



Building Transnational Bridges

Remittances, Diaspora and Opportunities in Mexico

HISPANICS **IN** PHILANTHROPY

The Power of Giving and Connecting

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ABOUT HIP

Established in 1983 to promote stronger links between organized philanthropy and Latino communities, Hispanics in Philanthropy became a transnational network of over 600 members committed to strengthening Latino communities across the Americas. HIP seeks to increase Latino civil sector resources by pursuing a partnership with donors, and focuses on raising funds from foundations, corporations, government organizations and individuals to support Latino nonprofits.

This partnership also serves HIP's mission to strengthen Latino leadership, while at the same time, increasing awareness of Latino issues and stimulating discussion as how to best serve the Latino community and Latin America. Transnational initiatives are designed to strengthen the relationships, connections and collaboration with leaders in civil sectors across borders, and to increase resources for Latino and Latin American civil sectors.

The case studies were prepared by Valeria Galetto, PhD, who works as an independent consultant in the areas of international migration and local development. Her research has examined the relationship between international migration, remittances from migrants and rural development in Mexico. In particular, her work has focused on factors that contribute to or impede productive investment in the migrants' communities of origin, and how these factors vary across time and space. She has also studied the dynamics of accumulation of social capital in migrant networks and the role of such networks in the economic development in Mexico. Valeria Galetto received a PhD in Development Studies from the University of Wisconsin-Madison in 2009, and a Masters in Social Anthropology from the Universidad Iberoamericana, Mexico, in 1999.

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ABOUT THE PROGRAM

Inequality and poverty remain major challenges in Latin America, making it the world's most unequal region. Due to the economic, social and security situations which have affected the region in recent decades, the focus is on emigration. Today, Latinos are the largest minority in the United States.

In 2006, Hispanics in Philanthropy (**HIP**) and the Packard Foundation began a special initiative to develop productive transnational projects in the States of Guanajuato and Puebla. This was based on the theory of change, that itself was based on the use of human and financial capital of Mexican migrants. The aim was to learn how to create sustainable bi-national finance models, offering families the choice to stay in their communities and develop small firms.

HIP launched its transnational program in 2006. It was a combination of two major initiatives:

- Promoting Diaspora and Local Support for Productive Initiatives (IDB)

- Building Transnational Bridges, Remittances, Diaspora and Opportunities in Mexico (David and Lucile Packard Foundation)

Both programs seek to link the diaspora with their communities of origin as a means to develop local economies. However, the Packard grant focused primarily on vehicles for social change and strengthening the civil sector, and focused on only two states in Mexico, while the IDB grant focused on the development of local philanthropy and technical assistance in three countries in Latin America.

The program "Building Transnational Bridges, Remittances, Diaspora and Opportunities in Mexico" was created in order to expand the work that **HIP** had begun in the transnational field and at the same time, develop and test models of transnational philanthropy and social change. Specifically, the program sought to identify and fund productive initiatives in the State of Puebla, and Guanajuato which were aimed at generating employment opportunities and/or increasing income in communities affected by migration to the U.S. and that would count on the participation of members and migrant organizations abroad.

MESSAGE FROM THE PRESIDENT

In our very first strategic planning session, HIP's leadership affirmed that our concept of "community" encompassed all of the Americas: North, Central, and South. As a result, HIP has long defined itself as a transnational network—even before 2001, when we initiated partnerships with nonprofit funders and organizations in Latin America, and certainly before 2006, when we opened our office in Mexico.

HIP's transnational program, "Building Transnational Bridges" Remittances, Diaspora and Opportunities in Mexico," has proved a rich learning experience. No matter where we work, collaboration is at the core of our philanthropic strategy: HIP brings together funders to leverage resources, maximize impact, and reduce risk. Through generous funding from the David and Lucile Packard Foundation, we were able to successfully adapt this collaborative funding model to Mexico, bringing together diverse funders to invest bigger and better resources in local communities.

The following report details the results of the "Building Transnational Bridges" program. We hope that the lessons learned will provide important insights for future initiatives, just as they will guide the next decade of HIP's transnational work. For HIP, the program has been an important affirmation of the potential of our diasporas—with the right systems and structures, diaspora communities can be key players in creating economic opportunities and strengthening democratic values in Latino communities across the Americas.



Diana Campoamor PRESIDENT
Hispanics in Philanthropy



Alternative production and food security

in the Northeastern Sierra of Puebla

INTRODUCTION

La Esperanza del Mañana is a civil association that seeks to improve the quality of life of the inhabitants of the Sierra Norte in the State of Puebla through the management and promotion of interdisciplinary and multicultural projects. The organization was founded in 2003 as part of the national program “Adopt a Micro Region.” This program was created by the private sector, together with the public sector, to develop initiatives to alleviate poverty, generate employment and reduce migration in highly deprived areas. As a result of this initiative, a group of micro-entrepreneurs adopted the northeastern region 3 in the State of Puebla, consisting of the municipalities of Cuetzalan del Progreso, Jonotla, Tuzamapan de Galeana, and Zoquiapan.

La Esperanza del Mañana seeks to improve the living conditions of the inhabitants of the Sierra Norte de Puebla through:

- i) Creating and consolidating artisanal companies,**
- ii) Improving the urban image,**
- iii) Developing alternative tourism; and**
- iv) Strengthening education.**

The project helped expand and diversify productive alternatives in the region through the establishment of backyard organic vegetable gardens as well as contributing food security to its population.

OBJECTIVES

- i) Provide theoretical and practical training in the comprehensive management of backyard organic gardens**
- ii) Promote organic vegetable production to double output and generate employment and increase consumption of fresh, varied and chemical free products and**
- iii) Identify and establish channels for marketing profitable products obtained from organic gardens.**

FIRST STAGE

A distinctive element of the project was to work with local educational institutions. In the first phase, the project was launched in **six schools, four high schools and two distance learning programs, located in six communities in the municipalities of Cuetzalan, Zoquiapan and Jonotla** in the northeastern State of Puebla. Each school was given theoretical and practical workshops on the integrated management of backyard organic vegetables. This was aimed at teachers, students and community producers. Each school established (if available) a demonstration garden where they conducted most of their practices. The rest were done in a “Demonstration Agroecological Center” that La Esperanza del Mañana maintains in the town of Cuetzalan.

The agency developed an intensive workshop on the management of vegetables and presented it to the *Secretaría de Educación Pública* (SEP) of the State of Puebla so that it could be **officially accredited**. The **“Workshop on integrated management of backyard vegetables”** a 54-hour curriculum was approved in December 2008 for a period of two years. As a result, the agency was able to **extend official recognition to students and faculty and community members who chose to carry out and complete this workshop**.

Nine groups of producers were also formed in nine communities in the mountains. In this micro-region, most backyard vegetable growers destine the majority of their production for personal consumption. Producers who marketed a significant part of what they produced grew

shallots, jitomate riñón (a very popular type of tomato from that region), amaranth and pepper.

One hundred and ten farmers received technical training (management of vegetables, tomato production and handling of birds), on-site consulting and monitoring the production of the gardens as well as a training course in training and strengthening community organizations. **Producer groups were formed by locality. This was an important step for funding and, subsequently, a regional association of producers was also formed.** The association is responsible, among other things, to establish a collective marketing strategy to get a better selling price in the market.

SECOND STAGE

The project was extended to **six new schools**, three high schools and three distance learning programs, located in six communities within the municipalities of Cuetzalan, Tuzamapan and Jonotla. As in the previous stage, each school was given a theoretical and practical workshop and a demonstration garden was set up. Technical training and advice to individual producers was continued. The workshops most attended were those of vegetables (142 producers), compost (78), organic fertilizer (68) and tomato production (38).



With regards to marketing, three strategies were followed. Firstly, the agency promoted and facilitated the sale of organic products in Puebla's organic market. A stall was set up and produce belonging to some of the producers was sold, as well as on some occasions, produce from school gardens. It was then determined that the cost of transportation from the mountains to the city of Puebla (a 360 miles round trip) was not viable commercially. Secondly, the agency sold four tons of red onion or shallot to a wholesaler in the State of Guanajuato. The producers may, on average, have received a higher price than they could have obtained in the local market; however, the overall negotiation process was very slow and complex. Thirdly, the agency contacted a firm called The Green Corner, a distributor of organic fresh produce in the Mexico City, to explore the feasibility of selling commercially; but, an agreement was not reached.

These experiences show the need to identify new channels and marketing strategies that are economically viable and relatively stable. La Esperanza del Mañana commissioned a market study to find alternative ways of selling organic produce from vegetable gardens in the Sierra Norte of Puebla.

Market research revealed that, on average, producers share out nearly half of what they produce for family consumption and half is sold (46% and 54% respectively). Most production is sold locally through "home delivery". The sale of vegetables represents, on average, 23% of a producers' monthly income. However, if the value of labor is added to production costs, the study shows that cultivating quintonil, shallot, jitomate riñón, cherry tomatoes and jitomate saladet are unprofitable. The only crops that are profitable are sesame seeds and pepper. It should be noted that these calculations were made assuming that producers place their products in "points of sale" in the city of Puebla, such as supermarkets, grocery stores, etc., many of which are provided directly by the Groceries' Center of Puebla.

The organization, *Seven Communities United by Cultivating the Land*, was established. It is a limited liability micro-industrial organization. This organization, which was formally constituted by 15 members, **represents vegetable farmers in seven communities in the mountains northeast of Puebla.** The organization was registered in the Public Property Registry and, subsequently, the Tax Administration Service of the Ministry of Finance and Public Credit. **The advantages** of having a formally constituted society of producers include **access to state training and marketing programs and the possibility to establish direct relationships with potential clients.**

THIRD STAGE

As a result, **the market study identified two business strategies.** On the one hand, it recommended **selling the production directly to "transformers" of food products,** particularly, restaurants, hotels and food outlets that use fresh vegetables. The market study found that owner-managers of these establishments are looking for, other than price, that products are fresh, clean and preferably free of pesticides and agrochemicals. On the other hand, **it recommended implementing a process of simple vegetable processing,** such as pickles, canned produce or dry goods, in order to add value to the product and expand the marketing perspective.

After evaluating the recommendations, La Esperanza del Mañana **focused first on strategy.** They identified a number of customers, restaurants and hotels in the town of Cuetzalan, who would require a significant amount of vegetables. Based on the "self-sufficient school model" promoted by the Paraguayan Foundation, **they designed a focused marketing scheme in schools in the region.** From September 2011, five high schools located outside the town of Cuetzalan began to function as collection centers and a

group of students were responsible for keeping a detailed log of fresh produce delivered by the growers. The produce was then transported to a distribution center in the town of Cuetzalan where students selected, packed and delivered the produce to different customers, restaurants and hotels in the city. The idea to involve students in the trading scheme was to strengthen “**entrepreneurial development**”, common in high schools in the State of Puebla. As a result, students had the opportunity to use skills learned in the classroom and under the strict supervision of teachers, they gained invaluable experience in management, administration and the organization of an agricultural company.

Also, in an effort to increase their presence in the region and establish partnerships with other institutions, La Esperanza del Mañana began working with the Child Fund Mexico, a nongovernmental organization dedicated to promoting the development of children and young people living in poverty

MAIN RESULTS

Established a significant number of gardens in the region. The project was implemented in 13 communities distributed in four towns in the mountains northeast of Puebla, and 300 organic vegetable gardens were set up. According to market research data, 46% of production was devoted to personal consumption, 54% to sell. While sales represented, on average, 23% of a family’s income, it appears that the volume of sales would tend to grow significantly as producers begin to place their products in the town of Cuetzalan and municipal markets in the region.

Developed a statewide job training program. At the end of the first year, teachers (and to a lesser extent students) who

in rural and suburban areas in the country. As a result of this collaboration, the project initially expanded to two new schools in the community of Xaltipa in the town of Cuetzalan.

Finally, and with regards to the training component, La Esperanza del Mañana prepared and submitted a “**training program for backyard agricultural work for Baccalaureates in the State of Puebla**” to the SEP of the State of Puebla. After several months of intensive work, the agency approved the program, which took effect in August 2010 and can be **taught in any school of the State**. The program consists of five subjects taught every semester. In August 2010, five high schools associated with the project adopted the program. **At the end of the first semester**, schools reported that, overall, **230 students had set up a backyard garden that directly contributed to strengthening their families’ food security and, possibly in the future, would generate a sustainable production alternative for the region.**

had collaborated on a voluntary basis, stated that it seemed a valuable initiative but that there was a high extra-curricular work load. To address this problem and, above all, to ensure the sustainability of the project, La Esperanza del Mañana sought to integrate the initiative in the schools’ curriculum. As a result, in 2010 a backyard agricultural training program was put together and approved and was implemented in schools in the State of Puebla. Additionally, the production and administration of sustainable backyard vegetables training program offers job prospects to young people. The hope is that, over time, it will become a real alternative instead of migrating to the United States.



MAJOR CHALLENGES

Created and started a regional association of producers. Organizing farmers into an association that represents and promotes their interests as a group was much more complex and slower than expected. One of the great benefits of creating a regional association of producers is that you can add the output from members and offer a greater quantity, diversity and consistency in product delivery. However, this requires having an organizational structure that maintains a high degree of communication and information exchange among members. In the case of the *Seven Communities United by Cultivating the Land's* association, two aspects weakened its operation. On the one hand, the low participation of its members - not all representatives could attend the meetings regularly. And, on the other hand, a lack of regular communication between representatives and the represented - there was no mechanism provided or formalized to inform producers of decisions that were taken at meetings or, conversely, for producers to manifest their interests or concerns to the steering committee.

Identify profitable marketing channels. The project was built on three assumptions:

- i) **The products produced in the mountains northeast of Puebla were widely consumed by the population,**
- ii) **That there was a demand for such products in the city of Puebla and Mexico City, and**
- iii) **That it would be profitable to place these products in those markets.**

Market research and commercialization efforts made later by the executing agency revealed that all three assumptions were incorrect. In fact, most of the “points of sale” (supermarkets, grocery stores, etc.) and food transformers (restaurants, hotels, etc.) interviewed by the agency, all located in the city of Puebla, did not know the jitomate riñón, the cherry tomato, and shallots. Therefore, in the absence of an established demand for these products it was more difficult and expensive to place these products in the market. After exploring various alternatives, without much commercial success, La Esperanza del Mañana found that there was a local market among a segment of service providers (hotels, restaurants) in the town of Cuetzalan. This commercial strategy was implemented in the summer of 2011, identifying the first customers.



LESSONS LEARNED

Generate efficient communication channels. The success of social interventions depends, amongst other things, on the existence of efficient mechanisms and regular communication between the executing agency and the beneficiaries of the project. In addition to the regional association of producers, it may have been important to create producer societies at the community level. Therefore, instead of communicating with the 15 representatives of the association, the agency would have had the opportunity to have a direct link with the producers, which do not necessarily have the same needs or face the same challenges. Additionally, as the beneficiaries of the project were distributed in different locations it would have been important to hold periodic meetings in the communities and therefore create opportunities for communication and exchanges between the community and staff of the implementing agency.

Obtain strategic information at the beginning. If a project plans to conduct a market study to investigate and find alternatives to market a product, it is important that this study be conducted at the beginning of the project. Results can guide timely action strategies. In this case, the study was conducted in the fourth semester of the project and some of the recommendations were first implemented in

the sixth and final semester. For most of the project, sales strategies explored or implemented were aimed, without much success, at putting the produce in non-local markets (the city of Puebla, Mexico City and Guanajuato). However, La Esperanza del Mañana realized from the results of the market research that the most suitable and economically viable strategy was to place the produce locally, in the town of Cuetzalan and in local fairs.

Make beneficiaries of the project active partners. The role and participation of beneficiaries in the different stages of a project - from planning to evaluating the project - determines, in large part, the development and impact of the initiative. The beneficiaries know the reality that affects them better than anyone else. That knowledge can be key and, along with the executing agency, appropriate solutions can be identified that are relevant and sustainable over time. La Esperanza del Mañana's Executive Director emphasized that, as a result of this project, it is important to improve communications between the agency and the beneficiaries and to promote development processes that are more participatory, inclusive and dynamic.



ROLE OF THE DIASPORA

The low incidence of laborers migrating to the United States from the region where La Esperanza del Mañana operates determined, in large part, the diaspora's involvement in the project. The executing agency sought to integrate those producers who had relatives living in the United States. Some of the producers did not wish to provide information about their families as they thought this information would be made public and that U.S. immigration authorities would find them and deport them because of their undocumented status. Others who were willing to contact their families did

not have the information needed to locate them. About 15 people living in the United States sent remittances that were invested in the production of vegetables in Mexico.

A Mexican volunteer, who lives in Canada, worked on the design of an evaluation instrument for school gardens over a period of two months. This instrument permits the evaluation of the state of school gardens and the contribution from students, teachers and technicians from La Esperanza del Mañana.



Potehtli-Pinole: a trans-migrant Indigenous community seeking economic alternatives in the XXI century market

INTRODUCTION

San Mateo Ozolco is an indigenous community located on the slopes of the Popocatepetl volcano in the municipality of San Andrés Calpan, in the State of Puebla. It has a population of 2,700 inhabitants, of whom more than half speak an indigenous language, which is primarily Nahuatl⁽¹⁾. The main sources of income are from subsistence agriculture, internal migration (mainly to the Mexico City) and migration to the United States. In 2005, the town of San Mateo had a high degree of marginalization⁽²⁾.

Migration from San Mateo to the U.S. is a relatively new phenomenon. People began to migrate significantly in the late 1980s and early 1990s. In this short time, residents estimate that between one third to half of its population is now living in the United States. The majority of migrants live in Philadelphia, Pennsylvania, and work in restaurants in these cities.

In 2004, migrants from San Mateo began to gather at a community center called La Casa de los Soles, in South Philadelphia. *Juntos*, a nongovernmental organization, worked from La Casa de los Soles. *Juntos* aims to organize Latin American immigrants to demand and create fair conditions in Philadelphia and in their countries of origin. Shortly after, the *Ozolco Group* was formed. The idea of working on a project that would benefit the community of origin and especially the young soon grew. After consulting with the community in Mexico, it was agreed that the first high school would be built in San Mateo Ozolco. The school would not only help to substantially improve the education of young people but would also “delay” their departure to the United States.

Once the high school project was finished and officially inaugurated in 2008, the *Ozolco Group* began to work on generating employment opportunities in Mexico. Driven by the then Executive Director of *Juntos*, Peter Blum, who tasted the pinole developed in San Mateo and sampled its commercial potential in Philadelphia, the group developed a project which aimed to produce organic pinole from the community of origin and sell it in Philadelphia ⁽³⁾. However it



was a long road from conceiving the idea to implementing it. On the one hand, they needed funds to finance the project and, on the other hand, an organization with experience in rural development that would be willing to operate and manage the project in Mexico. The David and Lucile Packard Foundation, Hispanics in Philanthropy and its network of local partners provided the financial resources and The Fundación Produce Puebla was selected as the implementing agency. The Fundación Produce Puebla was created in 1996, with the aim of linking the public and civil society sectors and addressed issues affecting farmers, in particular farmers who live in areas of high deprivation and poverty. *Juntos* served as the executing agency in the United States and the transnational productive project was born “Potehtli-Pinole: a trans-migrant Indigenous community seeking economic alternatives in the XXI century market.”

1 In 2010, San Mateo Ozolco had a population of 2,713 inhabitants; 52% of them spoke an indigenous language. INEGI. Population and Housing Census Bureau 2010. Main results by location (ITER).

2 CONAPO, 2005. The degree of marginalization is a summary measure comprising of four structural dimensions of social exclusion: lack of access to education, living in inadequate housing, insufficient income, and disadvantages associated with the settlement of the population in small towns. For more information please see CONAPO, 2006.

3 Pinole is a product of pre-Hispanic origin, made from roasted and ground corn. Traditionally, the corn powder is mixed with sugar, cinnamon and water and is consumed as a beverage. It is also used to make tortillas, cookies, energy bars, smoothies and homemade sweets.

OBJECTIVES

The project had two purposes: that of influencing the economic and cultural practices of the population in San Mateo Ozolco and that of offering good employment possibilities for migrants working in Philadelphia. On the one hand, it was suggested that residents of San Mateo produce and transform organic blue corn and other derivatives, and market these products in Mexico and the United States. The idea was to produce cornmeal and handmade baked goods (cookies, muffins, etc.) for the domestic market (Puebla and Mexico City), and produce pinole for the international market (Philadelphia). This strategy aimed, ultimately, at generating sources of income

FIRST STAGE

The project started in Mexico and included 21 beneficiaries. **Producers adopted three forms of agriculture: organic, mixed (a combination of organic fertilizers and chemicals) and conventional (a single chemical fertilizers and fumigants),** (4) depending on how the previous land had been used. In total, four acres were planted using organic production techniques; this included a demonstration plot and eighteen acres were planted using mixed and conventional forms of agriculture.

Workshops were offered on techniques for producing organic blue corn (organic composting, selecting and

in the community and thus constituting an alternative to migration to the United States. **Additionally, the idea was to identify, select and retain the varieties of native blue maize used in the community.** The rationale for this was the fact that the native blue maize is not only endangered, but recently it was found to contain compounds that act as antioxidants, a highly valued attribute in the food industry and in medicine. On the other hand, the project sought to empower migrants living in Philadelphia by selling pinole and that this would provide an alternative job in the United States.

improving maize seed in situ) and on establishing and operating working groups (cooperatives and other forms of associations). In addition to the workshops, the project organized two technical missions to meet successful productive initiatives and to promote the exchange of experience among producing organizations. Specifically, project participants visited the community of Tenampulco where they process corn husks to prepare tamales, and the Rancho La Noria in San Salvador el Seco, where they produce corn for the dough and tortilla industry. Both towns are located in the State of Puebla.

Potenti-Pinole: a trans-migrant Indigenous community seeking economic alternatives in the XXI century market



(4) In order for a maize field to be certified organic, it is not only necessary for the corn to be grown following a specific set of requirements, but also for all the surrounding plots of land to be certified organic.

SECOND STAGE



Potehlti-Pinole: a trans-migrant Indigenous community seeking economic alternatives in the XXI century market

The number of direct **project beneficiaries grew from 21 to 24. This group of 13 families founded Amigos de Ozolco**, a rural production company with limited liability and a variable capital. The company was registered at the Land Registry and released by the Ministry Finance. After the society was constituted, members were divided into five working committees: development of pinole, handmade food products derived from corn, use of the leaf (mainly for the production of crafts), improved seed production and production of organic corn.

During the first half of the project, The Fundación Produce Puebla commissioned a market study to understand consumption trends, distribution channels and sale of pinole in the cities of Puebla and Mexico City. The study found, contrary to what was expected, that cornmeal is not only consumed in small amounts, but has also been declining over the years. As a result, the recommendation was to develop three different pinole products - tortilla chips, tostadas and nachos - to sell in restaurants, industrial kitchens and grocery stores located in the city of Puebla.

Although the original project did not include the transformation of blue corn into industrial food products, The Fundación Produce Puebla and *Amigos de Ozolco*, decided to implement the business strategy recommended by the market study. The Fundación Produce Puebla donated the necessary resources to establish and equip a food production workshop, in particular, industrial work tables, a machine that produces up to 1,000 tortillas per hour and a baking oven. On top of this, a series of courses in industrial food production (i.e. production and food safety standardization) were conducted. At the end of 2009 (third semester of the project) the partners obtained the first crop of blue corn, 36 tons in total and the *Amigos de Ozolco* micro-industrial workshop began to operate in March 2010 (fourth semester of the project). Part of the production was used for making toast and nachos and part to develop organic cornmeal.

While this was happening, the necessary permits needed to export organic pinole to the United States were obtained. Although The Fundación Produce Puebla lacked the technical expertise and experience in this area they had to learn as they went along. There are a series of steps and requirements to comply with in order to be able to export organic pinole to the United States.

Some of the most important steps are:

I) Develop a manual for the organic production of corn (develop and apply compost and foliar fertilizers, select and conserve the maize seed, etc.) and develop a manual on the handling and processing of organic pinole corn (a detailed procedure on the preparation of pinole, including aspects of production, safety and health);

II) A detailed analysis of its composition and its shelf life. Using a sample of the product, laboratories certified by the U.S. Food and Drug Administration FDA verified that the product complies with the guidelines established by this agency. They performed a series of analyses: microbiological bromatológicos, pH, water activity and shelf life;

III) Registered the exporting company with the FDA to export products. Each product must bear a label containing a unique identification code and the nutritional analysis of the product; and iv) notified the FDA that the product would be exported, when, the means of transportation and the company who would receive and market the product in the United States.

During this stage, the community installed an automated climate monitoring station and connected it to a central database on the internet. Eight producers were trained to identify and characterize blue corn varieties and genetically

improve the seed in the field. Meanwhile, Graduate School professionals identified 10 varieties of San Mateo Ozolco blue native corn, which are stored in a germplasm bank.



THIRD STAGE

So that the production, processing and marketing of blue corn could be a viable alternative source of employment for the 13 families of *Amigos de Ozolco* and therefore contributing to reducing migration to the United States, a certain volume of sales had to be reached. A production plan, with a monthly income of MXN \$ 850 (about USD \$200), was developed for each family. Some of the measures to achieve this goal were:

- I) **The implementation of two six hour shifts with three employees per shift**
- II) **Appointing a person to manage and another for sales and customer service;**
- III) **Participate in local, regional and national fairs and exhibitions to promote and sell the products; and**
- IV) **Export pinole to Philadelphia, USA.**

In addition to increasing production and establishing profitable marketing channels, the company negotiated a grant from the State Rural Development Ministry to equip rural micro-enterprises. They acquired an industrial fryer, blender, grinder, and a refrigerator with the grant.

The company exported its first shipment of pinole to Philadelphia in February 2011. Five hundred kilograms of cornmeal stored in plastic buckets of about 3 kilos each were sent. **The cornmeal was received by the *Alianza de Maiz Azul*, a cooperative composed of members of San Mateo Ozolco and other Mexican communities** (5). *Juntos* helped the cooperative promote, disseminate and sell San Mateo Ozolco organic pinole in Philadelphia. These activities included participating in a promotion and sales booth at the annual 5 de Mayo celebration and organizing a dinner for a group of celebrity chefs and journalists in the city.

The project received two distinguished awards. ***Amigos de Ozolco* won second place in a productive projects competition “Enterprising Women”** organized by the State Rural Development Ministry. The prize was of USD \$6.800, which was invested in the company. **It was also one of three projects selected by the State of Puebla for the “Development of innovation in the food industry success stories program”.**

⁵ In the introduction, it was noted that Grupo Ozolco would be responsible for receiving and marketing the pinole. However, due to the significant delay in shipping the product from Mexico, many members became discouraged and ended up leaving the group. As a result, a new group was formed called Blue Corn Alliance.



MAIN RESULTS

Increased household income. Although the project was completed, permanent jobs in the *Amigos de Ozolco* micro-industrial workshop were not created. Members who worked in product development (toast, chips and cornmeal) received an income that varied according to the amount of hours worked per week. This income represented a share of the total income for the families who formed part of the society. Also, and as a result of the project, the income producers received from the organic blue corn increased as well as, indirectly, that of packaging manufacturers for products made by *Amigos de Ozolco*.

Formation of micro-entrepreneurs. The project facilitated the formation of micro-entrepreneurs in both Mexico and the United States. Project participants in Mexico were trained in the production of organic blue corn, in the transformation of corn products, and the marketing of these products in domestic and international markets. In the U.S., the *Alianza de Maíz Azul* cooperative were trained to import foodstuffs and in promoting and marketing them in the city of Philadelphia.

Consolidation and extension of solidarity practices and attitudes. Although they are difficult to observe, measure or attribute solely to the project, a series of intangible results were important to the executing agencies. These include the increase in income for participants in Mexico

and the number of kilograms of organic cornmeal sold in the United States. The results achieved in Philadelphia include, amongst others: the level of social awareness, in particularly in relation to economic, social, and environmental impacts of transgenic maize; the commitment to work collectively to improve living conditions in the community of origin; and the interest to recover and strengthen indigenous culture. In Mexico, the results were: increased participation in public affairs and local organizations; the re-evaluation of teamwork; and the conviction that collective work accelerates, in the long run, social change.

Conservation and enhancement of in situ blue corn seed. The San Mateo Ozolco producers were trained in identifying and selecting in situ blue corn seed. Producers identified and documented improvements in three cases: in the plant, in the cob, and in the seed. Following a set of criteria, they selected and improved the genetic material of the corn. As a result, when the project ended they had 10 varieties that could be registered with the Servicio Nacional de Inspección y Certificación de Semillas at the end of the Spring-Summer 2011 cycle. Once the seeds are registered, they will be able to market them, some of which are noted for their high content of blue pigment and for their high yield of flour.

MAIN CHALLENGES

Technical capacity to export / import foodstuffs to the United States. The procedure to export organic pinole to Philadelphia takes about eight months. Reasons for the delay include: the number of procedures and permits required in Mexico and the United States, communication issues between *Amigos de Ozolco* and *Alianza de Maíz Azul*, and La Fundación Produce Puebla's lack of technical

expertise in Mexico and that of Juntos in the States. As a result, organic cornmeal was only exported / imported for the first time during the sixth semester of the project. This delay caused frustration and discouragement among the project participants, particularly among residents of Philadelphia who were unaware of what was being achieved in Mexico to export the product.

⁶ This training was offered to both project participants and, through a series of community demonstrations, to all residents in the region.

Scale of the proposed initiative. Although the project provided training workshops and business management training, coordinators from both the Mexico and American implementing agencies stated that operating a transnational company was a huge challenge. This was due to the fact participants had to acquire new knowledge, as well as having to acquire a set of social skills to move and interact successfully with representatives in both the public and private sectors. Therefore, the transition from corn subsistence farmer or housewife with no previous experience in the labor market to being a member of a processed corn exporter or from being a migrant to an importer and trader of food in America, would seem hard to do without the help of an external body.

Characteristics and duration of projects. Another important aspect to consider when implementing a project is the time needed for the investment to mature, in other words, the time between investing and obtaining a profit. Added to this is the risk associated with a new activity. Many people refrain from starting a business because they are unable to invest time and capital without receiving remuneration for long periods of time. In this case, and during the first two years, members of *Amigos de Ozolco* received a low or no income. This long wait discouraged a few in the group, putting at risk the success of the project.



LESSONS LEARNED

Technical expertise of implementing agencies. The implementing agencies had no experience in import-export of U.S. food products. Instead of gaining that experience, an alternative would have been to outsource that component of the project and enter into agreements with, for example, export organizations which operate under the fair trade scheme. The implementing agencies would therefore have avoided allocating substantial human and financial resources to develop areas of work which are low priority.

Training of micro-entrepreneurs. Coordinators of the projects in Mexico and the United States emphasized the importance of providing training in the areas of management and operation of micro-enterprises. In addition to teaching workshops and courses, they noted the importance of incorporating non-conventional forms of education such as the transfer of knowledge and experiences among peers. The Fundación Produce Puebla organized several trips for project beneficiaries to have the opportunity to meet similar successful productive initiatives and to exchange experiences with those responsible. The participants stressed that the

exchange visits were extremely useful and enlightening. Another unconventional way of teaching would have been working with small business owners who were willing to share their successes and mistakes with future entrepreneurs. Having such a group of entrepreneurs would have been an invaluable source of support and inspiration for participants in the productive project.

Communication between the parties responsible for the project. The key to operating a transnational project is regular communication between the parties involved. Although this undoubtedly requires a substantial investment in time, maintaining weekly or biweekly meetings between representatives of a project, it can avoid problems caused by lack of information or lack of agreement between the parties. There were four organizations directly involved in the operation of this project: The Fundación Produce Puebla, *Amigos de Ozolco* (in Mexico), *Juntos* and *Alianza de Maiz Azul* (in the United States). It would have been very beneficial to have a communication infrastructure set up at the beginning of the project.

ROLE OF THE DIASPORA

Migrants from San Mateo Ozolco had a role in the design and implementation of the project in Philadelphia. Upon receipt of the pinole, members of the cooperative *Alianza de Maiz Azul* agreed that each partner had to sell the product in a particular geographical area within the city and what was received in the first year would go into a mutual fund.

There are three interesting aspects to highlight in relation to diaspora involvement in this project. **Firstly, unlike most cases where migrants, usually through hometown associations, contribute to the development of their home community by donating financial resources (collective remittances), this project cooperative partnered with *Alianza de Maiz Azul* who contributed time and capital to acquire and market pinole from San**

Mateo Ozolco in Philadelphia. (7) Secondly, even when taking into account an expected increase in pinole sales in the coming years, the expectation was that this activity would contribute to improving, not replacing, the income of migrants in the United States. Finally, when designing a development project where the diaspora will play a key role, it is important to take into account the structure, location and density of the social network of migrants in the United States. In this case, since the vast majority of San Mateo migrants worked in restaurants, members of the cooperative used social networks they had in the workplace to introduce and promote pinole in Philadelphia. It is worth noting that when proposing a new activity, the closer and more compatible with migrant activities in the United States, the greater its degree of acceptance and incidence within the population.

Potehtli-Pinole: a trans-migrant Indigenous community seeking economic alternatives in the XXI century market



Ingredientes para la masa

| Masa | | |
|------------------|----|-----|
| Harina de trigo | Kg | 500 |
| Pinole | Kg | 250 |
| Pulque (Necutli) | L | 650 |

Procedimiento

1. Mezclar el pinole con la harina de trigo e ir agregando poco a poco el pulque hasta obtener una masa suave y no pegajosa. Amasar por 10 minutos a mano y dejar reposar la masa en forma de bola por 30 minutos tapada con plástico o un trapo de cocina.
2. Amasar de nuevo por otros 10 minutos y dividir en 3 partes. Dejar reposar otros 30 minutos en forma de bola y cubrir.
3. Aplanar y estirar la masa con la mano hasta obtener una mini pizza con un grosor de medio centímetro.
4. La masa puede mantenerse congelada hasta una semana.



7 It is important to mention that the costs of transportation of the first shipment of cornmeal to the United States was covered by the project, which allowed the product to be purchased below its actual cost.



New groups incorporated into
the Sierra Negra Ecological Society of Indigenous Producers

INTRODUCTION

Tonanantlali is a civil association that seeks to improve the living conditions of the inhabitants in the Sierra Negra in the State of Puebla. This region has a high concentration of indigenous people living in conditions of great poverty and marginalization.

Tonanantlali

- I) Facilitates participatory planning processes,
- II) Promotes teamwork, and
- III) Trains the population in technical (organic production, construction of terraces to control soil erosion, etc.) and human areas (teamwork, gender equality, etc.).

The main productive activities in the area are the cultivation of coffee, growing canary chili, and rearing sheep. The agency, which is located in the city of Tehuacan, Puebla, was legally constituted in March 2007; however, most of the staff began working around 2003.

The staff currently part of Tonanantlali had an instrumental role in creating the *Sierra Negra Ecological Society of Indigenous*

Producers. This society is composed of organizations of producers and aims to collect organic parchment coffee from its members. In 2008, the Society had 303 producer members grouped in 19 organizations of producers from 16 communities in four districts: Coyomeapan, Eloxochitlán, San Sebastian Tlacotepec and Zoquitlan. The Society of Producers sells all the stockpiled organic coffee to the National Network of Sustainable Coffee Organizations A.C. (Red Nacional de Organizaciones Cafetaleras Sustentables A.C. (REDCAFES)), which operates under the fair trade system and sells coffee primarily in Europe.

The project developed by Tonanantlali, and funded by the Packard Foundation, Hispanics in Philanthropy (HIP) and its network of local partners, intended to incorporate new groups of producers into the *Sierra Negra Ecological Society of Indigenous Producers*. In particular, the agency worked with farmers in the municipalities of Coyomeapan, Eloxochitlán and San Sebastian Tlacotepec, located in the northeastern State of Puebla. According to the National Population Council these three municipalities had a very high level of marginalization in 2005 (CONAPO, 2005) (8).



Coffee production in this microregion is characterized by a low yield per hectare, low quality and low price. The vast majority of producers, who have on average a hectare of coffee, sell coffee cherries, ie the coffee cut directly from the plant. Since they are unable to process it, its price is substantially lower than that of parchment coffee. Parchment coffee, the second link in the chain, is coffee that has been pulped and dried. Therefore, in order to increase the income for the inhabitants of these three municipalities, the project aimed to train, associate, and integrate new producer groups to the Society of Producers of parchment coffee and fair trade organic operating in the area.

FIRST STAGE

OBJECTIVES:

- I) Substantially improve the income of coffee producers from the three municipalities of the Sierra Negra de Puebla,
- II) Increase the number of organic parchment coffee producers in those municipalities, and
- III) Increase the number of members of the *Sierra Negra Ecological Society of Indigenous Producers*.



8 The degree of marginalization is a summary measure comprising of four structural dimensions of social exclusion: lack of access to education, living in inadequate housing, insufficient monetary revenue and disadvantages associated with the settlement of the population in small towns. For more information see CONAPO, 2006.

The project began with 12 working groups in 12 communities located in the municipalities of Coyomeapan, Eloxochitlán, and San Sebastian Tlacotepec, in the northeastern State of Puebla. Each working group consisted, on average, of 15 members. Altogether, 183 farmers joined the project, of which 96 were women and 87 men. Tonanantlali had estimated, according to a survey previously done in the area, that the number of beneficiaries would be substantially higher: about 300 producers. Over the course of the project (six semesters in total), the number grew to 202 participants (108 women and 94 men).

Training workshops were held to:

- I) Form groups of producers;
- II) Teamwork
- III) Requirements to enter the *Sierra Negra Ecological Society of Indigenous Producers*, and
- IV) Quality of coffee.

SECOND STAGE

Certified organic coffee is a process that takes three years, and is obtained when the *Certificadora Mexicana de Productos y Procesos Ecologicos* (CERTIMEX) (the Mexican Certification of Ecological Products and Processes), a civil association guaranteed by international organizations, finds that production from a number of plots is free of chemicals and inorganic material. To be able to obtain such a certification, Tonanantlali offered two types of training: one general and one specialized. The first was to inform producers of the rules governing organic production and to provide technical advice on how to implement them. The second was to train a small group of producers that would act as internal inspectors. Internal inspectors are responsible for travelling to the plots to be certified, to report compliance / noncompliance of the rules and prepare a report for each area evaluated (they must fill out an eight page questionnaire) (9). The material is then drawn up into a comprehensive report and sent to CERTIMEX to request an external inspection. CERTIMEX sends an appraiser to inspect the plots to be certified and, if no recommendation is given, the producer group receives a favorable opinion at the end of the month (10).

Once the first certificate is obtained, the same verification procedure must be performed for three consecutive years. After that period, CERTIMEX issues a proof of “organic farmer” to each one of the owners of the plots. The certificate must be obtained each year before the coffee harvest which,

Workshops on coffee quality covered two main aspects: coffee farm management, including the renewing of coffee plants so that they become highly productive, and coffee processing (wet and dry milling). The workshops were taught mostly by external consultants.

Additionally, Tonanantlali organized a technological exchange trip to the State of Veracruz. Seventy-six representatives from the 12 farming groups and members from the Producers Association shared their experiences and knowledge with members from the United Producers from the Ocozaca Mountain. Producers from the Sierra Negra had the opportunity to visit a successful organic coffee management organization and learnt techniques on how to improve wet and dry milling and how to become familiar with strategies to diversify the family income.

in the region of Puebla, begins between November and February, depending on the altitude and the climate.

At the end of the project, 140 hectares were in various stages of certification.



9 To avoid conflict of interest, producers trained as internal inspectors oversee other communities that are not their own.

10 After reviewing the provided documentation, the external evaluator samples the plots to be certified; he goes and inspects the selected plots.

THIRD STAGE

The transformation process of coffee cherries to parchment coffee is done via what is called “the wet mill” followed by another called “the dry mill”. The wet process involves four steps. The process begins with the coffee cherries being washed. The next step is known as “pulping” and consists of extracting the coffee bean mucilage, which is the shell or the sapwood. Currently this step is done mechanically, using pulping. Once the seeds are obtained, they are placed in fermentation tanks where they are allowed to stand in water for a period of 24 to 48 hours, depending on the altitude and the climate. At higher altitudes, where the climate tends to be cooler and more humid, the fermentation takes longer. The last two steps are to wash the coffee a second time and then a third and final time. Given that water has a central role in the project and due to the lack of water storage systems in the region, Tonantlali negotiated with the *Secretaría de Agricultura, Ganadería, Desarrollo Rural, Pesca y Alimentación* (SAGARPA) (the Ministry of Agriculture, Livestock, Rural Development, Fisheries and Food) and with the *Secretaría de Desarrollo Rural del Estado de Puebla*

(SEDESOL) (the Ministry of Rural Development of the State of Puebla) economic subsidies to store rain water for productive purposes. As a result, producers acquired ferrocement tanks of approximately 20,000 liters. Furthermore, with resources from SAGARPA, the Federal Ministry of Rural Development (SEDESOL) and the producers themselves they acquired pulping machines (11).

Before the Tonantlali project started in the Sierra Negra region, producers dried coffee in bags, mats (a type of carpet made of palm) or directly on the ground. This practice is not only very slow and dependent on good weather, but the dried product has a substantially lower value in the market. Therefore, in order to improve dry mill skills, the executing agency arranged for the families of the 12 communities involved in the project to have drying patios or solar dryers. Packard Foundation, HIP and its network of local partners contributed funds to the construction of solar dryers (12).



FOURTH STAGE

Once the parchment coffee is dry, it is bagged in sacks. The aim of this project was for producers to deliver it to the *Sierra Negra Ecological Society of Indigenous Producers*. However, since the Producers Association markets its member’s output through REDCAFE, under the fair trade scheme, to join the Association new producer groups must obtain (in addition to being certified organic) the fair trade certification. To obtain the fair trade certification, each group must form a partnership that operates according to democratic, transparent and fair principles. The

partnership must be legally constituted and registered with the Public Registry of Property and Commerce.

Although the 12 producer groups involved in the project were established and began working at the same time, they reached very different results at the end of the three years. Of the total number of beneficiaries participating in the project, only 108 producers (54% of total) initiated the process of organic certification. Of the 108 producers, 69 (belonging to four

11 AGARPA resources were obtained through the program “Activos Productivos”, the federal government contributed 85% and the producers 15% of the value of the labor equipment. The value of a power pulper in the region ranged between USD \$590 and USD\$ 680. SEDESOL resources were obtained through an agreement between the State and the producers, by which the government provides seed capital to producers. After a pre-set time producers who “returned” the money can re-invest to improve or expand their productive activities.

12 The drying patio consists of a fabric floor on which the coffee dries outdoors. The solar dryer is a greenhouse in which tables of steel or openwork screens are constructed high above the floor. Hot air (due to the greenhouse effect) then circulates through the tables and dries the coffee beans, accelerating the drying process at more than 50% compared to the drying patio. An additional advantage to using a solar dryer is that the coffee never touches the floor.

communities) were in stage T0 (the first year the certification process) and 39 (belonging to three communities) in stage T1 (second year in the certification process). While the 108 producers were part of the Producers Association, only those who were in stage T1 and marketed coffee could collect through REDCAFES (13). In May 2011, a kilo of certified organic coffee marketed through REDCAFES reached a maximum price in the region of USD \$5.27, compared with USD \$3.82 for the same type of coffee sold by other means. A kilo of parchment coffee, non-organic or traditional, paid about USD \$2.36 a kilo.

Finally, the Producers Association began working on expanding and selling roast and ground coffee. To achieve this producers

MAIN RESULTS

Capacity building. More than 200 farmers were trained to produce organic coffee and to improve the processing of coffee cherries to parchment coffee. This way the product not only obtains a better price in the market but is also environmentally sustainable. Particularly, producers who participated in the project received training to improve the quality of production, to apply good practices in the field and the beneficiary, and to obtain organic certification for their plots.

Substantial increase of equity and income for producers. When the project began, the hectare of coffee cultivated in the traditional way was worth between USD \$2,700 and USD \$3,200. At the end of the project, the same hectare worked on and in the process of obtaining organic certification was worth around USD \$5,500. Producers who changed or adjusted their farming practices to organic certification, which was about half of the participants, almost doubled the value of their assets in less than three years. Additionally, they significantly increased their income. Although not all the producers marketed their organic parchment coffee through REDCAFES, under the fair trade scheme, as a result of the skills acquired through the project the vast majority improved the quality and increased the yield per hectare and therefore increased their income.

Strategies to adopt long-term investments. The transition from traditional to organic coffee is a long term investment for many producers and difficult to reconcile with short-term needs. To facilitate the transition to organic coffee and compensate the temporary reduction in income, Tonanantlali implemented two key strategies. On the one hand, it proposed that the renovation

received support to:

- i) Design a logo for the coffee;
- ii) Register the trademark “Cafen Nindu”;
- iii) Manage a unique identification bar code and iv) design packaging and product presentation.

On the other hand, Tonanantlali requested resources from SAGARPA to acquire a parchment coffee selector, a blender, a toaster, a sealer, a mill and a packaging plant. The idea was to start producing roasted and ground coffee during the summer of 2011 and then place it in the local and regional markets.



of coffee plantations be done in steps (from 100 to 200 plants per year). And, on the other hand, it identified productive alternatives that complemented family income. Therefore, high up in the mountains, palma camedor, which is used for making ornaments, was cultivated, and in the lower areas, bananas were grown. Both crops have a short maturity cycle, they are produced in a year, and in a regional market.

Successful management of additional resources to the project. Throughout the project Tonanantlali managed, with various government agencies, financial subsidies to equip producers with ferrocement tanks, pulping, drying yards and solar dryers and for the Producers Association machinery necessary to roast and grind coffee. These resources not only helped achieve the project's objectives but also had a great impact on improving the lives of the families of the producers of the Sierra Negra.

13 Of the seven groups that participated in the Society's meetings in late 2010, two groups were listeners and five were active partners.

MAJOR CHALLENGES

Producers' expectations of the processes of social development. Tonanantlali 's main problem when implementing the project was to increase the number of beneficiaries. Initially the agency had proposed to work with 324 farmers, instead of the 202 who eventually joined the project. Many producers expressed their interest in participating but then "dropped out" due to the fact that they expected to receive direct financial support. Indeed, when producers learned that the project's main objective was to impart training to improve production techniques and processing

of coffee, and that the results would be obtained in the medium term, many lost interest and decided not to participate. According to Tonanantlali coordinator, Maximino Meza Espejo, producers expected this due to the fact, the government, during many years, brought together producers in the region and allocated resources without a long-term strategy or any control over the use of them. It was difficult in some cases and impossible in others to try to change the way they worked and to convince producers of the benefits of the project.

LESSONS LEARNED

Improve the dissemination and promotion of a project. The proposal to increase the number of producers of certified organic coffee and integrate the *Sierra Negra Ecological Society of Indigenous Producers*, which was running successfully in the region under the fair trade scheme, had many potential benefits for the participants; however, the executing agency underestimated the importance of informing, disseminating, and comprehensively promoting the proposal. It was important to have adequate and sufficient information because the proposal involved a major shift in production practices and processing

of coffee (from traditional to organic) and how to work (from individual to group). One strategy to improve this critical aspect for any project is to allocate more resources and staff time to visit different communities and present the proposal at a series of briefings. In the case of ongoing projects where they seek to expand the number of beneficiaries, it would be important to invite people who are already part of the project to share their experiences. Therefore, potential beneficiaries would have the invaluable perspective of their peers.

ROLE OF THE DIASPORA

The low incidence of labor migration to the United States in the region where Tonanantlali operates determined, in large part, the low participation of the diaspora in the project. The role of the diaspora consisted of remittances which were used to purchase pulping machines for community use.



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The total project was of USD \$101.280

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Potehtli-Pinole: a trans-migrant Indigenous community seeking economic alternatives in the XXI century market

The project was operated by two implementing agencies: Juntos in the USA, and La Fundación Produce Puebla in Mexico.

The total project implemented by La Fundación Produce Puebla in Mexico was USD \$ 123.306

The total project implemented by Juntos in the United States was USD \$ 97.160

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