

# *Lessons Learned from **CLARIFI's** Grantmaking Experience*

*CLARIFI—The Community Land Rights and Conservation Finance Initiative*



**RIGHTS +  
RESOURCES**



**Campaign  
for Nature**



Photo Credit: Amazon Conservation Team



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# *Introduction*

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**CLARIFI's** mission is to expand the formal recognition of Indigenous Peoples', Afro-descendant Peoples', and local communities' (IP, LC, and ADP) territorial rights by mobilizing flexible, direct financing that strengthens locally defined priorities in conservation, adaptation, and governance.

This executive summary distills key lessons from CLARIFI's early years of grantmaking and partnerships across Latin America, based on interviews with 23 of CLARIFI's partners and grantees. These included leaders from the Fondo Territorial Mesoamericano (FTM), Alianza Mesoamericana de Pueblos y Bosques (AMPB), and other Indigenous and territorial organizations, technical staff of Indigenous and local community organizations, and strategic allies. The findings reflect the participants' direct experiences implementing CLARIFI-supported projects, complemented by collective discussions and personal reflections shared during regional workshops held in Colombia and Guatemala.



## ***Direct and Inclusive Financing***

### **Lesson 1. Intermediary Funding Arrangements and Simplified Requirements**

*If the intent is to expand funding access of IP, LC, and ADP organizations to international resources, then donors should combine simplified and proportionate procedures with intermediary funding arrangements that lower administrative barriers and facilitate inclusion of less structured and experienced organizations.*

Across CLARIFI's portfolio, its recipient organizations ranged widely in administrative and technical capacity, which limits their ability to access international funds. Combining simplified, proportionate requirements with intermediary mechanisms enabled smaller or newer organizations to implement projects otherwise beyond their reach, without compromising accountability. Simplified procedures and intermediary funding can expand inclusion while maintaining transparency. Donors can enhance this approach by supporting strategic local partnerships, coordinating territorial funding to avoid overlap, and adopting shared eligibility standards that strengthen local collaboration.

### **Lesson 2. Organizational Strengthening for Sustained Financing**

*To ensure that community-based organizations build institutional capacity and manage projects effectively, grantmaking should integrate administrative, financial, and technical support, preparing grantees to evolve from small, short-term projects to sustained, direct financing.*

Many community-based and Indigenous organizations entering international finance lack established systems for governance, accounting, and compliance, limiting their ability to manage larger or long-term funding. CLARIFI's grants helped build these foundations—supporting updates to statutes and manuals, professionalizing financial procedures, and creating accountability systems that positioned grantees for future direct funding. Donors can embed readiness-building into all funding cycles by ensuring that entry-level grants include training in management and compliance, and link their support to clear graduation pathways toward direct access. Early grants can also serve as leverage—demonstrating credibility and unlocking co-financing from public, private, or multilateral sources.



### **Lesson 3. Capacity Transfer through Fiscal Sponsorship Models**

*If the intent is to use fiscal sponsorship as more than a fiduciary mechanism, then sponsorship models should be explicitly designed to facilitate capacity transfer—helping beneficiary organizations build financial management, compliance, and governance skills that enable their gradual transition to direct funding.*

Experiences across CLARIFI's portfolio demonstrate that fiscal sponsorship enables community-based organizations to access international resources and carry out activities in their territories that would otherwise be inaccessible due to administrative barriers. When structured intentionally, these arrangements became vehicles for capacity transfer—helping grantees build internal systems, accounting practices, and governance mechanisms rather than relying indefinitely on sponsors. Donors can maximize the value of the fiscal sponsorship model by embedding mentorship, financial shadowing, and phased “step-down” plans into sponsorships; financing technical allies to maintain accountability; and ensuring that each sponsorship contributes to local organizations' eventual self-management and direct access to funding.

### **Lesson 4. Territorial Funds as Vehicles for Inclusion and Ownership**

*If territorial funds are to reduce funding-access barriers, align resources with territorial agendas, and strengthen community ownership, then they must be adequately resourced, legally recognized, and equipped with operational systems that enable the independent and transparent management of funding.*

The territorial funds that CLARIFI partners with have shown that community-led financing mechanisms can channel resources directly to the local level while reinforcing territorial governance and aligning funding decisions with community priorities. Simplified procedures and flexible design made these funds accessible to smaller organizations, expanding inclusion and ownership. Yet their independence depends on enabling conditions—legal recognition, governance systems, and operational resources. Donors can amplify their impact by supporting the legal and institutional foundations these funds need to operate autonomously, ensuring that financing remains rooted in community leadership and that one coordinated funding process can support many locally led initiatives.



## ***Flexibility and Responsiveness***

### **Lesson 1. Adaptive Frameworks and Flexible Implementation**

*To ensure the relevance and effective implementation of funded initiatives amid changing social, political, economic, and environmental conditions, grantmaking frameworks must remain adaptive—allowing flexibility in budgets, activities, and indicators while maintaining accountability and learning.*

Rigid grant structures often falter amid shifting political, climatic, and logistical conditions, leaving community partners unable to adapt to on-the-ground realities. By embedding flexibility into design and implementation (such as adjusting activities to agroclimatic calendars, extending timelines for community consensus, and funding inclusive measures like childcare and transport), CLARIFI sustained progress and protected accountability without excluding less-resourced organizations. Donors can institutionalize adaptability by including review checkpoints during grant cycles, allocating contingency funds, aligning timelines with community decision processes, and maintaining proportionate reporting systems that accommodate local realities.

### **Lesson 2. Holistic Territorial Approaches**

*If the goal is to achieve long-term territorial stewardship, then programs should adopt a holistic approach—combining territorial security and governance with production, livelihoods, and conservation activities.*

Across regions, a fundamental lesson emerged: territorial governance cannot be sustained when food, water, and livelihoods are insecure. Projects that integrated governance, restoration, and livelihood components achieved broader, longer-lasting results. Initiatives such as community aqueducts, family gardens, and sustainable production linked well-being and economic security with ecological stewardship. Donors can strengthen impact by funding livelihood initiatives tied to sustainable production, supporting food and water security as governance foundations, and creating dedicated financing streams for IP, LC, and ADP territorial economies.



### Lesson 3. Participatory and Context-Specific Projects

*If the objective is to ensure legitimacy, ownership, and long-term participation, then projects must be co-designed with communities—aligning activities, budgets, and timelines to local priorities, cultural norms, and evolving territorial realities, with explicit provisions for participatory planning and validation.*

CLARIFI has seen that projects designed without participatory validation often lose community trust and long-term viability, while those grounded in collective planning and local realities gain legitimacy and sustained engagement. Allocating resources for assemblies, consent processes, and community decision-making enabled grantees to co-design projects that reflected ethnic, cultural, and territorial priorities. Donors can ensure durable impact by funding participatory design and consent processes, aligning project timelines with community decision-making rhythms, and enabling inclusive participation through translation, childcare, and accessible spaces.



CLARIFI Tropical Andes Regional Learning Exchange



## ***Community-Based Territorial Governance and Strategic Collaborations***

### **Lesson 1. Capacity-Building within Territories**

*If the goal is to strengthen governance and sustain territorial protection, then grants should combine legal, administrative, and technical training with access to the tools and systems that allow communities to apply this knowledge in practice.*

Across CLARIFI's portfolio, IP, LC, and ADP organizations faced gaps in legal literacy, administrative systems, and technical skills—barriers that slowed progress on land titling, resource management, and territorial monitoring. Training alone proved insufficient; only when paired with equipment (drones, GPS units, mapping software, and communication systems) could organizations apply new skills effectively. This integrated approach strengthened governance frameworks, financial accountability, and on-the-ground management while broadening participation of women and youth in territorial monitoring. Donors can deepen impact by embedding legal, technical, and administrative training into all grants and pairing these efforts with the necessary tools for communities to manage, monitor, and protect their territories.

### **Lesson 2. Collaboration for Land Rights Consolidation**

*If the goal is to accelerate and legitimize land-titling processes, then programs should support both community leadership and strategic partnerships—ensuring that outcomes are legally binding and socially validated.*

Land titling remains one of the most urgent priorities for IP, LC, and ADP communities, yet in many countries, government-led programs are underfunded, slow, and ineffective. CLARIFI's support to the Asociación Interétnica de Desarrollo de la Selva Peruana (AIDESEP) in Peru demonstrated that combining community-led mapping with government collaboration yields faster, more legitimate outcomes. This joint model ensured accuracy, reduced disputes, and delivered officially recognized titles that strengthened long-term governance and land security.



### Lesson 3. Advocacy and Multi-Level Engagement

*If the intent is to strengthen community influence in public and private decision-making, then grants should include dedicated resources for advocacy, dialogue, and engagement with external institutions.*

Community participation is often limited not by lack of legitimacy or capacity, but by insufficient resources for advocacy and coordination. Funding travel, communications, and participation in hearings and policy dialogues enables communities to build alliances, shape agendas, and assert their rights. When grounded in territorial data and collective mandates, advocacy becomes a core mechanism of governance, linking local realities to national and international policy change. Donors can strengthen outcomes by funding participation and representation directly, supporting alliances among Indigenous and civil-society actors, and coupling training and communication with tangible advocacy actions such as policy proposals, campaigns, and legal reforms.

### Lesson 4. Peer-Based Learning Platforms

*If the goal is to strengthen coordination, amplify impact, and build on shared lessons across territories, then donors should invest in peer-learning platforms that connect territorial organizations and allies across regions.*

CLARIFI's facilitation of regional exchanges and women's networks demonstrated that peer-learning spaces foster collaboration, mentorship, and collective advocacy, building trust and shared purpose across territories. Through these exchanges, organizations co-developed methodologies, shared strategies, and advanced cross-territorial agendas that extended beyond individual projects. Institutionalizing such networks, particularly for women leaders, strengthens long-term collaboration and amplifies community voices in governance and policy arenas.





## ***Equity, Safety, and Resilient Leadership***

### **Lesson 1. Gender-Inclusive and Intergenerational Focus**

*If the goal is to build inclusive and resilient territorial governance, then grantmaking needs to dedicate resources to women-led organizations, gender-responsive project design, and long-term training opportunities for young leaders.*

Deliberate inclusion of women and youth in project design and governance processes makes decision-making more representative, innovative, and grounded in community realities. Engaging youth secures continuity and knowledge transfer across generations, while empowering women with access to data, technology, and decision-making spaces transforms their roles from peripheral to central in governance. Donors can advance this by earmarking funds for women-led initiatives, embedding gender and intergenerational equity across all grants, and supporting mentorship pathways that prepare emerging leaders for management and governance roles.

### **Lesson 2. Culturally Sensitive Gender Integration**

*If the intent is to advance gender equity, then grantmaking should support gradual, community-led, and culturally grounded processes that foster acceptance and shared ownership.*

Efforts to advance gender equity within IP, LC, and ADP communities often encounter resistance rooted in traditional roles and norms, requiring culturally grounded and participatory approaches. CLARIFI's experience showed that progress emerged when empowerment built on existing traditions and was legitimized by community and traditional authorities. Women-led practices like seed conservation, medicinal plant cultivation, and sustainable land management served as entry points for leadership, gradually shifting perceptions and strengthening women's roles in governance. Donors can promote lasting change by supporting multi-year, community-driven processes, leveraging traditional knowledge as a foundation for leadership, linking empowerment with livelihoods, and engaging men and traditional authorities to build shared ownership of transformation.



### Lesson 3. Safety and Protection for Territorial Defenders

*If the goal is to strengthen governance and sustain safe territorial protection, then funding must safeguard the people and institutions defending territories.*

Defending territories puts IPs, LCs, and women activists on the frontlines of conflict. Across regions, threats to Indigenous, local, and women leaders defending their territories are structural, driven by contested land rights, illegal activities, and weak institutional protection. CLARIFI and its partners made collective protection a core element of territorial governance, supporting community vigilance networks, alliances with protection organizations, and coordination with authorities. Special attention to the distinct risks faced by women leaders helped reframe safety as a shared responsibility that's essential to governance and sustainability. Donors can reinforce progress by funding collective safety systems, legal defense, and advocacy mechanisms that safeguard defenders' lives and institutions.



CLARIFI Mesoamerican Regional Learning Exchange, Photos by Flora Cruse





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