



Case Report

# Facilitating Engagement among Academic and Community Partners: The Monteverde Institute's View from the Middle

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**Abstract:** Researchers have recommended operative standards and ethical considerations to maintain the integrity of community engaged scholarship programs. This framework is valuable for guiding good practices and promoting enhancements. Implementation of these considerations in actual programs provides experiential knowledge and reveals additional considerations due to the distinctive nature of each program. This article presents a descriptive overview of the Monteverde Institute's history and model in its application of community engaged scholarship in Costa Rica. As a reflective exercise, I discuss the Monteverde Institute's successes and challenges as related to six principles put forth by scholars. As witnessed by its practices, the Monteverde Institute endorses these important concepts and I provide specific examples of the implementation and customization of these principles in different situations. As a result of this review, I outline the beneficial role provided by the Monteverde Institute as an intermediary, on-site institution in the facilitation of community engaged scholarship. The Monteverde Institute is an academic, research, and community organization that provides both academic structure and community project coordination to its partners. It views community engaged scholarship from different perspectives and guides the applicability of programs to real situations in the region. These actions enable the Monteverde Institute to co-create respectful and functional partnerships. This is important for long-term sustained cooperation and in-depth community engaged scholarship. The process is continual, and I end this reflection with the question, what now? Answering this question, as it relates to the Monteverde Institute, may reveal aspects applicable for the advancement of community engaged scholarship in other regions.

**Keywords:** community; engagement; scholarship; applied research; service learning; study abroad; collaboration; Monteverde

## 1. Introduction

Community engaged scholarship strives to advance a more continuous and creative interaction among the academic and civic cultures. In addition to a conceptual framework with identified objectives, methods, critical activity, and significant results (Calleson et al. 2005; Saltmarsh et al. 2009), reflection is considered a key component of these scholarly activities (Butin 2003; Bringle and Hatcher 2011). This article serves as a reflection of the experiences in community engaged scholarship of a community-governed, non-profit organization in Costa Rica, the Monteverde Institute (MVI), over the last 33 years. The successes and challenges of this organization's model may serve to discern key practices to strengthen community engaged scholarship in other regions. In this article, I offer background information on the MVI, its surrounding community, and examples of its programs. I will highlight the key principles by which the MVI has found success in this field (or learned from its challenges) and compare them to concepts proposed in the literature. I offer additional considerations that have contributed to the MVI's success in this area.

The Monteverde Institute was originally created to proactively serve isolated communities in a rural mountainous region that did not have the resources of a local government. Its mission is to advance sustainable living at both a local and global level. To realize this goal, the Monteverde Institute has combined academic courses, research, and community initiatives into integrated programs that promote mutually beneficial civic engagement. This has led to collaboration with over 60 local partners and universities, both national and international, in community engaged scholarship endeavors.

The Monteverde Institute's programs align with the following standards of community engaged scholarship. The programs operate through collaborative work to address identified community issues that affect the well-being of its citizens (Boyer 1990; Gronski and Pigg 2000; Ehrlich 2000; Saltmarsh et al. 2009). Reciprocity for genuine collaboration is considered critical (d'Arlach et al. 2009; Saltmarsh et al. 2009; Hartman et al. 2014; Hammersley 2013), including the consideration of power and privilege for genuinely reciprocal interactions (Davis et al. 2017). Multidirectional teaching, learning, and benefits are important (d'Arlach et al. 2009; Saltmarsh et al. 2009; Strier 2011; Fitzgerald et al. 2016), as well as creating partnerships that are based on common goals with interactive collaboration (Strier 2011) to create solutions and programs for community issues. Hammersley (2013) mentions that the attitudes (and verbiage) of "here to learn" rather than "here to help", and "doing with" rather than "doing for" (Ward and Wolf-Wendal 2000). Given these multiple considerations, one is left to balance many components to achieve equitable alliances and scholarly output.

As a member of the MVI in multiple roles over the past 20 years (oversight, direction, instructor, community partner, and member), I now have the privilege of reviewing the subject of community engaged scholarship as implemented by this institution. Formal analysis and research of the methods and impact of the MVI programs is necessary and is currently in process by several researchers. This article, however, is a first step to provide a descriptive review of the MVI model with references to recommendations that have been proposed in the literature. Using historic summaries, annual reports, course and project evaluations, strategic plans, and community surveys, this article reflects on the MVI experience and asks the questions: What has contributed to the success of community engaged scholarship programs of the MVI? What types of improvements could be employed? How do these findings compare with recommendations presented in the literature on community engaged scholarship? What might these reflections offer for other community engaged scholarship programs?

## 2. Background of the Monteverde Institute

Monteverde sits on a rugged mountain top in the Tilarán range of Costa Rica. The community was formed by a small assemblage of 175 Costa Rican farmers who were joined by 41 Quaker settlers from North America in 1951 (Burlingame 2000). The two groups shared the same values: peace, respect, community, simplicity, and "pura vida", or acceptance. The nearest government branch was located 60 km, or rather, four hours away via a rough dirt road. Due to the heavy tropical rains, Monteverde was inaccessible when landslides covered the road or washed it out. Community and development issues were, therefore, left in the hands of the community members.

In 1986, twenty-eight visionaries from the community (14 Quaker settlers, ten non-Quaker ex-patriots from the United States and Italy, and four native Monteverdians) met to create an organization that would serve the community in the absence of a local government, master plan, and development association (Monteverde Institute 1986a). The impetus was to address the budding ecotourism industry that was bringing visitors up the mountain to experience the Monteverde Cloud Forest Preserve. With the arrival of tourists, the local economy and social framework was rapidly changing. Unbridled development, infrastructure weaknesses, loss of agricultural capital, and land use changes were perceived threats. Monteverde Institute co-founder John Trostle stated, "the community had begun to realize that while tourism cannot be controlled, it might be possible to guide components of it in creative, educational ways" (Burlingame 2018). These residents worked to create a means from within the community to guide the ecotourism and establish a reliable institution to

promote the exchange of knowledge, propose solutions, and implement alternatives for the community (Burlingame 2018).

The founders stated that they wanted to attract “college groups into long term, high quality education programs, and by so doing, develop new jobs and careers for area residents, as well as create educational and cultural activities for the zone” (Burlingame 2018). The original intent was to offer place-based education with thoughtful cultural exchange programs. The first courses included a homestay experience, still in practice today, where students live with Costa Rican families and receive Spanish classes. The benefits of the homestay program would be the advancement of cultural understanding between the families and students, language instruction, and the provision of additional income to the local families. These goals align with the founding objectives of the Monteverde Institute: (a) provide educational opportunities so that interested persons could work towards a sustainable future; (b) integrate the programs and infrastructure of the Monteverde community to be commensurable with sustainability; (c) coordinate community programs with those of other organizations and projects; and (d) extend the benefits of the programs to the larger community (Monteverde Institute 1986b).

The Monteverde Institute is now a 68 member-governed Costa Rican non-profit association dedicated to education, applied research, and community engagement. The member assembly is comprised of 26 native Costa Ricans (19 of which were born and raised in Monteverde), seven Quaker settlers, and 35 ex-patriots from the United States, Chile, Columbia, and the Dominican Republic. All except nine members are full time residents of the Monteverde zone. The organization has public utility status which mandates, along with the MVI mission, that surplus funds from operations must be directed to community programs.

The Monteverde zone has been shaped by the shared Costa Rican and Quaker values of peace, equality, community, and environmentalism, and has been incorporated into locally formed organizations, such as the MVI. This has set the stage for mutual respect and collaboration among organizations and residents. The examination of the region by academics and students, starting as early as the 1970's with the Organization for Tropical Studies field courses (Burlingame 2002), has encouraged reflection of its citizens through the inquiry process and has promoted research. The decentralized nature of the Costa Rican government sets the stage for local participation, responsibility, and accountability (Ryan 2004; Long 2010). The region did not have local governance until the establishment of a municipal branch in 2003 to serve its 4155 residents (INEC 2011). The Concejo Municipal de Distrito Monteverde is active in the zone but a master plan is still lacking. The economic sector has shifted in the province to the service industry (66%) due to increase in ecotourism in the last 30 years, and agriculture (dairy farming and coffee production) has dropped to 17% of the labor sector (INDER 2016). It is estimated that Monteverde receives over 200,000 visitors a year (Avendaño Leadem 2017).

Since its inception, the MVI has facilitated over 990 place-based, experiential learning courses grounded in the environmental, social, economic, and cultural realities of the communities of the Monteverde region (Monteverde Institute 2016). Starting with two semester courses in 1987, the MVI currently hosts approximately 35 courses per year. The complete academic partner list totals 132 universities, colleges, high schools, and study programs. At least 24% have maintained long-standing relationships with the MVI (>4 years)—the longest being 32 years with the University System of California Education Abroad Program, followed by 24 years by the Sustainable Futures Program with the University of New York at Buffalo and the University of Maryland (Monteverde Institute 2018). Course topics include tropical biology and ecology, conservation, natural resource management, community health, education, Spanish and culture, journalism, writing, social change and development, environmental sustainability, landscape architecture, and civic engagement. An average of 500 students per year study at the MVI for over 11,000 annual student days (Burlingame 2018).

The cultural exchange purpose of the education programs expanded to include service-learning, civic engagement, and then community engaged scholarship programs. The homestay program remains

a strong component of the MVI courses and holds the original intent of the founders. Service-learning programs were a natural adaptation as universities were seeking these types of opportunities and the community was very receptive to work with students. The academic institutions then requested interaction with the communities at a scholarly level where more time, content, and commitment would deepen the experience. The MVI has responded by strengthening the civic work with relevant teaching, research, and community partner content.

Research directed by the MVI includes water resource management, community and environmental resilience to climate change, neotropical migratory bird overwintering survival, tropical reforestation techniques, human health concerns, such as obesity and women's reproductive health, sustainable building techniques, and endangered species conservation. The staff Geographic Information Specialist works closely with investigations and programs to provide the necessary background information. A fully equipped laboratory is available to students and researchers. The MVI digital library archives the work of researchers and the more than 50 student research projects completed each year (Monteverde Institute 2018).

The MVI welcomes research affiliates. Examples of current investigations include understanding migration and environmental impacts, small mammal distribution in tropical montane forest, epiphyte distribution and impacts of climate, and community-based resilience and transformative strategies in response to climate change.

The MVI assists the community through its implementation of community initiatives to address water, human health, cultural, sustainable development, conservation, discrimination, and self-governance issues. The MVI joins or forms community commissions to solve issues, such as gray water treatment and pedestrian safety, as well as aids conservation, education, and development initiatives. The MVI hosts many lectures, workshops, and music events that are free to the community. The MVI supports the youth of the zone by providing scholarships to young adults and incorporating leadership training in its summer camp for local adolescents. The MVI facilities serve as a community and emergency center.

The MVI also serves the local community by providing career jobs to its 30 employees and subcontracts an additional 15 people from the zone. The MVI also contributes nearly \$500k into the local economy through its homestay program with local families and by paying for local services, such as hotel lodging, restaurants, and area attractions.

The current position of the Monteverde Institute is the result of 33 years of work by many individuals who faced different challenges along the way. The MVI slowly and steadily built its reputation with academic and community institutions. Community partnerships have been formed through consistent participation over time. The MVI by-laws clearly state the importance of respect and collaboration with other community initiatives rather than duplication or competition (Avendaño Leadem 2017). Occasionally overlap in services and projects has occurred, but cooperative solutions were found. The MVI needed to provide dependable service in times of financial difficulties, such as start-up, and from external factors, such as 9/11. This required financial agility and personnel flexibility. Facilities were a challenge until a land donation was received and the MVI building was constructed. Student safety is a constant priority. Coordinated emergency protocols have been developed that meet the country standards and laws of both Costa Rica and the United States. Staff require continuous updates on academic institution expectations and regulations. Course coordinators must provide content, logistical support, community connections, and safety. There have been eight executive directors since 1986, with an average tenure of four years. The eight-member Board of Directors is volunteer and requires a commitment of personal time and expertise.

At this point, the MVI is financially sound, with reserve funds and no debt. It operates with a staff who believe that the success of the institution is a collective result of individual and team work. The MVI sits well in the community as an organization dedicated to the zone and has strong partnerships with community members and organizations. The MVI has long-standing relationships with academic institutions and hosts courses from an assortment of disciplines. The membership of the organization

is strong, the Board is dedicated, and is supported by a collaborative 501(c)3 organization and its Board of Directors.

### 3. Examples of the Monteverde Institute's Community Engaged Scholarship

The MVI is an academic, research, and community organization, governed and staffed by community members, working with local, national, and international institutions. Therefore, it understands community engaged scholarship and civic engagement from various points of view. The combination of programs within the MVI provides a successful blend of content, investigation, and collaborative support to study and assist the resolution of issues alongside community members who have identified specific needs.

The MVI promotes research that guides the community in the resolution of issues and leads to concrete actions. The MVI recognizes the importance of conducting research “with” rather than “on” a community (DeLugan et al. 2014). For example, research affiliates E. Ruiz, D. Himmelgreen, and N. Romero-Daza of the University of South Florida, in collaboration with a staff and community member of the Monteverde Institute, J. Peña (MVI), investigated food insecurity in the region. Their findings identified a potential health issue—less nutritious diets due to an absence of local farming and increased food prices aimed at the tourist market (Ruiz et al. 2014). To alleviate the food insecurity issue revealed in this study, the Monteverde Institute started its “Mesas Productivas” or “Productive Table Garden” program, where small raised beds were provided to residents who did not have garden space or who needed assistance (Peña 2014). This attracted a community health course from an international university, and while the academic program focused on the human diet and nutritional aspects of different economies, the program received assistance with the provision of table gardens that were planted by students. Community member experts taught gardening techniques, medicinal uses of plants, and led workshops for community members, researchers, and students.

This research spurred another community program, Monteverde in Motion, which provided exercise classes to the public in rural areas to reduce obesity and address sedentary lifestyles. It was a great success with over 218 well attended exercise classes in one year (2014) and 97% of surveyed participants (n = 56) reported that the program motivated them to change their lifestyle to include more exercise (Peña and Egedus 2014).

Another program that has used research to lead into a corresponding community action restores habitat on the Pacific slope of Costa Rica. It is based upon research of the decline of the Three-wattled Bellbird (*Procnias tricarunculatus*), led by long-time Monteverde residents D. Hamilton (MVI), V. Molina (Fundación Conservacionista Costarricense (FCC), and G.V.N. Powell (World Wildlife Fund). A successful restoration effort has been in force for over 20 years, initiated by the FCC, with the distribution of over 250,000 tree seedlings to area residents. Participating students are taught habitat restoration ecology and plant trees with MVI and FCC staff and community partners. Landowners wishing to restore their open areas to forest receive the physical labor necessary for planting trees. They work alongside the students, sharing their views on forests and knowledge about specific plants or tree species. The students also work in MVI-led research as field assistants. This program has prompted collaborative research, such as soil carbon studies in reforested areas (Tanner et al. 2016). The research has highlighted the need for Pacific slope habitat protection and restoration, contributing to the co-founding of the Bellbird Biological Corridor by six local organizations.

Attending to partnerships is critical (Crabtree 2013). The role of the MVI as a conduit linking academic and community institutions is a key factor in the long-term success of community engaged projects in Monteverde. A prime example is the collaboration between the Fundación Conservacionista Costarricense and the MVI, which began in 1998. In 2015, the FCC asked the Monteverde Institute to co-administer its reforestation program and the MVI Board of Directors unanimously approved this proposal. The program has been embraced by the MVI staff alongside FCC members. In this project, the MVI is both a community partner and an intermediary organization with the FCC.

On the other hand, a challenge encountered by the MVI is the transition of programs to community management. In some cases, such as the Monteverde in Motion program, progress has been slow and suffered set-backs due to external factors that are unmanageable for individuals to resolve (e.g., funding, lack of space, time constraints) (Peña 2014). The garden program has also continued at an irregular pace, which highlights the need for continued resources (time and funding) in order to fulfill the MVI's obligation to community projects and organizations.

The MVI also applies the community engaged scholarship method at the high school level. The MVI Adopt-a-Stream program has worked with three local high schools for over a decade. This structured program teaches students about water quality indicators and standards. The results of this program exposed water quality issues that led to the formation of a multi-organizational committee to address this issue. A guide on macroinvertebrates is also being created through this program (Monteverde Institute 2018).

Community engaged scholarship programs can offer products to the community in return for knowledge and experience. The Sustainable Futures program, started in 1995, provides design plans to local "clients". The students learn architectural design in the tropics in a studio "design and build" format. One client is the local municipality, the Concejo del Distrito Monteverde, which has a limited budget. Each year it requests assistance from the Sustainable Futures program to address issues and design solutions for the community. Projects include recreation areas for children, sidewalk design, traffic flow pattern enhancements, scenic vista benches, and excess rain water management. Preliminary research is done alongside members of the municipality who instruct the students about urban development issues in the tropics and local laws. The students present design proposals that are critiqued by relevant community organizations and the municipality. Students re-design. and if approved by the client, implement the project with help from MVI staff and community members. If the construction is not completed by the end of the students' stay in Monteverde, the Monteverde Institute assumes that responsibility alongside the community or governmental organizations, if possible. This has been very successful in many projects (sidewalks, recreation areas, rain gardens) but has been difficult in other cases due to the complexity of the project or lack of resources on the part of the requesting organization. This is an understandable situation, and yet there is room for improvement for public projects that could benefit from the combined MVI and municipality follow up.

Some projects show immediate results and others have more subtle impacts. A course on development and health issues in the tropics is part of a semester long program at the Monteverde Institute, in conjunction with Goucher and Mount Holyoke Colleges. In the Health and Development course, the students selected a group research project with their professor (Ken Jameson, University of Utah) to examine the threat of the Chagas disease in the zone. Each student focused on a specific aspect: the disease history, cultural perceptions, natural history of the disease's vector, economic impact related to the incidence of this disease, and the treatment of the disease. Information was gathered through readings supplemented by interviews and field data (collecting and sampling the insect vector Reduviidae (assassin bug) with a local expert). The students interviewed local doctors to learn of their knowledge of the disease and visited the local clinic to understand their protocols. The students also learned how to conduct social and biological research, data analysis, and presented their findings at a community forum. The audience at the final presentation included staff, local guides, interested community members, and homestay parents of the students. A community member stood at the end of the talk to say, "This was very informative to me, my family, and this community. We knew about the disease, but we did not know that there was a cure. We never were tested because we were afraid to know if we had the disease. Now we will get tested." In this process, the clinic discovered that it was not complying with its mandated protocol to examine any Reduviidae insect that was brought to the clinic to determine disease presence.

Some projects do not lend themselves to a clear scholarly or reciprocity format but are important work that assists community projects and advances knowledge (see Crabtree 2013 and Hammersley 2013 for more discussion on service as learning). This is especially apparent in "transactional partnerships",

defined by Davis et al. 2017, as those framed to meet short term goals or tasks. An example of useful and appreciated assistance, that is not perceived as “charity”, was the construction of a tree nursery by DukeEngage students for a small-town project. This task was part of a larger program where the students assisted regional conservation projects while analyzing the progress of reforestation efforts in an in-depth research project. In this instance, the most important goal was to build the nursery. The students learned about service, reforestation, and how community organizations function (and struggle). The students reported in their debrief that their effort was a contribution to a project created by local people who were committed to accomplish goals that would favor their community. The volunteer effort of the students was appreciated by the community partner and taught them about mangrove ecosystems, with a tour through that unique environment.. The community organization later reported that there was increased curiosity about reforestation by neighbors after seeing the student group working at their site.

Other programs do not fit a clear civic engagement approach of working alongside community partners, yet may have long term, indirect results that benefit the community. Laurie Kutner of the University of Vermont, in coordination with the MVI librarian, led a pilot program at the MVI. Students reviewed residents’ access to published scientific information of research that was done in their communities. The students were troubled to learn of literary injustice and left determined to promote and use open access journals (Kutner 2018).

Regarding scholarly investigations and collaborative inquiry, the Monteverde zone has a long research history starting in the 1970s. Using a list of 191 publications of research completed in the Monteverde zone from 2000 to 2004, 49 include collaborative authorship by both foreign and local Monteverde researchers. The book “Monteverde: The Ecology and Conservation of a Tropical Cloud Forest”, edited by Wheelwright and Nadkarni (2014), is a compilation of submissions by both international and resident researchers, as well as community members. This book is open access in both Spanish and English (<http://digitalcommons.bowdoin.edu/scholars-bookshelf>).

#### 4. Monteverde Institute’s Framework of Principles for Community Engagement

After three decades of community engagement practice by multiple institutions and community partners, there is great discussion regarding the benefits and drawbacks for community engaged scholarship. While intentions are to benefit all parties involved in a mutually beneficial manner, flaws in implementation and perceptions were suspected to subvert power, create dependencies, exploit communities, and, in the most extreme sense, practice neo-colonialism (Epprecht 2004; Crabtree 2008; Kahn 2011; Strier 2011; Hammersley 2013; Sharp and Dear 2013; Hartman et al. 2014). To address this potential lack of integrity in community engagement scholarship, numerous articles have outlined the framework for reciprocal and respectful programs with effective engagement and administration (Crabtree 2013; DeLugan et al. 2014; McNall et al. 2015; Davis et al. 2017), including work funded by well-known foundations, such as the Carnegie Foundation and W.K. Kellogg Foundation (Driscoll 2008; Calleson et al. 2005). Guidelines have been based on the experiences of community engagement offices in universities (DeLugan et al. 2014; Hartman et al. 2014) and include methods for incorporating programs within institutions (Butin 2006). Community partner considerations are discussed widely in the literature and clear (yet flexible) guidelines are still under development (Sandy and Holland 2006; Ferrari and Worrall 2000; d’Arlach et al. 2009; Hartman et al. 2014; Davis et al. 2017).

Using the scholarly recommendations for effective community engaged scholarship presented in this article, I review the MVI experience in relation to six key principles: (1) the inclusion of a scholarly framework into community engaged scholarship to assess and resolve real community issues; (2) the integration of civic and academic engagement in the philosophy and missions of the academic institution and community partner; (3) careful preparation and effective facilitation to foster mutually beneficial projects between partners; (4) the enhancement of collaboration through participation as informed stakeholders; (5) building resilient relationships through continuous or long term collaboration; and (6) reflection as a key evaluative and learning component for all participants.

The following review affirms the applicability of each concept by showing their employment in the MVI's community engagement program practices. The sources of MVI information include annual assembly reports, history, student evaluations, academic debrief information, community partner discussions, a community-wide census, staff reports, and personal involvement. These experiences provide insight regarding the various ways in which these principles can be applied, their subsequent effectiveness, and additional information for adaptability to distinct programs. For the MVI, this examination will promote a more deliberate implementation of good practices.

#### *4.1. Academic Framework in Community Engaged Scholarship*

Regarding John Dewey's four criteria for educative projects, the program should "generate interest, be worthwhile, awaken curiosity, and be of sufficient duration" (Giles and Eyster 1994). Project content should be presented to students within the context of site, history, culture, intention, and local, regional, and global relevance. Other useful recommendations include team building exercises and critiques regarding international service learning (Crabtree 2013) or training academies that cover ethical engagement for meaningful assistance to communities (DukeEngage 2018). The MVI community engaged scholarship is incorporated into academic courses or research, thereby framed with objectives, methods, reflection, and analyzed results.

While the MVI prepares students by providing background information on related topics, especially by calling upon residents, community organizers, local experts, and government officials, the sending academic institution often frames the scholarship component. This collaboration between the academic institution and the MVI could be strengthened with increased involvement by the community partner for co-creation of the scholarship and partner work. This would enable the community partner to impart their perspectives into the preparatory knowledge that students and faculty receive, thereby minimizing misperceptions that sometimes occur when students and community partners differ in their understanding of the issue or expected outcomes.

The Monteverde Institute expands the scholarly framework with the inclusion of research as a key component of its community engaged scholarship. Research that leads to concrete remedial actions in the community is especially encouraged. Verifiable data and analyses validate the perceived issue and the applicability of the proposed solution. Without investigation, perceptions can direct programs into solutions that are not effective. For example, it was previously doubted that food insecurity was an issue in the region until the joint USF-MVI research project was completed. The home gardening initiative would not have been implemented without the results from this research. In another instance, it was believed that the water quality in streams below contaminated areas were severely polluted until collaborative investigations showed more positive results, reducing the highly critical nature of certain projects.

The "sufficient duration" criteria is a real challenge. Not all study abroad courses are amenable to the in-depth framework of community engaged scholarship. While each short course contains the scholarly components of objectives, methods, content, and critical activities, the results may be limited due to on-site time constraints. In these cases, the academic partner modifies the end result or its timeframe. For example, a recent journalism course from the University of Missouri performed part of its work in Monteverde and will finish the preparation an e-book on the Bellbird Biological Corridor at its home university base. Community partners recognize that it projects may be finished through the combined efforts of multiple programs.

Calleson et al. 2005 suggests that significant results from community engaged scholarship should be either peer-reviewed articles, applied products, or the dissemination of information to the community. Collaborating researchers tend to publish peer-reviewed articles but also disseminate their findings to the community via talks or other written materials. In the student programs, the end products are typically construction, restoration, design plans, or dissemination of information through symposia, posters, pamphlets, and social media. The community partner gains service, funds, knowledge exchange, and a final product.

The collaboration between the MVI and the sending academic institutions and researchers is paramount. The MVI strives to build strong relationships through careful preparation for courses, strong safety and emergency protocols, personalized service, attentive communication, and flexibility. Researchers are encouraged to engage fully in the zone, and the MVI provides networking, use of space, and opportunities to interact with the community. These relationships have been reciprocal, leading to multiple course offerings with single institutions, course creation by research affiliates, and partnered research with the MVI.

#### *4.2. Co-Commitment to Community Engagement and Academic Exchange*

Several analyses of best practices to institutionalize community engaged scholarship state that its premise must be an integrated part of the institution's mission, philosophy, and administration (Calleson et al. 2005; Butin 2006). The MVI's mission, philosophy, direction, and practices embrace respectful community engagement. This commitment is woven through all departments (academic, research, and community initiatives) and levels of the organization (staff, administration, and governance).

The MVI's original mission, developed in 1986, states "the Monteverde Institute is a non-profit, public utility institution dedicated to peace, justice, knowledge, and the vision of a sustainable future. We provide programs that promote the appreciation of diversity and community, spirituality, and the wellbeing of all forms of life. The opportunities that we provide are designed for people of Costa Rica and other countries, the residents of the Monteverde region, and its surrounding communities" (Burlingame 2018). A revised mission statement was proposed in 2008: "to advance sustainable living at a local and global level through place-based education, research, and community programs" and a vision statement was added, "A sustainable community for a sustainable world" ([www.monteverde-institute.org](http://www.monteverde-institute.org)).

The Monteverde Institute practices and promotes community engagement at all levels. First, the community is the foundational base of the organization. The MVI's mission, vision, and operating format is governed by an assembly of 68 active community members (197 total members over 33 years). The assembly elects the overseeing Board of Directors and reviews the operations each year. Eighty-eight residents of the zone have served on the board since the formation of the MVI and the average tenure per person is four years. The Executive Director is hired by the Board to carry forth the MVI's mission with integrity. The direction of the Monteverde Institute uses an Executive Committee comprised of the Executive Director and department heads to discuss operations and make joint decisions. Staff meetings are held each month to promote autonomy, collaboration, and unity. This structure allows involvement by all parties and the opportunity to make decisions using collective wisdom.

The staff weave alliances with academic and community partners and believe that a participatory commitment in the relationship is critical. In 2016–2017, the MVI staff members interacted with more than 100 community members in 20 community commissions and boards (Monteverde Institute 2017). They led over 12 community programs in water, conservation, community health, and municipal service. The MVI hosted 60 talks and workshops for the community (several in collaboration with other organizations) and provided more than 60 community engagement opportunities to 20 collaborating universities alongside at least 46 community organizations or individual residents. In addition, approximately 500 visitors to the zone worked with the MVI and the FCC members in the joint reforestation program, providing 1000 h of service work. Eleven research affiliates imparted knowledge to the community in the form of research, lectures, and training programs (and the MVI recognizes that more participatory and joint research projects should be encouraged). Each of the 473 students that participated in the academic programs in 2018 worked in either a research or community program, and many participated in both.

One third of the MVI's annual income is paid to staff as salaries and related benefits. Another third of its annual income compensates local service providers and homestay families. Ten percent of the MVI gross income is destined for community programs.

Regarding the promotion of sustainability, as stated in the mission, over 97% of course evaluations by students emphatically state that the MVI promotes and practices its commitment to sustainability. In a participatory action research, 86.8% of the survey respondents (n = 341) stated that the Monteverde Institute is an important community institution for community development, education, sustainability, knowledge exchange, events, workshops, and the conservation of natural resources (Avendaño Leadem 2017).

For the community groups, a willingness to receive input from outside academics is very important for successful collaboration. There are many different levels of this involvement, such as the provision of data and analysis, end products, such as architectural plans, maps, and urban design concepts, and construction of project assets. Before project initiation, the MVI moderates the interchange formats, holding three key points in the forefront: (a) the community partner is the most knowledgeable about the issue at hand; (b) the program is an exchange of knowledge and skills; and (c) there are usually constraints (time, experience, knowledge) that may limit the quality of the end product, yet the overall benefits should outweigh the time commitment invested by all parties.

#### *4.3. Preparation and Facilitation of Community Engagement*

The Monteverde Institute serves as a facilitator of community engaged scholarship programs by identifying, linking, preparing, and coordinating community projects with appropriate academic partners. The ability of the MVI to connect academic and civic interests is enhanced by its participation in many community endeavors and its leadership in specific initiatives. Respecting the needs of the community, as identified by community members, is very important.

The Monteverde Institute plays an important role in the exploration of engagement opportunities, the integration of engagement into learning, and by supporting faculty, students, researchers, and community partners (as mentioned by Butin 2006). Community partners focus on their specific work goals and the preparation of student or researcher inclusion into the project. Educators focus on the integration of the academic content and scholarly aspects into the community engagement. The third party (students) must hold the same expectations while having additional priorities (Mills 2012). Students enter a new situation as learners and then convert to serve as active participants. The MVI's coordination role orients both the academic and community partners to the shared expectations, preparation, communication, and logistical factors of the project. A coordinator from the MVI participates alongside both groups to facilitate communication, work flow, and the completion of the project.

The MVI acts as a channel to specific projects through its participation and knowledge of certain community work. Visiting faculty can express their interest, focus, and goals for community engaged scholarship and the MVI matches those needs with existing community programs. When there is an appropriate match, the MVI supports the faculty with project coordination so they can focus on academic content.

It is important that the community projects supported by the MVI and visiting academic institutions are identified as needs by community members. This provides validity for the selected work and places the primary stakeholders of the project (the community) at the forefront.

The MVI has found that pre-project planning with the community partner is essential to determine expected outcomes of the collaboration, time frame, project supervision, and materials needed. The community partner determines the work time based on the academic course time constraints. Supervision is by choice of the community partner, materials may be provided by either side, and anticipated outcomes should be clearly defined. Some, but not all, of the most successful engagement has come from the municipality or well-established organizations. Some identified projects are not effective, such as the MVI keyhole garden project to establish beautiful gardens in public areas. This

project was short-lived due to a lack of reasonable function. Other projects have failed due to lack of resources (time, funds, space, etc.). However, these “failures” should not be ignored as they are important learning opportunities.

Partnerships are based on mutual respect, trust, and equality. This requires humility and the MVI tries to balance its own promotion with the promotion of partners that are also doing important work. A key component of good relations is the staff interaction with the partners. Staff are also community members in a small town, making this an easier task in Monteverde than in larger regions.

#### *4.4. Participants as Informed Stakeholders to Enhance Collaboration*

For respectful, reciprocal, and resilient collaboration, the MVI stresses that everyone is an actor and a stakeholder in the project. Comprehending each other’s roles, perspectives, and anticipated outcomes is very important. Understanding the current situation (e.g., events, culture, language, and use of technology) is also significant. “The civic model focuses on enabling students to become active, informed, and empowered citizens of a participatory democracy” (Hoppe 2004; Swaner 2007). The MVI believes this concept is applicable to all participants in the community engaged scholarship program.

“We need more than an ethos of reciprocity as a guide; we need to learn the . . . on-the-ground strategies that are more likely to produce mutuality” (Crabtree 2008). The “on-the-ground strategies” include insight into current academic trends, legalities, the appropriate treatment of programs, and the student, researcher, and community partner perspectives (current events, socio-economic, and political status). All involved parties need to establish common goals, shared responsibility, a clear understanding of the issue at hand, and agree upon methods and a timetable as the “appropriate treatment of programs”. Cultural respect is paramount.

For example, many people in Costa Rica consider face-to-face dialogue as more respectful than written or telephone communication. Therefore, written surveys may not capture the essence of the subject. Additionally, it is best to go to the subject’s place of work or home, rather than calling a meeting to which they must come. Certain social media apps are now widely accepted and researchers should use of those social media methods for the best results. Language can be misconstrued: “collaboration” and “cooperation” imply different levels of participation in Spanish; “compromiso” means obligation or engagement. Non-confrontational language in this country leads to indirect responses, which must be pursued further to ascertain the real answers. These cultural norms and technological uses are closely followed by the MVI. At the same time, the MVI facilitates for the academic customs. Researchers may not have time to “visit” before their interviews start, as is customary, or prefer not to drink “primera leche” (colostrum) in the homes of their interviewees. The MVI coordinator provides an interface between the cultures.

The MVI believes that each participant must be treated as a contributor to the entirety of the project. Participants are encouraged to embrace their roles. For example, the MVI on-site coordinator provides effective communication, provision of materials and tools, safety protocols, and insures clarity regarding the project, culture, and potential solutions. The MVI guides the students and community members to interact in supportive roles. The MVI provides the foundation for interactions between partners from start to finish. MVI’s participation with the community partner continues even in the absence of the academic program.

The sending academic institution is responsible for the overall scholarship of the program (curriculum, implementation, credit). They prepare students for their study abroad or place-based experience and approve project principles and interactions with the community. Researchers design and implement their investigations. The MVI offers support to all these tasks.

The student has a big stake in the game. Not only are they studying for academic credit, they are expected to provide a skill, knowledge, and labor to a project. They must understand the objectives and the basis of the community project, as well as fully participate in its execution. An initial task of the MVI is to empower the academic participants with background information. Second, if it is a multi-task job, students are asked to self-assign roles within the given job list. At least one coordinator

from the Monteverde Institute works alongside the group as an active participant and assists in all aspects of the project.

The community partner provides a clear objective and project design. They work alongside participants and impart knowledge and direction. They are responsible for the successful completion of the project. The MVI can be involved to any extent in this process, as required by the community partner.

There are nuances within each of the stakeholder roles that the MVI, in its intermediary role, addresses. For example, the community partner may be reluctant to manage or direct the project in front of others. This is a key point, as raised by [Crabtree \(2008\)](#), that the culture of the partner and site must be factored into the project. The Monteverde Institute has two options regarding this dilemma: (a) work to support the community partner with group management training, or (b) assist the community partner by voicing their direction to the group. While some training to empower community partners has been provided, this has mainly been informative programs regarding the content of the underlying issue. More could be done by the MVI on this subject.

The MVI feels responsible to ensure that there are reciprocal benefits for each party. The MVI has found reciprocity, as categorized by [Hartman et al. \(2014\)](#), to be attainable and effective—forms of exchange (interchange of benefits), influence (attitude, process, or outcome shift as a result of interaction), or generativity (produce something new together).

#### *4.5. Partnership Resilience through Continuous or Long Term Collaboration*

To re-quote Calleson et al. 2005, “community-based anything takes time, length, and breadth”. The MVI has learned that continuity fosters strong connections with collaborators and leads to significant impact. Most community partners have had working relationships with the MVI for an average 9.5 years. These alliances are maintained through the commitment of both parties. The MVI continues its involvement through committee work with the community partner, or with participation of other courses throughout the year, or by assisting in the completion of projects that were not finished within a course timeframe. It is a complex task for universities to hold a constant, on-going investment with a community partner that includes current interactions, understanding, trust, and common goals, while balancing power and expectations ([Strier 2011](#)), and vice versa. The continuity provided by the MVI solves many of these concerns.

Community partners have expressed frustration about annual schedules and the time allocations for collaborative action as set by the academic institutions ([Ferrari and Worrall 2000](#); [Mills 2012](#)). This is an unavoidable consequence that the Monteverde Institute alleviates by committing to the project continuation in the absence of the academic groups or researcher. For example, research regarding the resilience of the Monteverde community during a severe weather event was initiated by students from a semester long program with MVI faculty. The sample sizes of the student research were not sufficiently large and certain variables were not analyzed. Instead of shelving this research, MVI staff researchers expanded and completed the study. It was later presented at a conference and to the community, with credit given to the student groups ([Hamilton et al. 2018](#)). In another case, students designed and partially built sidewalks in areas where pedestrian travel was dangerous. The Monteverde Institute continued this project to its completion using staff and additional student groups. For other projects, such as reforestation or water quality testing, the programs are well established by the MVI and student participation in these on-going programs enhance the outcomes, rather than initiate the work.

The Monteverde Institute believes that it must be part of the community in order to support it. Trusted partnerships are built through mutual commitment. The MVI demonstrates this by honoring the project’s objectives at all times, thereby respecting the community partner’s goals and interests. Trust is also built through active participation. For example, the MVI staff participation with community partners on their committees shows commitment and keeps the MVI knowledgeable about community concerns and programs. Committee members contribute and maintain confidentiality and good rapport with other committee members and the community.

The homestay, or community extension, program is an important link to the community. The MVI has provided homestays for 33 years. Families are reimbursed for their services while gaining insight into foreign cultures. The children in the homestay families are empowered by these relationships and some travel to visit their student “sibling” in their home countries. The homestay families are invited to the MVI for workshops, language classes, homestay fiestas, and organizational meetings. They are considered a part of the Monteverde Institute family and know that the Monteverde Institute is their advocate. These actions lead to trust between collaborators and enhance the depth of community initiatives and engaged scholarship.

#### 4.6. *The Importance of Reflection*

Studies promote the use of reflection to link experience and education (Giles and Eyler 1994), as well as to solidify the learning experience, evaluate the employed methods and results, refine the project, and encourage personal growth (Eyler and Giles 1999). This powerful tool should be employed by all parties involved in the community engaged scholarship program.

MVI programs have reflection activities for the students that include readings, discussions, journaling, videos, and art. Many courses require student presentations of their experiences to the Monteverde community or to an audience at their home institutions. Some course evaluations include questions that provoke reflection. Course debriefs and evaluations provide another source of reflective material and are analyzed in relation to other programs and future planning.

While reflection activities are stressed for students, the Monteverde Institute should devote more time to institution and staff reflection, as well as assisting community partners in this activity, as suggested by Crabtree (2013). Further, d’Arlach et al. (2009) reports that community participants are rarely asked to reflect or are asked about their experiences. The Institute receives a large quantity of anecdotal and positive comments about its interactions, but this may be biased due to circumstance or interpretation. A more concrete evaluative process should be developed.

### 5. Overview—What Now?

Rolfe et al. (2001) poses three questions for reflective exercises and ends with the query: “what now?” I answer this question by reviewing successful actions by the MVI, followed by recommended modifications. Reciprocity is a key component of community engaged scholarship, and just as the MVI has learned from other experiences, I share this overview in that light.

Community engaged scholarship is commonly attributed to Ernest Boyer’s call for a larger purpose in academic programs and the “scholarship of service” (Boyer 1990; Ferrari and Worrall 2000; Calleson et al. 2005; Crabtree 2013). At the same time, community programs expand their stakeholder base and overall potential through community engaged scholarship.

The collaboration in the design of courses and community interaction between academic institutions and the MVI is advantageous. In the case of community engaged scholarship, the academic content relates to themes and disciplines relevant to community issues. Academic researchers also consult with the MVI regarding the significance and application of their investigation topics. The community partner identifies issues and corresponding projects, while providing knowledge, training, and experience to the participants. The learning component is multi-directional, as information is exchanged and enhanced by the employed analytical processes. Evaluation of programs with the emphasis to maximize the learning opportunity for all (including the MVI) could be further developed.

With the scholarship and community participation in place, there are two areas that need strengthening and this may be a common factor in other programs. Student evaluations express a deep appreciation for experiential and community exchanged learning, yet introductory material and background information appears limited. The other deficiency is reflection. While reflection activities are included, course evaluations mention that there was not sufficient time for reflection or “down time”. Community partners could be greater contributors of introductory material, reflection,

and evaluations. The inclusion of more background material and reflection should be considered for students, researchers, community and academic partners, as well as MVI staff, and the MVI institution.

Research alongside of theory and applied community actions has proven to be an important piece of MVI programs. Of particular value are investigations that guide or incentivize remedial action with community partners. Research also provides educational opportunities and substantive information for effective endeavors. Above all, research is a commitment to which many community organizations are not able to direct resources and the information provided is usually deemed extremely valuable.

Mutually beneficial relationships must be built and maintained by all involved parties. Time and patience are critical because resiliency is manufactured through trust, flexibility, understanding, and commitment—the sharing of a common vision and willingness to work together to attain those goals.

The Monteverde Institute, in its role as a conduit for community engaged scholarship, facilitates collaborations by holding alliances among academic and community partners. The commitment to these relationships is embedded in the organization's structure and practice and is honored by the MVI staff and direction. The MVI's commitment to the community project throughout the year, even in the absence of academic groups or research affiliates, is imperative for the continuity of programs and community partnerships. At the same time, the MVI upholds its commitment to the academic institutions that return from year to year. The MVI maintains the course integrity and planning while keeping the course's community project component active throughout the year. Since the community project and partner continuity is so important, an annual review of project stability should be done annually by the MVI to determine the factors of success and the obstacles that impede project completion, continuation, or independence from MVI support.

The MVI operating model shows that community engaged scholarship is well supported by an intermediary institution that can provide the necessary commitment to both academic and community partners. The MVI is a community member organization, as well as a collaborator with other initiatives. It provides a link between the academic and civic realms, allowing community partners to focus on their project at hand and faculty to focus on academic content and student guidance. The MVI promotes leadership by the community partner but will support the partners who ask for assistance. To improve this model, the MVI should focus more on community partner inclusion in the preparation process, leadership training, reflection, and the program evaluation.

Lastly, while the MVI strives to incorporate the good practices for successful community engaged scholarship, there are important community efforts that may not have the depth of scholarship application at first glance (e.g., building a wall for a childcare center). These smaller programs can still be an opportunity to teach about larger issues, and by viewing community engagement on a macro scale, the scholarship and reciprocity objectives can be achieved. The MVI can clarify this principle to academic institutions through a concrete design to facilitate the academic content.

The MVI has witnessed the positive impacts of scholarly community engagement when community-identified issues match academic interest and good practices are employed. A more in-depth review of this is pending but addressing food insecurity, habitat restoration, sustainable landscape design, community health, and municipal issues are just a few of the examples of how community engaged scholarship programs have impacted the Monteverde community and its academic partners. The dissemination of knowledge from these programs to local decision makers, community actors, and interested parties is significant. The results are evidenced in regional improvements (e.g., children's parks, home gardens, sidewalks, reforested areas, disease attention, digital library access, symposia, publications) and endorsed as valuable education experiences by faculty and students. Many of the principles put forth in the literature have been confirmed in MVI's experience, while recognizing the importance of program customization, because each community program is unique, each academic institution is distinct, as is each culture, location, and the individuals involved.

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