

# Capacity building for strengthening biodiversity data mobilization in Venezuela

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**Programme:**BID

**Project ID:** BID-CA2020-041-INS

**Project lead organization:**Provita

**Project implementation period:**1/7/2021 - 31/7/2022

**Report approved:** 27/1/2022

## Narrative Midterm report

### Executive Summary

By December 2021, the main project achievements are:

1. Completion of the BID Data Mobilization Workshop by a team member, including the certification exercises. We are awaiting for the results of the certification. Two additional team members are working through the course materials and exercises and should obtain the certification in early 2022.
  2. Successful completion of the Institutional capacity-building workshop on DwC and GBIF standards, with the participation of 12 of Provita's project coordinators and leaders.
  3. Successful publication of the checklist of the Venezuelan Red List of Endemic Trees through GBIF.org.
  4. A first draft of the "Institutional biodiversity data management policy" was completed.
  5. Preparation for the Training workshop for research collaborators has started, including preparation of a preliminary agenda and list of potential participants.
  6. Participation of team members in other relevant GBIF workshops: Limpieza de datos de biodiversidad con OpenRefine (Haidy Rojas) and BID Data Processing training course (Irene Zager). In addition, two team members participated in the Q&A sessions of the training workshop organized by our partners from Fundación Caribe Sur (BID-CA2020-025-NAC).
- Throughout, project progress was monitored following PMI standards. Early on, a detailed calendar of milestones and activities was developed, listing accountable team members and associated stakeholders. Weekly follow-up meetings were held, which allow team members to assess the status of each activity and milestone and implement corrective actions if needed. In addition, permanent contact was maintained with the BID regional project advisor, Leonardo Buitrago, to clarify project goals and address doubts regarding the DwC standards and GBIF publication process.

### Progress against milestones

**Has your project published at least one dataset through GBIF.org?:** Yes

**Dataset published:**

Dataset	DOI
Lista roja de los árboles endémicos de Venezuela	<a href="https://doi.org/10.15468/vfkuxf">https://doi.org/10.15468/vfkuxf</a>

**Has at least one member of your project team received certification following the BID capacity**

## enhancement workshop?: No

**Rationale:** One of our team members (Haidy Rojas) successfully completed the BIDCA Data Mobilization Workshop, and submitted the certification exercises by the specified dateline (October 17th). However, due to health issues experienced by the course lead, Laura Russell, review of the exercises was delayed and we have not yet received confirmation on the certification.

It is important to mention that two additional team members (Alejandro Gallardo and Irene Zager) were granted permission by Laura to pursue the certification outside of the original workshop's schedule. They are both currently working through the workshop materials and are expected to submit the certification exercises in early 2022.

## Report on Activities

### Activity progress summary

Following the original schedule, between June and December 2021 four of the project's ten activities were completed. These are:

**1. Completion of the "BID Data Mobilization Workshop" by a team member** (Haidy Rojas), including the certification exercises. The time and effort required to go over all of the course materials was larger than originally expected due to our lack of prior knowledge regarding the GBIF standards and publication process, and the vast amount of information and associated documentation available. On the other hand, course development was somewhat impacted by a medical emergency faced by its lead, Laura Russell, which prevented the final discussion and Q&A session from taking place. However, the thorough documentation and regular exchanges with the BID regional project advisor, Leonardo Buitrago, have allowed us to address our doubts regarding the DwC standards and GBIF publication process so far.

As mentioned previously, the official course certification by the Secretariat is still pending due to a delay in the review process of the exercises.

Two additional team members (Alejandro Gallardo and Irene Zager) were granted permission to pursue the certification outside of the original workshop's schedule. They are both currently working through the workshop materials and are expected to submit the certification exercises in early 2022.

**2. Completion of the "Institutional capacity-building workshop on DwC and GBIF standards"**. During the workshop, 12 of Provita's project coordinators and technical leads received an introduction to good practices for biodiversity data management and mobilization, as well as GBIF's standards and publication process. The training made use in part of available materials from the BID Data Mobilization Workshop. Due to difficulties coordinating the group's agendas, particularly for team members who had to conduct fieldwork activities, the training followed a mixed format, with each participant going over key materials ahead of two synchronous virtual sessions for discussion and Q&A. In addition, all participants were asked to complete a few simple exercises based on the data regularly gathered in the framework of their work. The results of these exercises are informing the development of Provita's Institutional biodiversity data management policy, which is one of the project's deliverables.

Even though the course served as a good introduction to the topic for all of our project's leads, it has become obvious that more time and practice will be required in order for them to feel comfortable with the standards. Therefore, some of them are aiming to participate in next year's more in-depth training workshop for our research collaborators.

**3. Publication of the checklist of the "Venezuelan Red List of endemic trees" through GBIF.org.** Between August and December our team compiled the information of the Venezuelan endemic trees that have been assessed following IUCN's standards in the framework of the Global Tree Assessment initiative, led by Botanic Gardens Conservation International (BGCI). Given that this is a global initiative, and that not all the assessments were originally completed by Provita's team, we decided together with our colleagues from BGCI and the BID regional project advisor to publish a first version of the checklist with only those species that were originally assessed by Provita's team and that had been already published in both the Global Tree Portal (<https://www.bgci.org/resources/bgci-databases/globaltree-portal/>) and the IUCN Red List of

Threatened Species (<https://www.iucnredlist.org/>). The checklist was published on December 17th (<https://doi.org/10.15468/vfkuxf>), and includes 629 records from 628 species and 68 plant families.

Seven families represent more than 50% of the total species on the list and of the total threatened species. The Fabaceae and Rubiaceae families top both lists. Moreover, 51% of families have more than 50% of their assessed endemic species under threat. The results indicate that 46% of the species are threatened (CR, EN and VU), while 27% face a low risk (NT, LC) and for 27%, there is not enough information (DD) to Evaluation.

An additional ~260 endemic tree species are under review and/or permission is being sought for their inclusion in a second version of the checklist in 2022.

**4. Submission of the midterm financial and technical report.** Both reports were submitted through the GBIF Grants Portal on December 22nd, following GBIF's standard formats.

During this period, we also made progress with three additional project activities:

**5. An early draft of the “Institutional biodiversity data management policy” was completed.** The document will be reviewed and complemented in early 2022.

**6. In preparation for the "Training workshop for research collaborators", a preliminary agenda was prepared as well as a list of potential participants** including stakeholders from academia, government institutions, non-governmental organizations, museums and herbariums. We will be contacting them in early 2022 to invite them to participate in the workshop, with emphasis on those institutions that are data-holders and would potentially be able to mobilize their own biodiversity data.

**7. Work towards digitizing and publishing the checklist of the Venezuelan Red List of Threatened Fauna was initiated.** Specifically, our team started the compilation and revision of the complete list of Venezuelan mammals, birds, reptiles, amphibians and freshwater fish, with information on their risk of extinction at the national level following IUCN's red list standards. We have already identified DwC fields that will be included and are working towards completing the information for each species.

Finally, members of our team **participated in other relevant GBIF workshops, which were not originally included in the project's activities:**

- Haidy Rojas participated in the course “Limpieza de datos de biodiversidad con OpenRefine”.
- Irene Zager participated in the course “BID Data Processing training course”.
- Alejandro Gallardo and Haidy Rojas participated in the Q&A sessions of the training workshop organized by our partners from Fundación Caribe Sur (BID-CA2020-025-NAC).

Work towards the project's other two activities will be initiated in early 2022, as per the original schedule. These are:

- Digitize and publish two additional datasets from workshop participants
- Biodiversity data advocacy workshop

### Completed activities

#### **Activity: BID Capacity enhancement workshop**

**Description:** A team member (Haidy Rojas) participated in the BID capacity enhancement workshop and submitted the completed exercises to obtain the certification. Official response regarding the results of the certification has not yet been received from the Secretariat.

**Start Date - End Date:** 19/7/2021 - 17/10/2021

**Verification Sources:** BID Data Mobilization Workshop Certification (Pending)

## Activity: Institutional capacity building on Darwin Core and GBIF standards

**Description:** A training workshop on Darwin Core and GBIF standards and protocols was held for 12 key Provita team members that gather and manage biodiversity data. Training was based on the training materials from the BID Data Mobilization Workshop and available documentation. Participants were asked to conduct some simple exercises linked to data previously collected in the framework of their work.

**Start Date - End Date:** 4/10/2021 - 15/11/2021

**Verification Sources:** a) Workshop agenda and training materials: 1.a\_Temario TALLER INTERNO PROVITA-GBIF.docx, 1.a\_Presentaciones\_Taller\_PDF.rar

b) List of participants: 1.b\_List of participants institutional workshop.pdf

c) Partial draft of the Checklist of Venezuelan Red List of Endemic Trees:

1.c\_20211025\_checklist\_ipt\_AEV.xlsx

## Activity: Digitize and publish the checklist of the Venezuelan Red List of Endemic Trees through GBIF.org

**Description:** Between August and December our team compiled the information of the Venezuelan endemic trees that have been assessed by Provita's team following IUCN's standards in the framework of the Global Tree Assessment initiative, led by Botanic Gardens Conservation International (BGCI). The published checklist includes 629 records from 628 species and 68 plant families. An additional ~260 endemic tree species are under review and/or permission is being sought for their inclusion in a second version of the checklist in 2022.

**Start Date - End Date:** 16/8/2021 - 17/12/2021

**Verification Sources:** <https://doi.org/10.15468/vfkuxf>

## Report on Deliverables

### Deliverables progress summary

Following the original schedule, between July and December 2021 our team completed the publication of one dataset through the GBIF.org platform and made progress towards a second one:

1. Publication of the Venezuelan Red List of Endemic Trees (Lista roja de los árboles endémicos de Venezuela, <https://doi.org/10.15468/vfkuxf>). This first version of the checklist includes only a portion of the Venezuelan endemic trees that have been assessed following IUCN's standards (629 records corresponding to 628 species and 68 families). We decided to only publish a partial list for this first version because we found some inconsistencies between the sources that we were using (i.e., Provita's records, the IUCN Red List of Threatened Species and BGCI's Global Tree Portal) that will require additional time for review. Similarly, since not all assessments were completed by Provita our team wants to make sure to contact the original assessors before adding the species they worked on, to avoid any licensing issues. Finally but not less important, familiarization with DwC standards and the process of identifying the appropriate fields for the checklist took longer than we originally expected, particularly since we wanted to include more fields than strictly necessary to maximize the potential use of the checklist.

2. Initiate compilation of the Venezuelan Red List of Threatened Fauna. Our team has started the compilation and revision of the complete list of Venezuelan mammals, birds, reptiles, amphibians and freshwater fish, with information on their risk of extinction at the national level following IUCN's red list standards, in order to publish it as a checklist in mid-2022. We have already identified DwC fields that will be included and are working towards completing the information for each species.

During this period, our team also completed one additional project deliverable, and made progress towards a second one:

3. Training workshop for Provita's team. An institutional training workshop was held, with the participation

of 12 project coordinators and technical leaders with the objective of strengthening the institutional knowledge base to manage the standardization, systematization and publication of primary data on Venezuelan biodiversity; specifically, those related to assessments of the conservation status of Venezuelan species and ecosystems, as well as those generated institutionally, by species monitoring and conservation projects.

The workshop had a virtual modality, with participants going over videos and documentation prior to two synchronous virtual work sessions. They also worked in teams to complete workshop assignments on their own.

The workshop discussions and completed exercises are informing the development of an Institutional biodiversity data management policy.

4. Development of a first draft of the Institutional biodiversity data management policy. This document aims to establish Provita's biodiversity data management policies to ensure compatibility with Darwin Core standards, while also covering the institutional needs. The draft will be circulated among key personnel in early 2022 for review and completion.

5. Initial steps towards the Training workshop for research collaborators. A preliminary agenda was prepared as well as a list of potential participants including stakeholders from academia, government institutions, non-governmental organizations, museums and herbariums. We will be contacting them in early 2022 to invite them to participate in the workshop, with emphasis on those institutions that are data-holders and would potentially be able to mobilize their own biodiversity data. The final agenda and format for the workshop will take into account the lessons learned by our partners from Fundación Caribe Sur (BID-CA2020-025-NAC) who recently completed a data mobilization training workshop with local partners focused on Venezuelan marine biodiversity. Finally, we have already discussed with the BID regional project advisor, Leonardo Buitrago, his potential participation in the workshop to talk about the publication process through GBIF.

Work towards the final two project deliverables will be initiated in early 2022, as per the original schedule. These are:

- Two additional datasets from workshop participants
- Biodiversity data advocacy workshop

## Progress towards deliverables

### Dataset deliverables

#### Checklist of the Venezuelan Red List of Endemic Trees

**Dataset type:** Checklist

**Dataset scope:** Preliminary list of Venezuelan endemic trees (from 68 families), with information on their risk of extinction at the global level based on IUCN's red list standards

**Number of records:** 629

**Data holder:** Provita

**Data host institution:** GBIF.org

**% complete:** 100%

**Status update:** A first checklist of the Venezuelan Red List of Endemic Trees was published through the GBIF.org platform on December 17, 2021

**DOI:** <https://doi.org/10.15468/vfkuxf>

**Expected date of publication:**

#### Checklist of the Venezuelan Red List of Threatened Fauna

**Dataset type:** Checklist

**Dataset scope:** Complete list of Venezuelan mammals, birds, reptiles, amphibians and freshwater fish, as well as some invertebrates, with information on their risk of extinction at the national level following IUCN's red list standards

**Number of records:** 4,000

**Data holder:** Provita

**Data host institution:** GBIF.org

**% complete:** 30%

**Status update:** The list is partially compiled and digitized. DwC fields that will be included have been identified. The team will be working on reviewing all of the species taxonomy and completing the

information for all fields by the expected publication date.

**DOI:**

**Expected date of publication:** 2022-06-17

## Other deliverables

### Training workshop for Provita's team

**Description:** An institutional training workshop was held, with the participation of 12 project leaders and managers to build their capacities on Darwin Core and GBIF standards. The workshop had a virtual modality, with participants going over videos and documentation prior to two online work sessions.

**% complete:** 100%

**Status update:** The workshop was completed between October and November.

**Sources of verification:** a) Workshop agenda and training materials: 1.a\_Temario TALLER INTERNO PROVITA-GBIF.docx, 1.a\_Presentaciones\_Taller\_PDF.rar b) List of participants: 1.b\_List of participants institutional workshop.pdf c) Partial draft of the Checklist of Venezuelan Red List of Endemic Trees: 1.c\_20211025\_checklist\_ipt\_AEV.xlsx

## Communications and visibility

To generate awareness on the project and promote biodiversity data mobilization in the country, we have used Provita's social media accounts to publish a series of posts describing GBIF and our project. The total number of posts and their reach so far is presented below:

Facebook: 6 posts, 5.244 people reached

Instagram: 5 posts, 5.755 people reached

Twitter: 8 posts, 2.900 people reached

In early 2022, we plan to publish a new series of posts presenting the project's progress (including the publication of the first version of the checklist of the Venezuelan Red List of Endemic Trees) as well as to start promoting the coming Training workshop for research collaborators.

An updated text for the project's webpage was added as an attachment (2. Updates to project page\_Strengthening biodiversity data mobilization in Venezuela\_BID-CA2020-041-INS.docx).

## Monitoring and evaluation

### Monitoring and evaluation findings

Project progress is monitored following PMI standards. Early on, we developed a detailed calendar of milestones and activities, listing accountable team members and associated stakeholders. We hold weekly follow-up meetings which allow team members to assess the status of each activity and milestone and implement corrective actions if needed. In addition, we maintained permanent contact with the BID regional project advisor, Leonardo Buitrago. So far, all of the project's main goals and datelines have been met (with the exception of the certification from the BID Data Mobilization Workshop for reasons that scape our control).

We have made important progress in preparation of next year's deliverables, and have maintained open communication with key partners and potential participants to ensure the planned workshop's success. An important change that will take place in early January is that Haidy Rojas will no longer be part of the project's team. Even though this situation is not ideal, we have already taken measures to minimize the impacts, including:

- 1) Two additional team members (Alejandro Gallardo and Irene Zager) are pursuing the certification. They are both currently working through the workshop materials and are expected to submit the certification exercises in early 2022.
- 2) During the second semester, both Alejandro and Irene will be dedicating more time to the project than originally planned. They have been actively engaged in all activities so far, so are very much up to date. If needed, a third member of Provita's team will also join the project to support the successful completion of activities on time.
- 3) A revised version of the calendar of milestones and activities will be developed in early January, to address the necessary changes.

## Impact of COVID-19 pandemic on project implementation

The biggest impact of the COVID-19 pandemic for the project implementation has been the limitation to conduct in-person meetings, training and events. All work has been conducted remotely by the team. In addition, one of the key team members was personally affected by the pandemic and had to take a couple of weeks off.

Even though this was taken into account since the preparation of the proposal, the impact has been somewhat larger than initially expected due to the additional progressive failure of public services in the country, which limit effective and timely online and phone communications. Nonetheless, we were aware since the beginning that this might happen, and therefore assigned additional time for each activity to allow for delays without affecting the overall project goals and timeline.

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**GBIF leads the Biodiversity Information for Development (BID), a programme funded by the European Union. The programme provides supplementary support for activities addressing the needs of regional researchers and policymakers through mobilization and use of biodiversity data.**

