are always thinking about how to achieve adaptive management within our projects. You have clearly articulated what you want to attain as part of your projects with very clear results. To help project monitoring, every six months you see if you are achieving the goals in your logical framework. This is somewhat flexible: if indicators must be changed, this can be done by consulting the CEPF; they are not fixed. When reports are prepared, there is flexibility for changing things to achieve goals.

Diane Jukofsky, Rainforest Alliance: How do you measure changes in attitude and what is the least expensive way to do this?

Richard Margoluis, Foundations of Success: You can do interviews with key informants, to see what the community is thinking, more or less. You can compile information in a structured group where someone is taking notes. If you are interested in having very accurate information, you have to do a random sample. But if you do not have many resources there are various other ways of compiling information.

José Rivera, Fundación Neotrópica: Using key informants certainly is an important source of information, but when attempting to gather qualitative results, observation is fundamental, from the moment when we arrive to greet a local family and have a cup of coffee. You need to pay attention to what people say, how they verbalize, detecting their feelings. If key informants are not accompanied by observation 24 hours a day, day after day, the information is not as good. Observation must have standards, guidelines, and training.

Felipe Montoya, Rainforest Alliance: I have seen a tendency in many NGOs to present a project's system of evaluation and monitoring simply as a list of project activities, which is an

easy way to say that they are monitoring and evaluating. It is very easy to get quantitative data. In many cases the logic is to comply with the donor using quantitative goals such as the number of workshops, number of participants, etc. If the importance of project monitoring against the expected impact was well understood, more energy would be dedicated to it and the funding request would be justified. It is information that will help other organizations and projects know whether an action resulted in an impact.

Vilma Obando, National Biodiversity Institute: If we could include monitoring from the beginning of the project, this would help determine what impact the project is having on conservation in general.

Participant: I would like to see how community participation is measured prior to project initiation and if experience in conservation is a necessary requirement for carrying out a project. I would also like to know if any of us here have measurable impacts and experiences, because it is important to learn from them.

Vilma Obando, National Biodiversity Institute: In reality I don't think the prior conservation experience is needed. Interest and commitment are more important. You do need to know how to get communities to organize themselves, and this can ensure the sustainability of the project over the long term. For example, a community organized to save a watershed or a river. Project size doesn't matter.

Bryan Finegan, Center for Tropical Agronomy Research and Training: Due to the fact that biodiversity impact monitoring has been a requirement for attaining certification, most forest managers see it as a requirement that must somehow be complied with. With all monitoring, even in an area managed for production, the situation is the same: systematic work is needed so that it becomes a true management tool.

Katiana Murillo, Rainforest Alliance: Another one of the big benefits of monitoring and evaluation are the resulting statistics or the data. This information can be very useful to give to the media as a way of explaining our work to the public. One of the important aspects our work is to make sure the public knows about it.

CASE 1:

ENVIRONMENTAL MONITORING IN THE AUTONOMOUS REGIONS OF NICARAGUA

Zarifeth Bolaños, from the University of the Autonomous Regions of the Nicaraguan Caribbean Coast, gave a talk about an environmental monitoring program that is underway in the Autonomous Regions of Nicaragua, one of the largest areas of tropical rainforest north of the Amazon. According to Bolaños, the forests suffer from large-scale and unsound exploitation. The project aims to monitor the status of the environment to detect changes and correct problems over time.

To see Bolaños's Power Point presentation: www.eco-index.org/search/pdfs/747report_4.pdf
(Spanish only)

“A MORAL OBLIGATION”: REFLECTIONS ON MONITORING AND EVALUATION

Vilma Obando, from the National Biodiversity Institute in Costa Rica, gave a talk about the importance of measuring the project impact as a moral obligation, rather than as a donor requirement. She also emphasized the importance of defining indicators, as a way to understand whether project activities are really contributing to or supporting biodiversity conservation and/or improving the quality of life, which are usually the main objectives of all conservation projects.

She said that a successful methodology requires stakeholder participation in the monitoring, as was the case of a project that involved training local guides for monitoring wildlife species. “The more people are involved, the more their perception and commitment will change,” she indicated.

Obando also emphasized the need to have a baseline of information before beginning projects and having clear monitoring and evaluation objectives, in order to measure the impact over time and have suitable information for decision-making at the end.

CASE 2: CONSERVATION AND MONITORING OF BIODIVERSITY IN THE SAN JUAN RIVER BIOSPHERE RESERVE-NICARAGUA

Heydi Herrera, from Friends of the San Juan River Foundation in Nicaragua, told the Dialogue participants about a proposal for a methodology to monitor biological diversity and for administrative monitoring of the protected areas that make up the San Juan River Biosphere Reserve, a region rich in natural resources, but threatened mainly by the advance of the agricultural frontier.

To see Herrera’s presentation: www.eco-index.org/search/pdfs/747report_5.pdf

CASE 3: CONSERVATION AND MEASUREMENT OF BIODIVERSITY IN COFFEE FARMS OF THE LA AMISTAD BUFFER ZONE

Cinthia Granda, from the Tropical Science Center (TSC) in Costa Rica, showed the participants a methodology for measuring biodiversity on shade coffee farms, using indicator species for forests and deforested areas, with the participation of the coffee-growing families.

To see Granda’s presentation: www.eco-index.org/search/pdfs/747report_6.pdf

Discussion:

Michele Zador, CEPF: This case is an example of how one can do monitoring that isn’t so complicated. The resulting information is going to stay in the community, but we also want the information to serve as proof of positive impact to someone who is going to buy the coffee.

We can show the Starbucks company that this coffee is going to have a real benefit for conservation.

Participant: What was the situation before the project started -- was there already some interest on the part of the community?

Cinthia Granda, TSC: We did some analysis in a few sites last year. We met with local residents, we saw their interests and plans. The diagnostic stage of getting to know local residents, groups, and the entire community, was very important. We didn't promise them anything. This is important.

Felipe Montoya, Rainforest Alliance: How did you get the community interested in collecting this data? Was there an incentive or is it just interest in maintaining control on their own farms, or of selling a particular kind of coffee?

Cinthia Granda, TSC: We did not promise any economic incentive at first. The farmers there were somewhat interested in working with us, a little because environmental awareness had been increased among the farmers. They know that if they do not change the way they farm and reforest, their crops are not going to succeed. What you have to remember is not to abandon the people.

Participant: What are the best trees to plant for attracting birds diversity?

Cinthia Granda: We also held workshops with local residents to select species for the tree nurseries. We chose timber species that would give some them direct benefits. We also chose species that were good for biodiversity. We sought variety, for example, we used jaúl [*Alnus acuminata*], manzana rosa [*Eugenia jambos*], and guayaba [*Psidium guajava*].

Participant: How do you know if the farmers are carrying out monitoring tasks adequately and keeping accurate records?

Cinthia Granda, TSC: First of all we do activities with each community, check their work and address any uncertainties. So community participants are already already trained basic aspects for determining the presence of biodiversity before giving them the notebook to record their observations. Supervision is key.

Participant: How were the species chosen?

Cinthia Granda, TSC: Since we work in the Pacific and the Caribbean, a general inventory was conducted that listed many species. The species had to be on both coasts and recognizable by the people.

Nuria Bolaños, Rainforest Alliance: Is there an established hour of the day when the observations are done or do they just make notes whenever they happen to see the wildlife species?

Cinthia Granda: The idea is that while the farmers carry out their work on the coffee farm, which they do all year, they monitor and make note of the species they happen to see. It is not strictly scientific, but it does help us to understand what is happening in general. What we did was to give the annual inventories to a professional who will be there the whole day, year after year, from 6 a.m to 6 p.m, monitoring the groups.

José Oduber, Fundación Neotrópica: In the Osa project, we are going to use local guides that are good at birdwatching to do the monitoring. There are “reference birds” you can use.

Hernán Villalobos, Coto Brus Agro-Ecological Foundation: Given our experience with the crisis affecting conventional coffee, if there is no incentive to improve biodiversity for the small farmers who enter a project as interesting as this, we could run the risk that in the short term any innovative initiative that we can promote is not going to succeed. The concern is whether there should be a real and direct incentive for the farmer, because this is really necessary in the case of coffee.

Cinthia Granda, TSC: We have verified this with the conservation coffee project, but the project cannot also create expectations in the people if it doesn't have something to offer at the moment. Hopefully we would be able to pay farmers for environmental services -- your point is definitely important to consider, but we shouldn't give up if we don't have an incentive. There are other interests as well that motivate the farmers.

CASE 4:

BIODIVERSITY CONSERVATION IN THE OSA BIOLOGICAL CORRIDOR THROUGH SUSTAINABLE AGRICULTURE

José Oduber, from the Fundación Neotrópica in Costa Rica, spoke about a project monitoring methodology that helps identify lessons learned, key elements that threaten or support the project's objectives, and also generate information so staff can make adjustments in their workplans during the course of the project. Generating local experiences and knowledge is fundamental for this methodology and using a participatory evaluation committee is also important.

To see Oduber's presentation: www.eco-index.org/search/pdfs/747report_7.pdf (Spanish only)

Presentation Summary

Richard Margoluis, from Foundations of Success, summarized the most important aspects of the previous discussions and presentations:

- The impact of project activities must be measured and monitoring must be integrated into management.
- It is important to be clear about what you are trying to achieve.
- Monitoring can be used as a mechanism for detecting change.
- The literature must be reviewed—you don't have to start from scratch, but can learn from what has been done in the world previously.

- Project staff need to be flexible and open to surprises and also clearly understand the purpose of monitoring.

Discussion:

The Dialogue participants also emphasized the importance of local participation in monitoring and the generation of knowledge and information, as well as flexibility in the definition and application of indicators to different scenarios.

José Oduber, Fundación Neotrópica: The adaptation of monitoring and evaluation systems to different scenarios is important.

Felipe Montoya, Rainforest Alliance: The indicators cannot be taken at face value. In each case they are different. For example, an indicator species for altered habitat may mean a transition to a forest ecosystem in another case.

Bryan Finegan, Center for Tropical Agronomy Research and Training: More work must be done so that monitoring institutionalized as a management tool for real adaptive management and stops being just a requirement for donors.

Participant: There is a tendency for monitoring and evaluation to be for scientists and technicians only. However, we also see that the farmers, with a little bit of coaching, can monitor their own farms and conduct their own control. Community participation is also important.

Heydi Herrera: If you see that things are not going well with respect to the goals you want to achieve, you need to back up and see what isn't going as planned. It may also be necessary to change some indicators and not consider them to be ironclad. Decision- and policy-makers must also be involved.

Participant: Often what the community wants is not taken into account.

Luis Murillo, Conservation International: When it's time to carry out project activities, sometimes project staff thinks that they have to remain completely married to the set indicators. If they don't have specific experience doing the project activities, they often fail because the indicators were established prior to actually doing the project activities. Then, it's appropriate to make an adjustment. Try measuring, using indicators that you discover as you work, and see which are the best. That's best way to ensure project success. Projects are very dynamic and, therefore, the indicators must be as well.

Participant: When the methodologies use a lot of technology, this can be a barrier to community participation. When simpler methodologies are used, the results will be more legitimate, because local people will participate.

Felipe Montoya, Rainforest Alliance: It is important to monitor the monitoring and evaluation you do and to keep a historic record, so that others can learn from and take advantage of your experiences.

SESSION 3: STRATEGIES FOR SUSTAINABILITY

The Dialogue participants broke into groups to consider financial sustainability of their projects. The different groups considered the longterm sustainability of projects that focused on research, ecotourism, environmental education, and ecosystem conservation.

The group exercise answered the following questions:

- Define the group strategy.
- How does the strategy contribute to conservation?
- What are the main costs associated with this strategy?
- What are the main sources of income for this strategy (current, potential)?
- Of the total cost for the implementation of this strategy, approximately what percentage can be recovered by project activities?

The objectives were the following:

- Describing the cause-and-effect relationship between some key sustainability strategies and conservation.
- Understanding some factors that determine to what extent these strategies can become sustainable.
- Analyzing costs and sources of income associated with these strategies.

The majority of the participants concluded that it is not possible to focus solely on economic sustainability without considering projects' social and environmental aspects and that the components cannot be addressed in an isolated way.

The following are presentations by the groups summarizing how they visualize economic sustainability in different areas.

GROUP 1: RESTORATION OF ECOSYSTEMS IN CRITICAL AREAS

Our strategy concerns ecosystem restoration in critical area of the agricultural frontier at Nueva Guinea, Nicaragua. We identified the cause-and-effect chain and its relationship to conservation.

We think that with community education and outreach, we can increase the forest area through agroforestry systems, regenerate areas with native species, using genetic material from remnant forests, make use of non-timber products, restore soil fertility, and contribute to an improvement in the quality of life. The last is demonstrated by economic income, generation of knowledge, changes in attitudes, among others.

How does this strategy contribute to conservation?

With a strategy of this kind we are going to help connect protected areas in the region. We can see degradation of all kinds of natural resources: water, forests, soil, and wildlife. Connecting protected areas contributes to an important national and international strategies. At the regional level is the Mesoamerican Biological Corridor and at the national level, the Atlantic Biological Corridor of Nicaragua.

What are the main costs associated with the strategy?

To promote agroforestry systems, the cost is estimated at \$30,000. The management of remnant forests and the regeneration of areas for propagation, has a budget of \$35,000. One important cost is training in biodiversity monitoring for the local communities. Our objective is to increase aptitudes so that local residents know the status of their natural resources and know a little more about their complexity, development, and interactions, and learn to manage them.

What are the main sources of income for this strategy?

In any project it is key to understand what the potential sources of income are for local residents. We identified two possibilities. One is management and commercialization of non-timber products, such as the medicinal plant raicilla [*Cephaelis ipecacuanha Rich*], which is a product familiar to the rural communities. Some initiatives in Costa Rica have been able to reach sustainability through marketing of raicilla. Handicrafts could be another source of income.

Regarding potential income we are talking about agroforestry systems that would be generating marketable sub-products within two-and-a-half to three years. The basic idea of the strategy regarding income generation is that it be related to biodiversity conservation.

Percentage that is expected to be recovered from the project activity.

There are cases like that of raicilla, where 36 plants fit in one meter square and we can obtain two rows of raicilla plants. This has a value of 40 to 60 dollars. A farmer who has a remnant area of one quarter of a manzana [almost 1/2 acre] can grow raicilla.

We think that an investment of some \$20,000 invested by the project can be recovered with in 10 years. Sustainability will be seen in the extent to which the local residents do forest management, non-timber products, and improve soil conservation.

We estimate that by producing raicilla through sustainable management with a value of 60 dollars per pound, \$20,000 would be recovered every three years. If we are talking about fund recovery, the project is sustainable. The conditions and the products are in remnant forest areas. We are going to have products in the soil and in the crowns of the trees.

GROUP 2: ENVIRONMENTAL EDUCATION

The group focused on non-formal education, which is disseminated by means of the media, not by direct instruction, and it can be done by NGOs.

How does this strategy contribute to conservation?

We think that environmental education makes people aware, changes their attitudes. Adapting this strategy helps us achieve wiser natural resources use.

What are the main costs associated with the strategy?

The associated costs that the group found are wages for personnel, equipment, didactic material, logistical expenses (food, documents, per diems, etc.) and monitoring. The latter consists of supervision, evaluation, and systematization of the entire process.

Main sources of income.

The main sources of income for environmental education programs at present are international donors. Governments in this region have not begun to set up programs of this kind and provide funds for this purpose. Private enterprises are making important contributions to environmental education, and we hope that it will be more involved in the future.

Amount expected to be recovered by the project activity.

This point was debated a great deal because no one in the group perceives any kind of income from the environmental education programs. From a long-term economic viewpoint it could be returning money. This improves quality of life for the people. As a project, however, no monetary return is contemplated.

Discussion:

Felipe Montoya, Rainforest Alliance: This is the dilemma of environmental education: it has all kinds of returns but not direct economic returns.

Zarifeth Bolaños, University of the Autonomous Regions of the Nicaraguan Caribbean Coast: I would like to clarify the economic versus financial issue a little more. The main objective of environmental education projects is to bring about changes in attitudes. This can be valued over the long-term because the attitudes of the people who traditionally are responsible for destroying natural resources are changing, and by changing the mentality and awareness the destruction stops. There are economic costs that would need to be calculated over the medium- and long-term, because we are talking about behavior and this is a long-term process. We cannot measure attitude change immediately after completing a short-term project.

Ernesto Ponce, National Association for Conservation of Nature: Environmental education is the basic platform of most conservation activities, and any initiative can generate returns on the investments through other projects, such as ecotourism and agroforestry.

Eladio Beitia, Organization for the Sustainable Development of the Naso People: In all the events that I have participated in the environmental education part is “the stool leg with termites” because there is no funding. We must also raise awareness among politicians so that they are willing to invest in environmental education. Although it is not going to return money or economic profits to the State immediately, we are going to make gains in knowledge and in achieving the objective of protecting biodiversity.

GROUP 3: ECOSYSTEM CONSERVATION

We think that our topic encompasses all the other topics. Our strategy is based on land management and local institutional strengthening, through alliances between the State and civil society at the local, national, and regional levels.

The common points among our projects were: collaboration with environmental ministry or agency, thorough support to resolve needs for financial, human, and technical resources; environmental education and strengthening of grassroots groups to develop organizational capacity. Another strategy is land management based on scientific data, which is vital for biological corridors. Also, the systematization and the rescue of traditional indigenous, rural farmer, and local knowledge; the use of flagship species such as the green macaw, which can have ecotourism and environmental education purposes; scientific research, which is the basis for decision-making; and support to the local communities or the development of economic alternatives, such as sustainable agriculture.

Direct costs: Per diems, equipment, hiring of personnel, administrative costs, dissemination and outreach, training, and printing.

Indirect costs: Local, national, and regional coordination; the time of the grassroots organizations, volunteers, political contacts, public relations, supervision and monitoring, outreach and non-formal education.

Sources of income: The majority would be donations. In some cases governments are also contributing. Potential sources of income might include having a trust or endowment fund and the selling consulting services.

Discussion:

Olivier Chassot, Tropical Science Center: In our case the grant from CEPF is a salary that means a financial return, because it allows us to do many things with other counterparts and people, but the project does not generate funds that could be used directly.

Zarifeth Bolaños, Universidad de Las Regiones Autónomas de la Costa Caribe

Nicaraguense: It depends a lot on the level of stability and basic conditions for achieving conservation that we have attained, because projects can be developed afterward that can generate income. First, we must guarantee basic conditions, investing in and guaranteeing conservation. Once this has been relatively guaranteed we can design other projects. None of us working in this has reached the point where we can say that we don't need financial support, because we are generating sufficient income. Upon reaching the final phase we could be developing projects for ecotourism, the sale of environmental goods and services, and others, which would help generate income that could be allocated to the costs de conservation.

Cinthia Granda, Tropical Science Center: Some members of a local group that is doing an environmental education component of our project have been trained as environmental educators and are raising their own funds for the sustainability of their program. For example, they are charging a minimum quota from each of the children who attend the environmental education classes, and in this way they have built their center. From this experience we have seen that environmental education programs can be sustainable.

GROUP 4: RESEARCH

We started with what we have in common. First, research has something to do with the rest of our projects' components. We identified a need and we began with a baseline, or the basic information that we must collect to respond to this need. There are two roads that can be taken: research to resolve an immediate problem, such as results for decision-making, and another longer road for long-term results. Research should respond to a public goal. You can't just conduct science for the sake of science.

Costs: Equipment, transport, per diems.

Principal sources of income: International donors and the private sector.

Recovery of costs: A palpable return is not seen from doing research, because its results are seen in achievements in other project components. For example, sustainable forestry management and application of the research that achieves conservation and obtains income. The long-term impact must be measured, such as the repercussions for improvement in the quality of life.

Discusión:

José Rivera, Fundación Neotrópica: In recent years we stopped driving local innovation, for example, participatory research with technical assistance. It is easier to get the people to adopt research results if they were part of the process. In recent years institutions have lost interest in participatory research. It's like this for the entire range of research, not just environmental, but social as well.

Zaida Ramos, Center for Tropical Agronomy Research and Training: We have had the experience in an ecotourism project where the communities themselves conduct research and use it to provide better services and conserve habitats, and they see it as an immediate return.

Participant: Are you talking about an economic return for the institution or for the communities? The NGOs are not for-profit institutions. What isn't clear is who the economic return is for.

Felipe Montoya, Rainforest Alliance: It seems to me that part of the idea was to show that there are projects that need external funding and others that can be self-sufficient eventually. Both kinds of projects have a positive impact on conservation, but they are not the same in the sense that one always needs external support and the other doesn't, and depending on the nature of the organization and the project, the income may or may not reach the NGO or the community.

GROUP 5: ECOTOURISM

We have proposed an ecotourism center. Questions arise about how it will be built and where the funds will come from. This has a cost of \$100,000 to \$120,000. We intend to build lodges with 40 beds, serving 40 tourists per day.

Part of the funds comes from donors who are contributing seed capital to launch the project. Currently we have been operating for three years and we receive, on average, one tourist each day who contributes \$24. Right now we have six beds.

Objective: Biodiversity conservation and finding alternative sources of income for the community.

Economic benefits: To the community directly and by creating a multiplier effect, for example, creating a market for handicrafts. This is how the community residents will see that wildlife is worth more alive than dead.

It is important to make a business plan about how to attract the tourists. Just having the installations is of no use to us and makes no sense. With 40 beds the investment could be recovered in three years.

SESSION 4: COMMUNICATION FOR CONSERVATION

IMPORTANCE OF SHARING LESSONS LEARNED IN CONSERVATION PROJECTS

This dialogue addressed the importance of sharing lessons learned among the NGOs and how best to communicate with people living near project sites. Participants gave examples of how they had communicated their project goals with local residents.

Hernán Villalobos, Fundación Agroecológica Cotobrusenseña (Coto Brus Agro-Ecological Foundation), Costa Rica

“When we arrived, Coto Brus was a forested zone. Our father, despite being illiterate, always took care of the natural resources and defended the forest against any threat. Only 100 meters from the house we had three hectares of primary forest, just as they are now. This is our great natural treasure that we enjoy. We have been shown how to obtain resources from the forest and protect it at the same time. This forest has given us much wealth. We have diversified the parcel, and it is now an integrated agro-ecological model farm.

“We believe in the campesino groups and began this project in December. The most important thing is experience. Our group is voluntary and has existed for 10 years. We chose honest community leaders who appreciated natural resources. After training, we managed to unite the group and we came to a conclusion – Ongoing communication at all levels is a vital tool for our work, regardless of the size of the organization.

“Valuing campesino experimentation is also important. Every so often we meet and share innovations. We have discovered some very simple techniques that have been quite useful to us. For example, some biologists were here investigating how to reproduce lianas to make baskets, because we use thousands of baskets each year in this coffee-growing zone. What they do is pull on the root of the itabo plant and cut it. Depending on how this is done, the plant dies or keeps growing. A campesino detected that if the root is pulled as much as possible, the leaf litter is cleared, and the little tubes from the liana placed on top, this helps the plant reproduce 20 or 30 rootstocks, instead of just one.

“When you arrive to talk with a farmer, it’s important not to sit in the shade and bombard him with questions while he continues working. According to our experience, the science is really in dedicating sufficient time to that particular family to become aware of their specific situation. Sometimes they need to unburden themselves, and they tell more than you wanted to know. This helps create trust. Visiting the farm, perspiring, and covered with mud, gives sufficient stimulus to the farmer to continue the good things he is doing and to accept some suggestions. This has also allowed us to make a kind of forum for knowledge dissemination, incorporating youths and children. We also conduct outreach about the project experiences over the local radio station.

“Incentives are important. People perceive that they are going to improve their quality of life and that they have an incentive over the short and medium term. It creates possibilities without creating false expectations. The campesino has a serious marketing problem. If we add the experience of the productive unit and bring this to the community, from there we can form a small industry, as with the case of organic coffee. This is an incentive, and the farmers are then going to be more responsive to conservation programs.”

Olivier Chassot
Centro Científico Tropical (Tropical Science Center), Costa Rica

Chassot spoke about the experience of the green macaw conservation project and the creation of Maquenque National Park, aimed at protecting the last remnants of forest for this species in Costa Rica.

“To create a national park you need to consider various communication strategies. In the past with the green macaw project, we gathered data to learn about the natural history of this species and then we began informing the people that live in the nesting area. We dedicated ourselves a lot to communicating the data we found with help from the local people. We have tried to pay a financial incentive to the people from the farms so that they monitor the nests and give us data. Then we communicated the data that seemed interesting to us and were the basis for the conservation initiative.

“We began to do work with the press to let people know that the green macaw is endangered without giving complicated statistical details, but rather focusing on the relationship between the species and its habitat and unsound land-management practices in the northern zone of Costa Rica.

“We started a campaign using tools like posters and tee shirts, and we created the binational macaw festival. We tried to make a lot of noise about the macaw, which is an attractive flagship species. We discovered that it was very expensive to print posters, and we didn’t have enough funds to do it, so we tried to do it ourselves with the computer. It’s a good lesson -- sometimes a lot can be done with few funds, and in this way we can be more efficient with the funds. The creation of a park is no joke, people sometimes become alarmed, and the communication component is vital. We are looking for a partner that can help us with communications. It can’t be taken lightly.”

Nuria Bolaños, Rainforest Alliance: Is the Eco-Index any help to you in your efforts to communicate?

Chassot: For us it is a platform. Instead of answering mail from the people, which takes a lot of time, we send them to the Eco-Index, which is an excellent database.

Diane Jukofsky, Rainforest Alliance: By the way, your report, which we have on the Eco-Index, is one of the most popular on the site -- it is downloaded at least 700 times a month. My question is, can you see a change in attitude in the people in the communities?

Chassot: The campaign has been copied by other organizations that are doing environmental education. People can understand the story of a species. With a simple message the people begin to comprehend and link the macaw situation with the forest situation.

COMMUNICATION STRATEGIES AND TOOLS FOR CONSERVATION

Katiana Murillo from the Rainforest Alliance, Ernesto Ponce from Asociación Nacional para la Conservación de la Naturaleza (ANCON, National Association for the Conservation of Nature) in Panamá and Luis Olmedo with Fundación para el Desarrollo Integral del Corregimiento de Cerro Punta (Foundation for the Integrated Development of the Cerro Punta District), also in Panama, gave a presentation about media outreach techniques used in a campaign against a highway construction project through Barú National Park. Mobilized pressure from the public

and from national and international NGOs has managed to halt highway construction to date, an effort assisted by the press.

To read more about the “Campaign to Increase Awareness of the Biological Importance of the Baru Volcano National Park”:

www.eco-index.org/search/results.cfm?projectID=692

To read an article about the campaign in the December 2003 - January 2004 issue of *Eco-Exchange*, a publication of the Rainforest Alliance. www.rainforest-alliance.org/programs/cmc/newsletter/jan04-1.html

Ponce: The best way to sell ourselves is to present news about what we are doing with the communities and our projects. We hold press conferences in special cases, if they need a lot of organization. The information that is going to be provided in an ANCON press conference must be reviewed by all the conservation specialists at the other organizations involved to make sure the names and terms are correct. Friday afternoons and Mondays must be avoided and it is preferable to have press conferences in the morning. I recommend providing refreshments -- this works in Panama.

When a press release is more than one page long, the journalist cuts it by half, and information is lost. The press release should be presented nearly finished, as concise as possible so that it will be used in its entirety.

A tour for journalists provides them with in-depth knowledge, and this is important for supporting projects and the community. Journalists are going to identify many more interesting things in the field.

One generally chooses the best medium, the best and most serious journalist to give them an exclusive story. You must be very careful.

Participant: Journalists often make mistakes or put out erroneous information. It's advisable to review what the journalist writes prior to publication.

Katiana Murillo, Rainforest Alliance: You really cannot review what a journalist writes. The journalist considers this to be a restriction or interference. I agree that journalists should review information with information sources, especially when there are very specific data. There are organizations, like the Rainforest Alliance, that design courses for journalists about certain topics, such as covering the environment. That can help minimize error somewhat.

Benefits of the Eco-Index

Nuria Bolaños, from the Rainforest Alliance, presented the advantages of the Eco-Index (www.eco-index.org) as a project outreach and experience exchange instrument to the Dialogue participants.

Manuel Ramírez, Conservation International: It is important that all of you as developers and implementers of projects have access to this tool. For us it is very important that other

people become acquainted with the projects that you are developing, so you should send your information to the Eco-Index and update your projects. This tool can also help the CEPF know what it is financing and more importantly, what you are doing.

Michele Zador, CEPF: It is a great tool for you, with information written by professionals in English and Spanish. You can use it to promote your own projects, by giving it to people as a reference.

Olivier Chassot, Tropical Science Center: It's possible that there donors interested in financing new projects among the people who visit the Eco-Index. It is an opportunity to project ourselves to possible donors.

NEXT STEPS FOR THE CRITICAL ECOSYSTEM PARTNERSHIP FUND IN THE SOUTHERN MESOAMERICAN CORRIDOR

This last plenary session, led by Manuel Ramírez of Conservation International in Costa Rica and Michele Zador, of CEPF in Washington, D.C., focused on how CEPF communicates with grantees and how project coordination, monitoring, and sustainability could be improved.

The participants provided comments, suggestions, and spoke of their respective experiences. They emphasized that CEPF should try to provide continuity to initiatives and establish alliances that could help projects continue and create an impact that could later be measured, once funds from the CEPF are no longer available.

Applying for CEPF Support

In a discussion about the CEPF application process, some participants emphasized the difficulty they had using the application forms online and obtaining assistance for technical problems.

Participant: It is tremendously difficult for indigenous people to use this procedure.

Manuel Ramírez, Conservation International: The same is true in other cases. We have been told that the process lacks clarity.

Abdiel Gaitán, Chiriquí Grande Trade and Farming Association: This is a problem with all international institutions. As a solution, I think that each program should create a structure in a common language for all the communities they want to reach. First it is necessary to undertake adaptation, validation, and communication.

Michele Zador, CEPF: Perhaps we could have a simple guide on our Web site that explains the process and how to use it better.

Gaitán: The International Development Bank Web site has a logical framework course. You can even listen to it on the computer.

José Rivera, Neotrópica Foundation: It would be worthwhile to review why some of us have not had any difficulty in putting the proposal together. For us it less stressful than other experiences we have had and we should examine why, in some cases, it was one way, and others had a different experience. For us the communication has been better than with other donors.

Olivier Chassot, Tropical Science Center: One problem is that I want to share the report with the other organizations that are part of the same proposal, but I cannot do it. The program doesn't let me do it.

Ramírez: That's an excellent suggestion and is also true of the Osa Biological Corridor Technical Coalition and the alliance that is working in southeastern Nicaragua.

Cinthia Granda, Tropical Science Center: The Web page does not mention that there is a coordination unit, how to contact it, etc. Things appear and disappear; for example, the ecosystem profile -- one week it was there, later no, and this is a basic tool without which one cannot prepare proposals. I think that the Web page has been neglected somewhat, but it is vital for carrying out the application procedure correctly. Regarding the programs -- we were sent one for updating a little while ago, but they are very complex. I wrote that I couldn't manage it and didn't get an answer.

Zador: We are using a new system at the global level. This will facilitate project management a lot because links can be made. I know that it is still very new, tests have been made, and we are improving it.

Ramírez: The conclusion here according to what was noted, is that it is necessary to make the system more friendly for you and not for the CEPF.

Zarifeth Bolaños, Universidad de Las Regiones Autónomas de la Costa Caribe Nicaraguense: We have a problem with filling out online questionnaires because we cannot be connected to the Internet all the time.

Zador: Would it be helpful to have a guide for the program in Spanish?

Participant: The program has a component with all the information, and it guides you step-by-step. The problem is the program itself.

Zador: We made tests and everything turned out very well, but I don't know what happened, people have had problems, and we are aware of this. You can send me your suggestions so that I can send them to the people who are working on this system.

Luis Murillo, Conservation International: The problem is that the form us sent with a number or access code. When I first received it, I had perfect access. What I have noted is that, depending on the person, different problems occur.

Eladio Beitia, Organization for the Sustainable Development of the Naso People: For me, the problem with the application on the Web page is that it is too difficult.

Zador: I've been told that now the page is very simple.

Ernesto Ponce, National Association for the Conservation of Nature: My recommendation is to make the process more friendly and accessible with a code or password, so that it can only be read by the person for whom I am writing the proposal. That would allow people to be able to revise it, if I give them the password. I can send it anywhere, but it can't be modified, just read. If I want you to modify it for me, I can give you the password. Another thing is how to construct the sentences that go in the logical framework's boxes. There could be a workshop to explain how to prepare the logical framework based on CEPF's semantic criteria CEPF, which are not the same criteria used by other donors.

Ramírez: This is possible when different groups submit proposals on similar dates. It has been done at the individual level, but it is difficult with an entire group. A letter of inquiry is required so we can avoid having an organization prepare an entire project document, when at the end we are going to turn them down.

Vilma Obando, National Biodiversity Institute: How do Conservation International and CEPF coordinate?

Ramírez: The direct relationship should occur between you and the CEPF, which is Michele. We take action at CEPF's request. When you send the letter of intent to the CEPF, it is then sent to us for our opinion prior to approval. The opinions of other experts in the subject are also taken into account. The official communications should be between you and CEPF, but you can call us unofficially and discuss the letter of intent so we can guide you. For example, we know the budget amounts that are likely to get approved, the regions where we work, etc.

Participant: Our NGO does not have a telephone or email, but the only way to can communicate with the CEPF office in Washington is through email.

Alejandra Monge, Corcovado Foundation: This strong dependency on computers concerns me, and I also worry that that there might be groups that do not have access to this tool.

Ramírez: We can get other people to help us. You don't have to deal with computers to prepare an excellent proposal. Another way is to send the proposal by fax, and the coordination unit can computerize it.

Zador: We are trying to have a coordination unit in each region to improve communication with Washington.

Vilma Obando, INBio: You can't assume that everyone has access to the Internet.

Adaptive Management

Participants discussed how to approach changing project indicators and goals through adaptive management, because making changes carrying out changes and adjustments is a normal part of all project management.

Michele Zador, CEPF: As donors, it interests us to know what you are doing through your reports, but we hope that these will be useful for you as well. Their purpose is to see if the project is progressing as anticipated.

Participant: Our organization is just starting our project, and I would like to know if we have to make a presentation every three months in order to monitor our progress. Can the CEPF give some tool that would help us do better monitoring?

Zador: The coordination unit is not here just to help with the forms. It is here to help with the entire project process, including project implementation and evaluation. We are interested in helping you with this, but we need to know if you are interested, before we invest time. We don't want to do things that are not going to be useful.

Vilma Obando, National Biodiversity Institute: The answer is affirmative, because you need to know if the projects you fund have some impact on conservation. If not, why are we here?

Zador: For us, measuring the impact is important because we want to know if the grant is being invested in conservation. The reports that you submit are one way of monitoring the projects. We also make site visits. The idea is to give support and see when the projects are not going well. We don't want to do police work. We want all the projects to be successful.

Next year a team is coming to carry out an evaluation of the Southern Mesoamerican projects and will prepare a report for our donors to see how we can improve our projects and our performance.

Olivier Chassot, Tropical Science Center: Regarding performance, we know that there are obstacles that crop up along the way. I would like to know if CEPF is flexible and willing to let us change the indicators or relocating them in the timetable.

Zador: Indicators and goals can be changed. Our priority is adaptive management. This means that there is flexibility for changing project design. If we have decided that an activity is not going to help us achieve our goal, but another one will, this is acceptable. You need to send me an e-mail saying that you have to change the indicator or result, and I need to give my approval. We often make changes and amendments to our projects. This is very common. So, you just send a request. If it is for a major, contractual change, we need to make a formal amendment.

Participant: We need a workshop to learn about monitoring.

Zador: We need to think about what would be the best way to conduct training on monitoring. I see that one priority here is that people want more information about project monitoring.

Participant: It would be good to have an exchange among projects and regions to help correct errors.

Zador: It's important that you learn from the projects that are working in the same field as you are. We want to support this. We are thinking about holding workshops with organizations that are working in agriculture or in the corridors. We have seen that even though there are organizations that are working in the same places on the same kinds of things, there is no communication.

Project Sustainability

Participants then discussed the possibility of obtaining financing, with support from CEPF, for projects with common philosophies and work plans, located in the same geographical area.

Michele Zador, CEPF: One fear that I have is that we are going to fund very good projects but later we don't know what will happen with them. We need to think how to best sustain the projects we are advancing. It takes a lot of time to acquire sources of funding elsewhere. Sometimes people think that we are going to fund all phases of a project, first, second, and third. We do not want to create this expectation. You need to think about how you are going to sustain the results you are achieving. We can help you with the search for funding.

Abdiel Gaitán, Chiriquí Grande Trade and Farming Association: Since 1991, I have been monitoring the billions of dollars that have been invested in Latin America in search of results, and sustainability concerns me. As an organization we must sell our proposals adequately. Otherwise, we are going to make the same mistakes we have made for many years. For example, I have asked myself about the National Association for the Conservation of Nature, one of the oldest NGOs in Panama, where thousands of dollars have been invested. Every year the Darién reserve is being deforested, because they have not been able to overlap projects, and they leave. There is no follow-up. This is worrisome. There is attrition. Now funds are sent to other countries like those in Africa. Our capacity to obtain funds is being exhausted, funds that we wasted in the past, and this should be a concern for everyone.

Participant: There are projects that have focused more on the southeastern part of the corridor, while the northeast is unprotected. They talk about the Atlantic Biological Corridor, but there is a big difference from what is seen in the field.

Zarifeth Bolaños, Universidad de Las Regiones Autónomas de la Costa Caribe

Nicaraguense: Few funds remain so they are trying to prioritize. Now that they are proposing making a Wawachán-La Selva corridor, there is nothing in Wawachán.

Zador: One thing for sure is that donors are not focusing on Latin America. All the funds are going to Asia and the Middle East. But I also think that you must be very smart and show that

you are capable of obtaining results. Donors want to invest in important, successful projects. I can sell your programs, but I need your help. We can also see how to attract other donors that would help with priorities, such as the case of the Wawachán corridor.

Manuel Ramírez, Conservation International: From CI's perspective, when explaining our action area, we see that it extends from Wawachán to the Eastern Pacific islands.

I want to make note of something: this world is not so generous. We let those generous contributions of long ago slip away, because we never got used to making clear financial accounting statements. We partied with the money given to the environmental sector, in Costa Rica, and to the social sector in Nicaragua. A lot of money was misspent. CEPF is now asking for financial accountability, just like all the other donors. The logical frameworks and the indicators have to be created, because we were the architects of those requests. Remember that CEPF's funds are finite, and there are many needs globally and the remaining funds are few. Even if they were combined we would not be able to have any impact in Wawachán, which has almost 300,000 hectares [741,000 acres]. Why should CEPF invest in a region that already had support from The Nature Conservancy, USAID, the Mesoamerican Biological Corridor, and the World Bank? According to an analysis, from Bluefields [Nicaragua] south to the Indio Maíz Biological Reserve and down to the Maquenque corridor in Costa Rica, few organizations were working. There was a huge imbalance between what northeastern Nicaragua was receiving in comparison to southeastern Nicaragua. As much as we wanted to include this block, we didn't do it. CEPF avoided dispersing itself over a large area because our resources are not sufficient.

There are more and less expensive countries. Of the three nations, Nicaragua is the most expensive for doing conservation work. Even though it has the poorest economic conditions of the three nations [Costa Rica, Panama, and Nicaragua], it is the most expensive for conservation due to the distances and the fact that access is difficult. This increases the costs. Although we don't have CEPF funds for this region, it is possible to work with you by looking at some proposals. CEPF is part of the strategy of CI and other organizations, therefore we can work with you on proposals.

Zador: It is important to try not to depend so much on donors, but rather on other sources of funds, such as tourist entry fees in protected areas and payments for environmental services.

Eladio Beitia, Organization for the Sustainable Development of the Naso People: It is important to market our products, and the Eco-Index is opening a window for this. Each one of our projects must see this as a long-term investment.

Participant: It concerns me that there might not be a second phase. Our project has been successful, and people's quality of life has improved. The social and cultural aspects have a lot to do with project sustainability.

Participant: With or without funds, our work must be kept alive, because it's a commitment.

Ramírez: Often sustainability occurs with a decrease in funds. Sustainability is not seen in terms of how many funds we receive, but rather how we manage to keep the flame of the project's principal objective alive. We see sustainability as a function of fulfilling the objectives. Sometimes we have to lower the level of activities a bit, but always carry on. The way to maintain ourselves is through the synergy of the groups. Remember that the CEPF is a seed fund that will help obtain other resources. It has to do with persuasiveness and attitude.

PARTICIPANTS' OPINIONS ABOUT THE CONSERVATION DIALOGUES

Ernesto Ponce, National Association for the Conservation of Nature, Panama: We have met with many heavyweight grassroots conservation organizations, and in this forum we have seen that everyone, even groups with a lot of experience, need to try new channels, inform ourselves, and get support. T

The best learning experience that I have had, even though ANCON has been working in conservation for 15 years, is that I have to keep myself updated and reconsider many things.

Abdiel Gaitán, Chiriquí Grande Trade and Farming Association, Panama: The experience was very enriching. I learned things I had no idea about and I am going to put them into practice.

Zayra Ramos, Center for Tropical Agronomy Research and Training, Costa Rica: It was a good idea to invite organizations that normally do not have access to these kinds of events, because they are very far away geographically. Here they had the opportunity to approach other organizations to see what they might do together.

Yendri Rojas, Three Hills Association, Costa Rica: It is important to get to know other people's experiences and let them know what you are doing. It was enriching.

Francis Castro, Bluefields Indian and Caribbean University, Nicaragua: For us this event was important because, besides working as an institution, we are representing five communities to which we report. This workshop has been very important for project sustainability.

Fernando Ellington, Ngöbe Indigenous People Development and Technical Assistance Center, Panama: The event has been of the utmost importance. We have learned about experiences in the three nations.