Project ID: CESP2017-0014

Project Title: Course on "Participatory Biodiversity Monitoring: Building Locally, Connecting Globally"

MID-TERM ACTIVITY REPORT

Contents

Executive summary

Grant holder should please provide a brief explanation of the context and the approach taken up to the mid-term of the project, as well as a summary of the main conclusions, lessons learned and recommendations for the remaining project period.

This report contains an evaluation of the first stage of the Participatory Monitoring Course. Over six days (21st to 28th October) of a workshop conducted in a natural reserve, 50 participants from seven countries exchanged experiences, learned concepts and methodologies, and created a community through which they could continue to improve their participatory monitoring projects. This has created the basis for the second part of the process, where the participants will apply what they learned: They will draw up a monitoring participatory plan and publish open data through GBIF.

The evaluation of the first stage was the result of constant feedback during the course with all the participants, using open circles and a poster-board for questions and suggestions. Additionally, there was a final session where all the participants shared their personal highlights and provided verbal feedback about the course. This in-person feedback was complemented through a virtual survey through which participants were asked to evaluate the methodology, content, outcomes, logistics and schedule of the course.

The participants considered the course especially useful for consolidating a community that will continue working together in the long term and for exchanging experiences. Although the limited access to the Internet in the venue was useful for maintaining the attention of participants in the course, it also limited the ability to work on online platforms. While the instructors knew about this limitation in advance and had prepared offline material, it was not the same.

While we had said we would organize virtual and in-person sessions with each of the Colombian participants to aid them with the processing and uploading of their datasets, we are reconsidering this, since it might be more efficient to instead organize an intensive workshop on data processing and publication.

Contact information

Sindy Martínez
Colombia
Instituto Alexander von Humboldt
Calle 28 A No. 15-09
Bogotá D.C., Colombia
smartinez@humboldt.org.co
+57 1 3202767 Ext. 1163
Main contact

Note. Karen Soacha has stepped down from her position in the Humboldt Institute, hence Sindy Martinez will be the main contact going forward.

Introduction

Grant holder should please explain to readers what they will find in this report. It should include:
- *A description of how the evaluation has been carried out (e.g. consultation or surveys with project partners and participants). Please refer to the description of monitoring and evaluation plans in the original project proposal.*
- *A description of how the project partners will use the evaluation results.*

This report provides a summary of the first stage of the participatory monitoring course, a summary of the evaluations received from participants of the course, as well as a brief overview of future course of action, including plans for communication of the course and its impacts, as well as our plans for expanding its impact

The first stage of the participatory monitoring course took place between 23rd to 28th of October, in the Rio Claro natural reserve, with the participation of nearly 50 experts and practitioners. In this first stage, the participants were to learn about the principles, concepts and methodologies relating to participatory monitoring. In the second stage, the participants will apply what they learned: They will draw up a participatory monitoring plan and will publish open data through GBIF before May 2018. During the second stage, the course coordinators at the Humboldt Institute will oversee the participants' coursework and provide any support or advice that is needed.

The project's monitoring and evaluation plan consisted of both a virtual survey by all the participants and instructors, as well as in-person feedback. The evaluation of the first stage has been carried out using three instruments. 1) There was feedback throughout the course, via a daily open circle session with all the participants, during which questions, suggestions, and expectations were noted on a board, which were resolved by the coordinators, instructors, or fellow participants depending on the nature of the question/suggestion.. 2) There was a feedback session at the end of the course where all the participants talked about their experiences, the lessons they learned, and about aspects of the course that could be improved upon. 3) One virtual evaluation where instructors, project partners and participants evaluated the methodology, content, outcomes, logistics and schedule of the course.

The project partners will find the evaluations we have received useful when they seek to implement their own versions of this workshop in their own countries: they can replicate those aspects which worked well, and they can seek to refine those aspects which didn't.

The project and its objectives

Grant holder should please provide a brief summary of the project to help readers understand its objectives, including, for example:
- *The project's start date and expected duration*
- *A list of project participants and description of the main stakeholders*
- *The targeted capacity needs as outlined in the project proposal*
- *The project objectives and expected deliverables as included in the project proposal*

This project started in July 2017, with the designing of an open call for participation, and will end in May 2018. The participatory monitoring course itself was held in the Rio Claro Natural Reserve from 23rd to 28th October 2017. The project's partners were the GBIF's nodes in Spain, Argentina (CONICET) and Mexico (Conabio). The course had 50 participants (including the instructors and coordinators) from Mexico, Chile, Bolivia, Peru, Brazil, Spain, Argentina and Colombia,representing more than 25 organizations.

From November 2017 to May 2018, the coordinators (Humboldt Institute, Colombia) will track the commitments made by each of the participants to create a participatory monitoring plan, or to update an existing one, and to publish on GBIF a data set acquired through participatory monitoring. The aim of the course was to contribute to an increase in the open citizen science data available through GBIF creating or improving the capacities of the participant who are engaged in developing projects involving the participatory monitoring of biodiversity (one type of citizen science project).

The deliverables of the course include a website for the course, which contains the course material, memory , one video about the course, information on the course evaluation methodologies and the the results of the evaluations, varied sets of open data through platforms interoperable with GBIF, such as iNaturalist, eBird, Natusfera, and participatory monitoring plans developed by each of the participants, which include

data and information management plans, including reports about similar workshops they hold in their own countries.

Project activities completed by mid-term

The grant holder should please summarize the project activities completed by the mid-term, with a description of the associated outputs and deliverables. You can present this as a list, table, descriptive text, or any other format that you find useful. Please highlight any changes from the original plans provided in the full project proposal.

Activities	Outputs/Deliverables
Web page for the Course, where we published the open call, and where we will shared the results of the Course.	https://www.sibcolombia.net/curso-de-monitoreo-participativo-en-biodiversidad/
Open call: On August 8th, we launched the open call for participation in the Course. The call closed on August 31st. The open call required applicants to fill out two application forms: One which required details about their experience, purpose for applying, and replication capacity; the other which required a detailed description (data management, planning, evaluation) of participatory monitoring biodiversity projects they are or have been involved in.	Application form: http://bit.do/application-formPM Inventory form: http://bit.do/inventory-formPM
Selection of participants: The evaluation committee (4 people) verify the submission and selected 15 people from different regions and kind of projects in Colombia, and selected one person each from Bolivia and Chile. We invited a participants from Peru and Brazil, additionally of the partners from Mexico, Spain and Argentina. 177 people from Iberoamerica submitted proposals for the Course: 12 people from Mexico, Spain, Peru, Bolivia and Chile and 165 from Colombia.	Selected participants: http://bit.do/participantsPM
Workshop: Six days of workshop for 50 people.	Instructors: http://bit.do/instructorscourse-PM Program: http://bit.do/programPM Photos:

	https://drive.google.com/open?id=16LKF4hbuvhA2yvgHOzmb8S5O5Mo5lt8v
One video with the key reflections about participatory monitoring process including the management of data and information.	https://youtu.be/Pf9tzEyRpWg
Video capsules about the lessons learned by the participants in the course, shared through social networks.	Capsule 1: https://www.facebook.com/instituto.humboldt/videos/1594444620623088/ Capsule 2: https://www.facebook.com/instituto.humboldt/videos/1598516280215922/ Capsule 3: https://www.facebook.com/instituto.humboldt/videos/1599538366780380/ Capsule 4: https://www.facebook.com/instituto.humboldt/videos/1600701499997400/ Capsule 5: https://twitter.com/inst_humboldt/status/929033703648645123 Capsule 6: https://twitter.com/inst_humboldt/status/928385681084252162 Capsule 7: https://twitter.com/inst_humboldt/status/930546708144119808 Capsule 8: https://twitter.com/inst_humboldt/status/930903574510555136

Initially the course was to have 30 participants, with one participant from each partner organization(3), 15 people from Colombia selected through an open call, instructors (4), and the organizing team (8). Finally, thanks to some changes in the GBIF's budget and additional financing from the nodes, we were able to accomodate 50 people, including more international participants and people from different regions in Colombia.

The following changes were reported to the GBIF CESP Team on October:

Flight: We spent less than we budgeted on four international flights, since we bought the tickets well in advance (at a lower cost) and the international instructor from the USA couldn't participate. We instead chose to invite three local people who have been working in participatory monitoring for years. This it means €1,801 less than initially budgeted.

Accomodation: We had initially planned two nights for each participant, before and after course. However, we had to provide accomodation for more nights since the flight schedules

of participants didn't always match up to the schedule of the course. In the, we funded the stay of 7 participants over 22 nights. Additionally, we increased the enrollment in the course from 30 people to 50 people. For coordinating this, we needed 3 people for logistics support, and hence the co-funding component increased from €7,000 to €8,068. We are requesting an additional €461 from GBIF.

Local Transport: We had initially budgeted for one bus to take 30 people to Río Claro natural reserve (5 hours from Bogotá), at a cost of €1,333. Since we expanded the number of participants from 30 to 50, the local transport cost increased to €1,967.

Co-funding: This was the largest change from the proposed budget to the actual budget, and that was to cover the salary of the workshop coordinator. We had initially projected for 1 month for the coordination work, but because of the open call, evaluation, planning of the course, 3 months of the coordinator's salary had to be covered. This increased the salary component from €1,667 to €5,001. The other change was the increase in hosting and food for the 20 additional participants.

Project communications

The grant holder should please describe the plans to communicate and share the results of your project with the project stakeholders and broader GBIF community. Please also review the page describing your project available from [https://www.gbif.org/project/83344/training-in-participatory-biodiversity-monitoring-building-lo cally-connecting-globally](https://www.gbif.org/project/83344/training-in-participatory-biodiversity-monitoring-building-locally-connecting-globally). Highlight any additional documents, events, news items or links that you would like to add to your page.

- The main page of the course has all the documentation related to the project: https://www.sibcolombia.net/curso-de-monitoreo-participativo-en-biodiversidad/
- Short videos have been created containing key messages about participatory monitoring, and these videos are being distributed through social networks..
- To communicate the highlights of the course, we created a 9-minute video that consolidates the main lesson learned. This video it is available on YouTube under a CC license, and was spread through the social networks of the Humboldt Institute and the project partners.
- The documentation of the course, including lessons learned, good practices and concepts will be available in a document with CC licence in the page of the course, the Humboldt repositories and will be shared through social networks.
- While the datasets uploaded by the participants through the projects they implement will be available through GBIF, their participatory monitoring plans will be private by default (available only to other participants and project partners), and will be shared publicly on the course website if the participant is willing.

It will be ideal if GBIF includes a link to the course course website on its own website, and spreads the videos produced as part of this course through its social networks.

Mid-term evaluation findings and recommendations for the remaining project implementation period

This is the main section of the report, covering for example:
- *An evaluation of the project activities by the mid-term and their outputs/deliverables, using the methodology outlined in the monitoring and evaluation section of the original project proposal*
- *Any feedback on the project's relevance from the partners and stakeholders*
- *Comments on the project implementation, its efficiency and effectiveness*
- *The management arrangements for the project, including support from the GBIF Secretariat*
- *Any reflection on the mid-term evaluation itself that could help inform the project's final evaluation and final report*
- *Areas of success to build on during the remainder of the project implementation*

This section is also an opportunity to draw out the main lessons from the project experience that could be applied in other contexts, including any best practice that others in the GBIF community could apply.

Try to clearly document any changes to the project plans that will be made based on the findings of the mid-term evaluation. Please discuss any substantial changes with the GBIF Secretariat (CESP@gbif.org).

Evaluation of the main project activities

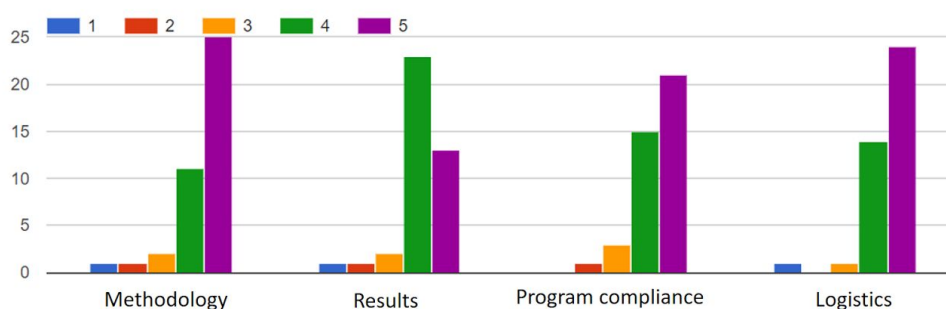| Outputs/Deliverables	State
Website with information about the course	100%
Open call and participates selected	100%
Six days of workshop with at least 40 participants	100%
Video that consolidates the main lessons learned	100%
Draft of the data management process for citizen science data	100%
Documentation of the course	50%
Communications plan	50%
Supporting participants in publishing data and creating/updating their own participatory monitoring plan	20%

Feedback from project partners and participants:

The main results of the online survey answered by 80% of the participants, are summarised below:

How would you rate the development of the Course?

● 5: Exceptional, so significant and consistent exceeded positively expectations.

● 4: Highly effective, fulfilled and in occasions positively exceeded the expectations.

● 3: Effective, it fulfilled its purpose.

● 2: Inconsistent, it was far from the expectations.

● 1: Unsatisfactory, did not comply with the expectations.

Event organization

5: Exceptional: Significantly and consistently exceeded expectations.

4: Highly effective: Fulfilled and on occasion exceeded expectations.

3: Effective: Fulfilled expectations well.

2: Satisfactory: Just barely satisfied expectations.

1: Unsatisfactory: Did not fulfil expectations.

Lessons learned:

● The course was designed using a methodology of tejeRedes and learning-by-doing. This was especially successful in creating a community in Colombia that could continue working independently of funding and of centralized coordination. While it might be difficult to track all the resulting collaborations and the various forms of cooperation within the network, but we are sure that the seeds for a successful cooperation have been sown.
● In the Iberoamerican region there are many interesting citizen science projects. During the course, the focal points from every country got together and agreed to explore the possibility of creating a regional network on citizen science, which could act as a point for exchanging experiences on data management, uses of technologies, and other such issues of common concern.. .

● It might be too inefficient to independently support each of the Colombian participants in publishing their datasets on GBIF. Therefore, we need to explore the possibility of instead organizing an intensive workshop on data publication.