



MEXICAN RED CROSS CASE STUDY “CLOSER TO THE PEOPLE”

A case study of longitudinal investments in National Society Development and localization of humanitarian action



Background

In 2016 the World Humanitarian Summit's Grand Bargain Commitments led to the establishment of a "Localisation Workstream" which set out to "learn from successful localisation practices around the world". Its main goal was to find new ways of expanding the "localization of humanitarian action" through processes that:

- Strengthen locally-led, accountable and principled humanitarian action
- Reset the power balances between local and international actors that empower local humanitarian actors to lead and deliver relevant, sustainable local services
- Use a more strategic blend of local to international resources to create efficiencies, speed of response, and promote more effective local collaborations for collective impact.

This Case Study was commissioned by the International Federation of Red Cross and Red Crescent Societies (IFRC) as a contribution to the Grand Bargain "Localisation Workstream's" learning objectives.

It describes the outcomes of longitudinal investments and inspiring practices in National Society Development in the Kenyan Red Cross Society that strengthen:

- The evidence base for the effectiveness of investment in local capacity
- Learning on methods for building the sustainable characteristics of local humanitarian actors to increase the reach and effectiveness of global humanitarian action
- The local humanitarian system's capacity to prepare for and respond to local, national and regional disasters and crises based on risk communication and community engagement
- Local, inclusive emergency response systems that leave no one behind, and business models that sustain them
- Evidence that investment increases the timeliness and effectiveness of response
- Delivery of humanitarian impact "in a manner that is as local as possible and only as international as necessary"
- Learning on innovative approaches to organisational development, capacity strengthening, and mutual sharing of peer expertise and resources.

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1. Introduction

“Previously, when you referred to the Mexican Red Cross, people automatically only knew it only for its national ambulance, health, and disaster relief services. We needed to design a strategy that was relevant to the needs of the communities. We needed actors, donors and allies who understood that strengthening our institution from within was our key strategy to better support the communities”.
 José Antonio Monroy, Secretary General of the MRC

The Mexican Red Cross’s (MRC) has a strong auxiliary role, framed within its Presidential Decree and the National Civil Defense Plan. Its impressive range of physical infrastructure including hospitals, training institutes and disaster response warehouses are supplemented by its large number of specialist teams trained in disaster response and pre-hospitalization health care located across the territory.

Its “National Society Development” (NSD) investments over the years have had a direct impact on services that have assisted a continuously expanding number of vulnerable people each year. MRC’s NSD investments in strong data gathering, analysis and transparent reporting systems have enabled it to demonstrate a comparison of numbers of people reached in 2013 compared with 2020, showing how certain services reached a consistently high number of people annually, while new services were added to respond to new needs across the country, as a result of MRC’s transformation process over these years.

Organizational strengths	2013	2020
Number of members and volunteers	44,684	45,593
Trained paramedics	12,153	12,141
Number of youth	9,820	36,261 trained in culture of peace and co-existence
Specialist disaster responder	350	2301 222 USAR (Urban Search and Rescue) specialists 482 accident prevention trainers
People reached		
Disaster response	699,722 families	4,869,356 direct + indirect 4266 in risk management 5,320 EQ resilience 833 flood resilience
Health and social services	5,763,972	4,579,995 Plus 268,700 COVID-19 beneficiaries including 28,157 migrants 8778 migrants 18,135 psychosocial support 85,614 watsan and hygiene
Ambulance services	1,318,176	1,129,098
Disaster response supplies (fluctuate each year with the number and scale of disasters)	8,397,000 kilos	175,993 kilos (customized according to the profile of disaster needs of each year)

Faced with increasing numbers of disasters and emergencies, often affecting communities in very isolated areas, MRC’s new senior governance and management team from 2012 onwards realized the limitations of a “response only” strategy and the need to equip communities themselves with the capacities to predict and mitigate risks, be prepared for immediate response, and reduce the loss of lives and livelihoods through their own actions.

This vision of being “closer to communities” required a “whole of organization approach” to build a new vision, a new modernized range of services, a new Branch development approach in its 32 Provincial and over 500 local Branches, and a new local sustainability model. It also needed new partners locally and internationally to assist in its longitudinal, planned, phased transformation process who could assist with both organizational development support to re-evaluate and refocus its local structures and human resources, but also with new approaches to resilience strengthening of communities.

Recognizing gaps in public humanitarian service provision that left many isolated communities across the territory vulnerable to increasing hazards, risks and new social issues such as violence and migration in their lives, required a transformation process that reconceptualized a new role for Branches in their communities. This would need sustained NSD investments in engaging and consulting with communities; Branch empowerment, diversified member, volunteer and youth mobilization; and new local partnerships.

In alignment with the Grand Bargain Localisation Workstream’s learning agenda, this case study documents MRC’s journey towards further “localization of humanitarian action” through its own locally-led initiatives and resources, and also with the timely support of selected partners to its multi-dimensional change process over 3 consecutive Strategic Plans between 2011-2021. In this context, it describes three specific approaches to “localization” in the Mexican context:

- ⇒ **Localization of multi-institutional partnerships for change** – by blending IFRC and International Red Cross Red Crescent NSD and programme development tools and support with those from local institutions to frame organizational and service reform agendas in a deeply local Mexican context.
- ⇒ **Localization of humanitarian preparedness and response capacities within communities** – by intensifying NSD investments in Branch revitalization; MRC community “brigades” as a permanent presence in their own communities; and local resource mobilization capacities to sustain local services.
- ⇒ **Localization of international corporate humanitarian partnerships** – by piloting, implementing, and learning from as well as contributing to local to global learning with innovative partnerships on issues such as the Zurich Flood Resilience Alliance Programme (2018-2024), the Community Earthquake Resilience Programme with the American and Canadian Red Cross (2018 onwards), and the Community Preparedness Programme with Land Rover from 2017.



2. Scoping the agenda for change

Since its foundation in 1910, MRC had built an impressive range of physical assets and institutions to deliver its well-defined auxiliary roles in disaster response and pre-hospitalization health care. As an integrated part of the national Civil Defense Plan it has played key roles in strengthening national capacities to respond to crises through its:

- ⇒ 32 hospitals
- ⇒ 21 nursing schools
- ⇒ 3 state training and education centres
- ⇒ 146 training facilities for medical emergency technicians
- ⇒ 1 national disaster warehouse
- ⇒ 1 national trauma centre
- ⇒ 1 anti-cancer centre
- ⇒ 9 blood donation centres.

Through its medical training facilities MRC has contributed trained personnel both to its own as well as national health service institutions. Each year it contributes an average of 3,200 trained doctors and nurses, 15,600 emergency paramedics, 2,300 disaster responders, and 222 Urban Search and Rescue specialists.

However, a rapidly changing humanitarian landscape in Mexico demanded a fresh approach to empowering scattered communities to be better first responders to increasing numbers of natural hazards, risks and climate-induced disasters such as hurricanes, cyclones, floods, landslides, droughts, and forest fires. Two thirds of the country also suffer from significant seismic risk.

The combination of these factors has left eight out of ten Mexicans in a situation of poverty or vulnerability¹ due to deficiencies in access to household income, education, health services, social security, quality of housing, food, and social cohesion. These in turn led to higher risks in emergencies and disasters, increases in diseases and accidents, and other social problems such as stigma, discrimination and violence. The challenging reality of multiple vulnerabilities in people's lives required local solutions, and holistic community responses.

Set against a backdrop where 90 million people live in risk areas, of whom approximately 70% live in urban areas, 20.5% in rural areas, and 9.5% in semi-urban areas, MRC was challenged to conceive of ways in which its country-wide network of 32 State and more than 500 local Branches could assist communities to identify risks, mitigate against them, and build early warning systems and permanently localised response capacities that saved lives.



1 Statistics quoted by the Mexican Council National Evaluation of Development Policy (CONEVAL)

3. Defining a “localization of humanitarian action” niche for MRC’s Branches

The increasing hazard, risk and vulnerability profiles of the country required new approaches to “localization” of services, partnerships, internal capacities to manage change, and locally empowered structures.

MRC had made significant investments in NSD between 1995-2001. Its first comprehensive “Strategic Plan for Institutional Development 1995-2001” which fed into its subsequent “Institutional Master Plan 2001-2011” laid the groundwork in areas such as Statutes reform; updating operational, programmatic and financial aspects; and aligning these further to IFRC’s and the Red Cross Red Crescent Movement’s global standards. However, the focus of this phase of NSD had been largely HQ-focused.

As a result, MRC’s new leadership from 2012 onwards recognized that the next phase of NSD investments would have to focus on Branches, whose traditional charity-focused activities remained largely autonomous, and lacked coordination and cohesion between all levels.

To change the organizational culture of “top down” planning, Branches would need to develop capacities to participate in a “bottom up” reassessment of the hazards, risks and vulnerabilities in their areas. They needed to prioritise the most vulnerable, while avoiding duplication of services provided by other humanitarian stakeholders. To refine and modernize its purpose further, MRC undertook its Strategic Planning process in 2014/5 which included an external environment analysis to identify how it could address and work in localized humanitarian service gaps. Its findings emphasized clear added value roles that it could play in:

- ⇒ focusing on reaching localities with fewer than 2000 inhabitants, and/or socially marginalized people and communities whom government civil protection mechanisms had limited options to reach;
- ⇒ strengthening links between civil society and civil protection mechanisms;
- ⇒ moving beyond emergency care and response to strengthening community capacities to identify and manage risks and climate-sensitive adaptations, building local preparedness, establishing early warning systems and response capabilities;
- ⇒ promoting the Movement’s Fundamental Principles and humanitarian values to contribute to violence mitigation, social cohesion and peace;
- ⇒ social mobilization and public communications campaigns to reduce vulnerability to disasters, enhance social responsibility and well-being, and form civil protection cadres at the community level;
- ⇒ improving sharing of hazard, risk, vulnerability or climate change data across research centres or institutions engaged in civil protection;
- ⇒ addressing the lack of dissemination on risk management in schools and educational institutions.

These findings gave a clear indication of the new high impact roles that Branches could also play in communities. Specifically, it helped to set the NSD agenda to build Branches’ capacities to:

- ⇒ engage new community and institutional stakeholders;
- ⇒ update participatory vulnerability and risk assessments across the country;
- ⇒ strengthen local plans to transfer the roles of the first responder in disasters to communities with better local preparedness and response capacities;
- ⇒ identify relevant local services that would leave communities stronger, better prepared for climate-smart adaptability, and more socially inclusive and peaceful;
- ⇒ strengthen the long-term sustainability of local services delivered.

To achieve these transformational objectives, MRC needed partners who could both support its internal change processes, as well as strengthen its community resilience approaches.

4. Consolidating community voices in governance to strengthen MRC Policy and service development

In order to strengthen the influence that community voices could have over its policy making, MRC made NSD investments in amending its Statutes to introduce further democratization, decentralization, and participation of local community members, volunteers and youth in its policy making. Its Statutes development, carried out in consultation with the global IFRC and ICRC Joint Statutes Commission in Geneva, further “sensitized” MRC to the voices and needs of communities it serves by:

- ⇒ expanding State Branch representation in the National Board;
- ⇒ expanding local Branch representation on their respective State Boards;
- ⇒ introducing rotation terms of elected governance at State, local Branch, and national levels to regularly refresh consciously diverse and accountable leadership;
- ⇒ conferring greater responsibility on Branch governance and management to contribute to the development of national plans, and thereafter implement and report on locally developed plans to deliver national priorities in contextualized environments;
- ⇒ giving more power to the National Board in designing and implementing Strategies (overcoming the earlier autonomy of Branches);
- ⇒ giving clearer roles to the Secretary-General to manage the implementation and enhanced monitoring of national Rules and Regulations.

To build on these strong new elements in its governance, and further strengthen public trust, confidence, acceptance and access in all communities, MRC’s NSD initiatives continued to emphasize its transparent, trustworthy, and diversity-sensitive nature to make it an organization that everyone would want to join. The amendments to its Statutes were the first step in a Branch revitalization process that ensured:

- ⇒ strengthened internal understanding of refreshed humanitarian mandates;
- ⇒ consistent humanitarian and organizational values at all levels;
- ⇒ clear participatory roles of all internal stakeholders in planning, policy development, monitoring and compliance processes;
- ⇒ reinforced transparency and inter-related roles expected in internal stakeholders at all levels;
- ⇒ institutionalizing of new organizational systems and protocols to strengthen integrity, risk management, and efficiency at all levels, including the establishment of an Ethics Committee to monitor the functioning of all levels;
- ⇒ strengthened due diligence systems including three levels of auditing – internal MRC audit, Government audit, and appointment of external third-party auditors such as KPMG at the national level, and national and local auditors at State and local Branch levels.

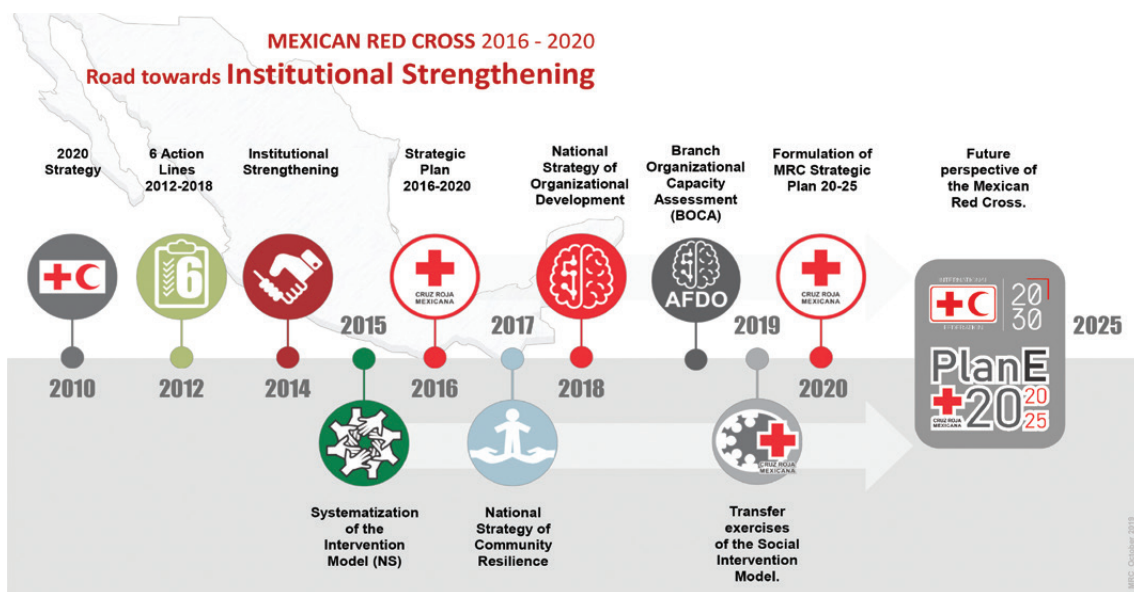


5. The management of MRC's localization process through cumulative Strategic Plans

(i) Alignment with IFRC Strategies

MRC's new leadership from 2012 onwards aimed at a stronger alignment of its Strategic Plans to IFRC's "Strategy 2020" and subsequently "Strategy 2030", both of which prioritised the strengthening of community resilience. IFRC's Strategies formed the backdrop of MRC's sustained long-term NSD investments to implement the new vision of "localization" over 3 phases, each of which faced its distinct challenges requiring specific solutions.

The following diagram shows MRC's systematic, longitudinal approach to participatory organizational analysis, development of new skills and competencies, strengthening of local structures. The aim was to identify needs-based services, all of which prepared communities to be first responders in disasters and crises while building community resilience.



(ii) The 3 phases of MRC's transformation – a pathway to safer, more prepared and resilient communities

Phase 1
MRC's "Strategy 2012-2015"
Strengthening the organization and introducing a community resilience focus

Refreshed MRC's Vision, Mission, humanitarian and organizational values. It articulated 6 new "Action Lines/Priorities" in the areas of prevention, fundraising, technological innovation, training, and environmental awareness, with national Policies and Strategic Guidelines for their implementation across its 32 State and 550 local level Branches.

To implement its "Strategy 2012-2015" MRC's senior leadership decided to develop partnerships with two localized Mexican resource agencies:

Collaboration with a Mexican resilience-focused organization specializing in contextualized perspectives on resilience strengthening in the Mexican context, enabling MRC to also test, design and replicate some local pioneering community resilience building initiatives. This also enabled MRC to contribute practical experiences together with other National Societies to the development of IFRC's "Resilience Framework", eventually published in 2016.

Local strategic partnership with “Nacional Monte de Piedad IAP”, a Mexican organization specializing in organizational development advice, support and joint analysis.

“We wanted external organizational analysis assistance to study lessons learned, to both improve the implementation of our existing Strategy, but also to lay the foundations for MRC’s forthcoming “Strategy 2016-2020”. We wanted our internal and external stakeholders, donors, and allies to understand that the purpose of strengthening our institution from the inside was to accompany communities better, and align Branches in a closer way with their communities” José Antonio Monroy, MRC Secretary General

Although MRC’s senior leadership had explored using the IFRC’s OCAC process and tool to analyze its capacities and gaps, the process was found to be lacking in the way it limits the diversity and number of internal stakeholders in the organizational self-diagnosis stage.

“Mexico is like 3 countries in one, with significant regional differences. We needed the active involvement of a much wider number of stakeholders that the OCAC² process could offer us, as the OCAC process recommends a limited number of 15-19 participants. We wanted to ensure that we develop one national Strategy that makes sense for a new era of MRC, is relevant to changing needs, but customizable to all regions” MRC National Special Projects Manager

The early investments made in “Strategy 2012-2015” brought swift recognition and enhanced positive public positioning. In 2015 MRC’s investments in volunteering and youth mobilization were recognized when it won the National Award for Voluntary Action and Solidarity. As part of its commitment to invest in more diversified volunteers and reward and recognize volunteer action, it had started to count the number of volunteer hours and give them a financial value. In 2015 alone 1,909,421 hours of volunteer work were counted. By 2018 the number of volunteer hours had risen to 3,112,785 with a financial value of \$50,347,791.



2 As a comprehensive assessment, OCAC not only provide an understanding of a NS capacity and performance in all the areas of work, but also of the relationships between those different elements to better manage organisational change, efficiency and effectiveness.

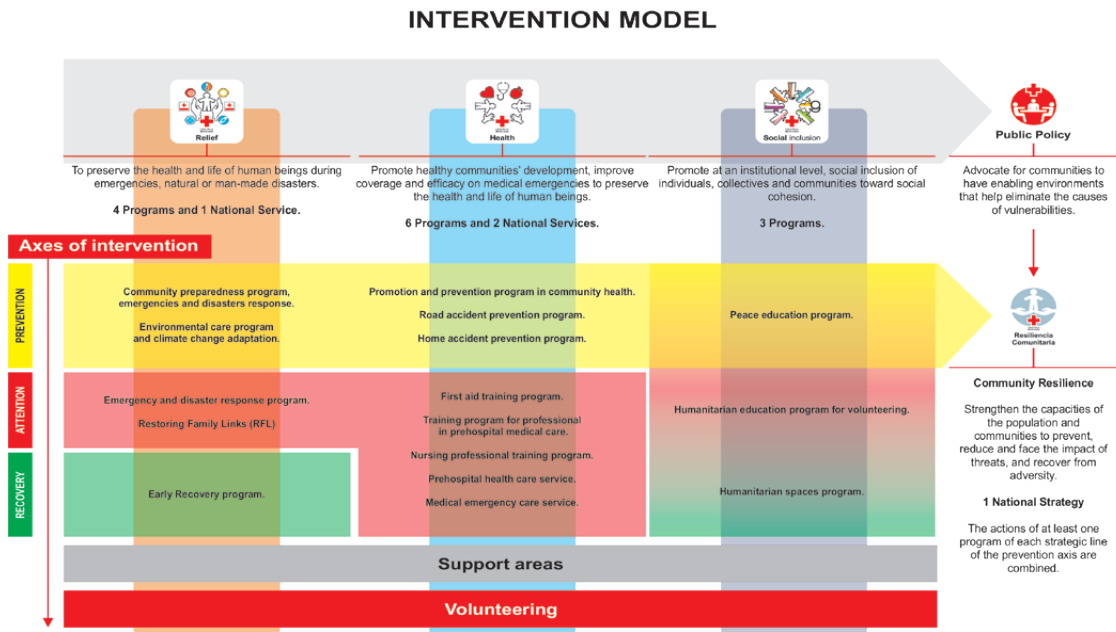
Inspired by these outcomes, and following the Fundamental Principles which guide National Societies to prioritise assistance to communities which no other institutions can reach, MRC intensified its NSD investments to transition into new local services by:

- ⇒ finding ways to better engage and empower communities;
- ⇒ expanding its principled base of local volunteers and empowering them to promote more locally-led humanitarian action in their communities;
- ⇒ and broadening its humanitarian services to locations where indigenous communities, socially marginalized and excluded groups such as migrants, and those internally displaced by disasters or violence lived.

Phase 2
“Strategy 2016-2020”
Refreshing humanitarian priorities

Prioritized 3 strategic lines - Relief, Health and Social Inclusion, in clearer alignment with IFRC’s “Strategy 2020”. These were to be implemented through three transversal axes across each humanitarian line - to improve quality in Prevention, Assistance, and Recovery, framed as the “Intervention Model”.

In 2017, by emphasizing the holistic inter-connections between relief, health and care, social inclusion, MRC’s “Intervention Model” led to defining its “Resilience Strategy”. Inspired by IFRC’s “Resilience Framework”, it took the three humanitarian strategic lines of “Strategy 2016-2020” and defined how they were to be delivered at HQ and Branch levels through cross-cutting capacity enhancement work at a community level.



To strengthen youth participation, MRC youth were given their own platform. Pre-COVID-19 they used to hold two annual youth meetings, but more recently since meetings have gone online they now meet every 2 months, inviting specialist speakers and engaging more young people to join MRC. Although youth have been empowered to participate and give proposals based on creative service ideas, there is as yet no youth representative on MRC’s Governing Boards.

In the meantime, the overall delivery of the “Intervention Model” helped MRC to contribute to three interconnected dimensions of “localization”:

(i) Working in the development-humanitarian-climate-adaptive- and peacebuilding continuum

MRC's definition of community resilience emphasized the long-term accompaniment of communities, through the stronger local community involving Branch structures. Such long-term presence forms a key characteristic of "localization" by ensuring that the continuous presence in communities addresses their long-term development, preparedness and response to humanitarian emergencies and crises, climate adaptation, peace-building, and social inclusion needs in one continuum. These attributes have become evident in the resilience building initiatives that have established local MRC brigades of volunteers in each community to empower communities to address all their respective long-term needs.

(ii) Enhancing organizational characteristics to contribute to resilience building

The implementation of resilience-building strategies in communities required NSD interventions to build Branches' capacities that:

- ⇒ maintained local participatory community activities;
- ⇒ mobilized fresh members, volunteers, youth, and local staff representing the full diversity of perspectives, cultures and needs in communities;
- ⇒ refocused plans and capacities to expand local, permanent, humanitarian presence in the most marginalized of communities;
- ⇒ introduced local community engagement and accountability mechanisms that resulted in greater community participation and feedback while strengthening their own resilience.

To deepen its learning on new resilience-focused approaches, MRC entered into three critically important new international partnerships, which showed immediate results in decreasing vulnerabilities in its targeted communities:

The Zurich Flood Resilience Alliance's "Flood Resilience Programme" (2018-2024): a multi-organisational and multi-sectoral partnership in which MRC's Branches mobilise diverse community volunteers, develop locally-led community programmes, update local assessments, share knowledge, and use evidence-based experiences to influence local and other authorities to help strengthen community flood resilience. Together with other local partners MRC's Branch and volunteer base empowered local communities to enhance preparedness, response and recovery capacities.

"After conducting local assessments, we know where areas of risk are located, and people now where to assemble so we can protect ourselves when danger approaches. The programme has helped me to connect more with people from outside and inside my own community. The Red Cross has become integrated into our daily life, providing training on health, First Aid, and helping to translate materials into our own traditional language" Community member





Community Earthquake Resilience Programme” (2018 onwards): through the American and Canadian Red Cross Societies, formed in the aftermath of the two highly destructive earthquakes of 2017, to work with communities, including indigenous ones, to reduce the dangers seismic risks and ocean swells.

“4 years ago, a local woman died because we couldn’t get her to hospital on time. We realized that health education is a necessity, as well as disease prevention and forming local Red Cross brigades to help all, but especially women and pregnant women to be safer. Once the community is aware of its vulnerabilities, it motivates us to work to counteract the dangers. Volunteers play essential roles in consolidating the community, promoting social solidarity, coordinating community response and managing our own well-being” Community member

The Land Rover “Community Preparedness Programme” (2018 onwards): through which MRC provides life-saving First Aid and other training to 55,000 men, women and children in low income communities to step in when an emergency happens. In the last 2 years the MRC teams have travelled over 23,000 miles in order to reach these isolated communities through rough terrains. To localise permanent Red Cross in all communities across the territory, the teams work not only to save lives, but also to strengthen communities to know how to act and overcome emergencies by forming their community civil protection brigades, emergency family plans, and evacuation protocols.

“For us, a community that is out of reach from a lot of things, I am grateful for what we have learnt and the equipment we were just given – the walkie talkies – because it’s a community with not a lot of phone reception. I know that with this we can offer our help so that we don’t have to go through that again, where we lost the life of a young man because we couldn’t do anything” Community member

“Our initial 8 resilience projects in communities threatened by earthquakes, floods and droughts in selected States emerged from our understanding that it is more cost effective and efficient to mobilise community prevention than to seek donor funds for the response. We found that in promoting prevention rather than response, we attracted a wider range of local volunteers, including corporate volunteers from corporates and industrial business units who wanted to make a difference to local communities in their areas by strengthening their preparedness and resilience. As part of MRC’s “Roadmap for Community Resilience” the initial 8 have now expanded to 21 rural communities” MRC National Resilience Commissioner

The knowledge gained by communities in all of the above programming approaches contributed to highly effective local community-based dissemination of preventive health education materials mobilisation practices during the COVID-19 response from early 2020 onwards.



Other partners were also sought to help develop appropriate support services to the increasing migrant populations settling in Mexico, and also travelling through it as part of the “human caravan” heading to the USA. In response to this unforeseen challenge during the development of its “Strategy 2016-2020”, MRC developed a range of migrant support services such as assistance points, basic pre-hospital medical care and attention, re-establishment of family links, basic psychological support, hydration, violence prevention, and referrals to specialized institutions with the support of ICRC and other national partners. It is yet to decide on the need for long-term services in this area into the future.

(iii) A strategy to strengthen MRC’s Branch reform process

MRC resourced its “Organisational Development Strategy” through its own funds. The key phases included:

- ⇒ developing guiding documents;
- ⇒ strengthening the HQ and Branch network of OD focal points or “champions of change”;
- ⇒ national OD workshops in 2018 and 2019;
- ⇒ 15 BOCA/AFDO processes for Branches in urgent humanitarian contexts;
- ⇒ the implementation of MRC’s Branch Management System to centralise information from State and local Branches. Although challenging, 68% of Branch information has been consolidated by 2021.

In order to undertake a structured and phased approach to Branch development as a part of its “localization of humanitarian action” goal, MRC used the above internal “socialization” processes to launch a four-step roadmap:

Step 1: Inventory of Branch services: This aligned all existing previously uncoordinated local services to MRC’s newly defined core services. For example, a Branch may have conducted services to reunite families but it wasn’t previously called “Restoring Family Links”. The new categorization and alignment of services brought these under one clear objective, methodology, and set of measurement indicators.

Step 2: Confirming relevance: Every service or “project” had to respond to a community issue identified in the updated needs assessment, also linking it to a sustainability strategy.

Step 3: Mapping of Branch assets: this first ever inventory of Branch resources and assets and resources were also linked to the strategic question of how to develop sustainability plans to retain them were deemed necessary.

Step 4: Volunteer mobilization: All volunteers and members could decide on which services from the nationally consistent catalogue were most important for their community and join those (e.g. join the relief strategy, or join the health strategy).

MRC's "Branch Management System" (SGD) software, created in 2016, focused more on Branch compliance monitoring against institutional checklists. It included the ability of each Branch to check if they have updated legal documents, Board member training etc. However, with the support of the IFRC/ ICRC NSIA funds, MRC aims to upgrade its use:

"The existing "Branch Management System" will transition from institutional compliance monitoring to a "first model" to show how programmes, services and capacities are developing in each Branch in an interconnected way, and how they are meeting the specific humanitarian programme and service indicators based on an improved "Social Intervention Model"

(iv) Overcoming internal resistance

To overcome internal resistance to change, MRC continued to use its own resources to fund the next phase of its transformation process through three further NSD interventions:

The creation of a "Special Projects Department" in 2017 reporting directly to the Secretary General and tasked with changing the mindsets of a wide variety of internal stakeholders to contribute to the new vision of Branches with more diversified, community-resilience building roles.

The creation of "change champions" in all the 32 State Branches. Although many saw the new function "as an expense, not an investment", gradually the concepts were sold based on the basis of return on investments that included more income, efficiency, and proximity to local people. Commitment grew slowly and 7 Branches pioneered the new approach, specifically recruiting qualified personnel, demonstrating the benefits to others, and strengthening a joint national and local team to support change.

"They were our counterparts, "drivers for change" disseminating the new strategy and proposing local adaptations and innovations" José Antonio Monroy, MRC Secretary General

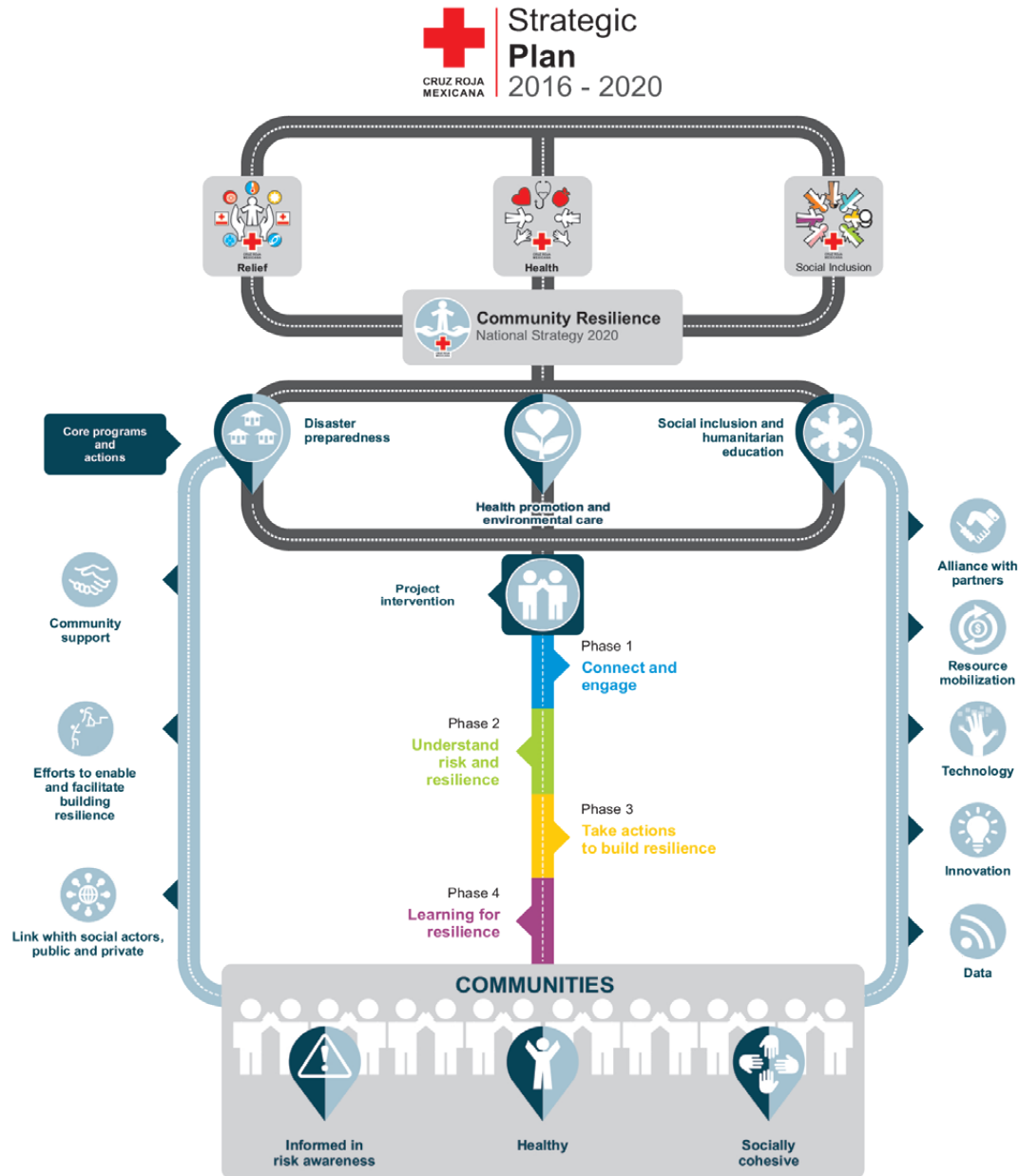
With the growing understanding of MRC's transformational plan, the title of "Special Projects Department" was incorporated into the "Organisational Development Commission", and subsequently to "NSD National Commission", with State and local Branches increasingly seeing their strategic roles in a harmonized local to national transformation team.

New Branch assessment and development tools in 2017/18 when MRC took an important step to study, adapt and contextualise the IFRC's "Branch Organisational Capacity Assessment (BOCA)"³ process and tool to accelerate internal change. Redrafted and rebranded as MRC's own "Analysis of Organisational Development Strengths (AFDO)" process, MRC was careful not to promote it as a Branch "audit", but instead as an opportunity for all State and local Branches to "know who they are, and how to better align to their new Strategy 2016-2020".

The AFDO process was run in 15 pilot State Branches selected because of the active commitment of their Governing Boards for change, and their capacities to manage a range of activities, including external relations. Using participatory methodology, it generated self-assessment exercises that assessed Branch's capacities, measuring their:

- ⇒ legal capacities to fulfill their humanitarian mission;
- ⇒ organizational capacities and assets (human resources, infrastructure, finance, administration, logistics, planning, monitoring, evaluation and reporting);
- ⇒ relationships and mobilization capacities (internal communication and decision-making, external relations and communication, and resource mobilization);
- ⇒ humanitarian performance;
- ⇒ conditions for growth.

The diagram below describes MRC's vision of resilience-focused work as outlined in its "Strategy 2016-2020", and the NSD components that contributed to its success.



An early test of MRC's new Branch capacities came in its response to the two earthquakes in 2017 where:

- ⇒ in Mexico City, more than 2,300 specialists in the rescue of people in collapsed structures participated in the rescue work and pre-hospital care in coordination with the Mexican Army, the Mexican Navy and Federal Civil Protection, Federal Police and the Mexico City;
- ⇒ hundreds of injured people Mexican Red Cross Hospital in Polanco, medical personnel, nurses and paramedics treated;
- ⇒ 16 Collection Centres were opened in various states of the country, in which 31,000 volunteers collaborated, 12,000 in Mexico City alone;
- ⇒ Socially responsible companies, academic institutions and governments of other nations also joined the cause;
- ⇒ 5,780 million kilos of humanitarian aid were collected, benefitting more than 2,100,000 people in the eight affected states to support the immediate needs of the population of 661 communities affected by the earthquakes.

The success of the new capacities and operation laid the foundation for the next phase.

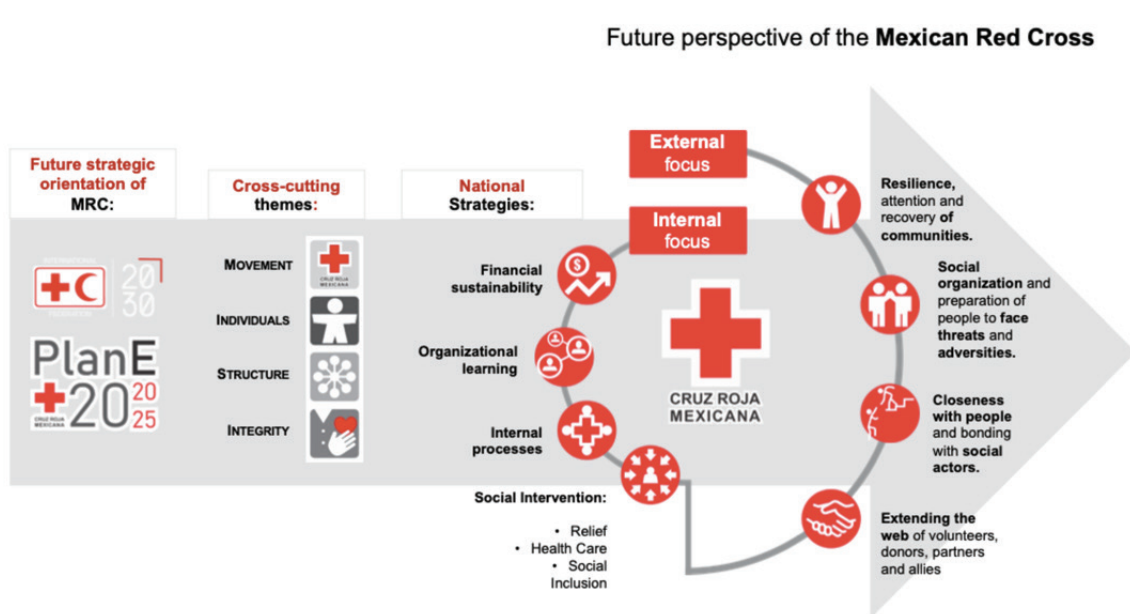
Phase 3
“Strategy 2021-2025”

Strengthening organizational resilience, sustainability, localized presence, and reach

Investing in local capacity analysis and strengthened structures “closer to the people” to build resilience, safety, preparedness, and a culture of non-violence, social inclusion and peace

(i) The first support from the IFRC and ICRC towards the transformation process

MRC’s latest “Strategic Plan 2021-2025” continued the “localization” vision, accelerating Branch development and the aspiration to be “closer to the people”. The Strategy aims to strengthen interconnected aspects of the social intervention model, financial sustainability, internal processes, organizational learning, investment in individuals (volunteers, members, youth, staff and governance), and local structures at the community level (to accompany the resilience building aim).



To support these objectives as a part of its longitudinal development, MRC successfully applied to the IFRC/ICRC “National Society Investment Fund (NSIA)” to develop a digital platform to monitor all MRC’s services and upload real time data and reports from all Branches. The success of the NSIA application was due to the demonstrated logic and impact of its longitudinal, self-supported NSD interventions, extending further the cumulative success of its two earlier consecutive Strategic Plans.

(ii) Implementing MRC’s new “Social Intervention Model”

“Strategy 2021-2025” promotes an enhanced “Social Intervention Model (MIS)” which enables each State Branch to undertake its locally contextualized plans, set evaluation categories and intervention variables, and align to a national system of achievement indicators.

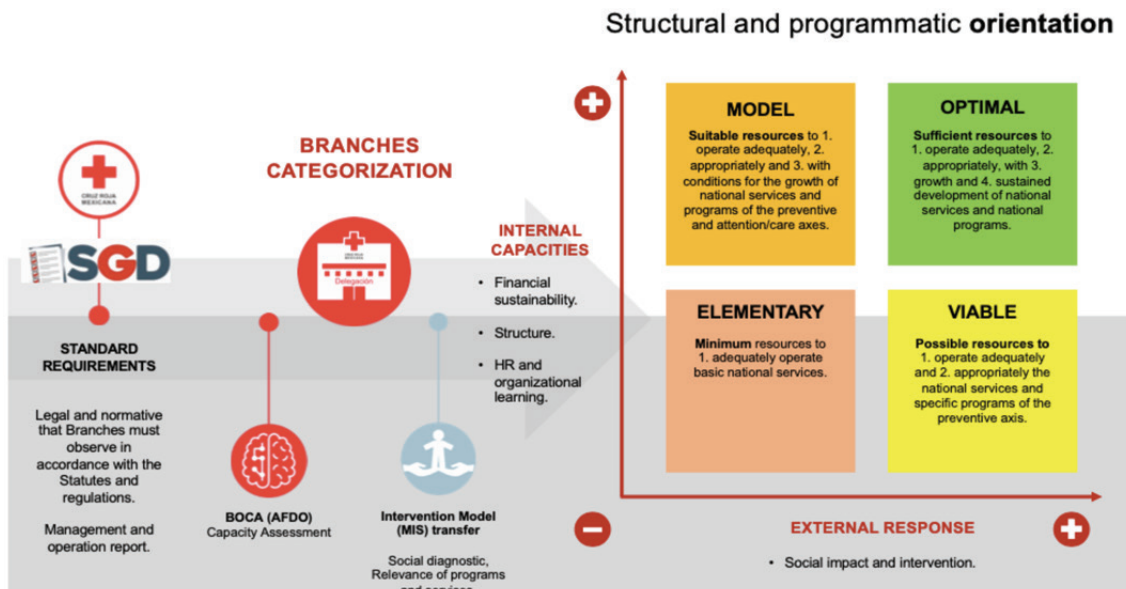
The strategic alignment process of Branches to the national plan takes place in 7 phases over 16 months. Three annual “Capacity Building” seminars offered specialized training on strategic planning, alignment tools, indicator design, and annual budgeting. In a final linkage between capacities and service targets, each Branch’s operational plan of action (which had to include the capacities analysed in the AFDO exercise), had to incorporate:

- ⇒ social and vulnerability diagnosis;
- ⇒ problems identified in the programmes and services provided;
- ⇒ self-assessment of the relevance of programmes and integrated services in order to determine:
- ⇒ the current situation. b) the desired situation.

To increase locally-led humanitarian actions, MRC adopted and adapted IFRC's "Project Planning Guidelines" and encouraged volunteers to develop locally relevant volunteer-led services from a national menu. New data gathering technology led to stronger Branch reporting.

"The more we advance on the needs of communities, the more we should focus on doing it well. We needed to have reliable, timely information on common axes across the country. When COVID-19 came, we saw that reporting really improved as everyone saw Branches' contributions to strategic data and decision making". MRC National Special Projects Manager

Once the participation of all internal stakeholders had resulted in collectively agreed indicators of successful Branch performance, MRC used the AFDO scorecards to categorize its Branches into 4 different levels of capacity:



The assessment of Branches not only documented the capacities within each Branch, but provided the platform for a stronger peer to peer support systems to use local knowledge to expand capacities across the Branch network. A number of instant positive gains were observed:

- ⇒ Branches in category B or C (Viable or Model) who had more capabilities to respond to community needs reached new vulnerable people as they must take up the strategy to help communities prepare for response;
- ⇒ new volunteers can choose from capacity strengthening options in 13 specific technical areas (programmes), contributing to their own professional development, helping to play clearer roles and attract more local community donations, and therefore building sustainability of locally-led action
- ⇒ the introduction of peer mentoring strategies based on improved sharing of knowledge, personnel and experiences across Branches to support mutual capacity strengthening
- ⇒ orientation and training materials translated into local languages, including those of indigenous communities, enabling more diversified communities to benefit.

“Localisation” for the Mexican Red Cross means understanding our own capabilities, the needs of communities, and being humble in an approach to balancing our resources in a more needs-based way. For example, since 2020 we have categorized 4 types of Branches, encouraging them to be more efficient, including in their assessments of local communities. This may mean that in some States a Branch doesn’t need an ambulance but instead to develop other local capabilities to assist the most vulnerable people that no other organisations are responding to. But first, we needed to relook at our self and decide on a clear pathway to achieve this new form of localisation” José Antonio Monroy, MRC Secretary General

Using data, evidence-gathering techniques, and new technologies MRC has built capacities in both itself as well as communities to develop “humanitarian foresight” to track, anticipate, be prepared for, and respond to hazards, risks and vulnerabilities. Investments in IT and digital systems over the years have improved overall accountability, speed of daily operations, and the “data-readiness” (e.g. in the ambulance services system or COVID-19 monitoring operation) of staff and volunteers to improve operational decision-making, consolidation of information, and humanitarian analysis.

6. MRC’s sustainability strategy – the “localization” of resources

MRC’s longer-term sustainability strategy has focused on expanding partnerships in 4 dimensions:

(i) The role of Movement and non-Movement partners

Over the past 10 years the majority of MRC’s specific NSD interventions have been self-funded thanks to its ability to use its national resources and income streams. This has enabled its partnerships with Movement components to focus more on peer support and knowledge exchange in the areas of organizational development, Branch strengthening, and resilience building strategies.

NSD funding source	2015 (USD)	2020 (USD)
MRC	51,087	137,338
Nacional Monte de Piedad	89,280	49,600
Turkish Red Crescent		20,000
IFRC/ICRC NSIA (2 years)		258,284
Total	140,367	465,222

The above summary demonstrates how MRC funded the majority of its transformation process from its internal funds, while also seeing the strategic added value of partnerships with its Mexican partners in OD and resilience.

Its Movement partnerships provided sector-specific support, but none of them provided support to its organization-wide transformation processes. IFRC’s global Policies, Guidelines, Frameworks and tools such as BOCA provided the strategic guidance for its resilience strengthening and Branch assessment processes, whereas ICRC’s support was appreciated in strengthening its capacities to address violence and migration-related aspects of its services over the years.

Its partnerships with the American and Canadian Red Cross Societies in its “North American cluster” have provided equitable three-way peer support, mentoring, and strategic exchange of programmatic development material and support, particularly in the areas of community resilience programming. MRC envisions future partnerships with other National Societies especially in knowledge sharing and strengthening mutual capacities in areas such as digitalization of data, local resource mobilization, and digital marketing.

(ii) Refreshing a vision for greater self-sustainability

Since 2012 MRC's new governance and management leadership team have managed three balanced income streams strategically to continue its commitment to funding its own organizational development and service expansion in a neutral, impartial and independent manner. These include:

- ⇒ 60-70% from national public fundraising campaigns spread over 2-3 months each year, and often supported by the President of the country;
- ⇒ 15-20% from income-generating activities and training fees through its schools for medical technicians, nurses, a variety of corporate training services, and private ambulances services to selected companies and institutions;
- ⇒ 10% in return for the public humanitarian services offered concerning its auxiliary roles at national and state levels (for services such as ambulances).

MRC's leadership has been careful not to "over-depend" on Government income as political changes result in volatile funding streams. The National Board has therefore set targets in the second category to increase the revenues from MRC's income generating stream to 40% of the total, which is the maximum permissible under national Laws which restrict the commercial income of voluntary and social organisations.

The national Fundraising Unit was strengthened with new personnel and directions in 2016 and to date investments in digital marketing and fundraising, and corporate partnership development, have led to significantly diversified income streams. It is anticipated that by strengthening digital systems for planning and reporting as well as fundraising, the NSIA fund will assist MRC to present a clearer and more appealing quantitative picture to donors of how, and on what, their funds will be spent, linked to human interest impact stories.

Building on Amazon's fundraising campaign during the 2017 Earthquake appeals which raised 60,000 donors, further sponsorship from Amazon's web service led to it building and hosting MRC's websites. As a result, each State Branch now has a website from which to reach new populations with messages about its services, volunteering opportunities, and appeals.

Each State Branch's Fundraising Coordinator receives 3 days of intensive training and then through a peer to peer support system including coaching, case studies, and specialist task forces. Some gains have been significant, with Morelos Branch, for example, being supported by 8 companies after receiving seminars on how to prepare proposals, budgets, and how to present return on investment and human impact case stories.

However, a restricting factor is the inability of Branches to have sufficiently qualified volunteers or staff to approach the 700 or so companies mobilized by the national Unit, who appear ready to partner in humanitarian services at local levels. Mexico also has approximately 9500 foundations



whose priorities need to be further compared to MRC's priority to customized approaches to each to engage in longer-term joint partnerships.

(iii) Individual and corporate fundraising expansion – NSD investments in reporting, communicating and transparency

MRC is able to position itself as a public, credible, and local humanitarian network whose cost-effectiveness derives from the economic contributions of volunteers. In 2018 MRC started counting the financial value of contributions from its 46,323 adult, youth and “ladies volunteers” whose collective contributions in in that year alone amounted to 55,294 activities, 725,432 beneficiaries, 3,112,785 volunteer hours, and an economic value of US \$ 50,347,791.

MRC's work with Nacional Monte de Piedad IAP had resulted in the “Intervention Model” on the social impact and introduced new measurement activities and improved transparency. Coupled with its increasing investment in social media messaging and transparent reporting on donations and impact, MRC has been able to expand its domestic fundraising and corporate partnerships by more transparently reporting on impact.

The preconditions and contributors for MRC's successful, sustained and growing NSD investments in resource mobilization have been:

- ⇒ the visibility of its core highly visible and highly appreciated, free public services;
- ⇒ investments in external multi-media communication platforms that can reach new audiences with messages promoting the Fundamental Principles and humanitarian values for social inclusion and peace;
- ⇒ the linkage with mobilizing new members, volunteers and youth to be socially inclusive ambassadors;
- ⇒ and mobilizing support for locally-led neutral, impartial and independent humanitarian action by Branch fundraising efforts in their own communities.

(iv) Enhanced auxiliary role funding

While careful not to become dependent on State funding, MRC's humanitarian advocacy efforts are nevertheless focusing on proposing new Laws at the state level for increased funding of a neutral, impartial and independent nature in return for “supplementing or substituting” public humanitarian services. Part of the strategy includes showcasing successful case studies of local state Laws which have led to quantitative and qualitative benefits in terms of humanitarian response and impact, to encourage other Laws to be passed.



7. MRC's external contributions to other humanitarian actors

In keeping with the learning goals of the "Localisation Workstream", MRC has consistently shared its humanitarian knowledge and capacities on a peer to peer basis with other Movement and non-Movement actors across the wider humanitarian sector to strengthen greater collective humanitarian impact. It does so in three dimensions:

- **As a strong national actor, MRC remains self-sufficient, but works with others through**
 - clearly defined roles in the Mexican Civil Protection system;
 - working on "Disaster Law" through advocacy with Government and other stakeholders;
 - mobilizing additional Movement resources only when the scale of emergency merits international assistance, responding to other local or national disasters in a self-sufficient manner through its pre-positioned assets and technically trained local and national and local human resource base;
 - coordinating, if necessary, all international assistance from Movement partners at times of national emergencies beyond a national disaster scope;
 - managing national emergency fundraising based on its long-term credibility and public trust in its integrity and transparent reporting;
 - not having an "International Department", but scaling up its Fundraising Department to receiving and reporting on donations at times of international emergency response if relevant (in the COVID-19 emergency this meant that all information to and from all national and international stakeholders could be managed from one place).

- **As a strong member of IFRC's "North American Cluster", MRC**
 - shares mutual resources, assets and search and rescue and disaster response personnel with the American Red Cross and Canadian Red Cross at times of disasters (e.g. sometimes complementing ARC deployments or CRC field hospital with MRC search and rescue or paramedics deployments)
 - shares expertise and good practices, experiences and technology through tri-national annual meetings to strengthen cooperation and regional work together with such as the NAHRS or NAHRI Initiatives to improve collaboration in response to transboundary emergencies or disasters, in partnership with the governments of the three National Societies (Mexico, Canada and the United States)
 - cooperates in the three NS Community Resilience Programme, generating tools for disaster risk reduction and preparedness for response in local and isolated communities
 - exchanges volunteers and expertise (e.g. in fundraising tactics) and with students for research with Canadian Universities.

- **As a member of the IFRC's Inter-American Plan Conference and Plan of Action, MRC**
 - customizes Regional Resolutions, absorbs them into its own Strategic Plans as medium-term objectives, and implements them in locally contextualized ways
 - contributes papers and knowledge to the development of regional strategies and plans.



8. Perspectives on good partnership that strengthen long-term organizational transformation and sustainable services

In the context of lessons learned on “localization” and NSD investments that lead to more “effective locally-led humanitarian action”, MRC’s experiences of effective partnerships point to three specific learning points:

- (i) Realizing that the Movement’s resources in supporting culturally-customized transformation change were limited, partnering with two strategic Mexican institutions to build **and fund** its organizational transformation and community resilience building strategies as interconnected parts of an internal transformation Strategy proved to be a key turning point that helped MRC accelerate a change process mindful of local cultural complexities.
- (ii) Raising resources for its internal participatory strategic planning processes was a challenge, with final funds coming from various local funding sources and NSIA fund. Movement and non-Movement partners failed to recognize the importance of providing timely support to such strategic change initiatives.
- (iii) The NSIA funds have enabled MRC to continue to build on a long-term, managed change process. However, MRC had to significantly reduce the size of its application to be successful, in the end only receiving support for one component of a wider 5 component strategy while at a strategic turning point moment. Although the NSIA support is welcomed, the reduced scope of the application continues to demonstrate that even within the Movement such a joint IFRC/ICRC managed investment fund does not yet have the resources to support wider organizational development and transformation processes more comprehensively. Although the NSIA and IFRC Governing Board have the ambition to grow the fund to be large enough to support comprehensive change processes, initial limitations of funding from donors have generated constraints.





9. COVID-19 response – the power of localization

As a powerful example of its localisation work and more recent NSD investments in strong Branch and volunteering systems that can reach hard to access communities in all parts of the country, MRC has made strong contributions to the national COVID-19 pandemic response through the strengths of its localised Branches and volunteers.

MRC's immediate "Guidelines for Branches" included protocols and SOPs for pre-hospital care, medical services, community and volunteer services and internal communications and reporting. It followed by activating its roles in the "National Response Plan for emerging Viruses", establishing financial reserves and procuring biosafety supplies. A further National Biosafety Manual and training was imparted to Branches who gathered and reported on daily data.

MRC reached a very significant number of people through its workshops on prevention and health promotion, education campaigns in the media and on social networks, and through its field hospitals and inter-agency alliances with other institutions. Its financial donations, corporate alliances and resource mobilisation enabled a logistics supply chain that reached the following numbers of people between March 2020 and July 2021:

- ⇒ 2,574,460 people reached through health prevention and promotion activities
- ⇒ 2,775,371 direct people reached
- ⇒ 63,792 pre-hospital care and medical emergencies suspected and/or confirmed patients treated
- ⇒ 16,781 registered cases of COVID-19 treated
- ⇒ 8,198 inter-hospital and social security transfers through ambulances
- ⇒ 1,333 operational ambulances, of which 281 ambulances equipped with biosafety capsules, dedicated to the exclusive transfer of COVID-19 patients across 32 States
- ⇒ 4,821 cases treated by MRC field hospitals
- ⇒ 40,345 migrants reached through medical services
- ⇒ 15,538 people reached with psychosocial support

The target groups reached by the above activities demonstrate the power of its localised volunteer and Branch network and collaboration with external agencies for collective action.

10. Conclusions

There is strong evidence that strengthening local Red Cross structures has led more resilient communities.

“4 years ago, a local woman died because we couldn’t get her to hospital on time. We realized that health education is a necessity, as well as disease prevention and forming local Red Cross brigades to help all, but especially women and pregnant women to be safer. Once the community is aware of its vulnerabilities, it motivates us to work to counteract the dangers. Volunteers play essential roles in consolidating the community, promoting social solidarity, coordinating community response and managing our own well-being” Community member

Mexican Red Cross’s transformation process, sustained by longitudinal NSD investments made by both national and international partners, contained many important features that deepened its long-term local humanitarian impact. Amongst these were:

- ⇒ the adaptation of IFRC’s tools for organisational assessment such as the Branch Organisational Capacity Assessment (BOCA) tool into a fully locally contextualised version
- ⇒ strategic partnerships with Mexican institutions who also provide long-term organisational development support
- ⇒ sensitive organisation-wide strategic planning processes that involved local Branches in the transformation plan over several conscious phases of consultation
- ⇒ renewal of leadership and strengthened orientation processes at all levels
- ⇒ balancing a strong auxiliary role with parallel investments in greater self-sustainability to mitigate against over-dependence on government or other external donors
- ⇒ strengthening community involvement in design, planning, monitoring and reporting of local relevant services and risk reduction programmes.

THE FUNDAMENTAL PRINCIPLES OF THE INTERNATIONAL RED CROSS AND RED CRESCENT MOVEMENT

Humanity

The International Red Cross and Red Crescent Movement, born of a desire to bring assistance without discrimination to the wounded on the battlefield, endeavours, in its international and national capacity, to prevent and alleviate human suffering wherever it may be found. Its purpose is to protect life and health and to ensure respect for the human being. It promotes mutual understanding, friendship, cooperation and lasting peace amongst all peoples.

Impartiality

It makes no discrimination as to nationality, race, religious beliefs, class or political opinions. It endeavours to relieve the suffering of individuals, being guided solely by their needs, and to give priority to the most urgent cases of distress.

Neutrality

In order to enjoy the confidence of all, the Movement may not take sides in hostilities or engage at any time in controversies of a political, racial, religious or ideological nature.

Independence

The Movement is independent. The National Societies, while auxiliaries in the humanitarian services of their governments and subject to the laws of their respective countries, must always maintain their autonomy so that they may be able at all times to act in accordance with the principles of the Movement.

Voluntary service

It is a voluntary relief movement not prompted in any manner by desire for gain.

Unity

There can be only one Red Cross or Red Crescent Society in any one country. It must be open to all. It must carry on its humanitarian work throughout its territory.

Universality

The International Red Cross and Red Crescent Movement, in which all societies have equal status and share equal responsibilities and duties in helping each other, is worldwide.



The International Federation of Red Cross and Red Crescent Societies (IFRC) is the world's largest humanitarian network, with 192 National Red Cross and Red Crescent Societies and around 14 million volunteers. Our volunteers are present in communities before, during and after a crisis or disaster. We work in the most hard to reach and complex settings in the world, saving lives and promoting human dignity. We support communities to become stronger and more resilient places where people can live safe and healthy lives, and have opportunities to thrive.

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