The Environmental Conservation Trust of Uganda (ECOTRUST)

Trees for Global Benefit

A cooperative Carbon – Offsetting Scheme Linking Smallholder farmers to the voluntary PES Market

Document Title	Report on Service Delivery Initiatives under Trees for Global Benefit (TGB
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1.0 Introduction

This document presents a summary of initiatives undertaken by ECOTRUST to strengthen service delivery under the Trees for Global Benefit program. The review follows investigations prompted by articles published in the Swedish newspaper Aftonbladet regarding the TGB project. In response, Max Burgers proposed improvements in four key areas:

1. Extend participant payments beyond 10 years to reduce the risk of premature tree harvesting.
2. Provide on-site training and clearer guidance, including contracts in multiple languages, to improve understanding and decision-making.
3. Eliminate undue delays in payments.
4. Promote better planning of tree planting locations to minimize competition with food production.

1.1 ECOTRUST Internal Reflection

In addition to the recommendations above, ECOTRUST conducted its own internal review. The reflection highlighted the need to enhance trust and transparency, focusing on traceability (farmers, trees, and impact), reporting, and improved communication with all stakeholders—including buyers, donors, and project beneficiaries. The review concluded that these factors are interrelated and must be addressed in a coordinated manner. They have been grouped into six thematic areas:

1. Farmer Value Proposition

A sustainability model that strengthens socioeconomic benefits for communities is essential. This includes diversified income streams, resilience enterprises, financial inclusion, business incubation, and access to larger markets. The ECOTRUST community engagement model, which fosters social cohesion and farmer networking, must be enhanced to support sustainable growth.

2. Technology & Processes

Robust systems are required to ensure traceability of trees and beneficiaries, timely and accurate farmer payments, and high-quality reporting. Accuracy, transparency, and effective communication of benefit transfers are central to maintaining trust and accountability.

3. Diversified Impact

The organization must broaden its contribution beyond carbon sequestration to include biodiversity conservation, watershed services, and climate change adaptation.

4. Human Capital

An appropriate staff-to-farmer ratio, combined with a culture of excellence, compliance, and effectiveness, is vital to building a motivated workforce and ensuring operational efficiency.

5. Compliance with Standards

Migration to Version 5 of the Plan Vivo Carbon Standard, adherence to new climate change regulations, and completion of third-party verification are critical steps to secure market access and investor confidence.

6. Stakeholder Engagement

A deliberate effort is needed to keep stakeholders informed about the TGB/ECOTRUST model. Disseminating the innovation and knowledge generated from ECOTRUST/TGB initiatives will strengthen institutional credibility and promote enterprise products.

2.0 Progress in addressing the issues

2.1 Farmer Value Proposition

The project delivers value to farmers through a combination of social capital development, financial resilience, and market access,

2.1.1 Gender Action Learning Systems (GALS)

At the core of the project's innovation is the adoption of Gender Action Learning Systems (GALS)—a structured, community-led empowerment methodology designed to foster self-driven economic, social, and political transformation at household, community, and organizational levels.

GALS mainstreams gender considerations by equipping women and men with practical tools to plan their futures, negotiate needs, and secure gender-equitable livelihoods. Using visual diagramming

and principles of inclusion, the methodology has been applied across all participating communities, enabling realistic estimates of restoration potential.

Each community has designated GALS champions who train households to develop household visions. These visions guide land-use planning, ensuring that tree planting complements rather than competes with food production. This aspect has now been included on the monitoring checklist to ensure adherence

2.1.2 Centers of Excellence

To provide on-site training and tailored technical advice, the project has established farmer field schools in the form of Centers of Excellence. The first center, located in Alimugonza Community Forest, was designed to stimulate investment in beekeeping as a viable economic activity aligned with forest conservation. Further assessments have been conducted in the Queen Elizabeth Landscape to identify potential sites for additional Centers of Excellence and collection centers.

2.1.3 Farmer Voice Radio (FVR)

Complementing the Centers of Excellence, the project delivers extension services through Farmer Voice Radio (FVR)—a fast, affordable, and wide-reaching communication tool. FVR integrates indigenous knowledge with expert insights to produce interactive, informative radio programs.

A distinctive feature of this approach is that farmers serve as the primary experts, while extension officers and radio presenters act as facilitators. Project participants form listener groups that engage in discussions, share challenges, and co-create solutions with technical experts.

Listeners contribute via SMS and voice messages, enhancing participation. In 2025, baseline surveys were conducted to assess listening habits, preferred languages, and knowledge levels. Stakeholder planning meetings informed annual content plans, while listener groups selected radio stations, validated content, and now hold monthly meetings to generate material for weekly broadcasts in local languages. Quarterly stakeholder engagements provide feedback, and an endline survey in 2025 will evaluate the effectiveness of this approach.

2.1.4 Business Incubation

To mitigate the risk of tree felling after Year 10, the project supports the development of forest-based enterprises using the International Labour Organization's Start & Improve Your Business (SIYB) methodology. Applied across all participating communities in 2025, SIYB equips groups with business planning skills. Each community has developed a business plan and received grants from CCF or donors to implement selected activities. Supported enterprises include: Beekeeping, Coffee bulking, Commercial seedling production, Fuelwood production, Tourism and Fish farming

Farmer groups are being organized into cooperatives linked to Centers of Excellence, while neighboring communities have established collection centers for honey and other apiary products, which are processed at Alimugonza.

2.1.5 Financial Inclusion

Timely payments to farmers have been hindered by limited access to banking services and errors in payment information. To address this, ECOTRUST has partnered with FINCA Uganda to expand access to affordable, customized financial services through a state-of-the-art digital banking platform. Key initiatives include: a)Customized transfer operations tailored to farmers' needs, b) Free financial literacy sessions for individuals and groups and c) Dedicated relationship officers to support account opening and ongoing banking needs directly within communities

2.2 Technology and Processes

The Trees for Global Benefit (TGB) monitoring system has progressively evolved through a learning-by-doing approach. Initially reliant on manual, paper-based processes—where coordinates were recorded using handheld GPS devices—the system has transitioned to mobile applications that ensure full traceability of all carbon credits generated. This digital transformation provides a transparent and verifiable trail for every parcel of land and farmer enrolled in the program.

In 2025, TGB adopted a structured, end-to-end digital data collection and management system using Kobo, which is now fully operational for farmer recruitment and monitoring. Key advancements include:

- Automation of Data Capture

Farmer monitoring data is collected digitally through Kobo forms, eliminating reliance on manual entry and consolidation. Kobo is used to onboard farmers, capture georeferenced data, validate inputs, and apply them consistently throughout the project lifecycle. Standardized electronic forms capture farmer identification details, georeferenced location points, land area measurements, and supporting documentation (photographs, local authority verification). This ensures that all participating farmers and plots are spatially identifiable, traceable, and auditable.

- Timely Payments

Real-time or near real-time data availability enables immediate review by the head office team once submissions are synced. This accelerates verification and decision-making compared to previous manual processes.

- Data Reliability

Each stage of data capture incorporates controls for GPS quality and verification. Submitted data undergoes both automated and manual validation checks to prevent duplication, ensure completeness, and confirm compliance with technical specifications.

- Data Security

Kobo provides secure cloud storage and controlled access, strengthening resilience against accidental data loss. The data team has also implemented routine export and backup procedures to ensure record availability in the event of system access issues.

- Digital Archiving and Record Retrieval

Farmer monitoring and recruitment records are now stored in centralized digital databases within Kobo, MS Access, and Excel. This improves retrievability and reduces risks associated with scattered offline files. A customized TGB application has also been developed and tested to serve as a backup, including migration of legacy data.

2.3 Diversified Impact

To better articulate the expected impact of Trees for Global Benefit, the project has refined its Theory of Change for biodiversity conservation and livelihoods. Current reviews indicate that the project generates significant environmental benefits beyond those presently tracked. Enhancing methodologies and approaches will strengthen the ability to measure contributions to conservation. Future strategies should incorporate: Monitoring of threats and barriers to biodiversity; Aessment

of contributions to biodiversity-based livelihoods and Leveraging social capital to design innovative, community-based monitoring programs that harness the potential of local structures.

2.4 Human Capital

ECOTRUST has established a dedicated Human Resource unit led by a Human Resource Manager. The HR Manager's first assignment was to collaborate with an independent firm to conduct a comprehensive HR review. This exercise produced detailed profiling of all roles and functions in line with the organizational structure, resulting in:

- **Strengthened Organizational Capacity:** Identification of key competency gaps has informed targeted capacity-building initiatives.
- **Workforce Planning:** A clear workforce plan was developed, including a graduate trainee program. Over 50 graduates have been recruited on short-term technical assistance contracts, improving the farmer-to-staff ratio and ensuring timely monitoring. Monitoring remains a critical determinant for performance-based payments.
- **Graduate Trainee Development**: Trainees have been trained to provide onsite guidance and advisory support during home visits, enhancing farmer engagement.
- **Enhanced Risk and Compliance**:The organization has upgraded its risk and compliance function from a single officer role to a full unit headed by a Manager, supported by two officers—one dedicated to fraud prevention and another to compliance oversight.

2.5 Compliance with Standards

TGB is currently migrating to Version 5 of the Plan Vivo Standard, with technical specifications under review to ensure full compliance. Updating these specifications is particularly significant, as Version 5 enables the conversion of ex-ante to ex-post credits, thereby enhancing market confidence by reducing the risk of over-crediting.

TGB is a land-use change project in which farmers transition from seasonal or annual cropping to mixed woodlots of native or naturalized tree species, alongside fruit orchards. The project's technical specifications outline the agreed activities that are conservatively expected to generate modeled environmental services. While this land-use also facilitates natural regeneration, monitoring data currently focuses on planted trees, managed land area, species type, and survival rates. Naturally regenerating trees and baseline vegetation are excluded, ensuring that credited benefits remain understated relative to actual gains.

The revisions required under Version 5 will introduce continuous monitoring of baseline vegetation and naturally regenerating trees, providing a more accurate and comprehensive picture of the project's environmental impact.

2.6 Stakeholder Engagement

ECOTRUST has initiated the development of a long-term, 360-degree Communication and Media Engagement Strategy. Rooted in ECOTRUST's 25-year legacy of innovation and impact, this strategy will serve as a dynamic framework for storytelling, stakeholder engagement, brand management, and crisis preparedness.

The approach will be co-creative, with ECOTRUST staff collaborating closely with a professional media firm and building on existing initiatives. ECOTRUST has already partnered with Hereandnow to produce a range of media assets—including hero films, documentaries, and short features—originally intended for the 25-Year Campaign. Several of these productions have been submitted to international film festivals, further amplifying ECOTRUST's visibility and global reach

3.0 Next Steps

1) Revision of farmer contract templates in line with the recommendations of the third party verifier. Consider group contracts where all farmers in a given community sign to one contract in their language.

2) Conclude the revision of technical specifications to enable maigration to Version 5 of the plan Vivo standard

3) Establish centers of excellence and collection centers in at least one more landscape and conduct assessments for one more landscape

4) Full transition to a dedicated web-based database linked to a customised TGB application
5) Implementation of community – based monitoring programme for biodiversity, livelihoods and adaptation