

THE CIVIL SOCIETY ACTIVITY'S LEGACY COMPENDIUM OF SYSTEMIC CAPACITY DEVELOPMENT IN MEXICO

This document provides an overview of the Mexico Civil Society Activity's (CSA) Legacy Compendium of methodologies and lessons learned. During the 4-year program funded by the U.S. Agency for International Development (USAID), CSA worked to improve the sustainability of Civil Society Organizations (CSOs) in Mexico to effectively implement their agendas in violence prevention, human rights protection and justice reform. CSA focused on improving CSO capacity to collaborate, increasing their connections with key stakeholders, strengthening their capacity to develop strategies that respond to their changing environment and constituents' needs and improving CSO access to knowledge and resources. Social Impact (SI) implemented CSA in partnership with Fundación Appliance.

The CSA Legacy Compendium is divided into four sections that are described in greater detail below:

- 1) The Strategic Role of Civil Society
- 2) CSA's Capacity Development Approach and Methodologies
- 3) CSA's Lessons Learned and Results
- 4) CSA's Capacity Development Tools

PART I: THE STRATEGIC ROLE OF CIVIL SOCIETY

1. Civil Society Organizations: Bridging the Gap between the Rule of Law and Social Development in Mexico

CSOs across the world have demonstrated their potential to represent grassroots perspectives, promote cross-sectoral collaboration, tackle complex social problems, and build a just society. Increasingly, CSOs collaborate with public and private actors to catalyze social change. CSA's experience in Mexico provides a valuable case study for capacity development interventions that promote the civil society collaboration with other actors in their local system. This document describes the Activity's experience supporting Mexican CSOs to increase their influence and contribute to improving rule of law and social development.

2. Civil Society Organizations: Towards Collaboration and Systemic Connection

This paper analyzes how organizations connect with each other across several dimensions of engagement and connection. Four dimensions are presented: The first corresponds to organizations' internal focus. The second dimension involves collaboration between civil society actors that work to advance similar causes. The third dimension is sectoral in nature, i.e., public or private; and the fourth is systemic, in which organizations aim to connect with actors across several sectors, including the public and private sectors, in order to influence the system and achieve their missions and collective agendas more sustainably.

PART II: CSA'S CAPACITY DEVELOPMENT APPROACH AND METHODOLOGIES

3. Civil Society Activity's Systemic Approach to Capacity Development

This document presents CSA's systemic approach to capacity development, including methodologies, tools, and performance solutions the Activity designed, piloted and validated. Key elements of CSA's approach include a holistic capacity development strategy that assigns equal importance to internal, environment, and systems-based strengthening; the CSA Theory of Change; its integrated, semi-automatized assessment tool; multiple interventions and tailored solution packages; and Monitoring and Evaluation instruments, among other key features.

4. Guide to Scaling up Capacity Development through Transfer and Replication

This Guide provides a step-by-step breakdown of the phases CSA used to support the transfer and replication of its systemic approach, including the institutional strengthening and grants management components. Each step outlines transfer and replication support to Intermediate Support Organizations that later replicated CSA's approach with their subgrantee organizations.

5. The Transformation of Civil Society Organizations that Receive USAID Grants

This document describes CSA's approach to strengthening CSOs that receive and manage USAID funds. Given the rigor of USAID's grant management guidelines, CSA accompanied organizations as they improved their capacities and performance in administrative processes, transparency, and accountability processes. This institutional strengthening created more effective organizations and promoted sustainability through more efficient administration of economic resources.

PART III: CSA'S LESSONS LEARNED AND RESULTS

6. Emerging Practices in Capacity Development in the Civil Society Sector in Mexico

This document outlines lessons learned during four years of CSA implementation to inform future capacity development programming. It emphasizes key capacity development principles including adaptive management, customized approaches, and sustainability, and provides practical information on how to incorporate the principles into one integrated operation. The lessons learned and emerging practices reflect the collaboration of CSA, USAID, over 40 Mexican CSOs, and CSA consultants and subcontractors.

7. Lessons Learned in Implementing a Grants Program in International Cooperation Programs in Mexico: The Civil Society Activity's Experience

This document presents concrete, actionable recommendations on how to launch a call for proposals to award grants to CSOs. The recommendations may inform implementing partners' decision making, improve collaboration between donors and CSOs, strengthen the sustainability of results, and contribute more effectively to USAID's Development Objectives (DOs).

8. Exchanging Best Practices in Civil Society: A Replicable Study Tour Model

This document describes CSA's experience in the design, coordination, and implementation of a Study Tour to Medellín and Bogotá, Colombia in which civil society leaders exchanged best practices in peace building and violence prevention. The document describes the model's objectives and methodology, which involved the participation of leaders from civil society and both the private and public sector. The document also offers practical tips for the model's replication and sustainability, including selection criteria and the requirement that participants design and implement joint programming to apply new knowledge and skills.

9. Gender and Inclusion Mainstreaming in Civil Society Capacity Development

This document describes CSA's experience and lessons learned in a systematized process of incorporating a gender and inclusion perspective into capacity development. The document describes how CSA staff and consultants designed and executed strategies to incorporate inclusive and gender-based policies and protocols, and highlights success stories, challenges, and best practices.

10. Protocolos de Atención y Prevención del Acoso, Hostigamiento Sexual y Discriminación Laboral en las OSC Socias del Programa para la Sociedad Civil de USAID

This document is the result of CSA's experience accompanying partner CSOs in their work to integrate the gender and inclusion approach in supporting their own partner organizations. A key result of this effort was the design and implementation of protocols to prevent and address sexual assault and harassment and discrimination in the workplace, complemented by mechanisms to monitor and analyze their implementation.

11. Building Sustainable Learning Communities to Strengthen the Local System

This document has two objectives: 1) To describe CSAs experience, results and lessons learned in coordinating three Learning Community groups in which organizations overcame a history of isolated activities and even competition to exchange best practices and collaborate in strengthening the civil society sector, and 2) To share how Learning Communities can impact the local system by promoting four dimensions of sustainability, participatory methodologies, and methodologies for continuous learning and adaptation.

PART IV: CIVIL SOCIETY ACTIVITY'S CAPACITY DEVELOPMENT TOOLS

12. CSA's Integrated Assessment Tool (OCA, OPI, Stakeholder Mapping)

CSA's Integrated Assessment Tool is the product of the innovation and creative energy that SI, its partner organizations, and USAID/Mexico dedicated to enhancing capacity development methodology and practice. Facilitators can use this single tool to apply OCA (Organizational Capacity Assessment) and OPI (Organizational Performance Index) assessment instruments, record qualitative observations, draft preliminary recommendations, draw results, and generate graphs to demonstrate findings in real time. CSOs may apply this user-friendly tool themselves in a complete or modular fashion.

13. CSA's Solution Packages

The Activity designed and curated thirteen solution packages for CSO strengthening of civil society organizations in the following key areas: Strategic Planning, Strategic Alliances, Communication and Digital Strategy, Project Design, Financial Strategy, Grants Management, Monitoring and Evaluation, Resource Mobilization and Generation, Gender and Inclusion, Knowledge Management, Institutional Governance (with Collaborative Leadership webinars), the Non-US Organization Pre-Award Survey (NUPAS), and Human Resources. Each solution package offers a methodological and pedagogical framework to carry out strengthening processes, complemented by tools, formats, templates and other resources.

For more information on CSA's Legacy Compendium, please contact Lucila Serrano (lserrano@usaid.gov) or Elise Storck (estorck@socialimpact.com).

The following image lists the various materials that comprise CSA's Legacy Compendium:

