

MID-TERM NARRATIVE REPORT

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1. Project information

Project title	Georeferencing training: tackling the spatial challenge in the Southern Cone	
Project ID	CESP2019-014	
Project period	Start date (dd/mm/yy): 01/06/19	End date (dd/mm/yy): 31/05/20
Reporting period	Start date (dd/mm/yy): 01/06/19	End date (dd/mm/yy): 30/01/20
Project lead		
Name of the main contact person	Anabela Plos	
Name of institution	Museo Argentino de Ciencias Naturales “Bernardino Rivadavia” MACN-CONICET	
City and country	Buenos Aires, Argentina	
GBIF Participant represented	GBIF Argentina. Sistema Nacional de Datos Biológicos (SNDB)	
Role(s) in this project	Main contact and activities coordination	
Project partner(s)		

Name and institution of the representative	GBIF Participant represented (if applicable)	Role(s) in the project
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2. Executive summary

The objective of this project is to improve the geographic data quality of Southern South America records, namely records from Argentina and Chile. To achieve that, two regional georeferencing training workshops were planned, during and after which georeferencing 5000 most common localities from target countries would be done. These localities will constitute the basis for a gazetteer of georeferenced localities that can be used by all members of the community to improve already published data and newly published datasets.

During the first half of the project, theoretical and practical training materials were developed for the workshops, including both online and onsite components. A georeferencing workshop was held in Buenos Aires, Argentina, in December 2019, during which 38 students from all over the country were trained. Also, during this period of the project Argentinian localities were extracted from GBIF and prioritized based on the number of occurrence records associated with them and the potential to repatriate georeferences back to the records. During the workshop students began to georeference these localities. This is an ongoing activity, and currently around 700 localities have been georeferenced. Localities from Chile were also extracted and are currently being prioritized. In the coming months the materials produced for the workshops will be revised and adjusted for the workshop to be held in Chile in April.

The indicators of success for this project include the availability of the training materials and the students' evaluation of the workshop, which has been very positive. The main lesson learnt, and which we would like to pass along to the rest of the GBIF community, is that interaction of people from different regions contributes local knowledge that is key to improving the georeferencing process and hence the quality of occurrence records associated.

3. Progress against expected milestones

Expected milestones	Completed? Yes/No
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Kick-off virtual meeting held and meeting report available. (Mid-term report milestone)	Yes
Workshop materials developed and available, and trainers confirmed. (Mid-term report milestone)	Yes
Identification of local/national sources of localities and georeferences, to prioritize georeferencing during the workshops complete and local localities list available. (Mid-term report milestone)	Yes (and ongoing)
Call and selection of Argentina workshop candidates complete and selection process documents available. (Mid-term report milestone)	Yes
Georeferencing workshop in Argentina completed, materials and report available. (Final report milestone)	Yes
Self-assessment meetings held and meetings report available. (Mid-term and Final report milestone)	Yes (and ongoing)
Technical support for new incoming localities from regional participants in place. (Final report milestone)	Yes (and ongoing)
Call and selection of Chile workshop candidates complete and selection process documents available. (Final report milestone)	Yes

4. Activities

Activity name	Status of activity at mid-term: Completed / On-track / Delayed	Explanatory notes, including new planned completion date if necessary	Source(s) of verification
Kick-off virtual meeting	Completed	Kick-off meeting was held among project participants to define administrative steps, define the trainers for the workshops and plan on steps ahead. After the kick-off meeting, several other remote meetings were held. Supporting document is in Spanish.	Minutes of kick-off and following meetings: https://docs.google.com/document/d/1W4J7NIFN6p3PTFIKele16suK_11z-kUn/edit?dls=true
Development of workshop materials	Completed	Material for the workshop (presentations, documents, exercises, etc.) were developed, reviewed and checked for consistency by all trainers. For details on these materials see Section 5. All supporting material is in Spanish.	Workshop presentations: https://drive.google.com/drive/folders/1OxZCccp5z_snbdpXC1wxC71f0NmN3ui5 . Workshop exercises: https://drive.google.com/drive/folders/1OSDaEBXcD4Z4pApV9JZPnq1NLrzTFAmv Argentinian e-learning Workshop site: https://formacion.ssnn.mincyt.gob.ar/courses/15/about
Identification of local/national sources of localities and georeferences, to prioritize georeferencing during the workshops	Completed / On-Track	It was decided that the source of localities and georeferences be the localities already available through the GBIF network (see rationale below, section 5). All localities from Argentina and Chile were extracted from a GBIF snapshot and prioritization was performed for Argentinian localities (see details below, section 5). Prioritization for Chilean localities is currently in progress.	Localities assigned to students: https://drive.google.com/file/d/12bGQgyruCbObPLJUIPY-4mNfBDZJeUg/view?usp=sharing
Call and selection of Argentina workshop candidates	Completed	144 registration requests. 35 students originally selected, 38 final attendees. See details on the call and selection below, sections 5 and 6. All supporting documents are in Spanish.	Workshop call: https://drive.google.com/open?id=1JL7Dk4mTqIk5Fm4CYg4Utsyc8-cl3sbT Workshop program: https://drive.google.com/open?id=1CX7VLhOtOsboXbh8Mh8Ktb8ZEmyXIHxv Registration form: https://docs.google.com/forms/d/1Cot6erz2iYUnsE-FsxlTi_47OYWxTia0WNKtXRhA8us/edit?usp=drive_web Students selection: https://drive.google.com/open?id=1tXaA93-tDwk8xGN1396FnreUBbbHKYIP
Georeferencing workshop in Argentina	Completed	38 students trained in georeferencing. See details below, section 6. Localities georeferenced during and after the workshop, still in progress. Trainers actively following up with students activities in shared online documents. Online meetings to be held with students grouped by region in early February to address questions and issues encountered during georeferencing. Students have until March 1st to complete	Argentinian e-learning Workshop site: https://formacion.ssnn.mincyt.gob.ar/courses/15/about Ongoing locality georeferencing by students: https://drive.google.com/drive/folders/1YTg7VC3JY0p-sz0uqZSOIAVNLI79aQA

		their respective locality georeferencing assignments. Ongoing georeferences gathered by student for the moment, until completion, after which final data quality check will be performed by trainers, prior to integration of the localities into a common repository. For more details see section 6.	
Self-assessment meetings	Completed / On-Track	Several meetings were held. Next meeting planned for first-second week of February. Supporting material in Spanish.	Minutes: https://docs.google.com/document/d/1W4J7NIFN6p3PTFIKele16suK_11z-kUn/edit?dls=true
Technical support for new incoming localities from regional participants	Completed / On-Track	Ongoing (see above, Georeferencing Workshop in Argentina). Same support will be provided for and after the workshop in Chile in April.	Ongoing locality georeferencing by students: https://drive.google.com/drive/folders/1YTg7VC3JY0p-sz0ugZSOIaVNLIS79aQA
Call and selection of Chile workshop candidates	Completed	238 registration requests. 40 students selected. See details on the call and selection below, section 5. All supporting documents are in Spanish.	Workshop call: https://drive.google.com/file/d/1I_vnP_MdH2za-1Vo2V5w8Wlr3NNDQf_D/view?usp=sharing Workshop program: https://drive.google.com/file/d/1T8pQWXk-QtfOEcbXh6Zh8zqbtUrWQzbc/view?usp=sharing Registration Form: https://drive.google.com/open?id=1mgYcEylz91YK4N7g5ip2wfJKvczByUhfChG0Q7E7s Students selection: https://drive.google.com/file/d/18JvVR3maJ8ZDnkDzUqcat5lo-15PgiX_/view?usp=sharing

5. Deliverables

Deliverable name	Status of deliverable at mid-term: Completed / On track / Delayed	Explanatory notes including new planned completion date if necessary	Source(s) of verification
Virtual meeting report	Completed	Supporting document is in Spanish.	Minutes: https://docs.google.com/document/d/1W4J7NIFN6p3PTFIKele16suK_11z-kUn/edit?dls=true
Workshop materials	Completed	Workshop materials consist of online pre-course material and workshop presentations and exercises, all available through the Argentinian e-learning platform. In order to see the materials through the platform, please request access at the given link. Presentations and exercises also	Workshop presentations: https://drive.google.com/drive/folders/1OxZCccp5z_snbdpXC1wxG71f0NmN3ui5 Workshop exercises: https://drive.google.com/drive/folders/1QSDaEBXcD4Z4pApV9JZPnq1NLrzTFAmv

		<p>available on Google Drive. Materials will be reviewed during February and March, prior to the workshop in Chile in April, particularly to adjust the presentations to show local examples. All supporting materials are in Spanish.</p> <p>The workshop materials included the Georeferencing Best Practices (Chapman & Wieczorek), the Georeferencing Quick Reference Guide (Zermoglio et al.) and the Georeferencing Calculator Manual (Wieczorek & Bloom). These three documents are currently being revised under a documentation project contract with GBIF. Final versions will be published in 2020. For the workshop, all authors contributed to building draft versions (properly identified as such) that could be momentarily released and used by the students. From the interaction with the students and the use of these three documents by them, further refinement was made to the documents.</p> <p>Supporting documents are in Spanish.</p>	<p>Argentinian e-learning Workshop site: https://formacion.ssn.mincyt.gob.ar/course/15/about</p> <p>Post- onsite workshop survey: https://docs.google.com/forms/d/e/1FAIpQLSff0yBKJSourBRyhjnL4ERb9fbei0PCweZ2xZTwokDWueTWRQ/viewform?usp=sf_link</p> <p>Post- onsite workshop survey results: https://docs.google.com/spreadsheets/d/1oPgYUitQKxf9qJnfKafatiltQR_h35d4wFbWJLJKoo5A/edit?usp=sharing</p>
Candidates selection process	Completed	<p>The selection process was carried on prioritizing their experience with dealing with biodiversity data, their capacity for further training in the institutions, and geographic spread of the candidates. For this, a registration form was designed to capture the necessary information to decide upon the final attendees list.</p> <p>Supporting documentation is in Spanish.</p>	<p>Registration form for workshop in Argentina: https://drive.google.com/open?id=1Cot6erz2iYUnsE-FsxITi_47OYWxTia0WNKtXRhA8us</p> <p>Registration form for workshop in Chile: https://docs.google.com/forms/d/e/1FAIpQLSc85bJCPq7cJfXyphkNN2UKU48zWvdrHf273s-5m-5WyH05eQ/viewform?usp=sf_link</p>
Georeferencing Workshops Memoires	Completed	See Workshop materials above.	See Workshop materials above.
Local localities list	Completed	Please see Note 1 below for details.	<p>Localities assigned to students: https://drive.google.com/file/d/12bGOgyrucbObPLJUIPY-4mNfBTJDzJeUg/view?usp=sharing</p>
Regional Georeferenced Localities Gazetteer	On track	<p>Localities georeferenced during and after the workshop in Argentina, still in progress. Students have until March 1st to complete their respective localities georeferencing. Around 700 localities have been georeferenced and are being vetted by the trainers so far. Ongoing georeferences gathered by student for the moment, until completion, after which final data quality check will be performed by trainers, prior to integration of the localities into a common repository.</p>	<p>Ongoing localities georeferencing by students: https://drive.google.com/drive/folders/1YTg7VC3JY0p-sz0ugZSOIAVNLI579aQA</p>

Note 1. It was decided that the source of localities and georeferences be the localities already available through the GBIF network. The rationale behind this was that those are localities already published, and that therefore a georeference could directly have an effect on enhancing data quality of records that are already available (as opposed to taking localities from other sources, whose publication is uncertain). All localities from Argentina and Chile were extracted from a GBIF occurrence snapshot from 2019-04-15 and loaded into BigQuery. A location table was built including all distinct combinations of fields in the Darwin Core Location class, where countryCode=AR or CL (for Argentinian or Chilean locations, respectively). Each locality was then assigned a UUID as its localityID, and these were also added to the corresponding Occurrence records, so that georeferences of the distinct localities could be reassigned with the occurrence records. (If needed, these intermediate working tables can be provided, please contact John Wieczorek). In order to prioritize the localities, a first criterion was that the occurrences associated with the localities be from Argentinian or Chilean data providers. This criterion was adopted so that the repatriation of the georeferenced data could be more easily achieved. In order to filter by provider, a secondary table was built with distinct combinations of institutionCode - collectionCode associated with the occurrences that had countryCode=AR or CL. This list was manually processed to determine which institutions belonged to the target countries. Data from some providers were purposely left out given that: a) it is known that they publish records from other local institutions that also publish, b) difficulty was identified in repatriating enhanced data further along the line, e.g., data coming from eBird, c) it was impossible to easily determine the origin of the data from institution and collection codes (e.g., two letter codes). Aside from eBird data, the rest did not represent a large proportion of localities nor of occurrence records associated. With the information about providers, an extract was obtained of the localities from Argentina or Chile associated with occurrence records published by institutions in those countries. The next prioritization step was based on the number of occurrence records associated with each locality, ordering from most to least represented locations. For Argentina, the first 5550 most represented locations were distributed among the students for georeferencing (about 150 locations each). This number of localities greatly exceeds the expected number of localities to be georeferenced during this project. The number was chosen contemplating that not all students would finish their task and that there may be localities that cannot be georeferenced due to lack of sufficient data or to internal inconsistencies. The distribution of localities among students was not random, it was prioritized according to the regional provenance of each student and their knowledge of each region. Students were asked to tell which provinces they felt more comfortable working with, and hence selections by dwc:stateProvince were made as a first pass to assign the localities. For those that had the field empty or not standardized, a pseudo-random assignment was performed. Prioritization for Chilean localities is currently in progress and will follow the same criteria expressed above.

6. Events organized as part of the project

Event title	Organizing institution	Date held / expected dates	Number of participants	Explanatory notes	Source(s) of verification
Taller: Georreferenciación de registros biológicos: teoría y práctica*.	Museo Argentino de Ciencias Naturales "Bernardino Rivadavia" MACN-CONICET. Argentina	09-13/12/2019	38 participants	Please see Note 2 below for details. All supporting documents are in Spanish.	Workshop call: https://drive.google.com/open?id=1JL7Dk4mTqlk5Fm4CYg4Utsyc8-cl3sbT Workshop program: https://drive.google.com/open?id=1CX7VLhOtOsboXbh8Mh8Ktb8ZEMyXIHxv Registration form: https://docs.google.com/forms/d/1Cot6erz2iYUnsE-FsxITi_47QYWxTia0WNktXRhA8us/edit?usp=drive_web Students selection: https://drive.google.com/open?id=1tXaA93-tDwk8xGN1396FnreUBbbHKYIP Workshop pre-course activities (and course materials): Argentinian e-learning Workshop site: https://formacion.ssn.mincyt.gob.ar/course/15/about Post- onsite workshop survey:

					https://docs.google.com/forms/d/e/1FAIpQLSff0yBKJSourBRyhjnL4ERb9fbei0PCweZ2xZTwokDWueTWRQ/viewform?usp=sf_link Post- onsite workshop survey results: https://docs.google.com/spreadsheets/d/1oPgYUtkQKxf9qJnfKafatiltQR_h35d4wFbWJLJKoo5A/edit?usp=sharing
Taller: Georreferenciación de registros biológicos: teoría y práctica*.	GBIF Chile	April 2020	40 participants	Originally thought to be for 20-25 students, due to high demand, it will be extended to 40 participants. The call for applications is closed and selections of participants has been performed.	Workshop call: https://drive.google.com/file/d/1I_vnPMdH2za-1Vo2V5w8WLR3NNDQf_D/view?usp=sharing Workshop program: https://drive.google.com/file/d/1T8pQWXk-QtfOEcBxH6Zh8zqbUrWQzbc/view?usp=sharing Registration Form: https://drive.google.com/open?id=1mgYcEylz91YK4N7g5ip2wfJKvcizByUhffChG0Q7E7s Students selection: https://drive.google.com/file/d/1vCEXqDgbvSrwlaiku_RN0hK9r0b1USx/view?usp=sharing

Note 1. Originally thought to be for 20-25 students, due to high demand, the workshop was extended to 38 effective participants. Regional and thematic representation: participants were from 17 different provinces representing all regions in the country (<https://drive.google.com/open?id=1tXaA93-tDwk8xGN1396FnreUBbbHKYIP>). Most participants were collection managers, but there were also representatives from the National Parks Administration and the Environment National Secretariat (Secretaría de Gobierno de Ambiente y Desarrollo Sustentable de la Nación). Participants presented a wide range of expertise regarding taxonomic groups (including terrestrial and marine taxa) and the characteristics of the locations where those taxa are collected/observed, which represented added value to the group when it came to understanding the georeferencing process and implications. Both the trainers and the students recognized that the interaction of people from different regions, contributing local knowledge, was key to improving the quality of the georeferences. Trainers: trainers were John Wiecezorek, Paula Zermoglio, Renato Mazzanti and Catalina Merino. Workshop development: the workshop consisted of three sections: 1) online pre-workshop (2 weeks), 2) onsite workshop (1 week), and 3) remote follow-up (2 months, ongoing). All three sections were mandatory for all students. Online pre-workshop consisted of introductory reading materials and exercises, some of which had to be handed in and received feedback from the trainers. The students mean progress in the lessons, as automatically recorded by the platform, was 86%. Ninety percent (90%) of the students expressed that it was useful to have a pre-course, and 95% agreed that its contents were appropriate. For the full students evaluation of the pre-course, please see https://docs.google.com/spreadsheets/d/1oPgYUtkQKxf9qJnfKafatiltQR_h35d4wFbWJLJKoo5A/edit?usp=sharing. The onsite part of the workshop was held at the Museo Argentino de Ciencias Naturales "Bernardino Rivadavia". The activity counted with the support of the Museum, and the Sistema Nacional de Datos Biológicos (SNDB), which aided with funds for co-funding the workshop. The workshop activity consisted of two days of theory presentations and exercises, one day of mixed content and discussion, in which students were asked to resolve and present a particular topic, and two full days of onsite georeferencing. Students were each given a set of localities, which they started to georeference aided by the trainers and they currently continue to georeference with remote guidance. The remote follow-up is ongoing, and online meetings are planned to be held with students grouped by region in early February to attend questions and issues encountered during georeferencing. Students were given up to March 1st to complete their respective localities georeferencing. Ongoing georeferences are being gathered by student for the moment, until completion, after which final data quality check will be performed by trainers, prior to integration of the localities into a common repository. Students survey: after the onsite workshop was completed students were asked to fill in a survey assessing the quality of the pre-course and the onsite workshop (https://docs.google.com/forms/d/e/1FAIpQLSff0yBKJSourBRyhjnL4ERb9fbei0PCweZ2xZTwokDWueTWRQ/viewform?usp=sf_link).

The survey included questions regarding the contents (both theoretical and practical) and the time allotted to them, the trainer's performance, and the interest in a complete or partial replica of the course, either onsite or virtually. Twenty (20) students have completed the survey so far. The general rating of the course was 9.15 out of 10. 75% of the students expressed that the course should have lasted more days, dedicating more time to both the theoretical and the practical parts. All students expressed that the theoretical and practical contents were appropriate, and the mean rating for trainer's performance was 8.7 out of 10. Ninety percent (90%) of the students expressed interest in replicating the course in their institutions, while 80% said that would be interested and could attend virtual courses. For more detail on the survey results, please see

https://docs.google.com/spreadsheets/d/1oPgYUtkQxf9qJnfKafatiltQR_h35d4wFbWJLJKoo5A/edit?usp=sharing.

Workshop outcomes: georeferenced localities: during and after the onsite workshop the students georeferenced localities that were assigned to them according to the prioritization described above (see Section 5). As mentioned above, this activity is still in progress, and students were given two months to complete their task, ending March 1st. Currently, over 700 have been georeferenced and are being vetted by the trainers. **Workshop outcomes: documentation refinement:** the workshop materials included the Georeferencing Best Practices (Chapman & Wiecek), the Georeferencing Quick Reference Guide (Zermoglio et al.) and the Georeferencing Calculator Manual (Wiecek & Bloom). These three documents are currently being revised under a Documentation project contract with GBIF. For the workshop, all authors contributed to building draft versions (properly identified as such) that could be momentarily released and used by the students. From the interaction with the students and the use of these three documents by them, we took the opportunity to further refine the documents based on the questions and doubts that arose during the workshop. **Other opportunities:** the workshop represented a great opportunity to reinforce the regional community links and to engage participants in other biodiversity data initiatives. In particular, a local, informal, off-the-clock-meeting was held for ArgentiNat (the recently launched Argentinian iNaturalist platform, <https://www.argentinat.org/home>), in which participants were introduced to the project and the people involved.

7. Calendar of activities

Activity	2019							2020					Notes
	J	J	A	S	O	N	D	J	F	M	A	M	
Activity: Kick-off virtual meeting Lead partner: All partners	X												
Activity: Development of workshop materials Lead partner: VertNet	X	X	X	X	X	X		X	X				Materials are already developed and used, as planned, but will go through a new review process before the workshop in Chile to adjust to local needs (blue Xs).
Activity: Identification of local/national sources of localities and georeferences, to prioritize georeferencing during the workshops Lead partner: All partners	X	X	X	X	X	X							
Activity: Call and selection of Argentina workshop candidates Lead partner: GBIF Argentina					X	X							
Deadline for mid-term reporting and milestones								X					Mid-term report was delayed (originally Nov 2019). The reason for the delay was to be able to include the results from the workshop in Argentina in the report.

GBIF - Capacity Enhancement Support Programme

Activity: Workshop in Argentina Lead partner: GBIF Argentina, VertNet							X						
Activity: Technical support for new incoming localities from regional participants Lead partner: VertNet								X	X	X	X	X	
Activity: Call and selection of Chile workshop candidates Lead partner: GBIF Chile								X	-				The call and selection, thought for being developed in Jan and Feb was completed in January.
Activity: Workshop in Chile Lead partner: GBIF Chile, VertNet												X	The workshop, originally planned for March 2020 was postponed to April 2020. The reason was to be able to align dates with another workshop in Data Use that is going to be held in Chile as part of another CESP project (CESP2019-005). Given that some of the organizers/trainers/mentors in both workshops are the same people, this would enable us to achieve a better use of resources.
Activity: Identify georeferencing priorities within the region Lead partner: All partners										X	X	X	Identification of priorities, due to the delay in the workshop in Chile, is expected to extend into the first part of May 2020 (blue X).
Deadline for final reporting and completion of all activities and deliverables. Completion of final capacity self-assessment.												X	

8. Monitoring and evaluation

The impact of the project will be monitored and measured in the short and long-terms, using the following indicators:

- Participant meeting minutes and reports. The project is on track, activities being developed as planned.
- Number of participants and institutions represented in the workshops and regional spread. Participants in the Argentina workshop were almost double the original number planned. Mainly collections were represented, but also other governmental participants, from all over the country. See section 6 for details.
- Satisfaction of the workshop participants measured through post-workshop evaluation forms. Workshop participants expressed a high level of satisfaction with the workshop in Argentina, evaluations were very positive. For details see section 6.
- Number of localities georeferenced during and after workshops, and assessment of the learning curve for different stakeholders and locality types. So far over 700 localities have been georeferenced. The activity is on track and proceeding successfully. This is an ongoing activity. Learning curves will be included in the final report.
- Number of occurrence data records in GBIF which quality has been improved as a result of the georeferencing of localities. This will be informed in the final report.
- Number of partial or total replicates of the training sessions by the participants within their own institutions, and number of trainers and trainees involved. No replicates have been completed so far, but there will be a small local replicate at the Instituto Miguel Lillo (Tucumán, Argentina) in March. There are plans for a full replicate in Córdoba (Argentina) during 2020 and in Santiago (Chile) between 2020 - 2021.

The main lesson learnt, and which we would like to pass along to the rest of the GBIF community, is that interaction of people from different regions contributes local knowledge that is key to improving the georeferencing process and hence the quality of occurrence records associated.

9. Project communications and visibility

Communications regarding the project have been spread in both target countries through official venues (i.e., governmental and ministries communication channels).

The training material generated through this project is and will be available for all the community to use. The participants in the workshops have access to those materials and are encouraged to reuse them in their own institutions, with no restrictions. Materials will also be shared and promoted through the larger Latin American community by communications to the relevant GBIF Nodes during regional meetings.

Locality georeferences will also be freely available in the form of a gazetteer and through a Kurator workflow, which will be ready by the end of the project.

In the webpage of the project we would like to include the following links:

- Workshop program: <https://drive.google.com/open?id=1CX7VLhOtOsboXbh8Mh8Ktb8ZEmyXIHxv>
- Argentinian e-learning Workshop site: <https://formacion.ssnn.mincyt.gob.ar/course/15/about>

10. Annex 1 – Additional sources of verification

All sources of verification provided in links in the report.