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SIERRA VOLCÁNICA BIOCULTURAL LANDSCAPE

Collective Action for a Regenerative Landscape Transition

LANDSCAPES
FOR 1 BILLION
PEOPLE

LANDSCALE

Common
Ground

This case study is part of an ongoing effort to generate practical learning and reflection around integrated approaches to sustainable landscape management. It documents the evolution of a landscape partnership in the Sierra Volcánica Biocultural Landscape in Mexico, highlighting key insights from the processes of coordination, visioning, planning, and investment mobilization.

The document was developed jointly by Rainforest Alliance and EcoAgriculture Partners as a contribution to the 1000 Landscapes for 1 Billion People initiative, as a part of the Finance Design Team. It is intended to support practitioners, policymakers, and partner organizations who are designing, implementing, or supporting integrated landscape initiatives in diverse contexts.

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1000 Landscapes for 1 Billion People (1000L) is a coalition of organizations united in a shared mission to advance local landscape efforts to sustain and restore ecosystems, build rural prosperity, confront climate change and contribute to the Sustainable Development Goals. Our goal is that by 2030, landscape partnerships will deliver sustainable solutions across 1000 landscapes for 1 billion people–aligning actions to meet global targets for addressing food and water insecurity, biodiversity loss, land degradation and climate change. 1000L is building the infrastructure to help landscape partnerships connect and ally with one another, strengthen their capacities and leadership, access digital data and tools for greater impact, and mobilize financing to scale landscape investment.

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Common Ground

Common Ground is a collaborative systems change initiative in the domain of environmental governance and rural livelihoods in India, jointly led by several organisations. Common Ground leverages the unique opportunity presented by the Commons to address three linked crises of our times —livelihoods, climate, and social equality— by bringing a socio-ecological narrative into mainstream development models. Through a collaborative action framework, Common Ground focuses on 'field setting', so that entrepreneurial action by multiple actors is accelerated and multiplied, seeding the ecosystem with institutional apparatus and a distributed network of change leaders, to set the stage for sustainable impact beyond the scope of any single initiative, or organisation.

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RAINFOREST ALLIANCE

Rainforest Alliance is a global organization working to create a better future for people and nature by making responsible business the new normal. We work at the crossroads of business, agriculture, and forests. By bringing diverse allies together, we are making deep-rooted change on some of our most pressing social and environmental issues. Together, we amplify the voices of farmers and forest communities, improve livelihoods, protect biodiversity, and help people mitigate and adapt to climate change in bold and effective ways.

rainforest-alliance.org

ecoagriculture partners

EcoAgriculture Partners is a leading global nonprofit organization dedicated to cultivating collaborative action for thriving landscapes worldwide. Through the development of interactive training, community networks, and innovative tools, EcoAg partners with local governments, communities, and other landscape actors to co-create solutions that sustain ecosystems, build resilient food systems, and advance climate adaptation and mitigation.

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LANDSCALE

LandScale is a collaborative initiative led by Rainforest Alliance, Verra, and Conservation International. It provides a standardized framework to assess, communicate, and improve sustainability at the landscape level. By integrating indicators on ecosystem health, human well-being, governance, and production, LandScale offers a shared reference that strengthens accountability and supports collective action.

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CONTENTS

ACRONYMS

ANEBERRIES	National Association of Berry Exporters of Mexico
APEAJAL	Association of Avocado Producers and Exporters of Jalisco
BHP	BHP Foundation
CDP	Carbon Disclosure Project
CIFOR	Center for International Forestry Research
COVID	Coronavirus Disease
CSR	Corporate Social Responsibility
ESG	Environmental, Social and Governance
FEPAJ	State Trust for Agricultural Development of Jalisco
FIPRODEFO	Trust for the Administration of the Forest Development Program of Jalisco
GIZ	German Agency for International Cooperation
IIEG	Institute of Statistical and Geographic Information of Jalisco
ILF	Integrated Landscape Finance
ILM	Integrated Landscape Management
ISEAL	ISEAL Alliance
JIDELAA	Intermunicipal Environmental Board for Sustainable Development of the Upper Ayuquila River Basin
JIMA	Intermunicipal Environmental Boards
JIRA	Intermunicipal Board of the Ayuquila River
LAFG	LandScale Assessment Framework and Guidelines
LEEEPA	State Law for Ecological Balance and Environmental Protection
LFA	Landscape Finance Accelerator
MEL	Monitoring, Evaluation and Learning
POER	Regional Ecological Zoning Program
RA	Rainforest Alliance
REDD	Reducing Emissions from Deforestation and Forest Degradation
SADER	Ministry of Agriculture and Rural Development (Mexico)
SBTN	Science Based Targets for Nature
SEMADET	Secretary of Environment and Territorial Development (Jalisco)
SVBL	Sierra Volcánica Biocultural Landscape
USAID	United States Agency for International Development

A CASE STUDY FOR INTEGRATED LANDSCAPE MANAGEMENT

Today's most pressing challenges—climate change, biodiversity loss, food insecurity, social inequity, and land degradation—are deeply interlinked. These complex issues do not conform to the boundaries of conventional sectors or administrative units. Yet, responses often remain fragmented, with actions led by isolated sectors or short-sighted value chains.

Such siloed approaches are increasingly inadequate in addressing the systemic nature of these environmental, social, and economic crises. Integrated Landscape Management (ILM) offers a compelling alternative. It provides a holistic, place-based framework that allows for managing land and addressing structural social ecological challenges through the promotion of broad-based landscape partnerships and social inclusion. A core feature of ILM is its emphasis on catalyzing collaboration among the many actors who live in, depend on, or influence a landscape. Rather than working in isolation, these diverse stakeholders, ranging from local communities and farmers to government agencies and private sector partners, are invited to engage in shared planning and decision-making processes. Through this approach, stakeholders build trust, establish a shared understanding of the landscape's needs and challenges, and work to reconcile different objectives for coordinated, mutually reinforcing action.

At the center of ILM is the focus on developing and maintaining a participatory and inclusive governance structure, often referred to as a Landscape Partnership (LP), to support adaptive management addressing conflicts, trade-offs and advancing long-term objectives. It ensures that decision-making reflects the realities of those who live in and depend on the landscape, while creating the institutional arrangements needed to guide integrated planning, implementation, and monitoring.

While many landscape initiatives have emerged over the past decades, documenting detailed and process-oriented experience of how ILM is implemented in practice remains scarce. Most available accounts focus on outcomes or general descriptions, offering limited insight into the concrete steps, decisions, and challenges involved in operationalizing ILM on the ground.

This case study seeks to share one such experience by illustrating the development process of the **Sierra Volcánica Biocultural Landscape**, where the landscape approach and core elements of ILM were put into practice. It traces the process from its inception, highlighting key moments, milestones, and collective decisions made along the way and reflects the lessons learned and insights gained from this experience in collaborative land stewardship. By unpacking the practical dimensions of ILM implementation in its socio-ecological context, this case study offers a grounded contribution for practitioners, policymakers, and stakeholders seeking to apply integrated, inclusive, and locally grounded approaches to landscape management in their own territories.

PURPOSE AND STRUCTURE OF THE CASE STUDY

This case study documents the evolving Integrated Landscape Management (ILM) process in the Sierra Volcánica Biocultural Landscape (SVBL), located in the state of Jalisco, Mexico. Coordinated by Rainforest Alliance Mexico, the initiative brings together a diverse group of actors working to build shared governance, develop a common vision, coordinate action, and lay the foundations for landscape-scale finance.

Rather than presenting a model or prescriptive guidance, the case documents a transition, a movement from fragmented interventions to more coordinated, multi-sectoral engagement. It also shifts from conventional supply chain efforts to inclusive governance platforms and strategic investment planning. The SVBL experience illustrates how ILM unfolds through iterative cycles, shaped by socio-ecological dynamics, institutional capacities, and long-term commitments.

The structure of the case study mirrors the <u>five core elements</u> of the ILM framework:

1. LANDSCAPE PARTNERSHIP

2. SHARED UNDERSTANDING

3. VISION AND PLANNING

4. COORDINATED ACTION

5. LEARNING AND ADAPTATION

Figure 1: Five core elements of the ILM framework

These sections are preceded by a brief contextual overview and followed by key takeaways and annexes. The narrative reflects the evolving nature of the process, recognizing that the five elements often develop simultaneously and in different sequences depending on local conditions.

While the case draws from the application of tools such as the **LandScale Assessment Framework** and the [1000 Landscapes for 1 Billion People (1000L) Landscape Finance Accelerator](#), its central focus remains the broader landscape process itself. It traces the formation of shared agendas, governance platforms, and an initial roadmap for finance readiness, aiming to support other initiatives that seek to better align governance, planning, and investment across sectors and scales.

This case does not aim to capture final results or isolated impacts. Instead, it explores the enabling conditions being cultivated for long-term transformation at the landscape level, among them, the strengthening of local institutions, the alignment of public and private agendas, and the creation of mechanisms for collaborative action.

This documents the transition from project-based approaches to a core governance/landscape partnership with a vision to maintain long-term alignment and coherence. As noted in *Design Foundations for Systems Capital*, the goal is not to engineer outcomes, but to foster the systemic readiness and interdependence needed for landscapes to thrive (Hannant, A., Burkett, I., Fowler, E., O'Brien, T, McNeill, J., and Price, A., 2022).

INTRODUCTION

In Southern Jalisco, the **Sierra Volcánica Biocultural Landscape - SVBL** spans four municipalities: Atemajac de Brizuela, Chiquilistlán, San Gabriel, and Tapalpa, and covers over 190,000 has (see figure 2). Its wide altitudinal range contributes to rich ecological diversity and productive agricultural systems. The region is home to nearly 50,000 people across a mix of rural and urban settlements.

The SVBL holds both ecological and strategic importance. It connects the Sierra de Quila and Nevado de Colima protected areas, serving as a critical corridor for migratory, endemic, and especially protected species (see figure 3).

The territory includes a wide range of ecosystems, from temperate and cloud forests to oak-pine woodlands, and sustains export-oriented agricultural systems such as avocado, agave, and berries (*SVBL Situational Analysis*, 2022).

FIGURE 2: LOCATION OF THE SIERRA VOLCÁNICA BIOCULTURAL LANDSCAPE

Chiquilistlán 16% 315.5 km²
Atemajac de Brizuela 17% 342.5 km²
Tapalpa 30% 581.8 km²
San Gabriel 37% 723.5 km²

Sierra of Tapalpa Landscape

Total area: 1,963.3 km²

Atemajac de Brizuela

Chiquilistlán

Tapalpa

San Gabriel

Jalisco, *México*

Source: adapted from LandScale Report
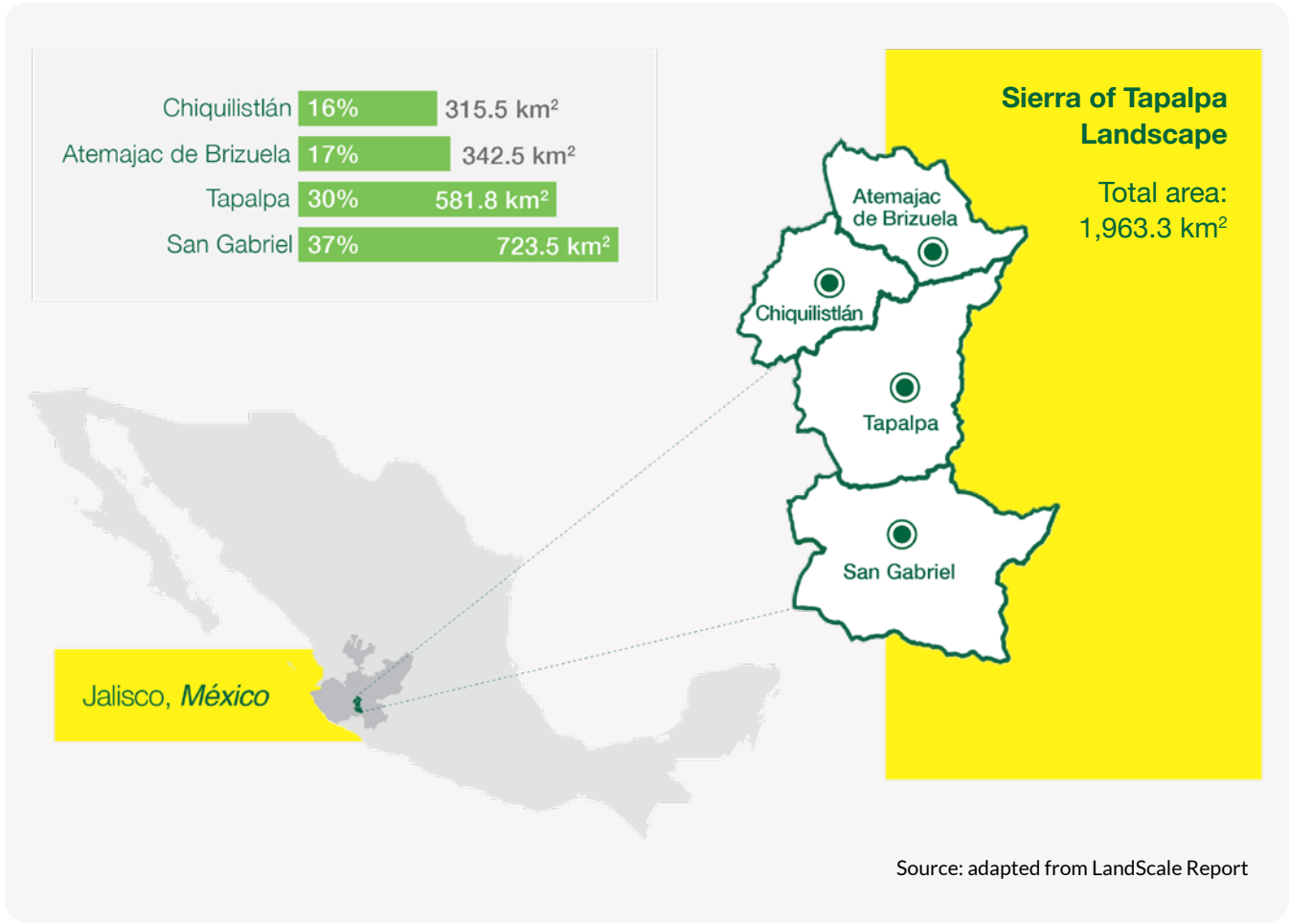
Over the past decade, increasing land use pressures, social fragmentation, and environmental degradation prompted a shift toward more integrated and coordinated territorial approaches. A key inflection point came with the participatory development of the Regional Ecological and Territorial Zoning Plan - POER of Sierra de Tapalpa in 2019 and part of 2020 by the Secretary of Environment of Jalisco. It involved heavy data analysis of the landscape but also a participatory process to identify and determine clearly land use issues in the landscape.

FIGURE 3: DIVERSITY OF ECOSYSTEMS IN THE SVBL AND ITS FUNCTION AS AN ECOLOGICAL CORRIDOR

Sierra of Quila

Line of connectivity

Sierra of Manantlan

Nevado of Colima Volcano

15 of 24 Ecosystems in Jalisco are found in this region

☐ Sierra de Tapalpa Region
••▸ Connectivity Line
◯ Protected Areas
◯ RAMSAR Sites

● High altitude coniferous forest
● Coniferous forest
● Oak-gallery forest
● Cultivated and regenerated forest
● Cloud forest and low evergreen forest
● Low and medium sub evergreen forest
● Low deciduous and sub deciduous forest
● Tular
● Natural grasslands

Source: adapted from SEMADET 2021

This momentum was partly catalyzed through the work facilitated by the **Rainforest Alliance (RA)**, with a small team (see *Annex 1: Rainforest Alliance landscape convener team structure*) and financial support from USAID and BHP Foundation. RA started the process as a Convener with a LandScale[1] Assessment in 2020 (see *Element 5 – Learning and Adaptation*) and the formation of a local multi-stakeholder platform and associated landscape-scale objectives in 2021. Its engagement in this landscape reflects a deliberate shift beyond specific supply chain interventions, embracing instead a more holistic approach to sustainable development, one rooted in the conviction that people and nature can thrive in harmony. This principle lies at the heart of RA's global mission and guides its work to foster inclusive, resilient systems that integrate ecological integrity, rural livelihoods, and responsible governance.

The SVBL initiative exemplifies this transition. Rather than focusing only one commodity certification or productivity gains, it seeks to nest this in the larger environment and build enabling conditions for long-term, landscape-scale transformation. This involves strengthening local institutions, aligning cross-sectoral agendas, and supporting collective action across scales.

Five years into this process, the SVBL remains a young but increasingly consolidated landscape initiative. Its progress reflects a broad effort to move from fragmentation to convergence, from short-term projects to enduring partnerships. With the support of 1000L[2], an initial landscape finance roadmap has been developed and is in different stages of implementation across the 'portfolio' of priority projects and actions required to advance towards the landscape objectives and action plan defined (see *Element 4 – Coordinated Action*).

In 2024, the territory was officially designated a 'Biocultural Landscape'[3] by the state of Jalisco (see *Element 1 – Landscape Partnership*), a milestone that institutionalized the governance structure built since 2021 and anchored the landscape's shared vision in law within the subnational government structure and ensuring funding from public finance windows of the Secretary of Environment and Territorial Development (Jalisco).

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1   LandScale is a comprehensive assessment tool designed to measure, communicate, and improve sustainability performance at the landscape level. Its implementation initiates participatory processes that strengthen territorial governance, align key stakeholders, and generate robust information to support decision-making for sustainable land management. For more information: www.landscale.org.

2   1000 Landscapes for 1 Billion People (1000L) is a radical collaboration of change agents working together to accelerate landscape efforts to sustain and restore ecosystems, build rural prosperity and confront climate change. 1000L is convened by EcoAgriculture Partners and co-led with Rainforest Alliance, Climate-KIC, Commonland, Conservation International, the United Nations Development Programme, and information technology leader Tech Matters. Another 20+ partners are sharing technical and financial expertise, and 12+ Landscape Partnerships are co-designing the initiative. Together, these organizations already engage with over 250 Landscape Partnerships worldwide and are positioned to provide a strategic bridge with international and national programs championing Landscape Partnerships.

3   A Biocultural Landscape in Mexico is a rural territory of high natural and cultural value, officially recognized by the State of Jalisco through the State Law on Ecological Balance and Environmental Protection (LEEEPA). This legal designation ensures the territory is managed for long-term sustainability, integrating conservation with cultural preservation and productive uses.

In Jalisco, Biocultural Landscapes are legally equated with other conservation designations such as State Protected Natural Areas (Áreas Naturales Protegidas Estatales) and Areas Voluntarily Destined for Conservation (Áreas Destinadas Voluntariamente a la Conservación, ADVC), granting them formal recognition as protected areas under state law.

At the national policy level, Biocultural Landscapes are aligned with the Integrated Landscape Management and Conservation Vision and are listed as Other Effective Area-Based Conservation Measures (OECMs), in line with the Convention on Biological Diversity targets.

Under the IUCN protected area classification, Biocultural Landscapes can be considered equivalent to Category V – Protected Landscape/Seascape, which emphasizes the interaction between people and nature over time and supports sustainable socio-ecological systems. However, full alignment with Category V may depend on conditions such as the perpetuity of the designation and the existence of an effective management plan, which are not always guaranteed in practice.

TIMELINE

2019

The **Regional Ecological Planning Program (POER)** is established with the purpose of planning land use and promoting community development.

2020

The **Rainforest Alliance** acts as a landscape promoter. An agreement is signed between SEMADET, the Secretary of Agriculture and Rural Development (SADER), and the "*Juntas Intermunicipales de Medio Ambiente*" (JIMAS) to promote territorial management models with a landscape approach.

2021

The **LandScale Assessment Framework** helps generate key information to build a shared vision of the future *Carta Territorial*, the landscape baseline.

2022

The first **landscape sustainability report** is published. The Promoter Group and the Territorial Management Council (CGT) are formed, bringing together key stakeholders from civil society, producers, academia, and local residents.

2023

The **Territorial Charter** of the Biocultural Landscape, priority actions, stakeholders, and implementation and financing roadmap are validated.

2024

Official recognition as a Biocultural Landscape is requested from the State of Jalisco. The LEEPA requirements are met, and the establishment of the CGT and the Promoter Group is formalized. The territory is officially recognized as *Sierra Volcánica Biocultural Landscape* (PBSV) for a period of 15 years.

Today, the Landscape Partnership supports a growing set of actions contained in the Territorial Charter (ranging from agroforestry transitions and water governance to ecosystem restoration and inclusive tourism) structured around **five thematic priorities**:

1
Promote sustainable and equitable rural and agro-industrial development

2
Conserve ecosystems and value their goods and services

3
Foster orderly land use and social well-being
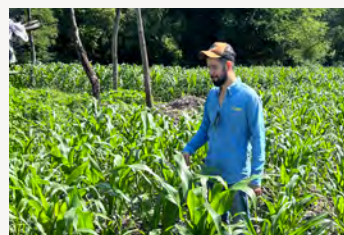
4
Recognize local collective identity and cultural heritage

5
Promote effective water governance with a watershed approach
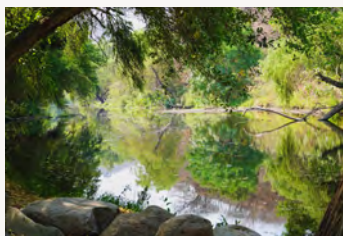
These pillars have helped structure planning and investment efforts and reflect both stakeholder values and policy alignment (see *Element 3 – Vision and Planning*).

This case study documents the process steps and formation of core capacities that enable landscape resilience: a shared agenda, a governance structure, and a strategic finance roadmap.

It offers a snapshot of a territory in motion, still navigating tensions and learning through iteration, but firmly committed to a path where prosperity and conservation reinforce one another.

The table below summarizes the main milestones achieved by the SVPB through the 5 elements of the ILM framework between 2019 and 2025. It shows how the process has evolved, from partnership building and shared understanding to coordinated action and learning. Each sequence of colors represents a phase in which capacities, relationships, and systems were progressively strengthened, demonstrating the adaptive and non-linear nature of the landscape journey.

TABLE 1: MILESTONES ACHIEVED ACROSS THE 5 ELEMENTS OF THE ILM FRAMEWORK FROM 2019 TO 2025

Milestones	2019	2020	2021	2022	2023	2024	2025
Landscape Partnership							
POER development	■						
RA as convener		■	■	■	■	■	
LandScale local committee established		■	■				
Institutional work group establishment			■				
Landscape boundaries definition and confirmation	■					■	
Transition to Biocultural Landscape						■	
Establishement of CGT and GP						■	
Shared Understanding							
Situational analysis		■					
Participatory map of perceived landscape pressures		■					
Communication strategy		■					
LandScale baseline report		■	■				
Workshops to discuss LandScale results		■	■				
Studies and data generation		■	■	■	■		
Vision and Planning							
Action plan				■			
Thematic working groups				■			
Prioritization criteria and project portfolio					■		
Preliminary finance analysis						■	
Alignment with monitoring system						■	
Coordinated Action							
Prioritized project portfolio					■	■	
Finance roadmap with phased investment tracks						■	
Costing model for platform coordination					■	■	
Mobilization of public funds for smallholder-led projects					■	■	■
Pilot engagements with private sector actors					■	■	
Prefeasibility study for water-linked financial mechanism						■	
Thematic coordination structures						■	■
Learning and Adaptation							
LandScale baseline assessment		■	■			■	
Territorial Charter monitoring system						■	
LandScale reassessment							■

The following sections examine each of these elements in detail, documenting not only what has been achieved so far but also how the process itself has evolved. They offer a grounded account of the challenges to operationalize ILM in practice: building governance from the ground up, aligning diverse actors around shared goals, and creating the enabling conditions for future impact.

ELEMENT 1

LANDSCAPE PARTNERSHIP

Objective: Develop agreed-upon objectives across land-uses, sectors and stakeholders at the landscape scale and a dialogue and governance platform to create shared understanding, consensus, implementation, and improvements through a formalized landscape partnership.

Establishing a durable, inclusive landscape partnership requires more than bringing stakeholders together, it demands a shared framework, sustained facilitation, and legitimacy anchored in local governance. In the SVBL, the creation of a Landscape Partnership[4] unfolded over three years, combining territorial planning tools like the Regional and Territorial Zoning Plan (POER) with the LandScale assessment process.

What began as an experimental, loosely structured Landscape Partnership gradually evolved into a governance architecture rooted in collective decision-making, political legitimacy, and technical alignment. The following section traces this transition, through its early steps of stakeholder engagement, boundary definition, and dialogue facilitation, toward the formalization of a participatory anchored landscape institution.

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4   Throughout this document, the term Landscape Partnership is used interchangeably with expressions such as multi-stakeholder platform, multi-stakeholder landscape partnership (MLP), or Landscape Management Board (LMB). In Spanish, it is referred to as la alianza del paisaje. These terms all denote the collaborative structure that coordinates planning, decision-making, and joint action within the landscape. For core components of a Landscape Partnership, as defined by LandScale and aligned to CDP, SBTI, ISEAL, see also https://www.landscale.org/case-studies/landscape-initiative-maturity-a-roadmap-towards-greater-credibility-and-resilience/

1.1. THE REGIONAL AND TERRITORIAL ZONING PLAN (POER) AND DEFINING THE LANDSCAPE BOUNDARIES AS A FOUNDATIONAL STEP IN THE PROCESS

The definition of the landscape boundaries of the SVBL was the result of a participatory process carried out through two consecutive and complementary efforts:

- **2020**
  Completion of the Regional Ecological and Territorial Zoning Plan (POER) for the Sierra de Tapalpa.

- **2021**
  A multi-stakeholder consultation process facilitated through the Landscape Partnership, led by RA in partnership with the Secretariat of Environment and Territorial Development (SEMADET), the Secretariat of Agriculture and Rural Development of Jalisco (SADER), the Intermunicipal Environmental Board of the Lower Ayuquila Watershed (JIRA), and the Intermunicipal Environmental Board of the Upper Ayuquila Watershed (JIDELAA).

The POER is a regulatory planning instrument that includes a comprehensive characterization of natural resources, demographic and economic conditions, and urban dynamics. The conceptual framework behind this territorial planning effort is grounded in a watershed-based approach that transcends municipal boundaries. In addition to aligning different regulatory frameworks across the region, the POER provided grounded analysis and data of the main challenges facing the landscape.

Building upon these findings and strategic guidelines, the RA team in coordination with SEMADET, the JIMAs, and the SADER, undertook a participatory validation process with the landscape main stakeholders to finalize the landscape boundaries in 2021. This process considered the socio-environmental dimensions highlighted in the POER and incorporated additional studies on connectivity, land use, land tenure, and local social dynamics.

If landscape boundaries have not yet been defined, the LandScale Adjacency Analysis offers a structured approach that can support the delineation process. For a 10km area around the initial landscape area, LandScale includes a methodology to assess connecting points between the territory and its surroundings, considering all activities that impact the area outside the landscape and vice versa, as well as resources and sensitive areas in the adjacent vicinity.

The final boundary of the **Sierra Volcánica Biocultural Landscape** was established through the Adjacency Analysis conducted as part of the **Situational Analysis of the Sierra de Tapalpa**, using the LandScale Assessment Framework and Guidelines (LAFG). In short, the defined boundary was based on four main criteria: (1) administrative jurisdictions, (2) bio connectivity importance, (3) watershed and sub watershed units, and (4) areas identified by local users.

As a result, the Biocultural Landscape Boundaries were defined and convened, including approximately **190,000 hectares and four Municipalities (Atemajac de Brizuela, Chiquilistlán, San Gabriel and Sierra de Tapalpa)**.

FIGURE 4: SITUATIONAL ANALYSIS 2021

SIMBOLOGÍA

☐ Límite municipal   🟩 Área Natural Protegida   🟩 Región Tapalpa   🟦 Subcuenca
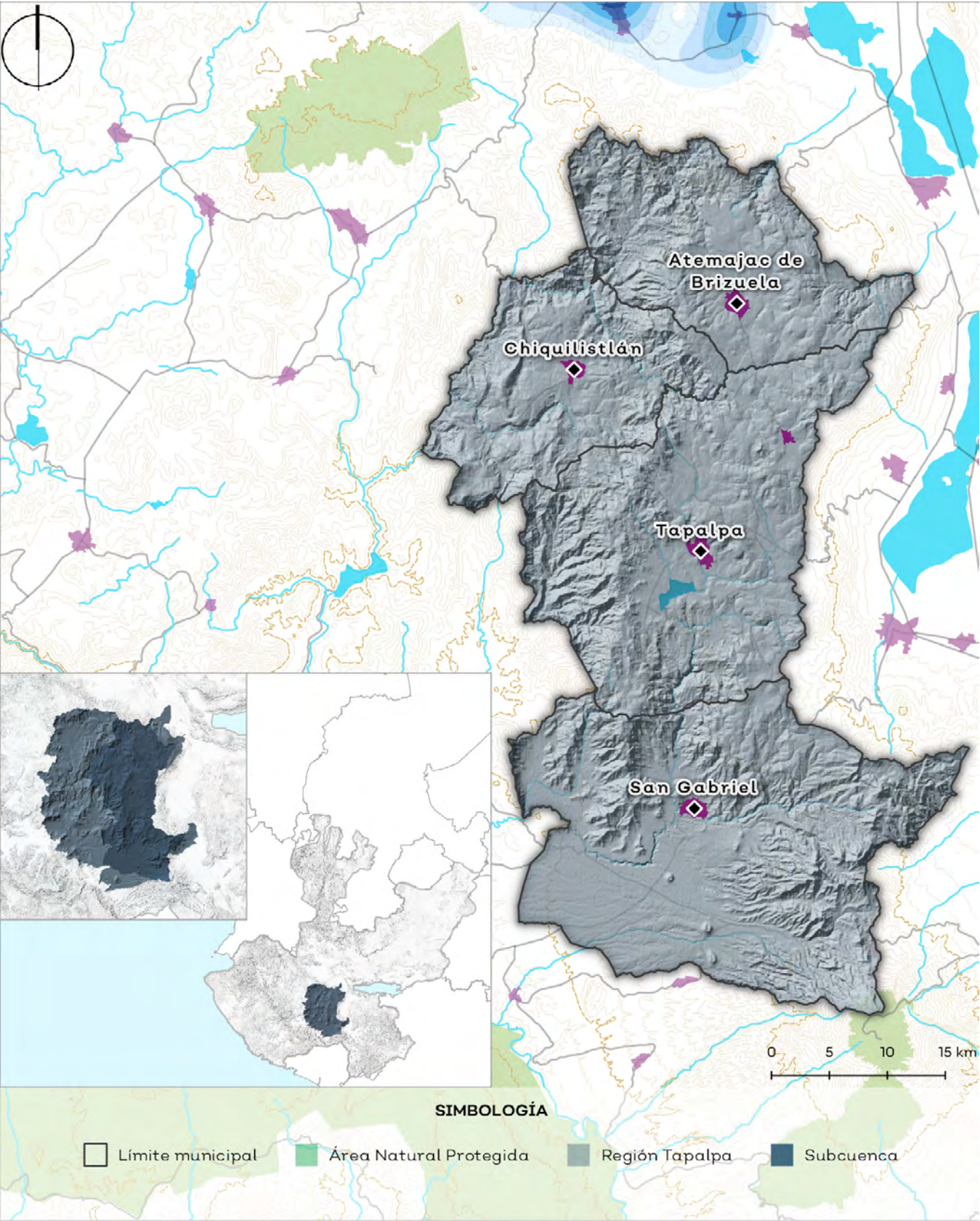
Source: Municipal Boundaries of the General Map of Jalisco, IIEG (2012)

1.2.
INITIAL CONSULTATIONS WITH STAKEHOLDERS TO UNDERSTAND CROSS-SECTORAL DYNAMICS AND NEEDS TO DEFINE A LANDSCAPE PARTNERSHIP

In the early stages of the Sierra Volcánica Biocultural Landscape initiative, one of the first and most fundamental challenges was building a **shared understanding among a very diverse group of actors** (ranging from producers and civil society organizations to public institutions and private companies) **who often spoke different "languages" in terms of priorities, risk perception, and territorial vision**.

RA drew extensively from POER's stakeholder mapping and characterization of land use, natural resources, and socio-economic conditions. However, while the POER offered a solid diagnostic of the region, defining which activities were permitted or restricted in specific areas and identifying key challenges, it was not designed to chart a pathway toward collective solutions. Building on this foundation, the team proceeded to the **identification of existing collaboration and dialogue spaces within the territory**, such as agroforestry committees, forest brigades, and the local livestock association. This helped the team map out social networks, identify areas of convergence, and assess the potential for alignment with Integrated Landscape Management (ILM) principles, ultimately laying the ground for the creation of the first form of Landscape Partnership: a Local Committee.

This effort unfolded in 2020, under the very difficult conditions of the COVID-19 pandemic. Initial engagements had to be facilitated, at least partially, through digital means, an added challenge for a team grounded in fieldwork. Surprisingly, the slowdown of daily activity created space for reflection, and

several socio-productive actors, who under other circumstances may not have engaged online, became more open to participating. The moment presented a rare opportunity to initiate the idea of a landscape alliance.

As soon as public health conditions allowed, mid 2020, a Local Promoter was hired by RA to lead local engagement using a **snowball sampling methodology[5] to implement phase 1 to 3** (see table 2). In addition to mapping existing platforms, the officer conducted informal interviews and conversations, often in town bakeries or local gathering spots, to identify key actors, assess relationships and conflicts, and conduct a preliminary capacity analysis. At this stage, the initiative was not yet framed as an Integrated Landscape Management (ILM) effort. Instead, it was introduced as a four-year project aimed at addressing key territorial challenges through the application of the LandScale tool. Locally, it was referred to as the *Alianza de Sostenibilidad del Paisaje*, reflecting a broader intent to build sustainability in the region while keeping the scope and objectives intentionally flexible during this early phase of engagement.

Stakeholders in the landscape are diverse in both sector and capacity, from artisans and smallholder producers rooted in traditional practices and local identity to large export-oriented avocado and berry agribusinesses. Early engagement focused on identifying who should be involved and how.

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5   A non-probability, chain-referral sampling technique in social research where a small initial pool of respondents (e.g. key informants) identifies and recruits further participants through their social networks, causing the sample to grow cumulatively like a rolling snowball. This iterative method is often used to reach hidden or hard-to-access populations and is particularly useful in territorial initiatives (e.g. Integrated Landscape Management) for identifying and engaging local stakeholders when a comprehensive list of actors is not initially known. Reed, J., Ickowitz, A., Chervier, C., Djoudi, H., Moombe, K., Ros-Tonen, M., ... & Sunderland, T. (2020). *Integrated landscape approaches in the tropics: A brief stock-take*. Center for International Forestry Research (CIFOR). Retrieved from https://www.cifor.org/publications/pdf_files/articles/AReed2001.pdf.

TABLE 2: PHASES PREVIOUS TO ESTABLISHING THE LANDSCAPE PARTNERSHIP

Phase	Activity	Description
PHASE 1	Initial awareness-raising through informational workshops	Introductory workshops were held with stakeholders identified in collaboration with the LandScale-Jalisco Working Group (SEMADET, SADER, FEPAJ, FIPRODEFO). Sessions focused on explaining what LandScale is, how it functions, where it has been applied, and why the Sierra de Tapalpa was selected. The workshops also explored the potential role of the Local LandScale Committee as a coordination mechanism.
PHASE 2	Sectoral outreach and thematic engagement	Actors were grouped by sector (e.g., producers, municipal governments, agroindustry, NGOs) and invited to thematic workshops tailored to their priorities and language. These workshops allowed outlined potential roles and engagement pathways, and introduced the concept, function, and structure of the Local LandScale Committee. They also served to clarify expectations and explore alignment with broader territorial agendas.
PHASE 3	Consolidation of the multi-stakeholder space	A formal convening session marked the beginning of the partnership's consolidation. Key territorial challenges and a long-term vision were discussed collectively. The Local LandScale Committee was positioned as a neutral platform for informed decision-making, coordination, and joint problem-solving. The session laid the foundation for emerging governance, sustained collaboration, and a shared mandate across sectors.

Source: own creation

In parallel, it was essential to establish a **Working Group**, composed of key institutions from the Jalisco state government such as **SEMADET** (Jalisco's Secretariat of Environment and Territorial Development), **SADER** (Secretariat of Agriculture and Rural Development), **FEPAJ** (Trust Fund for the Development of Jalisco's Forestry Sector), and **FIPRODEFO** (Trust Fund for the Administration of Jalisco's Forestry Development Program), with the mandate to provide technical and political guidance to the landscape process, channeled through RA as the convener, and to align public action with the ILM initiative (see figure 6).

1.3. NAVIGATING DIVERSITY:
ADAPTIVE APPROACHES TO BUILDING THE SVBL LANDSCAPE PARTNERSHIP

The three phases described previously laid the foundation for the establishment of a **Landscape Partnership** on September 20, 2021. Quarterly meetings were set to advance both the development of the LandScale baseline and progress on shared understanding, planning, and the implementation of the action plan, while simultaneously strengthening the governance platforms. Initially structured as a Local Committee of around 40–50 participants focused on sustainability measurement with

LandScale, this space gradually evolved into a broader platform for coordination, dialogue, and joint action. The LandScale framework, that requires an important participatory approach, provided a structure for engaging stakeholders around key indicators, while also helping translate technical data into accessible, contextually relevant insights to support collective understanding and decision-making.

Image 1: Landscape Partnership establishment session

Source: Gustavo Rojas

Engaging with this range of actors **required differentiated communication strategies**. One of the first tasks of the field officer was managing expectations: clearly communicating that no direct subsidies were being offered in exchange for participation, and that the initiative aimed to create a shared space for influence and dialogue. In many cases, this resonated with producers frustrated by the lack of attention to issues such as agrochemical regulation or public policy responsiveness. Ensuring that these concerns were heard in plenary spaces became a motivation to participate.

Inclusion was not left to chance. Alongside broad multi-stakeholder dialogues, RA made a deliberate effort to engage voices often absent from territorial governance, particularly women and youth. A concrete entry point was the technical assistance program for women producers of backyard poultry and egg production. Through tailored training, basic equipment, and seed funding, the initiative supported livelihoods while fostering a local network of women producers. Beyond its immediate benefits, the program opened pathways for these women to participate in the emerging alliance. Several local

leaders gradually gained recognition and became active voices in the broader landscape dialogue, with two eventually taking on formal roles within the Steering Committee. This experience helped create space for new forms of engagement and recognition within the evolving governance of the landscape.

> *"Don't underestimate the power of logistics: providing transport and food was not a nice-to-have. It was essential to make sure everyone could show up and be heard."*

The collective discussions held through **LandScale-structured meetings and workshops** (see *Element 5 – Monitoring and Learning*) became an opportunity to build trust. Bringing objective data to the table, giving equal weight to different voices, and providing a neutral space for dialogue helped shift the tone, from blame to co-responsibility.

Engaging the private sector, however, required a distinct approach.[6] This work was led directly by the project lead at RA, as it required higher-level strategic dialogue and trust-building. The organization was able to leverage its longstanding relationship with the avocado sector, particularly through certification programs, which provided credibility and familiarity. For companies with no formal sustainability reporting but under pressure from their parent corporations to demonstrate sustainability commitments, the platform offered an opportunity to gain visibility and legitimacy through collective action.

RA also drew on its participation in international agroindustry and sustainability forums, where it frequently crossed paths with representatives of these companies.

These sustained interactions helped cultivate relationships and align narratives over time. Understanding how each actor communicated its sustainability actions /whether through ESG (Environmental, Social and Governance) narratives, marketing language, or supply chain goals was critical to shaping messages that resonated.

The entry point was a **co-responsibility framing**: companies were not being asked to fund a landscape project but rather invited to become part of a long-term solution to challenges that exceeded their individual operational scope, such as water scarcity or reputational risks. Rather than labeling them solely as drivers of landscape degradation, the initiative positioned these actors (particularly from avocado, berry, real estate, and tourism sectors) as key contributors to solutions.

At the outset, mistrust ran deep: agribusiness actors were widely perceived as key drivers of deforestation and water overuse, and their involvement sparked skepticism among local communities and institutions. Yet, through participatory sessions and sustained engagement through the years, these tensions began to soften. While trust was never formally measured, tangible signs of collaboration emerged, such as unexpected partnerships between local media and private sector actors. Over time, the process helped differentiate within sectors, recognizing those genuinely committed to sustainability. Today, despite ongoing challenges, the landscape alliance rests on a stronger foundation of trust, built gradually through dialogue, shared spaces, and mutual accountability.

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6   For more information, see: *Engaging the Private Sector in Latin America and the Caribbean: Mexican Landscape*. USAID, 2023. Disponible en: https://drive.google.com/file/d/1LtTqzq7M1p_QEpgymIGxlhCpnnB0UDQ-/view?usp=drive_link.

The idea was not to deny their impact, but to encourage them to recognize and act on their responsibility, alongside other sectors, in restoring and protecting shared natural assets.

This approach resonated with many sustainability officers and producer associations, who were already familiar with the language of corporate social responsibility. Contextual factors, like the 2020 landslide attributed to illegal avocado expansion and growing concerns over water access and pesticide use, added urgency and made the cost of inaction more tangible. The presence of public institutions and NGOs as active partners helped ensure that the space would not become one-sided or punitive, but a neutral arena for co-designing solutions.

Early reactions from the private sector varied. While some actors were wary of being stigmatized, others saw strategic value in joining the dialogue early on. RA invested in differentiated communication and slow, deliberate engagement to move the conversation from blame to co-responsibility. This involved acknowledging the heterogeneity within each sector, not all avocado producers are engaged in deforestation or illegal activities, nor do all berry exporters overuse agrochemicals, and highlighting existing good practices as potential reference points.

Stakeholder engagement also required active efforts to keep the rest of the Landscape Partnership informed about ongoing private sector conversations. This was particularly important given initial skepticism among some members of the alliance, who questioned the inclusion of actors historically associated with deforestation, water overuse, or extractive practices. Questions like *"Why are we inviting the avocado industry to the table?"* or *"What role should the berry exporters play in a biocultural landscape?"* were both legitimate and recurring.

In this context, transparency became essential, not only to build trust but to ensure alignment across sectors. Regular updates, open discussions, and clear communication helped clarify the rationale behind these engagements and foster understanding of the co-responsibility approach. It was made explicit that these actors were not being invited as neutral or benevolent supporters, but as stakeholders with a direct responsibility in shaping and implementing solutions.

These conversations also emphasized the importance of differentiation: while the agro-industrial sector brought valuable tools, investments, and technical expertise, it often did not contribute to cultural identity, traditional knowledge, or social cohesion, dimensions where other actors played a much more prominent role. Recognizing these complementary strengths was key to promoting collaboration and mitigating perceptions of imbalance.

> *"The hardest part isn't getting everyone to the table, it's realizing they don't all speak the same language, move at the same pace, or come with the same motives. That's where being a 'translator between worlds' becomes essential, and no one really trains you for that."*

Understanding the diverse motivations behind stakeholder engagement was critical to designing effective and inclusive strategies. While some actors, like real estate developers, were **motivated by reputational concerns and the desire to be seen as positive forces in the landscape, others found strategic value in aligning with RA due to its connection to sustainable markets**. For all, the platform offered a new avenue for visibility and coordination. This engagement required from the RA team a mix of credibility, sectoral understanding, sustained dialogue, and the capacity to "translate" between local priorities and private sector strategies, a role that RA with both environmental and supply chain expertise was particularly well positioned to play.

Companies also recognized the value of data and tools provided by the initiative (such as aquifer maps, sustainability indicators, guides, and training) which allowed them to better estimate environmental risks and investment needs. As one private-sector partner expressed, *"It's cheaper to prevent damage than to repair damage."*[7] Academic institutions also drew on landscape-generated information, such as the situational analysis, to design applied research and territorial planning efforts. One concrete example is the development of a water restoration plan for the Juanacatlán area in the municipality of Tapalpa, led by a university affiliated with the Landscape Partnership. The availability of such information promoted new opportunities to align research, education, and local action.

Beyond the private sector, other groups joined the Landscape Partnership with distinct expectations and aspirations. **Academic institutions were drawn to the opportunity to engage students in applied research and field-based projects that could contribute to territorial sustainability**. For them, the initiative offered a space to bridge theory and practice, provide real-world experience to students, and generate evidence to inform decision-making.

Small and medium-scale producers were primarily motivated by the chance to have a voice in territorial decision-making. Many had long felt excluded from high-level governance spaces, and the Partnership offered a rare opportunity to articulate their needs, priorities, and proposals in dialogue with state institutions and other powerful stakeholders. **Access to technical assistance and financial resources was a recurring theme**: producers emphasized that any transition toward more sustainable practices would require both knowledge and equipment. For them, the landscape platform became a means to highlight not only their needs but also their existing contributions, especially through initiatives like farmer field schools and sustainable

"We often talk about collaboration as if everyone starts from the same place, but in practice, trust builds at different speeds. Some actors jump in quickly, others hold back, and that's okay. What matters is keeping the door open."

production methods such as silvopastoralism. These experiences, predating the formal Partnership, helped legitimize their leadership and made clear that innovation and resilience were already embedded in many of their practices but further efforts were needed.

Despite the progress made in building trust and shared governance, key challenges remain in the Sierra Volcánica Biocultural Landscape. **There is still a perception that private sector actors, particularly those with greater environmental impact, could contribute more actively to sustainability efforts**. Tensions also persist, especially with some environmental advocates who continue to voice concerns about the ecological footprint of certain industries. Meanwhile, socio-productive groups such as livestock producers, artisans, and local cooperatives still require substantial support to make their voices heard and influence decisions. Strengthening leadership within these sectors remains a core priority for the Landscape Partnership.

Strengthening leadership within these sectors remains a core priority for the Landscape Partnership. While plenary sessions may gather 30 to 40 participants, a smaller core group, often no more than 10 to 15 people, has emerged as the most consistently active. This dynamic, common to many landscape initiatives, reflects both the commitment

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7   Ibid. Page 25.

of certain individuals and the barriers that still limit broader engagement. Building inclusive governance therefore involves not only ensuring representation across sectors, but also fostering the emergence of new leaders, promoting rotation in governance roles, and investing in capacity building so that more voices can participate meaningfully in shaping the landscape's future. Supporting leadership development, particularly among women, youth, and historically underrepresented producers, will be key to sustaining momentum, renewing the alliance over time, and ensuring that its decisions are grounded in the full diversity of knowledge and experience present in the territory.

The Landscape Partnership was therefore organized around the **five objectives of the landscape**, drawing its foundation from four main sectors (see figure 5):

- **The academic sector** (major universities in the state)

- **The agro-industrial sector** (large exporters of agave, berries, and avocado)

- **The public sector** (both municipal and state), and

- **The social sector** (producers, cooperatives, ejido leaders, NGOs, etc.).

FIGURE 5: STRUCTURE OF THE LANDSCAPE PARTNERSHIP
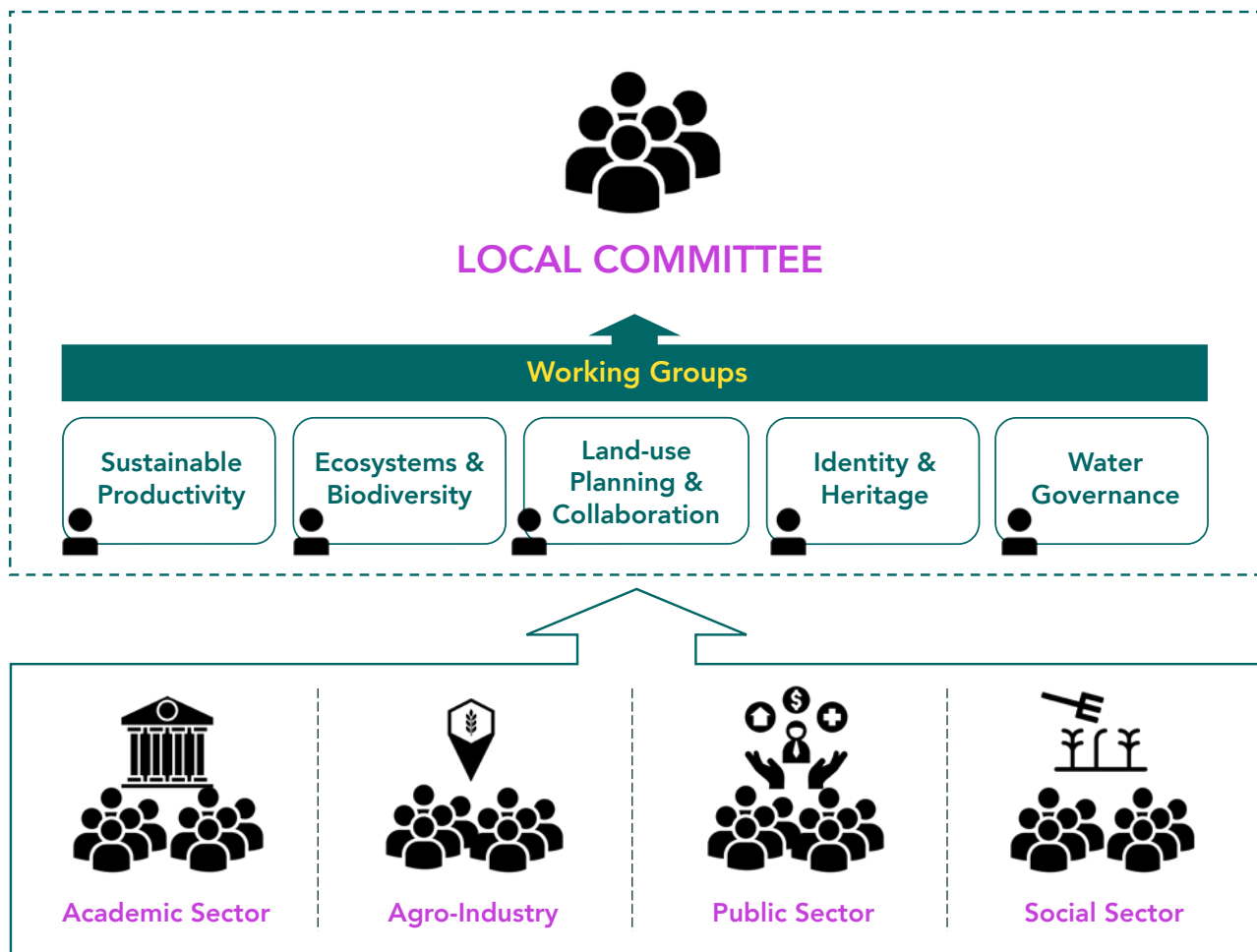
Source: prepared by the authors

1.4. LANDSCAPE PARTNERSHIP OPERATION

Once the Landscape Partnership as a Local Committee was established in September 2022, meetings were held on a quarterly basis. Between each plenary session, depending on the stage of progress, additional meetings were organized either through thematic working groups or with what later became known as the **Steering Board**, a smaller group of 10 representatives from the four main sectors described above. These include: one representative from the Intermunicipal Environmental Boards and their alternate; two representatives from socio-productive sectors and their respective alternates(one from the livestock sector and one a woman leader active in territorial processes); one representative and one alternate from the agriculture sector; and one representative and one alternate from the silvopastoral sector.

These sessions were coordinated by RA, which managed the logistical, financial, administrative, and content-related aspects necessary to advance through the Shared Understanding and Planning phases. RA secured for the first meeting venues, covered food and hospitality costs, ensured broad participation, prepared presentations, documented decisions, and shared outcomes with the broader group. Some of these costs were later covered by some of the stakeholders, especially meeting venues, transport and food.

A critical aspect during this phase was ensuring that **all relevant voices were heard**, both within and outside the formal meetings. RA, as convener, took responsibility for maintaining a balanced agenda, ensuring that no single actor dominated the direction of the initiative. As facilitator, it guided conversations during meetings, managed time, brokered agreements, identified gaps, and kept a holistic view of the alliance's overall progress. In parallel, RA also carried out complementary activities such as Farmer Field Schools, the development of good practice manuals,

bioconnectivity studies, and analyses of land use data gaps. This enabled sustained engagement with diverse actors and helped advance and drive the landscape agenda across multiple fronts.

> *"If resources allow, implementing on-the-ground activities, such as providing technical assistance to small and medium producers, can be extremely helpful. These actions help build trust, draw producers into the alliance, and allow us to identify (or develop, when needed) local leadership. These leaders often become key voices within the multi-stakeholder platform, the landscape alliance."*

Since the creation of the Landscape Partnership, ten formal sessions have taken place, each with around 40 participants. Decisions were taken by majority, while making space for dissenting voices when necessary. Given the grassroots nature of the initiative, the great variety of stakeholders, **there was a conscious effort to avoid excessive bureaucracy**. Decisions were made through open voting, and each session included an attendance list and a signed record of agreements, which was circulated to the full Landscape Partnership as part of the official meeting minutes.

Decisions were made through open voting, and each session included an attendance list and a signed record of agreements, which was circulated to the full Landscape Partnership as part of the official meeting minutes. Attendance was carefully documented, and the composition of participants by sector was reviewed to track representation across sessions. Decision-making followed a simple principle: one person, one vote. Voting

was conducted openly, typically through verbal agreement or a show of hands in plenary. Most decisions were adopted by broad consensus, and dissenting views were welcomed and recorded.

From the outset, there was a deliberate **effort to avoid excessive bureaucracy**. The initial formalization of the Landscape Partnership involved the signing of a single declaration by participants, with no legally binding commitments. While the possibility of formalizing the governance structure through legal instruments was discussed, it was ultimately set aside in favor of maintaining flexibility and adaptability. Regulatory frameworks and governance protocols were only introduced later in the process, particularly during the landscape's transition toward biocultural recognition, when it became important to clarify criteria for membership, roles, and procedures.

Until then, operational simplicity was prioritized. Participants signed in upon arrival, and meeting summaries were promptly shared via email and

WhatsApp. Proposals, including nominations for governance roles, were often discussed and refined in advance to streamline decision-making during the plenary. This behind-the-scenes preparation (often facilitated by RA as convening organization) helped ensure that meetings remained dynamic and accessible, and that participants could engage meaningfully without needing to navigate complex formalities. These practices reflected a clear intent: to prioritize dialogue, participation, and momentum over rigid administrative procedures, and to foster a space where simply raising a hand could shape the course of collective action.

As the process matured, collaborative efforts emerged organically. Municipal governments began offering venues for the meetings, some participants contributed audiovisual equipment, while others provided meals. This growing collective ownership helped sustain the initiative's momentum.

1.5. EMBEDDING GOVERNANCE FOR THE LONG TERM: THE TRANSITION TO A BIOCULTURAL LANDSCAPE

As the process progressed during four years, some important questions surfaced about leadership, ownership, and long-term sustainability, particularly as the **Landscape Partnership transitions from being facilitated by RA to being locally driven**. In this uncertainty, it was crucial to keep stakeholders engaged and ensure they were aware that there was a commitment to institutionalize the structure, along with the support of the government and define a clear pathway forward.

To ensure this transition, legitimize the Landscape Partnership, and provide a long-term foundation for governance beyond project timelines, a formal recognition by the State of Jalisco process was carried out in 2024. The goal was to highlight the territory's high ecological and cultural value, while also offering an "exit strategy" for RA's convening role. As a result, the territory was designated a

Biocultural Landscape under Jalisco's State Law on Ecological Balance and Environmental Protection (LEEEPA), a legal figure that recognizes rural territories of ecological and cultural significance and provides a renewable 15-year framework for their management (see *Annex 2: Biocultural Landscape recognition process*).

This legal designation embeds the landscape into Jalisco's broader territorial and environmental planning instruments, including the state's REDD+ strategy (see figure 6). The process took place throughout 2023 and 2024, combining stakeholder sensitization with a concerted effort to engage and align the four municipal governments of the landscape. It was not just about demanding recognition, it was about creating a shared institutional framework with long-term viability.
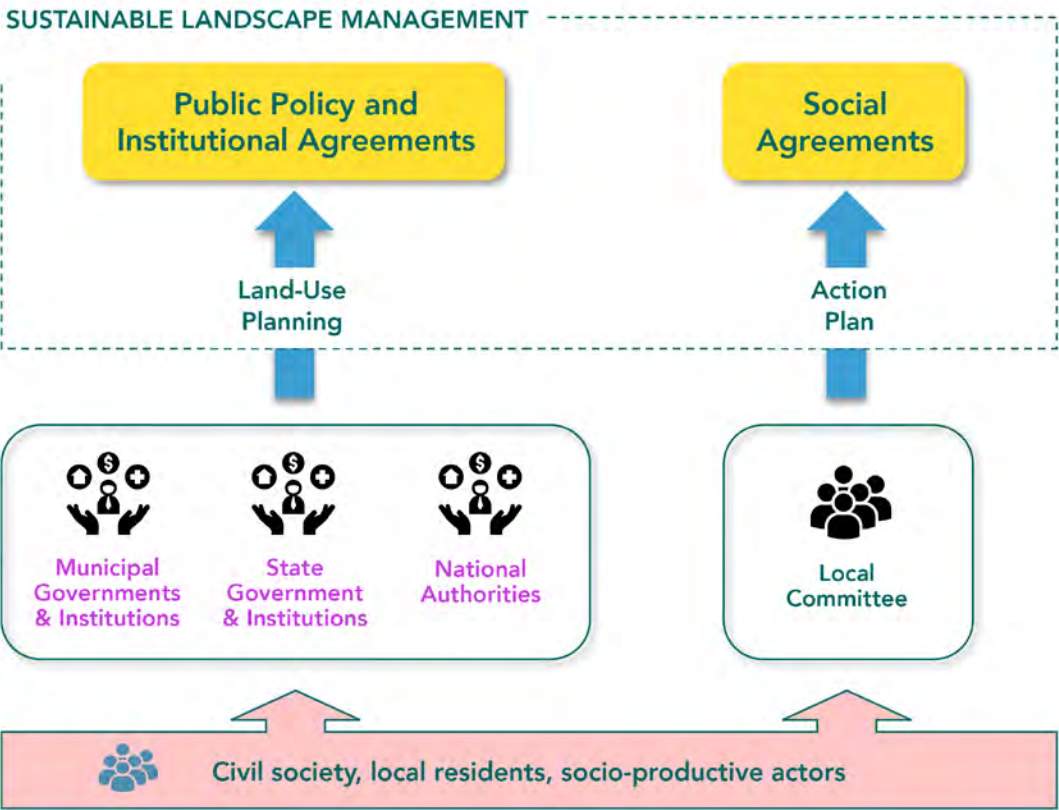
FIGURE 6: ALIGNMENT OF ILM INITIATIVE WITH PUBLIC POLICY

Source: elaborated by Santiago Machado, director of RA Mexico.

This recognition not only legitimizes and consolidates the efforts undertaken over the past four years by the Landscape Partnership, but also unlocks access to public funding mechanisms. These can cover platform operating costs (including coordination and facilitation roles), support institutional infrastructure, and finance future project implementation aligned with landscape goals.

As part of this transition, the Landscape Partnership evolved into two formal bodies: the Territorial Management Council (*Consejo de Gestión Territorial*) and the Socio-productive Representative Group (*Grupo Promotor*).

The **Territorial Management Council** is the highest governance body of the Sierra Volcánica Biocultural Landscape (see *Annex 3: SVBL Governance structure*). It plays a central role in guiding the implementation of the Territorial Charter, a shared agreement among the state government, municipal governments, intermunicipal environmental boards, and the region's productive sectors. This Council is responsible for major strategic decisions: approving annual work plans, reviewing and updating the Territorial Charter, validating LandScale evaluations, and using those findings to guide planning and investment priorities. It also defines which projects are adopted and how they are prioritized within the landscape agenda. This space ensures coordination across conservation, production, and governance, issuing technical recommendations and promoting multi-sectoral dialogue.

By bringing together diverse actors (from state-level institutions such as the Secretariat of Environment (SEMADET) and the Secretariat of Agriculture (SADER) to municipal and intermunicipal authorities and socio-productive representatives), the Council embodies a model of collaborative governance with a long-term vision at the landscape scale.

The **Socio-productive Representative Group** (*Grupo Promotor*), serves as the grassroots base of

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TRANSFORMATION OF THE LANDSCAPE ALLIANCE

Local Committee
Informal structure with a written agreement

Local Committee + Steering Board
Informal structure with a written agreement

Territorial Management Council and Promoting Group
Formalized through various formal agreements

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the governance structure. It is composed of local residents, cooperatives, producer organizations, artisans, and other socio-productive actors who shape the direction of the landscape. This space functions as a platform to identify leadership, monitor progress, and prioritize pressing issues from the ground up. It meets quarterly and tracks the advancement of **sectoral working groups** (*mesas socioproductivas*), evaluating the implementation of projects and agendas aligned with the Territorial Charter. The group also selects sector representatives who will bring the voices of their sectors and communities to the Territorial Management Council. In practice, it acts as an incubator for local leadership and a temperature gauge for the territory, surfacing emerging challenges form the sectoral working groups, validating actions, identifying project ideas, and maintaining momentum and coherence across sectors. Its role is fundamental to ensuring that the landscape strategy remains grounded in lived realities and evolves with the needs and aspirations of the people of the landscape.

To support the operationalization of this structure, RA prepared the internal statutes for both the Territorial Management Council and the Socio-productive Representative Group. These documents were reviewed and validated by the respective bodies and are currently in early stages of implementation. Given that official recognition as a Biocultural Landscape was granted only in November 2024, both governance bodies are still in the process of being fully operationalized. For a synthesis of the governance model, roles, and decision-making architecture, see *Annex 3* and *Annex 4*.

Outputs and why they mattered:

- **Public sector working group:** enabled coordination between local and regional government actors, fostering early institutional buy-in and ensuring that landscape planning aligned with public policy frameworks.

- **Established and adaptive convener team:** a core facilitation group, capable of adapting to emerging dynamics, ensured continuity, trust-building, and strategic alignment among diverse stakeholders.

- **Workshops to discuss needs and objectives:** facilitated inclusive dialogue among landscape actors, ensuring that the partnership's direction reflected a broad range of priorities and local realities.

- **Stakeholder structure and participation in the partnership:** clarified roles, decision-making mechanisms, and representation. This formalized collaboration and enabled the transition from ad hoc coordination to an operational landscape governance platform.

- **Initiation of the policy and participatory process to gain institutional recognition:** marked a shift from informal coordination to a legally or administratively recognized landscape entity, enhancing legitimacy, accountability, and long-term sustainability.

ELEMENT 2

SHARED UNDERSTANDING

Objective: In the context of this landscape, the objective was to develop a shared understanding of the territory as an interconnected system, recognizing how challenges like water scarcity and deforestation, or unregulated development and fires were interlinked, and clarifying the governance needs and socio-environmental dynamics that shaped the region.

The process of building shared understanding in the landscape did not start from scratch. It drew upon existing institutional efforts, technical information, and a clear political will to act. However, it soon became clear that for this knowledge to support meaningful action, it had to be translated, contextualized, and collectively reinterpreted.

This element recounts how the initiative moved from state-level mandates and technical data to a locally grounded process of analysis, dialogue, and communication that laid the foundation for a more inclusive and informed vision of the landscape

2.1. FROM REGIONAL MANDATE TO LOCAL RELEVANCE: LEVERAGING STATE ALIGNMENT FOR COLLECTIVE UNDERSTANDING

The process began with a concerted effort to consolidate and interpret existing data. The RA team **drew heavily from the earlier Ecological and Regional Land Use Plan (POER)**, which had identified some of the principal stakeholders, produced an extensive characterization of land use, natural resources, and socio-economic dynamics across the region.

A critical enabling factor was the prior involvement of the Government of Jalisco, particularly through its initiative to regionalize strategic territories. The Sierra de Tapalpa region had already been identified as one of these priority regions, which brought with it not only technical data (from the Secretariat of Environment, other state-level agencies, and intermunicipal environmental boards), but also an initial stakeholder map and a political mandate for action. This exercise of state power laid the groundwork for the landscape initiative, providing essential raw data and early institutional alignment. Such favorable conditions are not always present. In other contexts, partnerships may face mistrust or resistance toward state actors, requiring additional

effort to build legitimacy and ensure inclusive engagement.

This alignment was more than technical, it was political. **One of the decisive reasons RA selected this landscape for intervention was the strong political will expressed by the Secretariat of Environment (SEMADET)**, which saw the ILM process as a way to complement and operationalize its broader policy on Biocultural Landscapes. The landscape initiative was thus grounded in an explicit effort to address deep-rooted environmental challenges identified by the state, particularly ecosystem degradation, land-use pressures, and water stress, and to channel institutional energy toward reversing them.

However, it soon became evident that this information was neither well known nor meaningfully owned by local stakeholders. To be useful, it had to be translated into accessible formats, situated in context, and made relevant to people's lived experiences.

2.2. FROM DATA TO DIALOGUE:
HOW LANDSCALE & PARTICIPATORY ANALYSIS ANCHORED COLLECTIVE UNDERSTANDING

The team recognized the need to shift from evaluating what activities can be done by region, to what the inhabitants of the region can do to make that region more sustainable.

A situational analysis (Valencia, Leal, Martínez, & Bascich, 2021) was conducted, this time focused not only on ecological and socio-economic conditions, but also going deeply on stakeholders existing governance platforms (see table 3), mapping key narratives, stakeholder perceptions, and in-depth landscape data.

The process for the analysis helped identify where trust was low, which actors were underrepresented in the dialogue, and what types of information or messaging were needed to foster broader support. It was a fully participatory process, including interviews and workshops to contrast information and consolidate a shared understanding of the main challenges of the landscape.

With the POER, and the situational analysis generated, the **LandScale assessment process** provided the structural backbone to develop further this stage (see figure 7). It allowed the RA team and the Landscape Partnership to organize the diagnosis around a comprehensive set of sustainability indicators, including environmental health, human well-being, governance, and production systems. Rather than treating these indicators as abstract metrics, they became starting points for conversation with sectors from the landscape and the roots of the shared understanding. RA's field coordinator played a crucial role in sparking those conversations, not only in formal spaces, but also through visits to ejidos, participation in community assemblies, and informal exchanges at places like town bakeries or local agro-supply shops. These encounters provided rich insights into how different people understood the landscape's challenges, and helped the team ground its analysis in real-life narratives.

TABLE 3: EXCERPT FROM STAKEHOLDERS AND GOVERNANCE PLATFORMS MATRIX

Organization	Type	Level	Description
Subcuenca Tuxcacuesco	Governmental	Regional	Manage water issues at the watershed scale
CADER 34, Tapalpa	Governmental	Regional	Support center for rural development
UMAFOR No.5, Tapalpa	Governmental	Regional	Located in Meseta de Tapalpa, Zacoalco de Torres, Sayula, Amacueca, and Techaluta de Montenegro
Junta Intermunicipal del Medio Ambiente Para la Gestión Integral de la Cuenca Baja del Río Ayuquila	Decentralized public body	Regional	Functions as an environmental agency
Junta Intermunicipal de Medio Ambiente del Ayuquila Alto	Intermunicipal decentralized public body	Regional	Assists in the design, implementation, management, and evaluation of environmental projects
City Council of Tapalpa	Governmental	Municipal	Department of Ecology and municipal regulations for the care of the environment

Source: SVBL Situational Analysis, 2022

"We learned to balance rigor with empathy. A table showing groundwater depletion is important, but hearing a producer describe how his well ran dry just before harvest made that data resonate."

FIGURE 7: LANDSCALE ASSESSMENT TIMELINE

ASSESSMENT TEAM				
Assessment team selection	Boundary selection	Indicators and metrics selection	Data Review Selection of local experts	Reporting
STEP 1	STEP 2	STEP 3	STEP 4	STEP 5
Validation	Validation	Validation	Landscale Validation Local Reviewers Validation	Validation and support with final report
LANDSCALE TEAM				
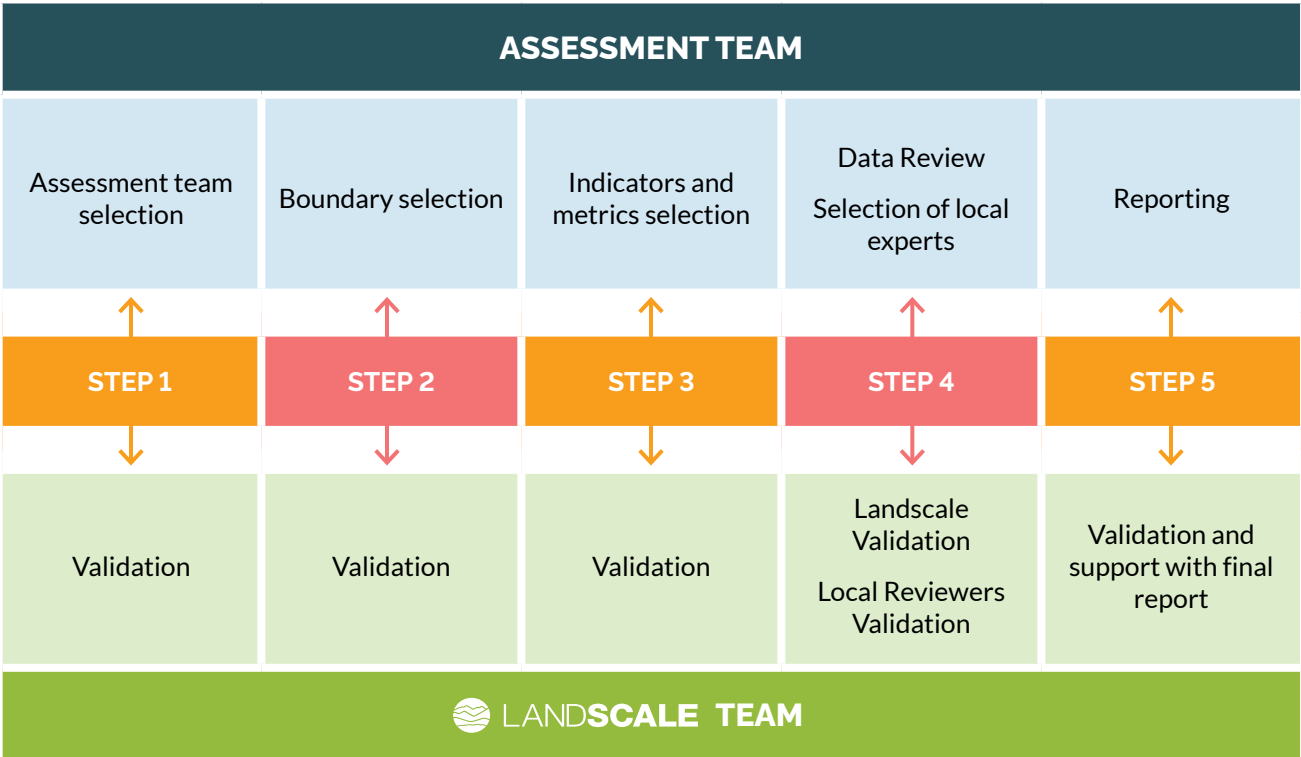
Source: landscale.org

One example of critical insight that emerged in this case was the role of **water**, particularly groundwater from shared aquifers, as a connector across sectors. Agricultural producers, municipalities, and state agencies all recognized water scarcity as a common threat. For avocado and berry growers, aquifers sustain production; for municipalities, they ensure drinking water supply. It became clear that degradation in the upper watershed, such as deforestation or unregulated land conversion, could directly compromise water availability downstream. This recognition helped frame upstream reforestation efforts not only as environmental actions, but as strategic investments to sustain the entire socio-ecological system.

This groundwork laid the foundation for more structured engagements. **Participatory workshops, having LandScale as an initial ground, were then organized to validate and enrich the technical findings**.

These sessions gathered municipal authorities, intermunicipal environmental boards, producers' associations such as APEAJAL and ANEBERRIES, state agencies like SEMADET and SADER, and local NGOs. Rather than simply presenting data, these workshops transformed it into a vehicle for collective analysis. Maps became tools for dialogue; technical concepts were translated into everyday language; and previously unrecognized issues (such as informal land parceling or unregulated boreholes) emerged as critical concerns.

"Information by itself doesn't change minds. What made the difference was the slow work of turning data into dialogue."

As these conversations deepened, it became increasingly clear that technical information alone was not enough.

Conveying a sense of collective vision, of belonging to something beyond a single value chain or municipality was essential for building momentum and an idea of a Landscape Partnership.

What truly advanced the process was the collective ability to interpret the data, contextualize it, and begin to see interdependence across the territory.

These connections gave new meaning to technical interventions. Reforestation, once seen as isolated projects, was better understood as a mechanism to link public and private agendas. Informal land parceling, previously invisible, emerged as a systemic risk to watershed health. Even governance gaps, like the lack of coordination between municipalities, were reinterpreted in terms of their ecological consequences.

2.3. MAKING INFORMATION ACCESSIBLE: HOW COMMUNICATION ENABLED BROADER ENGAGEMENT

To ensure that dialogue could reach beyond the walls of formal workshops, and that the data truly became a shared resource, a strategic communication layer was needed. Translating indicators into insights was only the beginning, the next step was to make them diffuse and resonate. This required not just content, but channels: multiple, accessible, and adapted to the diversity of actors across the landscape. Communication, therefore, became not a parallel effort, but an important component of building shared understanding.

To support this, a **multi-channel communication strategy** was rolled out with the support of a local communications agency and the communications and social media managers of RA Mexico. WhatsApp groups were created to share updates with producer groups; printed briefs were distributed to local authorities; and digital folders were developed for technical institutions to review indicator methodologies and assumptions (see image 2: Example of communication materials). [A dedicated webpage](#) was also launched to host information about the

process, including downloadable documents, [videos](#)[8] and updates. These tools helped ensure access to information and allowed actors to engage with the material at their own pace and from their own starting points.

However, this communication effort was also one of the most challenging aspects of the shared understanding phase. Despite early support from RA's national communications team, the collaboration with the local agency faced significant limitations. The agency struggled to grasp the nuance and complexity of the landscape's dynamics, and the resulting outputs often fell short of expectations, both in clarity and resonance. This led to misalignments, delays, and friction among team members, ultimately limiting the scope and effectiveness of the overall communication strategy. In retrospect, part of the challenge lay in the abstract and technical language and ideas often used by those immersed in landscape work. Concepts like *"governance mechanisms," "multi-stakeholder alignment,"* or *"territorial planning"* may feel intuitive

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8   An example of a video that helped create a shared understanding in fire combat is the [documentary about Fire Brigades in the Landscape](#). It showcases the critical role of forest brigades in combating and preventing wildfires in the region of Tapalpa, Mexico. Key figures, including brigade leaders and local residents, discuss their responsibilities, experiences, and the importance of maintaining a careful balance with nature. It helped inform stakeholders about how the challenges are easier to confront when collaboration is fostered among actors at the landscape level.

to practitioners, but are not necessarily accessible to broader audiences. The communication gap, then, was not unidirectional, it reflected a broader tension between the need for conceptual precision and the challenge of translating that language into meaningful, grounded messages for local actors.

Nonetheless, some key achievements emerged from this difficult process. One of the most valuable outcomes was **identifying which channels were most effective for reaching different types of stakeholders**, from informal WhatsApp exchanges to more technical digital repositories. While far from perfect, these initial efforts helped lay the groundwork for more targeted communication approaches in subsequent stages of the landscape initiative.

In sum, after all these efforts, there was a growing recognition within the Landscape Partnership, not yet a full consensus, that the challenges facing the territory could not be addressed in isolation. Water governance, forest management, agricultural transitions, and social cohesion were increasingly understood as interconnected issues. Solutions, including adequate finance for the landscape, had to be adapted to this vision. The different dialogue spaces (workshops, interviews, informal gatherings, plenary meetings, etc.) allowed people to begin to see how their work, their concerns, and their institutional mandates were part of a larger system.

This foundation of shared understanding became the entry point for more strategic discussions:

- *How do we move from diagnosis to vision?*

- *What actions can address multiple challenges simultaneously?*

- *And what kinds of coordination, investment, and leadership are needed to turn insight into action?*
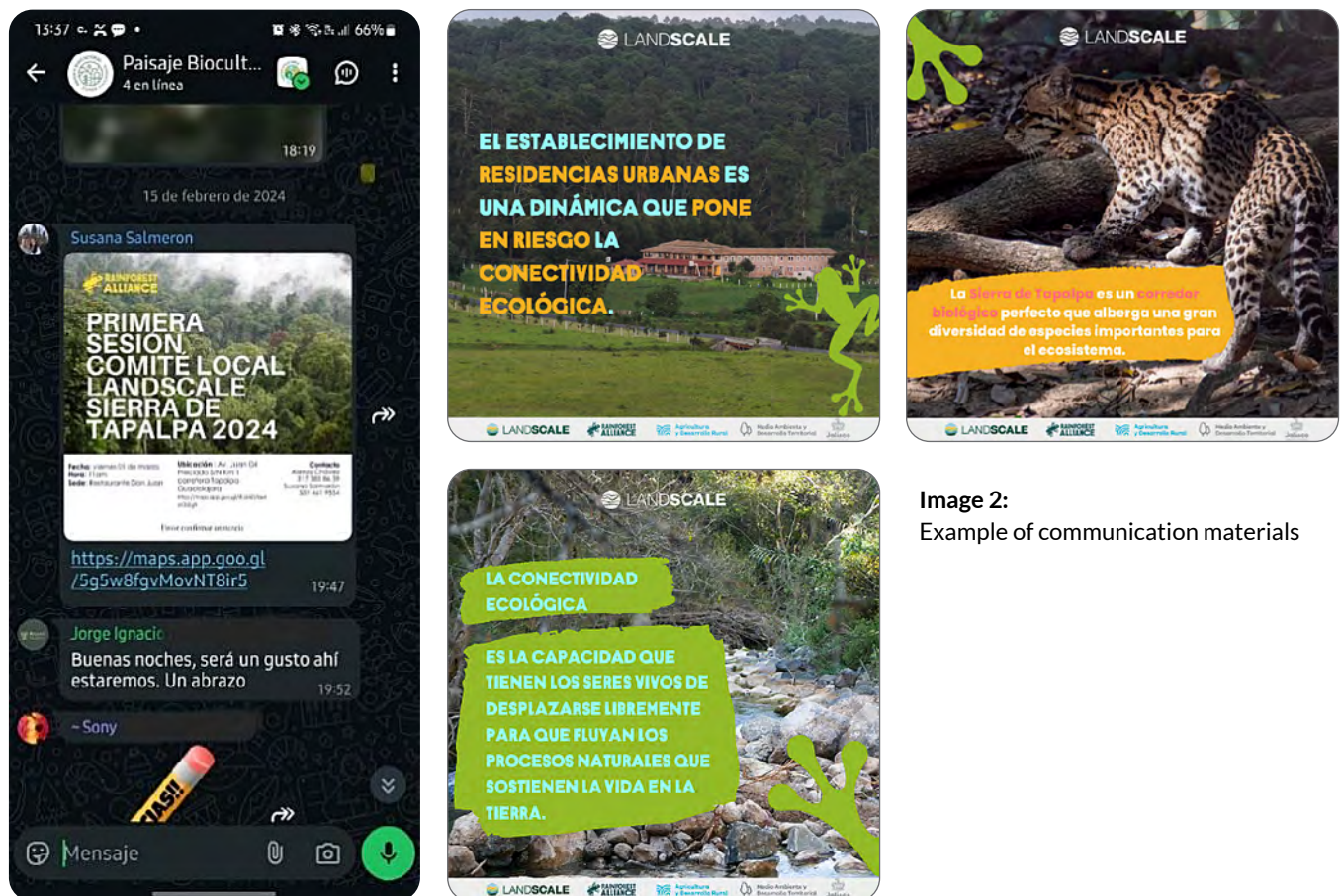
Image 2:
Example of communication materials

Image 3: Early meetings with main stakeholders

Outputs and why they mattered:

- **Situational analysis:** refined and deepened the initial diagnosis of the POER to highlight key leverage points for communication and engagement. This version focused specifically on mapping existing governance structures, stakeholders perceptions, narratives, and information gaps among different stakeholder groups.

- **Communication strategy:** defined clear objectives, target audiences, core messages, and tools to support outreach, transparency, and engagement. It enabled the landscape partnership to build a shared identity, articulate its added value, and maintain consistent dialogue with diverse actors across sectors and territories.

- **A well established field team:** Having a team established in the territory, recognized for its active participation in local activities, which would generate trust, drawing power, and various entertainment activities is essential. The trust building required it to be actively involved in other activities and spaces in the territory.

- **LandScale Baseline Report (2022):** Provided a shared, multi-sectoral snapshot of the landscape's sustainability status, which all actors now use as a reference.

- **Workshops to discuss LandScale results:** created space for interpreting data collaboratively, validating findings, and jointly identifying implications, strengthening ownership of both the process and its outcomes.

- **Emerging Local Narratives:** The process allowed for the emergence of shared narratives (e.g., *"water is everyone's problem now"*) that can mobilize collective action.

- **Foundations for Monitoring:** the baseline indicators serve as a reference point for the long-term monitoring system being developed under LandScale.

ELEMENT 3

VISION AND PLANNING

Objective: Through the governance and landscape partnership process, define a shared vision and shared objectives as the basis for a joint planning process to address landscape-scale issues identified.

While shared understanding and the early signs of governance structures were essential to ground the dialogue among actors, it was through the articulation of a shared vision, collective prioritization, and concrete planning that the partnership began to take shape as a coordinated actor. The process involved multiple topics: co-creating a long-term vision; defining shared priorities through participatory workshops; structuring these into a five-objective Action Plan; and formalizing them in the *Carta Territorial*, a document that anchors strategy in the territory's ecological and cultural identity.

In parallel, the landscape partnership began identifying projects with investment potential and assessing funding flows, using the [Landscape Investment and Finance Tool](#) (LIFT) and the Landscape Finance Accelerator (LFA) methodology (forthcoming). These efforts helped build not only strategic alignment, but also a deeper awareness of financial needs and opportunities, laying the foundation for a long-term landscape finance roadmap to be operationalized.

3.1. VISION AND PLANNING AS EVOLVING PROCESSES

The process of articulating a shared vision and designing a joint action plan for the Sierra Volcánica Biocultural Landscape did not follow a rigid sequence. **Although governance, shared understanding, vision and planning are presented separately for clarity, in practice these elements were closely interwoven**. As in many integrated landscape initiatives, progress unfolded in parallel across multiple fronts: trust-building, diagnostic processes, and governance formation. From the outset, the RA team recognized that vision and planning could not be postponed until "everything else was in place." Instead, they had to evolve iteratively, grounded in what was already emerging from the participatory diagnosis.

These efforts followed a non-linear path, with each process reinforcing the others over time. Early participatory workshops, originally designed to foster shared understanding, also provided a space to test nascent governance structures and explore preliminary ideas for a collective vision. Similarly, initial conversations about landscape challenges and

priorities began shaping the action plan, even before formal planning sessions were held. Vision, planning, and governance co-evolved in response to local dynamics, stakeholder feedback, and the gradual maturation of the landscape partnership. It is worth noting that transitioning from a time-bound project framework to a broader recognition of the landscape as a biocultural system in 2024 required expanding time horizons, redefining ambitions, and somehow reimagining the long-term vision for the territory.

The groundwork for a lot of these parallel processes was based on the foundational consultations of the LandScale assessment process to define a baseline, which created an **enabling environment** for deeper strategic conversations. With this jointly defined baseline in place, which collected the perspective across sectors and stakeholders, and the beginnings of a governance platform taking shape, the Landscape Partnership began convening spaces to reflect on what the future of the landscape should look like and how to get there.

3.2. VOICES AROUND THE TABLE: DEFINING PRIORITIES THROUGH PARTICIPATION

The first four sessions of the Landscape Partnership (initially defined as a Local Committee) held between late 2021 and early 2022, were pivotal in shaping the direction of the landscape initiative.

Every three months, the Landscape Partnership had meetings to make decisions and provide input on the direction of the landscape process. Each was structured as a participatory workshop with a distinct focus:

1. **The first** centered on collectively interpreting the findings from LandScale and the POER

2. **The second** aimed at defining a shared vision and thematic priorities

3. **The third** focused on outlining a preliminary action framework as well as actors in charge per action, and

4. **The fourth** was to establish a shared vision, operational mechanisms for follow up actions, and establish a first version of the action plan, based on the previous three sessions.

FIGURE 8: SESSIONS HELD BY THE LANDSCAPE PARTNERSHIP

FIRST SESSION
- What is the problem?
- Problematization and prioritization
- Clustering causalities

SECOND SESSION
- How do we solve the problem?
- Activities proposed by the committee members, grouped into actions, strategic lines, and objectives

THIRD SESSION
- What are we doing?
- Stakeholder contributions
- What is already being done?
- What remains to be done?

FOURTH SESSION
- How will we do it?
- Intervention proposals by objective, differentiating between goals, strategic lines, actions, and activities

Source: adapted from Landscale

These workshops convened a diverse group of stakeholders, including public institutions such as SEMADET, SADER, and the intermunicipal environmental boards (JIRA and JIDELAA), as well as producers' associations, NGOs, and academic institutions. The workshops were designed not only to surface ideas, but to test assumptions, mediate differing expectations, and ensure all voices, including those of smallholders and ejidos, had weight in shaping the vision.

FIGURE 9: PROBLEM TREE. KEY CHALLENGES AND THEIR ROOT CAUSES
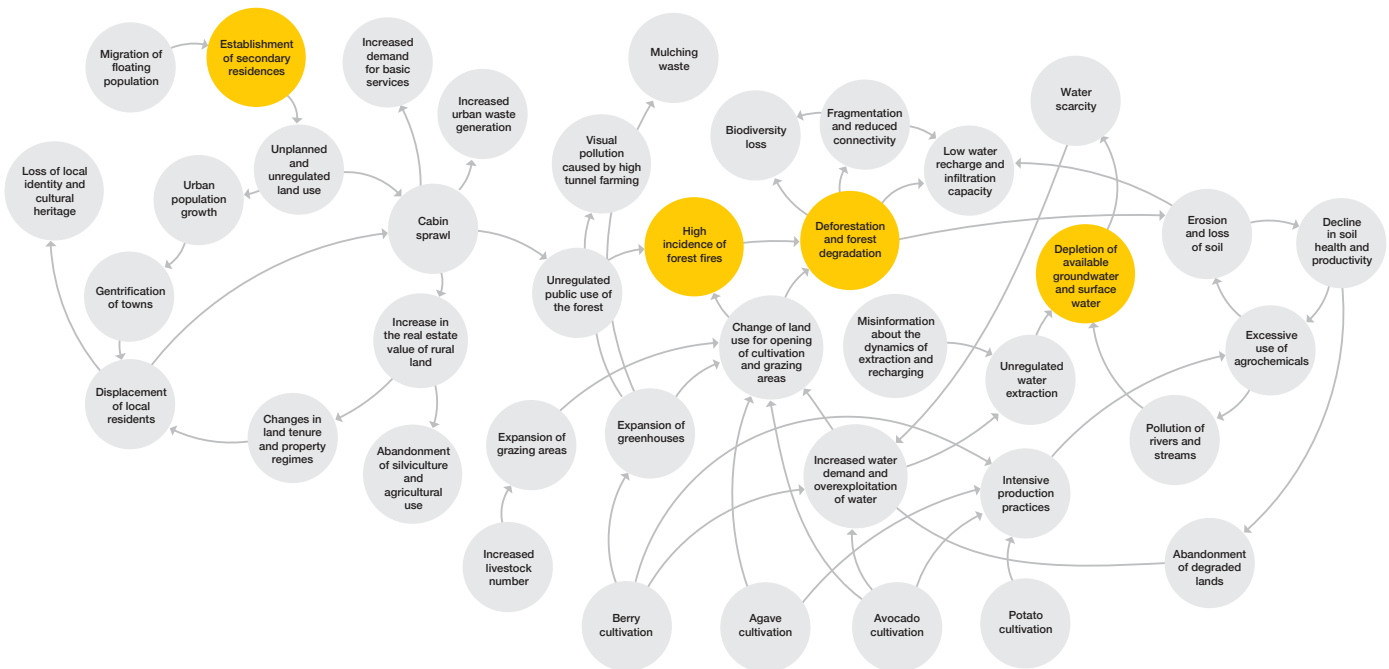
As a starting point, a participatory problem tree analysis (see figure 9) was conducted with the Landscape Partnership to identify key territorial challenges and their root causes. This process helped structure a shared understanding of interlinked dynamics, highlighting four central problems in orange: unplanned residential development, forest fires, deforestation, and water depletion. Around them, a network of contributing causes and cascading effects was mapped in gray. **This analysis provided a foundation for prioritizing actions and directly informed the development of the Action Plan.**[9]

One particularly sensitive topic during the workshops was the role of real estate developers, who were frequently criticized by public institutions for contributing to landscape fragmentation, biodiversity loss, and increased vulnerability to forest fires. **However, the participatory sessions provided a platform for dialogue, allowing some actors from the sector to express their willingness to implement different actions to reduce their impacts.** This

included exploring more sustainable development practices and seeking ways to contribute to specific actions included in the Action Plan. **These exchanges helped shift the tone from blame to co-responsibility and gave rise to initial collaborative ideas**, such as supporting local fire brigades or contributing to community communication initiatives, proposals that would later be reflected in the lines of action of the Action Plan included in the Territorial Charter and verified through the LandScale "Claims" feature (see *Element 4 – Coordinated Action*).

"The vision workshops worked in part because we had done the hard work beforehand: listening, analyzing, building trust. You can't facilitate strategy with strangers."

---

9   See Module 5: Landscapes Action Plan for more information on how to define problems with the problem tree.

Image 4: Photo of Workshop 3, *"What actions are we doing? What's needed to complement?"*

3.3. FROM SHARED PRIORITIES TO A TERRITORIAL CHARTER: GROUNDING ACTION IN LANDSCAPE IDENTITY

The resulting vision reflected the diversity of the actors involved: it prioritized agricultural transition and watershed resilience, but also explicitly included themes like inclusive governance and sustainable tourism, areas often overlooked in more sectoral planning.

Rather than drafting a final document in isolation, **the RA team iteratively circulated drafts, incorporated feedback from working groups, and slowly assembled a plan that felt owned by the platform and that was then ratified by the Landscape Partnership at the fourth workshop**.

To complement the Landscape Partnership workshops, four thematic webinars were held to address pressing territorial challenges. External experts contributed reflections on four topics: forest

VISION: *by 2038, the Sierra Volcánica Biocultural Landscape, encompassing the municipalities of Atemajac de Brizuela, Chiquilistlán, San Gabriel, and Tapalpa in the state of Jalisco, will be recognized as an emblematic territory that promotes the restoration, sustainable management, conservation, and innovation of practices that honor both natural and cultural heritage. In this landscape, residents, producers, academic institutions, and government entities collaborate to improve the quality of life for all who call this territory home.*

Image 5: Fourth Landscape Partnership meeting

fire management in wooded areas (SEMADET), landscape forest ecosystems (UICN), water governance in the region (ITESO), and LandScale as a sustainability monitoring tool (RA). These thematic sessions not only offered technical insights, but also helped strengthen landscape identity and informed ongoing goal-setting discussions. They reconnected participants with the region as an integrated whole, beyond municipal or sectoral boundaries.

Still, building consensus on priorities was not straightforward. Some stakeholders favored visible, short-term actions, such as road improvements or product promotion, while others stressed the need to tackle deeper issues, like land tenure. These differences gradually gave way to more substantive dialogue on the scope and direction of the Action Plan.

The production objective, in particular, generated a wide range of perspectives. Smallholder and medium-scale producers prioritized traditional activities such as maize cultivation, egg production, and livestock

farming. In contrast, larger agro-exporters sought to align the Action Plan with their existing ESG strategies and sustainability certifications. For them, the value of the plan lay in offering coherence and visibility to ongoing efforts in areas like soil health, responsible pesticide use, and water conservation.

Throughout this process, it was critical for the RA team to remain available, responsive, and transparent, helping to reflect these diverse perspectives in the evolving drafts of the Action Plan and ensuring that all voices across the landscape felt represented in the final document. This required several one-on-one meetings to unpack trade-offs and explore how different agendas could be meaningfully integrated. Besides clarifying stakeholders on the ongoing process and promoting appropriation, in many cases, these spaces enabled quieter or less represented voices to express concerns or propose ideas that might have been lost in larger plenaries.

It also became clear that proposed actions needed to be grounded in the real capacities and scope of the Landscape Partnership. While building infrastructure, or formal land tenure regularization may have seemed compelling to some, implementing such a stream of actions would require extensive coordination with institutions beyond the partnership's immediate reach (national authorities for example). Managing expectations and aligning ambitions with feasible pathways became part of the collective work of visioning and planning.

The Action Plan, later integrated into the *Carta Territorial*, came to light as a flexible document that articulates five strategic objectives for the Biocultural Landscape:

> ### 1. Sustainable productivity
> Promote a harmonious development of rural and agroindustrial productivity alongside the preservation of natural heritage, ensuring sustainability, equity, and justice in commercial and environmental relationships.
>
> ### 2. Ecosystems and biodiversity
> Promote the sustainable management of ecosystems and their biodiversity, as well as the valuation of the goods and services provided by natural heritage.
>
> ### 3. Orderly land use and collaboration
> Promote an orderly use of the landscape, and build collaborative relationships in favor of social well-being and improvements in quality of life.
>
> ### 4. Identity and cultural heritage
> Promote the recognition of local collective identity and cultural heritage, which makes the landscape an exceptional territory.
>
> ### 5. Water governance
> Promote effective governance and water management with a watershed approach.

Each objective was accompanied by illustrative actions, key stakeholders, indicative costs, and initial coordination ideas. Once these objectives were defined, dedicated working groups were formed (each led by a designated focal point), and tasked with collecting proposed actions from local actors. These groups, convened by the Local Promoter, provided the structure needed to populate the plan with concrete actions and responsible parties. It was at this stage that the first collaborative project ideas began to emerge, aligned with the Action Plan and laying the groundwork for the implementation phase (see *Element 4 – Coordinated Action*).

As the process evolved and the *Carta Territorial* took shape as the formal reference document for landscape planning, the time horizon was also redefined. While the Action Plan had been initially developed with a medium-term vision of five to ten years, the *Carta Territorial* extended this outlook to a fifteen-year horizon. This adjustment responded not only to the need for a long-term orientation that could support systemic territorial change, but also to a specific institutional requirement. Under the guidelines established by the State of Jalisco, a minimum planning horizon of fifteen years was necessary for the territory to qualify for official designation as a Biocultural Landscape.

The *Carta Territorial* consolidates the outcomes of this collective journey. While it incorporates the Action Plan and Shared Vision, it also broadens the scope to include additional foundational elements: an ecological characterization of the territory, a description of the governance system, and a dedicated section on cultural identity and heritage.

One element worth emphasizing is the Landscape Partnership decision to center culture and identity as important themes for the Action Plan. These dimensions emerged naturally as a central thread in how people make sense of the territory. In 2024, through workshops, conversations, and local reflections, communities surfaced the stories,

values, and practices that shape their connection to the land, elements that are now embedded in the *Carta Territorial* shaping both the Shared Vision and priorities of the Action Plan.

The *Carta Territorial* evolved from a planning tool into a territorial pact, an expression of shared understanding and long-term commitment across levels of government, civil society, and local communities. Structured around the five strategic objectives above, the *Carta Territorial* defines a development framework, identifies priority actions, and establishes mechanisms for coordination, monitoring, and shared accountability. More than a technical document, it formalizes a collective agreement to advance inclusive and sustainable development while protecting the landscape's ecological and cultural heritage; and it serves as both a roadmap and a reference point.

TABLE 4: EXCERPT FROM THE 2024-2039 SVBL ACTION PLAN

Thematic priority	Objective	Actions	Activities	Funding needed 2021-2026	Years	Actors & roles
Sustainable Productivity	Strengthen and develop markets	Reward sustainable production with seals and certificates	Develop and implement the certification program for priority crops: avocado and agave	$2,250,000	3	RA, Grupo los Cerritos, APEAJAL
	Build capacity and promote sustainable production practices	Strengthen capacity to provide added value and sustainability	Capacity-building program for sustainable production and integration of biodiversity in agriculture and stockbreeding (field schools and technical support)	$1,400,000	1	Juntas Intermunicipales (JIRA, JIDELA), SADER, RA, APEAJAL, Aneberries, Mujeres prod. de Huevo, EDUCAMPO, INTEGRA
		Compensation mechanisms (PES, carbon certificates, etc)	Develop landscape-adapted technology packages (IUCN). Send out proposals and participation guidelines to incentivize producers. Develop carbon market projects.	$8,550,000	2	Ejido el Jazmín, MEXICO2
		Organize festivals and fairs to showcase good practices	Create calendars of events, a WhatsApp channel for promotion and a Facebook page to distribute information	$700,000	1	RA, juntas Intermunicipales (JIDELA, JIRA)
	Secure funding for the transition to sustainable production	Seek funding from private, social, and international entities	Develop and implement a portfolio of financial resources mobilization and sustainable investment	$1,200,000	2	FIPRODEFO, SEMADET, SADER, juntas intermunicipales (JIDELA, JIRA), RA
Ecosystems and Biodiversity	Protect the forest and its services	Promote PES (Payment for Environmental Services) and similar instruments	Provide operating rules and support guidelines to landscape inhabitants. Create a list of offering institutions and potential beneficiaries.	$20,000,000	2	Asociación de Silvicultores de la Meseta de Tapalpa, SEMADET, Ejido el Jazmín, FIPRODEFO
	Ensure the sustainable use of the forest	Promote carbon markets	Inter-institutional work with CONAFOR, FIPRODEFO and *Fideicomiso Servicio Forestal* to broadcast operating rules and support guidelines	$950,000	2	FIPRODEFO, SEMADET
		Reforestation and sustainable production	Promote reforestation projects with landscape stakeholders. Analyze and monitor the ecological health of the landscape and the connectivity between *Nevado de Colima* and *Sierra de Quila*.	$2,500,000	2	SEMADET, Asociación de Silvicultores de la Meseta de Tapalpa, APEAJAL, MAZATI, Berrymex, SEMADET, RA
		Build capacity and promote sustainable production practices	Promote best practices for the management of forest areas and their various uses (residential, touristic, silvicultural, etc.)	$325,000	1	Asociación de Silvicultores de la Meseta de Tapalpa, MAZATI, SEMADET
		Assess forest use and producers' capacities to use forests.	Value and promote ecosystem functionality and the environmental services provided by the forest	$20,000,000	3	
		Improve fire management practices	Implement the regional fire management and landscape risk management program. Create and maintain fire brigades. Purchase firefighting equipment. Develop awareness campaigns. Create and broadcast a calendar of scheduled agricultural burning.	$20,000,000	3	SEMADET, Asociación de Silvicultores de la Meseta de Tapalpa, Municipios del Paisaje, MAZATI

3.4. UNDERSTANDING NEEDS AND BUILDING THE LANDSCAPE INVESTMENT CASE: PROJECTS, FINANCE, AND STRATEGIC ALIGNMENT

Building on this work and to make tangible progress, the process for the organization, identification and prioritization of investable projects into a landscape-scale portfolio of projects and activities began as a part of the implementation of the Landscape Finance Accelerator (LFA) process and methodology in the SVBL, as part of the collaborative activities under the 1000 Landscapes for 1 Billion People initiative's Finance Solutions Team.

The work was organized using an assessment tool from the LFA and structured around the 6 steps of the Landscape Finance Framework:

1. WORK FROM LANDSCAPE ACTION PLANS

2. LANDSCAPE FINANCE ASSESSMENT

3. LANDSCAPE FINANCE STRATEGY

4. IMPROVEMENT & DEVELOPMENT OF FINANCIAL INSTRUMENTS

5. FUNDRAISING AND CAPITAL MOBILIZATION SUPPORT

6. FINANCIAL MONITORING AND EFFICIENCY IN SPENDING
(1000L, 2025, forthcoming)

These steps will guide the following subsections. It is worth noting that **steps 1-3** were the focus of the work developed in the landscape and there is an initial exploration of **steps 4-6**, but there has been limited progress yet in those elements of landscape finance.

3.4.1. Aligning Investment with Landscape Goals: The SVBL Project Prioritization Process

The LFA process in the SVBL is built upon preexisting consensus and planning from the previous elements described. A shared vision and structured plan were already in place through the Strategic Action Plan and governance mechanisms. This foundation enabled the prioritization of investable projects with clear criteria for alignment with agreed landscape goals.

The process for the prioritization of investable projects was guided by criteria focused on three key dimensions:

- Project readiness (i.e., how advanced or bankable a proposal was)

- Alignment with the Action Plan's objectives, and

- Potential access to funding.

At the request of the Landscape Partnership, an additional criterion was included: priority would be given to projects submitted by stakeholders actively engaged in the governance process. This reinforced the value of sustained participation and strengthened local ownership.

> *"Before choosing projects, we had to agree on how to choose. That simple step shaped trust, ownership, and whether people felt part of the process."*

The process was guided by the Landscape Finance Accelerator (LFA) toolkit, developed by the 1000L Finance Team, led by the Regenerative Development Group (RDG) and EcoAgriculture Partners. This support was part of the broader LFA pilot, through which 1000L, RDG and EAP accompanied RA during the acceleration phase of the Sierra Volcánica Biocultural Landscape. Their role was instrumental

> *"At first, everyone thought the money had to come from outside. Mapping the flows helped us see: the landscape was already moving, we just weren't watching closely enough."*

in structuring the process, testing early tools that would later feed into the global LFA framework (forthcoming), and ensuring that emerging insights were connected to a larger pilot effort.

The landscape finance process was led by the private sector engagement associate and the field coordinator (RA) by organizing a series of sessions to assess ongoing project maturity, alignment with landscape objectives, and investment sources. This exercise generated an initial list of investable projects and funding needs, encompassing both ongoing projects and early-stage ideas requiring incubation or funding partnerships.

The process of identifying an aligned set of projects and activities with the landscape partners unfolded in multiple stages. It began with an internal review involving RA and the LFA team, followed by targeted interviews, surveys, and field visits to validate assumptions and capture project-level data. Members of the Landscape Partnership, as well as local stakeholders, contributed essential insights through direct consultations and written inputs. The initial results were then shared in a Landscape Partnership plenary session and refined through dialogue with its Steering Board to agree on next steps.
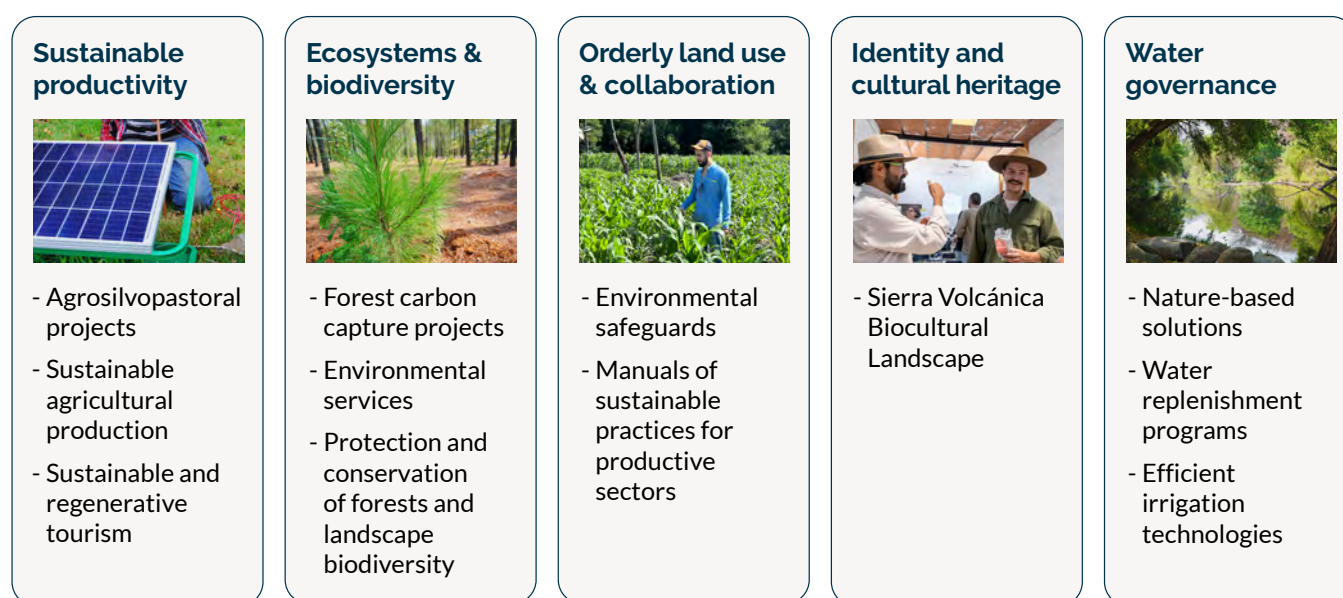
Through the Landscape Finance Accelerator (LFA), the landscape partnership undertook a structured process to identify and assess an emerging portfolio of 42 initiatives. These projects span a range of sectors and stages of maturity, reflecting the diversity of actors and priorities present in the

SVBL. This mapping effort did not merely catalogue initiatives, it sought to understand how territorial challenges and opportunities were being translated into action, and which projects could meaningfully advance the landscape vision if appropriate support mechanisms were activated.

Two guiding principles shaped the portfolio's design: additionality, favoring initiatives that would not materialize without landscape-level coordination, and alignment with the vision of the

Territorial Charter (see figure 10). These criteria helped surface a wide array of initiatives led by small and medium-scale producers. Many of these producers participate in Farmer Field Schools and have adopted agroecological practices such as silvopasture, soil conservation, and reduced agrochemical use. Despite their clear alignment with the shared vision, these projects often face barriers in scaling, primarily due to limited access to financing, technical assistance, and enabling policy environments.

FIGURE 10: PORTFOLIO OVERVIEW. PROJECT TYPOLOGY & ALIGNMENT WITH ACTION PLAN OBJECTIVES

Sustainable productivity

- Agrosilvopastoral projects
- Sustainable agricultural production
- Sustainable and regenerative tourism

Ecosystems & biodiversity

- Forest carbon capture projects
- Environmental services
- Protection and conservation of forests and landscape biodiversity

Orderly land use & collaboration

- Environmental safeguards
- Manuals of sustainable practices for productive sectors

Identity and cultural heritage

- Sierra Volcánica Biocultural Landscape

Water governance

- Nature-based solutions
- Water replenishment programs
- Efficient irrigation technologies

In contrast, larger actors, including agroindustrial companies and real estate developers, presented more mature and financially scalable proposals. Several of these initiatives already benefit from private investment or co-financing mechanisms. However, **not all of them are fully aligned with the territory's ecological and social goals, highlighting the need for cross-sector dialogue and coordination mechanisms that go beyond financial viability alone**.

Conservation initiatives also emerged as part of the portfolio, including forest carbon and reforestation projects led by ejidos, landowners, and private firms. These efforts show potential for accessing environmental service payments and climate finance instruments. Still, most require further technical development, such as forest inventories, polygon definition, and carbon accounting, to meet eligibility thresholds.

To ensure transparency and promote shared learning, the RA team facilitated plenary sessions with landscape stakeholders. These spaces served to present progress, translate technical content into accessible formats (see figure 11), and invite **collective reflection through guiding questions**:

- *What types of projects are emerging?*
- *Who is leading them?*
- *Where are the financing gaps?*
- *And what types of support are still missing?*

These discussions laid the groundwork for the subsequent prioritization and planning phases.

FIGURE 11: EXAMPLE OF "PROJECT PROFILE" PRESENTED TO THE LANDSCAPE PARTNERSHIP

Project:
Development of regenerative tourism experiences and nature-based solutions

Proponent:
Ejido Comala

Category:
Sustainable productive activities

Location:
Comala, Chiquilistlán Municipality, Jalisco, México

Required investment 2023-2024:
$4,500,000

Financing mechanism:
a) Own funds (sustainable productive reinvestments)
b) Green credit for cooperatives
c) Public subsidies for rural SMEs
d) Crowdfunding
e) Income from tourism experiences

Objective 1.5:
To secure funding from private, social, and international entities that reward sustainable methods of production.

Objective 2.4:
Capacity building for producers, and promotion of good production practices for the sustainable use and management of forests.

Objective 4.1:
Capacity building for the tourism sector, in order to add value to the tourism services & products that can be offered in the landscape.

Objective 5.5:
Proposals of protocols for addressing contingencies caused by the contamination of bodies of water.

The portfolio analysis revealed three main categories of projects:

1. **Well-developed activities with adequate/ sustainable financing:** Some initiatives were already well-developed and sustainably financed, notably those led by agribusinesses with internal investment capacity or some important real estate developments.

2. **Well-developed activities, but with insufficient/ unsustainable financing:** others were well-developed but with unsustainable financing, including activities in value chains such as avocado and agave, which although they have investments in the landscape, are not being sufficiently sustainable. Opportunities for improvement in production systems were identified, mainly in the proper planning of plantation establishment through key-line studies; increased use of bio-inputs for agriculture and reduction of highly residual agents, such as glyphosate; soil conservation works and works to recharge aquifers.

3. **Activities that have not been well developed and currently do not have funding:** a third category of high-potential but unfunded projects, mainly from small and medium-sized producers, and that had not yet been shaped into formal proposals, highlighted the need for pre-investment support and alignment with existing funding programs. In addition to these community-led ideas, several enabling or cross-cutting activities also emerged from the process. These included proposals for carbon accounting and forest mapping, landscape-level data consolidation, policy design, and feasibility analyses for a watershed conservation fund.

What gradually emerged was not a static project list, but a dynamic web of interdependencies. Improved water governance supports both ecological function and productive capacity. Technical assistance enables smallholders to meet sustainability
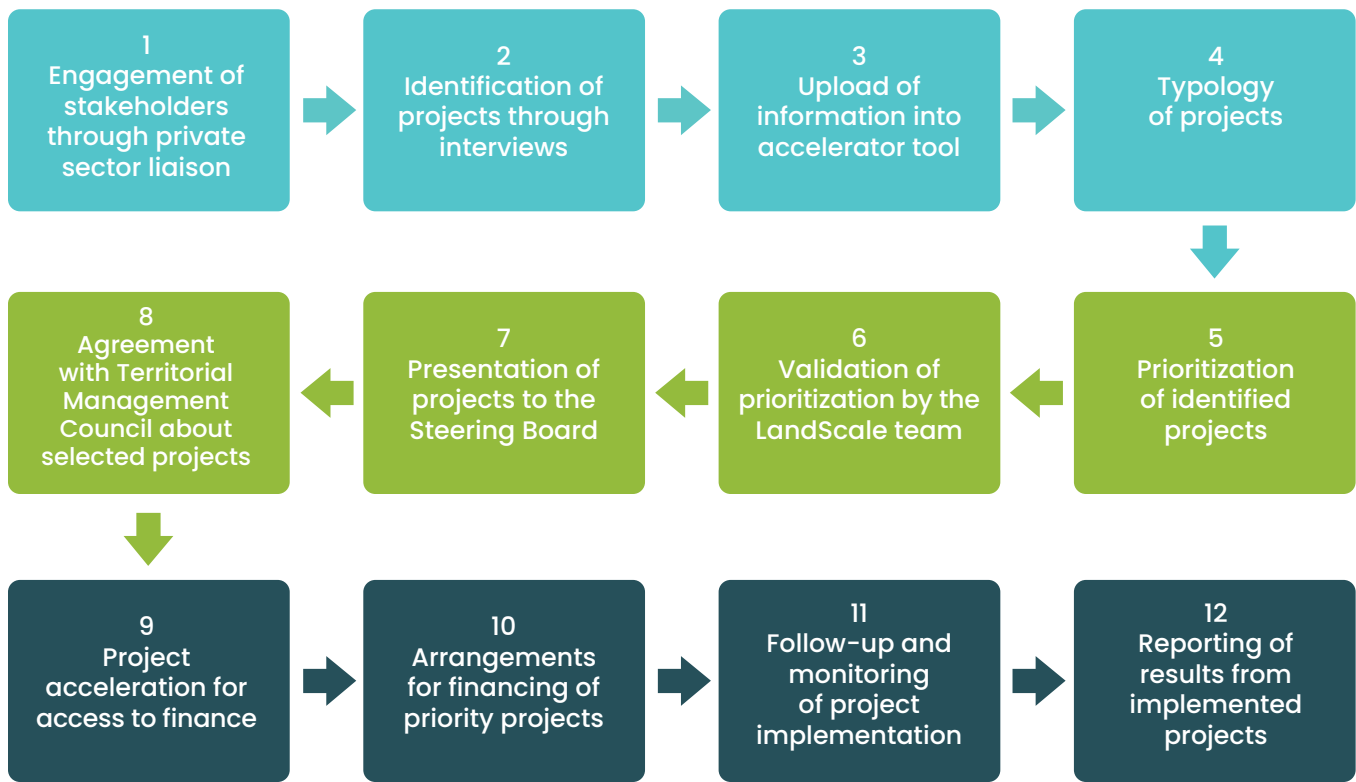
"In this landscape, water emerged as the thread that connected everything, from agriculture to conservation to governance. But that won't be the case everywhere. Part of the work is staying open to what each territory reveals as its catalyst"

standards and access differentiated markets. Fire prevention reduces GHG emissions and protects ecosystems and infrastructure. These synergies, spanning sectors, scales, and time horizons, form the scaffolding of a more resilient territorial system.

Public sector efforts have further anchored these dynamics. CONAGUA's reactivation of the watershed commission has opened new avenues for coordination between local actors and national water governance. In parallel, Jalisco's REDD+ strategy, supported by FIPRODEFO and other public institutions, has begun financing transitions toward silvopastoral systems and reforestation efforts. Meanwhile, in fire-prone real estate corridors, developers have contributed operationally and financially to fire prevention brigades, aligning with the state's official fire management strategy co-developed with RA.

Once the initial set of projects had been identified, the next step was to establish a clear, fair, and collectively agreed process for prioritization. From the outset, the RA team and the Steering Board recognized that grounding project selection in shared criteria would help prevent conflict and strengthen cohesion across the multi-stakeholder platform. The development of this criteria matrix was a participatory process in itself, shaped through dialogue with the Steering Board and validated across the partnership to ensure transparency, clarity, and equity. Great care was taken to avoid any perception that the criteria could disproportionately benefit some actors over others.

FIGURE 12: PROJECT IDENTIFICATION AND PRIORITIZATION PROCESS

1 Engagement of stakeholders through private sector liaison	**2** Identification of projects through interviews	**3** Upload of information into accelerator tool	**4** Typology of projects
8 Agreement with Territorial Management Council about selected projects	**7** Presentation of projects to the Steering Board	**6** Validation of prioritization by the LandScale team	**5** Prioritization of identified projects
9 Project acceleration for access to finance	**10** Arrangements for financing of priority projects	**11** Follow-up and monitoring of project implementation	**12** Reporting of results from implemented projects

Despite this framework, the process of prioritization was not without challenges. A large share of the initial project proposals had been submitted by well-established actors, such as agroindustrial enterprises and government institutions, who often had greater experience in project design and resource mobilization. This imbalance risked sidelining smaller initiatives with strong alignment to the landscape's vision but limited technical capacity.

To address this, the role of the Field Coordinator was key. By conducting outreach and direct field visits, the coordinator was able to identify and document projects led by small and medium-sized producers, many of which had emerged through Farmer Field Schools or local agroecological efforts. These projects were then integrated into the prioritization exercise, helping to rebalance the portfolio and ensure it reflected the diversity of the landscape's actors.

Once the prioritization criteria had been validated, the initial portfolio of 42 initiatives, identified during the planning phase and consultation rounds, was gradually narrowed down to a shortlist of approximately nine. These represented a range of thematic areas and scales of intervention, from mature projects ready to pursue financing to early-stage concepts requiring further incubation and support.

The process also clarified distinctions between project types and support needs. Some initiatives were production-oriented, aligned with the Action Plan, and mature enough to seek funding. Others required further refinement or connections to potential funders.

TABLE 5: EXCERPT FROM THE SVBL PROJECT PRIORITIZATION MATRIX

Project Portfolio			Criteria for Project Prioritization				
Project Name	Project Leader	Project Description	Alignment with Action Plan	Alignment with Funding Opportunities	Level of Maturity	Proposed by Local Committee	Score
Mazati forest conservation and carbon sequestration area	Rancho Mazati	- Private property - Chiquilistlán Municipality - Conservation of 1,000 hectares of forest - Annual planting of 50,000 trees - Variety of pine tree species - Soil retention barriers - Funding needed for improved conservation and restoration practices, forest inventory, and certification of CO_2 reduction	5	5	3	5	18
Tepozal forest conservation and carbon sequestration area	Manuel Arias	- San Gabriel Municipality - Conservation of 600 hectares of forest - Annual planting of 10,000 trees - Variety of pine tree species - Soil retention barriers - Funding needed for improved conservation and restoration practices, forest inventory, and certification of CO_2 reduction	5	5	4	3	17
APEAJAL Fire Brigade	APEAJAL-Sierra de Tapalpa	- Sierra de Tapalpa - Forest fire prevention - Includes purchase of furniture, equipment, tools, and payroll for a team of 10 firefighters	4	3	4	5	16

Within the portfolio, special attention was given to smallholder-led initiatives. Recognizing the lack of technical support as a structural barrier to sustainable transition, the Steering Board, together with the intermunicipal environmental boards (*Juntas Intermunicipales*), agreed to prioritize a subset of projects requiring technical accompaniment. These included initiatives such as Farmer Field Schools and agroecological practices already supported by RA in the territory.

In parallel, the team strengthened engagement with private-sector actors. While several proposals from agribusiness and state development entities were well-developed, many were not yet aligned with the Action Plan. To address this, RA co-developed workplans with select companies and signed Memorandums of Understanding (MoUs) to define shared priorities and progressively realign their initiatives with broader landscape goals. **These efforts also laid the groundwork for piloting LandScale sustainability claims** (see *4.1. Aligning Finance with Landscape Needs: A Three-Track Roadmap for Action*).

By the end of the process, project identification had evolved into a more structured pipeline, forming the basis for coordinated resource mobilization carried out in 2023 and early 2024. This enabled the Landscape Partnership to present a coherent portfolio of investable projects, anchored in shared priorities and guided by inclusive, context-sensitive criteria.

3.4.2. Mapping Financial Flows for Landscape Alignment

In parallel, the RA team initiated a financial flow assessment using the [Landscape Assessment of Financial Flows](#) (LAFF) (Shames, S., B. Louman and S. Scherr, 2017). Applied in two steps, first characterizing the landscape economy and then mapping the main flows, the methodology combined interviews and desk research to identify sources, recipients, purposes, and gaps in relation to sustainability objectives of the *Carta Territorial*. By mapping both supportive and misaligned flows, the process allowed all stakeholders to reflect on how existing finance could be realigned to better serve its vision. The results of the LAFF assessment revealed a fragmented financial ecosystem across the territory: isolated donor projects, constrained municipal budgets, and a disconnect between private investment and territorial needs.

A key component of this phase was the development of a dataset mapping available financial sources across and beyond the landscape (see [table 6](#)). This effort, based largely on interviews and desk research, yielded **several key insights that would later guide project prioritization and strategic alignment with potential funders:**

- There is a broad variety of financial sources across the landscape, including public, private, and philanthropic funds. However, most of these sources were not designed with landscape

"Small producers often feel they're last in line. Setting clear, inclusive criteria was a way to tell them: you're part of this from the start."

sustainability goals in mind. In several cases, they responded to individual or sector-specific objectives, and some were even misaligned with broader landscape priorities. This misalignment highlighted the need for active facilitation and coordination to motivate convergence between available finance and sustainability goals.

- Most grants-based finance originates from the public sector and there is a range of risk tolerance across type of funders. From higher to lower risk tolerance, the main actors were: (a) the public sector and development banks; (b) civil society organizations, and; (c) commercial banks and cooperatives. Public sector grants, in particular, were more aligned with the needs of small and medium-sized farmers and the Action Plan. Given this context, it became essential to strategically engage public funding programs, such as FIPRODEFO, to secure support for priority initiatives.

- An important portion of the finance, public and private, was focused on water related issues. This included either improving water access for agriculture, restoring strategic aquifer recharge zones, or actions to preserve water security. This trend revealed a thematic entry point around which various stakeholders' interests could converge and served as a potential anchor for financing alignment moving forward.

TABLE 6: SOURCE OF FINANCE TYPOLOGY

Institution	Disbursement Channel	Funding Opportunity	Financial Instrument	Grant	Debt	Equity
International Finance Corporation (IFC)	Banco Multilateral de Desarrollo	IFC Advisory Platforms	- Loans - Equity - Quasi-equity - Blended finance - Guarantees - Grants - Trade finance - Risk management products - Subnational finance - Early-stage development capital	√	√	√
KFW	Banco Multilateral de Desarrollo	KFW	- Grants - Low-interest credits - Long-term loans	√	√	
The European Commission's Directorate-General for International Cooperation & Development (DG DEVCO)	MDB	DEVCO	- Grants	√		
BANOBRAS	Banco Nacional de Desarrollo	BANOBRAS	- Refinancing - Grants - Debt	√	√	
SHCP / BANOBRAS	Banco Nacional de Desarrollo	FONADIN	- PPP		√	

In conclusion, this finance planning phase of the process did much more than organize information; it created a basis for collective reflection around the financial baseline and sustainability of the landscape and it's current and potential economic activities. The assessment helped illuminate where support is most needed and laid the groundwork for a broader **landscape finance roadmap and its implementation**. It also contributed to a shift in how local actors perceive the role of finance, not just as a source of external funding, but as an essential dimension of landscape strategy and resilience that could be advanced from within (more of this in _Element 4 – Coordination Action_).

With a shared vision and structured plan in place, the next challenge was to translate intentions into coordinated action. Moving from planning to implementation required new forms of collaboration, clearer governance and operational structures, and the ability to adapt support in response to emerging opportunities and constraints.

Image 6: Landscape Partnership meeting

Outputs and why they mattered:

- **Action Plan:**
  Structured around five objectives, this plan provided a clear, accessible roadmap of what the partnership aimed to do and why.

- **Thematic Working Groups:**
  These informal subgroups (e.g., on water or tourism) allowed deeper technical and political dialogue to emerge around specific areas. They became spaces where smaller producers, academic institutions, and government staff could co-design and refine actions outside of larger plenaries.

- **Project Portfolio:**
  Using the LFA methodology, the partnership compiled a portfolio of 42 projects at varying levels of maturity. The portfolio helped visualize where alignment existed, and where further incubation or realignment was needed.

- **Preliminary Finance Landscape Analysis:**
  A systematic mapping of financial flows and funding sources revealed critical insights: finance was fragmented, thematically concentrated on water, and poorly aligned with landscape goals. These findings helped initiate a conversation about the need for a future integrated finance mechanism and provided inputs for early prioritization.

ELEMENT 4

COORDINATED ACTION

Objective: Organize and develop an organized portfolio of connected and reinforcing actions and projects that could be funded, supported, and mobilized through the landscape partnership. As part of this, develop pathways and organize the landscape governance for achieving these actions through the differentiated strengths, resources, and mandates from the stakeholders involved in the landscape partnership.

Every landscape process reaches a point where a shared vision must translate into coordinated action. For the SVBL, this meant moving from planning to assembling a strategic, coherent, and fundable portfolio of initiatives rooted in collective priorities. This section captures that transition, how the Landscape Partnership turned ideas into pathways, aligned projects with a common strategy, and developed a finance roadmap grounded in local context. It also reflects the practical challenges of implementation: balancing urgency with inclusion, aligning diverse actors, and ensuring that the platform's core structures could sustain the demands of execution.

4.1 ALIGNING FINANCE WITH THE LANDSCAPE NEEDS: A THREE-TRACK ROADMAP FOR ACTION

The LFA process that was undertaken provided the necessary information and groundwork that led to the design of a three-path finance roadmap, which is the foundation for the implementation phase, designed to reflect both the landscape's maturity and its operational needs. Anchored in the realities of local financial flows and institutuons, the roadmap is intended to build on what already exists, matching capital to context, and sequence investment over time.[10]

The roadmap was structured around three interlinked tracks:

4.1.1. Covering Fixed Operating Costs: The Backbone of Coordination

A critical early step toward implementation was securing the operational continuity of the Landscape Partnership. This required covering core coordination costs (including facilitation, stakeholder engagement, strategic communications, and reporting) essential for keeping the platform functional and credible.

Until 2024, these functions were primarily supported by RA. Beyond convening, this included the logistical backbone of coordination: team salaries, transportation, event logistics, and related expenses. Although some of these costs were gradually assumed by local stakeholders (e.g., meeting venues, local transport), RA's planned transition out of the convening role made it essential to prepare for the financial sustainability of these foundational functions.

To support this shift, RA, with support from the SEMADET and JIMAs, conducted a **detailed cost estimation exercise**, with a focus on the first two years of autonomous operation. This included not only human resources, but also infrastructure needs: vehicles, fuel, office utilities, and start-up equipment. Rather than designing a new model from scratch, the team collaborated with the Sierra Occidental

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10 Following the logic of Integrated Landscape Finance frameworks such as *The Capital Continuum* (CPIC), *The 4 Returns Framework* (Commonland) or *The Evolution of Landscape Investment and Financing Over Time* (Shames, Seth, and Sara J. Scherr. 2020).

Biocultural Landscape (already recognized and partially funded by Jalisco's Environmental Ministry) to adapt its financial structure and align approaches. This conversation served two purposes. It offered a tested reference for estimating real costs under comparable conditions and laid the groundwork for inter-landscape collaboration on funding strategies. Building on this, the SVBL submitted a comprehensive cost proposal to Jalisco's Ministry of Environment, with the aim of securing public funding to assume operational costs beginning in 2025, as RA's financial support phased out.

Estimated needs for the first year after RA transitions away from it's coordination role amounted to approximately USD 150,000 in year one. For the second year, costs were projected at USD 80,000, assuming reduced investment needs and increased local ownership. This amount was designed to cover only the core operational structure: a small coordination team (three people), a vehicle, and the recurring costs associated with convening, planning, facilitation, and communication across the landscape. **It did not include** costs for implementing specific projects, conducting technical studies, or undertaking additional LandScale assessments.

> *"Projects come and go, but coordination and facilitation hold everything together. They are rarely funded, often overlooked, but without them, nothing really sticks."*

By the end of the planning phase, and through a lengthy process, an agreement had been reached: **operational costs for 2025 would be jointly covered by SEMADET, the Intermunicipal Environmental Boards (JIMAs), and RA**. From 2026 onward, local authorities are expected to assume these costs, signaling a transition toward locally sustained landscape coordination.

4.1.2. Bridging Projects to Strategy: Dual Pathways for Early-Stage Finance

Early implementation efforts aimed to demonstrate value and generate visible impact, while beginning to operationalize the Strategic Action Plan. To this end, the SVBL team activated three complementary finance pathways, tailored to different actor profiles and levels of investment maturity.

Aligned with the Incubation Stage of the Capital Continuum, one pathway focused on mobilizing concessional public funding to support small-scale actors. A key partner was FIPRODEFO, Jalisco's state forestry development fund, which had been engaged from the outset through its participation in the institutional working group. This prior involvement proved essential when early-stage funding opportunities emerged.

Many of the supported proposals originated from Farmer Field School participants. With guidance from SVBL partners and RA, smallholders received administrative and financial support to navigate the application process and comply with FIPRODEFO's technical requirements. Most funded projects focused on water retention and silvopastoral practices, such as installing rainwater harvesting systems. The presence of ongoing technical accompaniment, including field school activities, enabled hands-on support during implementation. When administrative challenges arose, the team acted as liaison with FIPRODEFO to ensure clarity and continuity.

Although these efforts have not yet result in a landscape-wide funding agreement with FIPRODEFO, they offered proof of concept: **aligning public funds with grassroots needs can generate timely, visible results**. This also helped maintain momentum among smallholders and reinforced their role within the platform. **The experience confirmed a broader insight: for early-stage or higher-risk projects, non-reimbursable public funds, paired with tailored technical support, remain the most viable and equitable financing option**.

In parallel, the RA team engaged with more mature actors (primarily agribusinesses and real estate developers) already investing in the landscape. The aim was not to attract new capital, but to **realign existing investments with the Action Plan and broader biodiversity goals**, particularly in areas such as reforestation and aquifer recharge.

One concrete example involved nurseries co-managed by APEAJAL (avocado exporters) and berry producers like Driscoll's. These nurseries provide native tree seedlings for restoration efforts across members' properties. While these initiatives were already underway, they had not been formally aligned with state environmental strategies or coordinated at the landscape level. Additional collaboration focused on technical support for sustainable transitions, including materials, guidelines, and training-of-trainers programs on topics such as pollinator protection (see image 7: Covers of guidelines for pollinator protection practices in avocado and berry production systems).

To motivate alignment, the implementation of LandScale "claims" offered a concrete entry point for deeper engagement around sustainability. RA and the LandScale team launched a pilot to develop verified landscape sustainability claims, formal declarations that specific private-sector initiatives contribute meaningfully to landscape-level sustainability metrics. The process followed a structured, ten-step methodology, beginning with project identification and culminating in the public release of claims on the LandScale platform.

Key components of the process included (see full methodology at www.landscale.org):

● **Stakeholder engagement:** Claims were co-developed with APEAJAL, Driscoll's, and Mazati (a real estate actor), each of whom signed Memorandums of Understanding with RA. These agreements reinforced their commitment to sustainability and enabled tailored support.

Image 7: Covers of guidelines for pollinator protection practices in avocado and berry production systems.

● **Technical accompaniment:** Each claim was supported by detailed documentation covering project objectives, sustainability practices, governance mechanisms, and monitoring approaches. This was facilitated through one-on-one guidance, shared templates, and validation checkpoints with the LandScale global team.

- **Transparency:** Two virtual and one in-person session were held to present the claims process, clarify expectations, and build trust. Structured support was provided for evidence submission, using shared Google Forms and organized folders covering 15 key documentation points.

While incentives varied by actor, several converging motivations emerged. For some, participation offered an opportunity to enhance the credibility and visibility of sustainability efforts, particularly in response to growing scrutiny from regulators and international buyers. Others saw alignment with state-led strategies as a way to leverage public funding or demonstrate leadership in landscape stewardship. The claims process also provided a spatial and measurable framework for sustainability, offering companies an opportunity to integrate landscape-level impact into their strategies.

Initial results of these joint efforts included:

- **The alignment and mobilization of over USD 350,000 for the 2023 period**, directed toward landscape-aligned actions such as reforestation and mobile fire brigades (approximately USD 200,000), and support for small and medium-scale producers through projects and technical assistance (approximately USD 150,000).

- **Progress toward joint watershed restoration goals**, with reforestation efforts increasingly concentrated in aquifer recharge zones, contributing both to ecological goals and long-term water security for agribusiness operations.

- **Institutional collaboration**, such as the establishment of mobile fire brigades co-financed by a local Real Estate Developer and the SEMADET, initiatives that responded to shared landscape threats and demonstrated the value of public-private coordination.

> *"Getting early-stage funding to smallholders isn't just about writing good proposals, it's about walking with them through the bureaucracy, one form at a time."*

The total estimated cost of the identified activities linked to the five strategic objectives for the 2023–2026 period amounts to MXN 72 million (approximately USD 3.9 million). This figure underscores the need for continued resource mobilization to close existing funding gaps. In addition, the operational costs required to sustain the landscape platform itself amount to roughly MXN 1.8 million per year (around USD 110,000), highlighting the importance of securing long-term support not only for implementation, but also for coordination and governance.

One illustrative example is the **investment claim led by APEAJAL**, the regional avocado exporters' association. Through a five-year reforestation program (2021–2025), APEAJAL committed over 70K USD to operate a nursery for native tree species (*Pinus douglasiana, Pinus devoniana, and Cupressus lusitanica*), with a production goal of 250,000 trees, of which 30,700 were targeted for reforestation efforts across avocado farms and forested areas of the SVBL. The initiative is designed to restore 930 hectares of degraded landscape and directly contributes to LandScale indicators 1.1.4 (ecosystem restoration) and 4.1.3 (adoption of sustainable land management practices). These results are not only publicly visible but also traceable through LandScale's independent performance assessment framework.

The APEAJAL claim illustrated how landscape-aligned investments, initially loosely structured, can begin to evolve into traceable contributions to broader ecological and social goals. **However, it is important to acknowledge that, at the moment of writing this Case Study, the LandScale claims mechanism remains in a piloting phase. Several elements (particularly documentation requirements, communication clarity, and integration with landscape-level monitoring) still require refinement**. While the approach offers a promising pathway toward greater transparency and alignment, it is not yet a fully consolidated tool for communicating landscape-level impact. As the process continues to evolve, it will be essential to incorporate practitioner feedback and real-world experience to strengthen its methodology and ensure its relevance in diverse implementation contexts.

4.1.3. Designing a Long-Term Mechanism: The Third Track of the Roadmap

Given the cross-sectoral relevance of water, and its critical role in both environmental integrity and local economies, particularly for agroindustry, the team developed a prefeasibility study for a long-term water-linked finance mechanism. Inspired by water fund models, the proposed mechanism aimed to serve as a financial vehicle capable of aligning public, private, and philanthropic contributions over time. This corresponds to the Stabilization Stage of the Capital Continuum, where multi-stakeholder institutions can manage pooled resources and channel them toward long-term objectives

The initial groundwork was promising. Water emerged as a potential unifying theme; key institutional actors were mapped; and an initial assessment of financing needs was conducted. However, the work on water as a unifying theme ultimately gained limited traction within the
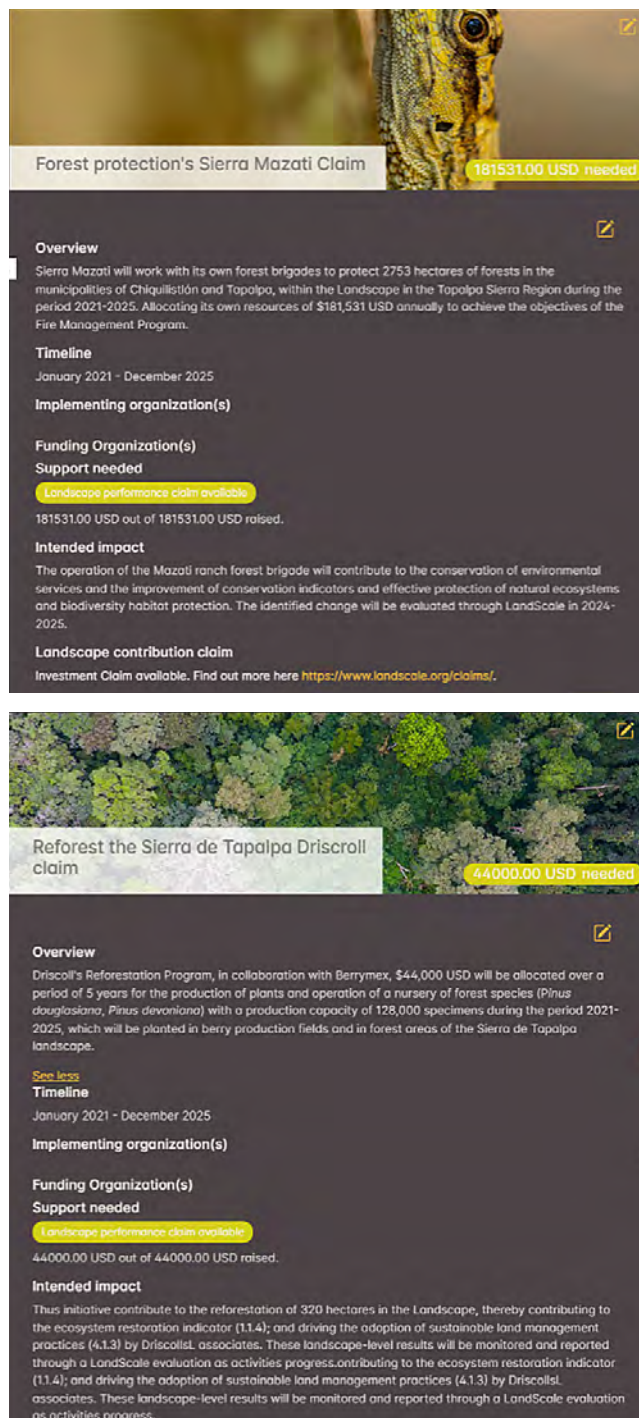

Image 11: Examples of claims in the SVBL profile page in www.landscale.org

Landscape Partnership. Time, resources, and institutional bandwidth were constrained, and the broader political context did not favor advancing this pillar of the roadmap at that time.

Despite these limitations, the strategic sequencing, from subsidized action, to aligned investment, and eventually to structural finance, proved valuable. It enabled landscape actors to visualize a credible progression from immediate needs to longer-term opportunities. While securing operational costs remained the most urgent concern, articulating a longer-term finance vision helped build confidence among partners and potential funders by demonstrating both short-term deliverables and strategic foresight.

The transition to coordinated action was not without its challenges. The designation of the territory as a *Biocultural Landscape* was a major milestone, but also demanded significant time and political capital. The RA team had to prioritize securing institutional recognition, which temporarily slowed the implementation of Action Plan components.

Additionally, **the absence of a comprehensive monitoring and evaluation system beyond the LandScale indicators limited the ability to track progress across actors and initiatives**. Coordination relied on regular multi-stakeholder meetings and informal channels such as WhatsApp groups.

"Just having a roadmap made a difference. It showed we weren't improvising, even if we couldn't act on everything yet."

While these mechanisms kept actors connected, they lacked the structured documentation and feedback loops needed to support systematic landscape-level learning (see *Element 5 - Learning and Adaptation*).

Although the partnership remains in the early stages of implementation, several pilot actions are already underway, particularly in sustainable agriculture and natural resource management. These efforts are guided by the overarching strategy but are often led by individual members or coalitions within the platform. Work is ongoing to improve the documentation of progress, enhance communication strategies, and develop a shared narrative that links local actions to broader landscape goals. Early implementation efforts have focused on ensuring that coordination mechanisms are not only in place, but functional and responsive to the diversity of actors involved.

4.2. OPERATIONALIZING IMPLEMENTATION: FROM PROJECT STRUCTURING TO FUND CHANNELING

As the landscape transitioned from planning to implementation, a new set of operational demands emerged. These required not only governance capacity and effective coordination, but also concrete mechanisms to structure, align, and channel project funding. This phase coincided with the formal adoption of the Biocultural Landscape framework, which introduced a more defined governance architecture and raised expectations for accountability and delivery.

RA's role during this stage focused on enabling implementation from behind the scenes. Rather than leading project execution, RA supported the structuring of viable initiatives, ensured alignment with the Action Plan, and facilitated access to funding. The organization also played a key convening role, helping embed technical support, strategic coherence, and scalability within the landscape's project pipeline.

Most of the initiatives originated from the Socio-productive Representative Group, the core participatory body of the landscape alliance (see *Element 1 – Landscape Partnership*). Within this structure, seven sectoral working groups operate as thematic entry points for surfacing project ideas. These groups are essential for identifying local priorities and shaping proposals. **Every three months, a plenary session of the Landscape Partnership is held to share progress, validate project alignment, and assess funding status. This regular rhythm of collective review has helped reinforce transparency and shared ownership.**

Given the limited project development capacity typical of emerging landscape partnerships, RA placed strong emphasis on strengthening technical accompaniment. In some cases, RA provided this support directly. In others, it mobilized institutional actors capable of taking on this role.

One such actor is the *Junta Intermunicipal del Río Ayuquila* (JIRA), which, together with JIDELAA, serves as an intermediary governance body in the landscape. These intermunicipal boards operate at the interface between municipal and state levels, with formal mandates in environmental coordination and territorial development. Their legal status and long-standing presence enable them to act both as facilitators and as financial conduits.

In recognition of this capacity, JIRA was selected to host the coordination team for the operational phase beginning in 2025. This decision followed extensive dialogue and reflects JIRA's experience managing public and international funds, including from GIZ and USAID, as well as its alignment with the landscape's governance principles. Operational funding is already being channeled through JIRA, providing institutional continuity and establishing a replicable model for project implementation finance.

While still in an early stage, the current operational structure has laid the foundation for a more autonomous and embedded implementation system. Several projects have already been launched and initial funds mobilized, marking an important step toward long-term functionality.

Outputs and why they mattered:

1. **Prioritized Project Portfolio (2023)**: A clear set of criteria (co-developed with the Steering Board) was applied to evaluate 42 proposals. The final portfolio, aligned with the Action Plan, provided a credible foundation for resource mobilization and helped focus efforts on mature, high-impact initiatives.

2. [Finance Roadmap](): A phased roadmap was designed to reflect the landscape's financial maturity and strategic needs. This structure clarified pathways for investment and staged engagement with different funders.

3. [Costing Model for Platform Coordination](): This output provided a clear rationale for core funding requests and reinforced the importance of financing enabling conditions as a prerequisite for sustained landscape collaboration.

4. **Mobilization of Public Funds for Smallholder-Led Projects**: Through collaboration with FIPRODEFO, the platform secured financing for over a dozen projects focused on agroforestry, soil conservation, and micro-watershed restoration. These investments responded to urgent needs and validated the platform's capacity to serve as an intermediary between local actors and public institutions.

5. **Pilot Engagements with Private Sector Actors:** Co-created workplans and signed MoUs with companies helped align private investments with the Action Plan. These collaborations set the stage for piloting sustainability claims under LandScale, enhancing transparency and accountability.

6. **Draft Claims for Landscape Impact Attribution:** The LandScale claims pilot allowed key actors to document, validate, and communicate contributions to shared landscape goals. While still evolving, this mechanism began positioning sustainability efforts within a traceable, landscape-level narrative.

7. [Prefeasibility Study for Water-Linked Financial Mechanism](): Although not yet implemented, the study mapped potential actors, governance structures, and investment entry points for a long-term blended finance vehicle. It framed water as a strategic axis for future collaboration.

8. **Thematic Working Groups**: The launch of working created operational nodes for collaborative action. Although not totally consolidated, some groups need more support than others, these groups enable distributed leadership and provided continuity between formal convenings of the landscape platform.

ELEMENT 5

LEARNING AND ADAPTATION

Objective: Measure, learn, and adapt the actions being taken to improve effectiveness and understand what is required to reach the objectives that have been established.

Monitoring in the Sierra Volcánica Biocultural Landscape has never been treated as an isolated function. Instead, it has been woven into the fabric of the landscape initiative as a tool for building shared understanding, guiding strategic dialogue, and aligning diverse efforts toward common goals. From early applications of the LandScale framework to the development of locally rooted monitoring systems, the focus has remained on using information not only to measure progress, but to strengthen collaboration and adapt to an evolving context. This section explores how monitoring and evaluation have supported institutional learning, fostered ownership, and enabled an integrated and responsive approach to landscape management.

5.1. LANDSCALE AS A CATALYST FOR SHARED UNDERSTANDING AND ALLIANCE BUILDING

In the Sierra Volcánica Biocultural Landscape (SVBL), Monitoring and Evaluation (M&E) has been embedded in the ongoing evolution of the ILM process. One of the main tools supporting this process has been LandScale, a sustainability assessment framework developed by RA, Verra, and Conservation International.

First introduced in 2020 as part of a global pilot, LandScale served as both a practical tool and a unifying reference point for the landscape partnership. The four-pillar structure of *ecosystem health, human well-being, governance, and sustainable production* provided a common framework that facilitated dialogue and guided the identification of key territorial challenges and opportunities.

FIGURE 13: LANDSCALE FOUR PILLAR ASSESSMENT FRAMEWORK
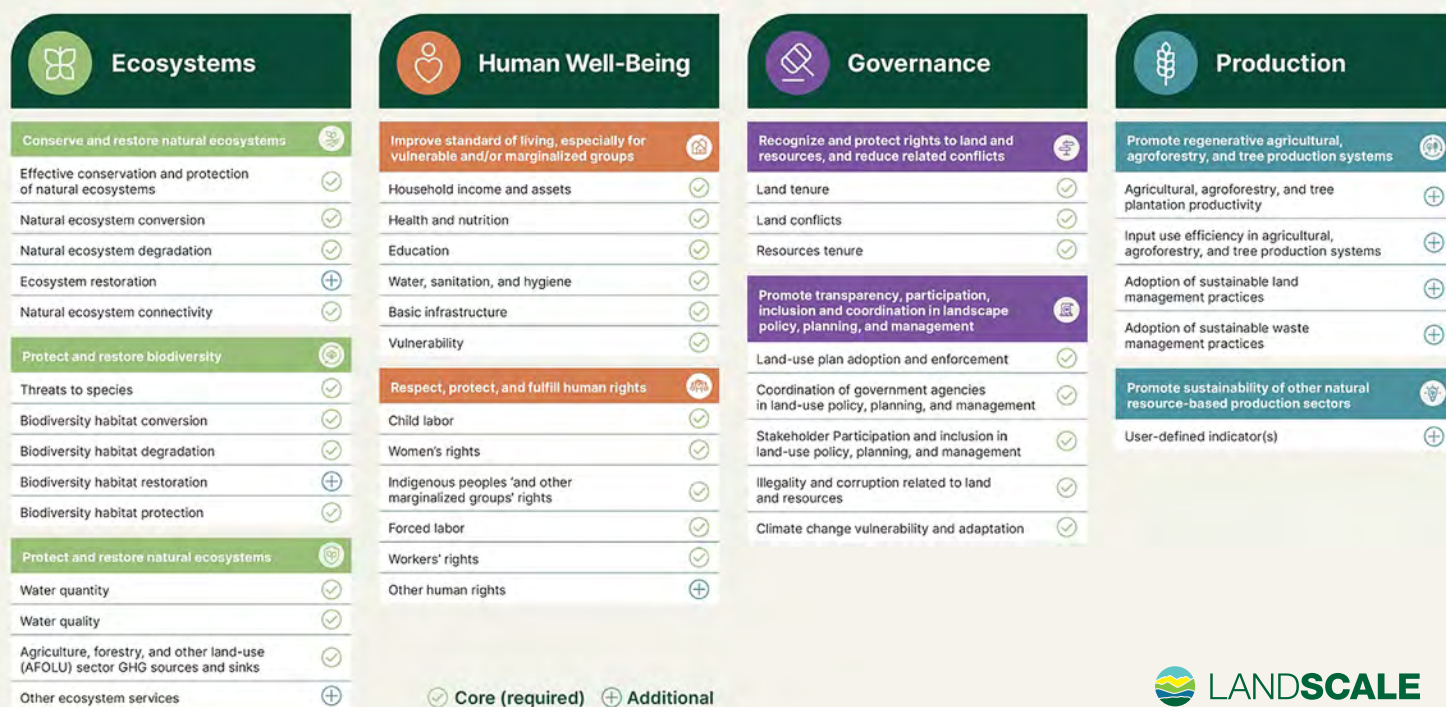
An important contextual factor that shaped the effectiveness of the LandScale baseline in SVBL was the availability and quality of public data in the state of Jalisco. Environmental and agricultural databases maintained by the SEMADET, SADER JIMA's and Municipalities and National authorities, provided a strong foundation for the assessment. This level of data availability, spanning geospatial layers, ecosystem inventories, public program registries, is not common across all Mexican states, and was instrumental in enabling a technically robust baseline process.

That said, data gaps remained, particularly in the Production pillar. At the beginning of the initiative, access to private-sector data was limited, largely due to the absence of trust and formal collaboration mechanisms. While an important part of aggregated information was available, detailed production-level data (e.g., water use, agrochemical inputs, soil monitoring) remained difficult to obtain. These gaps highlighted the need for continued engagement with agribusiness actors and the importance of building confidence over time to enable deeper data sharing.

Beyond its technical function, LandScale served as an entry point for dialogue and coordination of the landscape initiative. Its participatory components and the data collected offered transparency and coherence during the early stages of collaboration, when partners were still establishing a common vision.

Later, the Landscape Partnership participated in the pilot of the Landscape Initiative Maturity Framework (LIMF), a diagnostic tool align with CDP, ISEAL, and SBTN. This experience provided a structured opportunity for self-assessment, helping the partnership identify capacity gaps and organizational strengths. It also reinforced the role of monitoring tools not only as reporting instruments but as drivers of institutional development and shared governance.

5.2. MONITORING FOR LEARNING: FROM BASELINE TO STRATEGIC DIALOGUE

The first LandScale assessment, conducted in 2021, laid the foundation for understanding the sustainability dynamics of the territory. It produced a baseline of indicators across the four LandScale pillars, offering a shared reference for actors across sectors. It also contextualized the territory's ecological importance as a biological corridor connecting Sierra de Quila, Nevado de Colima, and Manantlán.

Building on this, the Territorial Charter formalized a **Monitoring and Evaluation (M&E) roadmap** structured around two components: an annual dashboard managed by the Territorial Management Council, and a comprehensive five-year evaluation using the LandScale framework. This system is designed to support iterative learning and adaptive management, grounded in data validated at the local level.

The 2025 assessment will be the first reassessment since the baseline and is being carried out jointly by RA and local partners. It will be available in the second semester 2025. Although four years is a relatively short timeframe to observe major landscape-level changes, let alone attribute them to specific interventions, the exercise is expected to reveal patterns of progress or setbacks. Just as importantly, **it creates a space for strategic reflection among stakeholders in a phase where there is a major need for information for decision making for planning and implementation**.

A priority in this cycle is to enhance local ownership of the tool. Particular emphasis is placed on the role of the JIMA's (intermunicipal environmental boards). These institutions were included due to their cross-jurisdictional mandate to manage ecosystem services at watershed scale, their technical expertise, and their institutional linkage to the Jalisco State Secretariat of Environment. **Their involvement strengthens the system's legitimacy and continuity**.

Although a formal Monitoring, Evaluation, and Learning (MEL) system is not yet fully operational, the 2021 LandScale baseline provides a solid foundation. Some of its indicators (such as those on deforestation, ecosystem restoration, adoption of sustainable soil management practices) have been integrated into the Territorial Charter and are expected to inform both strategic and operational decisions.

Local institutions, particularly the **Territorial Council** and **Thematic Working Groups**, are essential for turning monitoring results into action. A **Monitoring Committee** is currently being developed to coordinate data flows, facilitate analysis, and promote evidence-based planning. The ultimate goal is to foster a landscape-wide learning ecosystem, where monitoring is not an end in itself, but a tool for adaptive strategy and collaborative decision-making.

5.3. USING RESULTS TO MOBILIZE ACTION AND ALIGN INCENTIVES

One of the elements that made LandScale particularly valuable in the SVBL context was its ability to serve as a bridge between individual initiatives and collective sustainability goals. Beginning in 2024, the Landscape Partnership undertook a process identify which specific indicators assessed by LandScale would be included in the Carta Territorial to monitor progress. This alignment allowed each activity, whether led by producers, civil society, or government, to be framed as a contribution to broader sustainability outcomes.

This process culminated in 2024, when the Action Plan and monitoring system were formally integrated. The RA team, in collaboration with the Landscape Partnership, ensured that the goals outlined in the plan could be measured against a refined set of LandScale indicators. A draft technical proposal was reviewed collectively with the **LandScale Working Group**, a multi-stakeholder body established early in the initiative. Together, they simplified and prioritized indicators, focusing on those most relevant to the landscape's goals. As a result, indicators under the **ecosystem** and **production** pillars received the most emphasis in the final version included in the Territorial Charter: information was richer, actions from the landscape were better organized around these pillars and it felt right to prioritize given the recent formation of the Landscape Partnership.

For some private sector actors, the existence of a shared monitoring framework also opens possibilities for communicating their sustainability contributions beyond farm-level metrics. While this is still an emerging area, landscape-based reporting, made visible by landscape-based, could become a valuable complement to existing certification (such as the RA standard) and sourcing systems.

In 2024, the link between **the action plan and the monitoring tools were operationally linked**. It became important to connect strategic goals and proposed actions to a broader impact framework that could track progress at the landscape level. To do this, the RA team, together with the Landscape Partnership, worked to align the Action Plan with LandScale indicators. This alignment helped clarify how individual initiatives could contribute to system-level outcomes over time.

Given the complexity of the issues, collaboration with the LandScale Working Group, established from the outset, was essential at this stage. An initial technical proposal was reviewed jointly with these stakeholders, resulting in the version ultimately included in the Territorial Charter.

Despite this progress, efforts to develop an activity-level monitoring mechanism remain in early stages. The Action Plan includes defined objectives and mid-term targets, but no comprehensive system is in place to track annual progress or evaluate completion.

To address this gap, the team is exploring how to complement the triannual LandScale assessments with **lightweight, participatory tools**, such as annual accountability checkpoints, dashboard templates, and community feedback mechanisms. These tools are intended to be locally managed and adapted to available capacities, reinforcing the landscape's ability to translate data into meaningful action over time.

Outputs and why they mattered:

- **Action plan and indicator alignment (2024)**: by linking the Carta Territorial to LandScale indicators, the initiative ensured that activities led by diverse actors could be understood as coherent contributions to broader sustainability goals.

- **LandScale baseline assessment (2021)**: this first landscape-wide assessment established a shared understanding of sustainability conditions of the landscape.

- **Landscape Initiative Maturity Framework (LIMF) diagnostic (2023)**: the LIMF diagnostic enabled the Landscape Partnership to identify institutional strengths and gaps in capacity.

- **Territorial Charter monitoring system (2024)**: the Charter introduced a dual-level M&E structure: a lightweight annual dashboard for ongoing learning, and a five-year comprehensive LandScale reassessment.

- **Enabling landscape-based claims**: by anchoring interventions in a shared monitoring framework, the initiative has opened pathways for companies and local actors to make credible, landscape-level sustainability claims, going beyond commodity-based narratives and strengthening trust among stakeholders.

- **Evaluation for strategic reflection (2025)**: the ongoing LandScale reassessment is designed not only to track changes since the baseline, but to foster dialogue on progress, bottlenecks, and future priorities.

KEY TAKEAWAYS

The experience of the Sierra Volcánica Biocultural Landscape offers a window into the realities of integrated landscape management as a dynamic and evolving process, less a linear path than a continuous effort to balance vision, coordination, implementation, and adaptation. Rather than treating technical work, political dialogue, planning, and financing as separate domains, the initiative took an iterative and concurrent approach, grounded in building relationships and responding to shared territorial challenges.

As the partnership moves toward greater local leadership and RA gradually steps back from its convening role, new questions emerge around institutional continuity, impact tracking, and the landscape's long-term ability to mobilize and manage investment.

The reflections that follow distill some of the key learnings from this ongoing journey. They are offered in the spirit of shared learning, and may be useful for others working to advance collaborative, place-based sustainability efforts in complex and fragmented contexts.

For Landscape Conveners and Allies (e.g. NGOs, international organizations)

- **Platform costs are not optional, they are the foundation.** Coordination, communication, and facilitation are essential for keeping landscape partnerships functional and credible, yet they are often underfunded or treated as secondary. These "invisible" costs, such as staffing for convening, managing communications, organizing meetings, or maintaining inter-institutional dialogue, are what hold the process together. Ensuring long-term impact requires not only identifying these costs early but also developing a concrete strategy to finance them sustainably, especially as international organizations like RA transition out. RA implemented an exit strategy to transfer convening responsibilities to local actors; however, the long-term financial model to support core platform functions remains under construction. Without such a model, landscape processes risk losing momentum even when technical planning is strong.

- **A set of tools and frameworks supported different phases of the process in SVBL.** The LAFF methodology helped assess financial flows and identify gaps; the 1000L Landscape Finance Framework guided the creation of a financial roadmap; LandScale structured monitoring and evaluation; and the RA certification standard provided a concrete benchmark for sustainable practices. Rather than being applied in isolation, these tools were adapted and combined to respond to the landscape's evolving context and priorities.

- **Visioning and planning should evolve with the process.** As in many integrated landscape initiatives, progress unfolded in parallel across multiple fronts: trust-building, diagnostic processes, and governance formation. From the outset, the RA team recognized that vision and planning could not be postponed until "everything else was in place." Instead, they had to evolve iteratively, grounded in what was already emerging from the participatory diagnosis.

- **Recognizing and building on existing collaboration spaces can accelerate progress.** While diagnostic tools like the POER offered a valuable starting point, they were not designed to chart a pathway toward joint solutions. Identifying and engaging existing collaboration spaces (such as forest brigades, agroforestry committees, and livestock associations) allowed the partnership to map out social networks and assess their alignment with ILM principles. This approach laid the groundwork for forming the initial Landscape Partnership and fostering early legitimacy.

- **When engaging stakeholders to identify investment opportunities**, it is essential to first acknowledge actions already underway that align with the landscape vision. Recognizing these efforts helps surface existing capacities and builds a realistic base for planning future interventions. This approach encourages continuity and reinforces the legitimacy of locally driven processes.

- **In landscapes where financial flows already exist**, but operate independently from the shared strategy, the challenge is to foster ownership and alignment. Redirecting such investments requires time, trust, and a robust governance structure. This experience confirmed that long-term financial alignment cannot be imposed; it must be cultivated through iterative engagement and demonstrated value.

For Governments and Public Institutions

- **Institutional allies are essential, not optional**. The engagement of Jalisco's state agencies across sectors and mandates (SEMADET, SADER, FIPRODEFO, FEPAJ) provided critical legitimacy, technical capacity, and alignment with public programs, especially in a context where landscape work overlaps with formal territorial planning.

- **Decentralized platforms need centralized support**. While municipal and local actors drive implementation, state and federal support remains key for legal recognition, access to funds, and policy coherence. Long-term enabling conditions require coordination across levels.

- **Public data can lay the groundwork for landscape-scale collaboration**. The availability of public data, ranging from land use and forest cover to agricultural and hydrological indicators, was a key enabling factor in understanding the landscape's dynamics and setting a shared baseline. These datasets, often produced by government agencies at the state and federal levels, provided the evidence needed to identify risks, align priorities, and build a common vision. Investing in open, high-quality, and regularly updated territorial data is one of the most strategic contributions public institutions can make to support multi-stakeholder processes.

- **Technical information must be connected to a shared narrative**. Data and diagnostics are necessary but not sufficient. What helped build momentum was the collective ability to interpret this information, contextualize it, and recognize interdependence across the territory. Governance gaps, for example, became more visible when reframed in ecological terms, and reforestation gained traction as a mechanism to connect public and private agendas.

For Private Sector Actors and Investors

- **Landscapes offer a strategic space to manage shared risks**. Agribusiness associations initially reluctant to engage saw value when landscape coordination addressed cross-cutting issues, like water scarcity and social license, that no single actor could solve alone.

- **Impact claims need credible metrics and shared accountability**. The pilot use of LandScale to ground sustainability claims showed that private actors are willing to participate when indicators are transparent, co-developed, and aligned with their operational contexts.

- **Framing matters: co-responsibility over project sponsorship**. Instead of presenting engagement as a request for funding, the entry point was framed around shared responsibility. Companies were invited to become part of a long-term solution to collective risks, such as water scarcity and reputational exposure. This framing resonated with associations from the landscape, particularly those with experience in ESG standards, and helped open dialogue.

For Local Communities and Civil Society

- **Participation from the start builds trust and legitimacy.** Early visits to communities, assemblies, and even informal spaces helped build trust. This presence on the ground ensured that local priorities were heard and that the process felt genuinely inclusive, laying the foundation for long-term ownership.

- **Inclusive spaces give voice and influence to local actors**. Smallholder producers and grassroots groups found in the platform a space to influence agendas usually shaped without them.

- **Leaning on existing networks accelerates legitimacy**. Instead of starting from scratch, the process built on community structures like forest brigades and producer associations. Recognizing what people were already doing helped create continuity and reinforced that local knowledge matters.

- **Simple and transparent governance encourages engagement**. Voting rules, open records, and clear meeting protocols made it easier for community members to join in decision-making. Keeping governance low threshold helped ensure participation wasn't just for experts or officials.

- **Investing in local leadership strengthens long-term capacity**. By identifying and supporting emerging leaders, especially women and youth, the initiative fostered confidence and capabilities. Hands-on support helped small producers and ejidos become active participants, not just "beneficiaries".

- **Reducing barriers to participate makes inclusion real**. Covering transportation, meals, or paperwork assistance wasn't charity, it made it possible for everyone to be involved. These small actions sent a strong message: all voices were needed and valued.

- **Trust is built over time, through dialogue and consistency**. Initial skepticism between actors softened thanks to repeated face-to-face encounters and open forums. Over time, shared understanding replaced mistrust, and unexpected collaborations emerged.

- **Plan for local leadership from the beginning**. Transitions from external facilitation to community-led governance take time and intention. Defining clear roles, securing recognition, and identifying sustainable funding routes early on helps ensure long-term ownership and continuity.

FINAL REFLECTIONS ON RA INVOLVEMENT AND EXIT STRATEGY

The experience in SVBL shows that building a durable governance structure requires early and sustained efforts to shift operational leadership to local actors.

RA's transition from facilitator to strategic partner included developing formal governance mechanisms (the Territorial Management Council and Promoter Group), legal recognition through the Territorial Charter, and institutional agreements for fund management. This gradual transfer of ownership was informed by capacity assessments and policy alignment, allowing for a more deliberate and context-sensitive repositioning. Some key take aways from the process:

- **The ability to define who will assume core functions** (like coordination, meeting facilitation, and communications) is key to the continuity of the platform. RA worked with SEMADET and the JIMAs to co-develop an operational and financial transition plan, including a costing exercise and joint funding proposal. While not all roles have been fully transferred, the foundation is now in place for locally anchored management.

- RA focused an important part of efforts on facilitating decision making around **enabling local platforms to gradually assume strategic and operational roles**. This included defining an operational structure capable of managing funds and responsibilities, alongside capacity assessments[11] of key institutions like the intermunicipal boards (JIMAs). These assessments informed decisions on governance and fund management by the Territorial Council.

- **Transitioning from convening actor to strategic partner** required deliberate, stepwise repositioning. Ownership of communication, event coordination, and monitoring began to transfer to JIMAs the SEMADET and the Socio-productive Representative Group, with technical backstopping by RA. This avoided abrupt exits and enabled local actors to step in with confidence.

- **Support withdrawal from RA** was scaffolded allowing for local authorities and the Landscape Partnership to adapt to the end of support.

- **Supporting the formal recognition of the Territorial Charter and the two governance bodies** (Territorial Council and Promoter Group) ensured there was a clear mandate and social contract to guide post-RA coordination. This provided both structure and legitimacy for ongoing collective action.

- **The exit strategy** included a detailed cost assessment and financing proposal for public funding of core platform functions. By anchoring governance in both institutional and financial terms, the transition avoided fragility and created the conditions for sustained coordination.

- **The second LandScale assessment** served not only to update the baseline but also to transfer methodological capacity to local institutions, warranting that landscape monitoring would continue independently. This hopefully builds the credibility needed for future funding and sustainability claims, even without RA's ongoing presence.
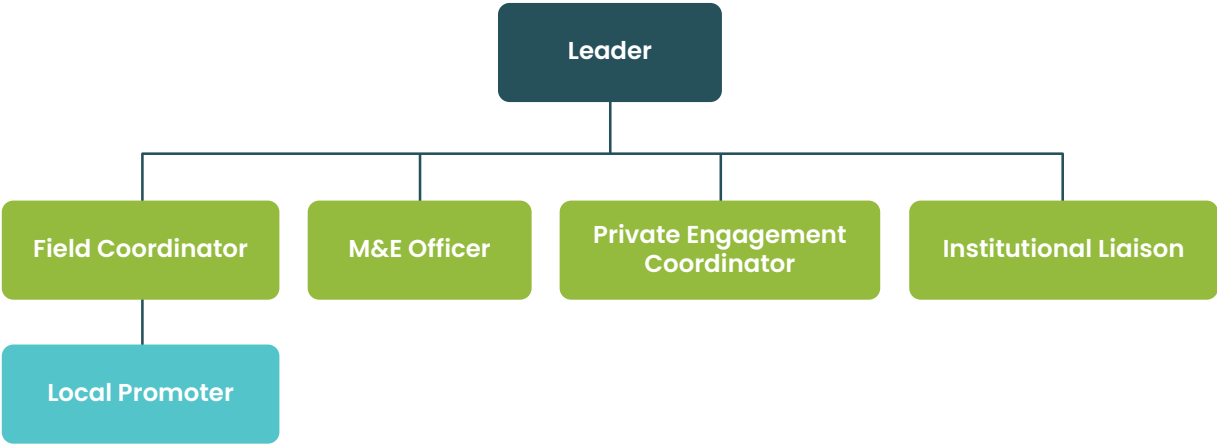
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11 As part of the USAID-funded project, JIMAs and SEMADET capacities were monitored using Pact's Government Performance Index (GPI), a standardized tool that regularly measures public sector performance, including effectiveness, efficiency, relevance, and sustainability, to support improved policies and service delivery. See for more information www.pactworld.org.
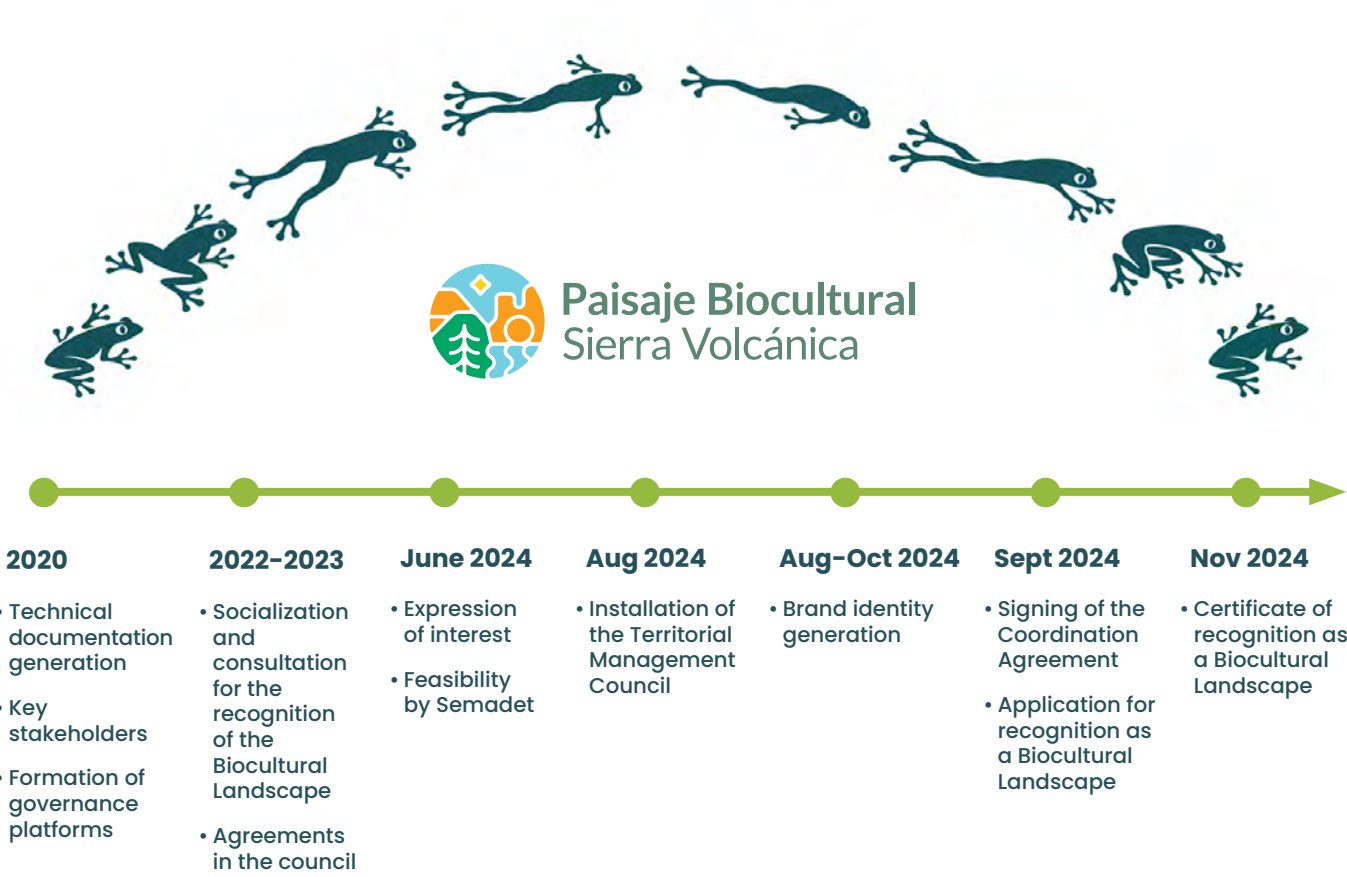
ANNEXES

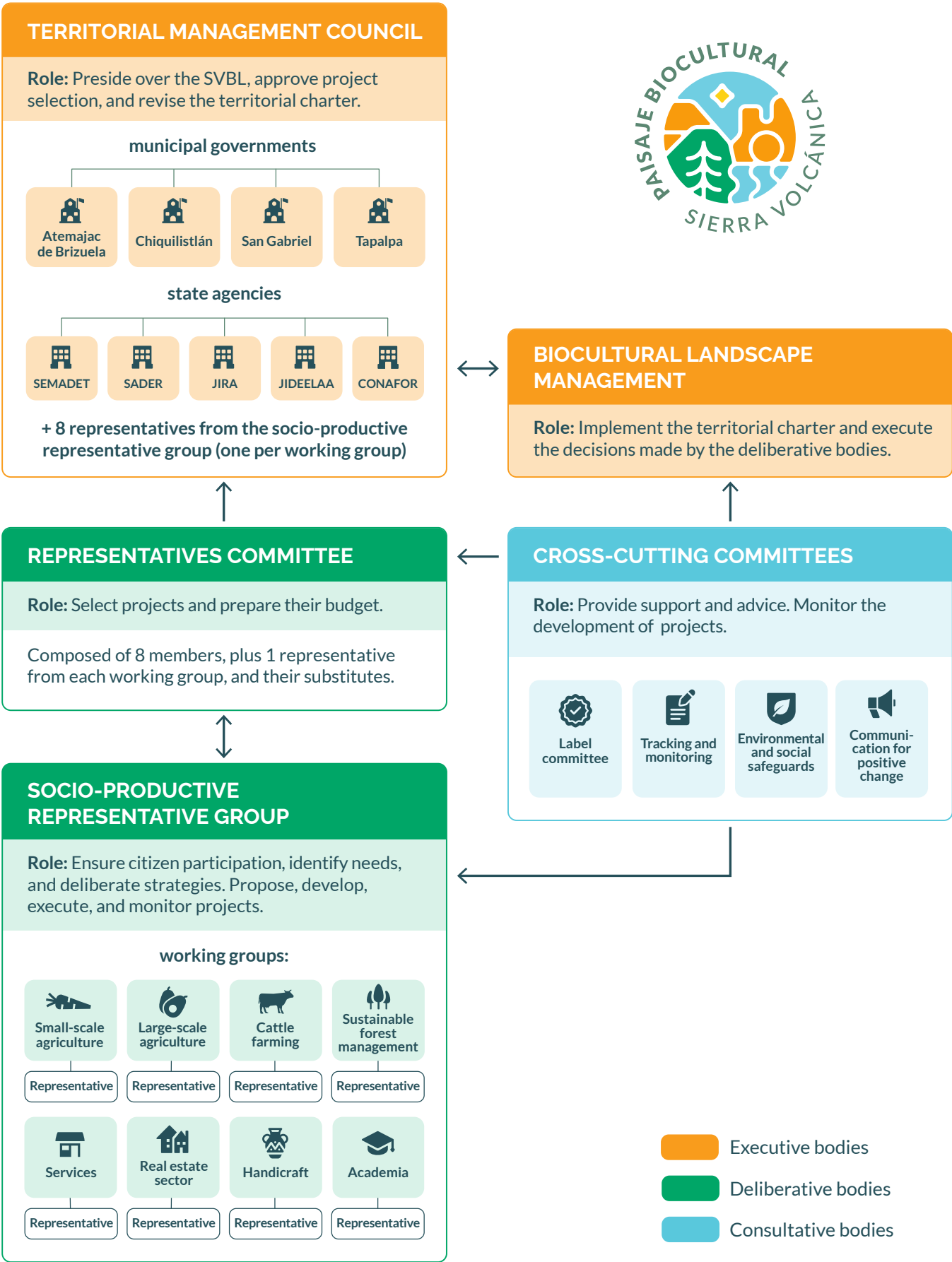# ANNEX 1: RAINFOREST ALLIANCE LANDSCAPE CONVENER TEAM STRUCTURE

Team structure at peak capacity: this structure only existed for a brief period, no more than some months during the four years of engagement in the landscape. Over time, the structure evolved significantly, adapting to project needs and resource constraints.

ANNEX 2: BIOCULTURAL LANDSCAPE RECOGNITION PROCESS

Paisaje Biocultural Sierra Volcánica

2020	2022–2023	June 2024	Aug 2024	Aug–Oct 2024	Sept 2024	Nov 2024
• Technical documentation generation • Key stakeholders • Formation of governance platforms	• Socialization and consultation for the recognition of the Biocultural Landscape • Agreements in the council	• Expression of interest • Feasibility by Semadet	• Installation of the Territorial Management Council	• Brand identity generation	• Signing of the Coordination Agreement • Application for recognition as a Biocultural Landscape	• Certificate of recognition as a Biocultural Landscape

ANNEX 3: SVBL GOVERNANCE STRUCTURE

TERRITORIAL MANAGEMENT COUNCIL

Role: Preside over the SVBL, approve project selection, and revise the territorial charter.

municipal governments

Atemajac de Brizuela	Chiquilistlán	San Gabriel	Tapalpa

state agencies

SEMADET	SADER	JIRA	JIDEELAA	CONAFOR

+ 8 representatives from the socio-productive representative group (one per working group)

BIOCULTURAL LANDSCAPE MANAGEMENT

Role: Implement the territorial charter and execute the decisions made by the deliberative bodies.

REPRESENTATIVES COMMITTEE

Role: Select projects and prepare their budget.

Composed of 8 members, plus 1 representative from each working group, and their substitutes.

CROSS-CUTTING COMMITTEES

Role: Provide support and advice. Monitor the development of projects.

Label committee	Tracking and monitoring	Environmental and social safeguards	Communi-cation for positive change

SOCIO-PRODUCTIVE REPRESENTATIVE GROUP

Role: Ensure citizen participation, identify needs, and deliberate strategies. Propose, develop, execute, and monitor projects.

working groups:

Small-scale agriculture	Large-scale agriculture	Cattle farming	Sustainable forest management
Representative	Representative	Representative	Representative
Services	Real estate sector	Handicraft	Academia
Representative	Representative	Representative	Representative

PAISAJE BIOCULTURAL SIERRA VOLCÁNICA

- 🟧 Executive bodies
- 🟩 Deliberative bodies
- 🟦 Consultative bodies

ANNEX 4: SVBL MAIN GOVERNANCE BODIES AND THEIR FUNCTIONS

Section	Key Question	Response
Formation of Governance Bodies	How were the two main governance bodies formed?	The Territorial Management Council and the Socio-productive Representative Group (*Grupo Promotor*) were created as part of the formalization of the Biocultural Landscape in 2024. Inspired by the French *Parcs Naturels Régionaux*, they were adapted to the Mexican institutional context. The process was embedded in the recognition pathway led by the state government and supported by the Territorial Charter.
	What is their legal/institutional basis?	Both are grounded in the recognition of the landscape under the *State Law on Ecological Balance and Environmental Protection* (LEEEPA) and validated through official meeting minutes and documented statutes.
	Who participates in each body?	The Council includes representatives from the socio-productive sectors (one per sector), municipal governments, intermunicipal boards, and state agencies (e.g., SEMADET, SADER, FEPAJ). The Socio-productive Representative Group brings together local producers, cooperatives, ejido leaders, and socio-productive associations from across the landscape.
Functioning and Decision Making	What is the role of the Territorial Management Council?	It is the highest governance body. It approves the annual work plan, validates project selection and prioritization, oversees LandScale evaluation use, and can revise the Territorial Charter.
	What is the role of the Socio-productive Representative Group?	It is the grassroots deliberative space. It identifies needs, develops project ideas, tracks socio-productive agendas, selects its own sectoral representatives, and feeds recommendations into the Council.
	How are decisions made?	Both bodies use consensus as a first option. If not reached, decisions are made by majority vote. Meetings are formally recorded and agreements signed.
	Are there leadership roles?	Yes. Each body elects a President and a Technical Secretary annually. The Council President must be a sitting mayor; the Socio-productive Representative Group elects a socio-productive representative.
Role of Rainforest Alliance	What role does RA play in this structure?	RA has acted as the operational and facilitating unit, organizing meetings, preparing materials, maintaining coordination between actors, and managing resources. It serves as the executing arm of the governance platform, responding to the priorities set by the two bodies.
	Is RA part of governance decisions?	RA does not hold voting power in the Council or Socio-productive Representative Group. Its role is that of convener and neutral facilitator, supporting legitimacy and continuity while preparing for a gradual exit.

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