

MID-TERM ACTIVITY REPORT

Guidelines on how to complete the activity report are included in italics.

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1. Project overview

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Project title	Increasing capacities to develop National Species Checklists in the Latin America and the Caribbean Region	
Project ID	CESP2018_011	
Project period	Start date (dd/mm/yy): 01/06/18	End date (dd/mm/yy): 31/05/19
Project lead		
Name of the main contact person	Name: Anabela Plos	
Name of institution	Museo Argentino de Ciencias Naturales "Bernardino Rivadavia" MACN-CONICET	

GBIF Participant represented	Argentina	
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
Leonardo Buitrago, SiB Colombia	Colombia	Participant
Dairo Escobar, SiB Colombia	Colombia	Participant
Francisco Pando de la Hoz, CyTeD	CyTed	Participant
Vilma Savini, AndinoNet	AndinoNet	Participant
Diana Hernández Robles, CONABIO	Mexico	Participant
Andrea Ferreira Portela Nunes, SiBBr	Brazil	Participant
Leisy Amaya Montano, GBIF Chile	Chile	Participant
Néstor A. Acosta Bueñano, GBIF Ecuador	Ecuador	Participant
Harol Gutiérrez Peralta, GBIF Perú	Perú	Participant
Hugo Ignacio Coitiño Banquero, GBIF Uruguay	Uruguay	Participant
Leslie Melisa Ojeda Cabrera, CONAP	Guatemala	Participant

2. Executive summary

We have been holding monthly virtual meetings (via skype) since the beginning of CESP. In them we have been addressing different issues of the checklist:

- Term taxonID: useful available lists, how to update them through suggestions of participants of the present CESP (Catalog of Life, Worms, Catálogo del Cono Sur)
- Suggested terms of DwC: those already used and those suggested for their recommendation in the checklist publication
- Test checklist: in order to focus on the problem, we decided to work on a previous list of plants (Geranium) and animals (Amphibians)
- Checklist classes: we generate a list of the types of listings that are included under the term checklist (taxonomic, geographic, IUCN, invasive, uses)
- Previous information: relay of the previous information of relevance contributed by the participating nodes of the CESP

We also send an invitation to the node manager of the LAC nodes that are participants of GBIF and that we could not contact in time for the CESP presentation. Invitations were sent to the nodes of Costa Rica, Ecuador, Peru and Uruguay, being accepted by all the nodes, except Costa Rica (we have no answer).

For the remaining time, we plan to hold a workshop in Buenos Aires (March 12-14, 2019) with the CESP participants.

3. Introduction to the project and its objectives

Species checklists are a key component for all biodiversity information systems, as they are needed for exchanging and integrating biodiversity information for many activities, scientific and otherwise. Species checklists must include validated nomenclatural data organized according to coherent taxonomic standards, and maybe developed for different scales, include thematic data for a given purpose. Some countries in the LAC region (Mexico, Colombia), have developed documentation and procedures to compile national species checklists as well as content requirements specifications. However, these procedures are not enough to achieve interoperability among these countries species lists. The vast majority of countries in the region lack documentation or procedures to compile local and national species checklists. As a result, we currently have fragmented information without common standards, which makes it hard to compile regional lists, which in turn hampers research and conservation actions at the regional level or dealing with major threats such as alien invasive species.

For the aforementioned reasons, the GBIF nodes of Argentina, Colombia, Mexico, Chile and Brazil with the associations CyTeD and Andino NET are proposing to conduct a regional project to work on the definition of consensuated procedures for the development of national species checklists focused on achieving databases interoperable with the existing ones. These procedures will be published in Spanish, Portuguese and English. We will carry out capacity dissemination events under a “train the trainers” scheme, supporting the replication of these in more specific contexts and to promote the publication of national and regional checklists. Finally, a pilot checklist per country will be publish in the GBIF data network as a proof-of-concept

This project will implement the following monitoring and evaluation system:

1. Short term evaluation:
 - Previous survey for actual status of each node.
 - Number and origin of participants in the workshop.
 - Evaluation of the workshop by participants.
 - Mid-term report of advances in the development of checklists by each participant.
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2. Long term evaluation and sustainability of the program:
- Number of replicated workshops carried out by participants of the project's workshop in their respective countries or community.
 - Pilot checklists uploaded to the GBIF Portal.
 - Number of downloads of pilot checklists
 - Statistics of use by country.
 - Survey on how the development of checklists by each participant / node benefited after the resultant procedures.

4. Project deliverables - status update by mid-term

Deliverable	Related activity	Status: Completed / on track / delayed	Explanatory notes	Sources of verification
Document of the consensual procedures and requirements in Spanish.	Skype calls Workshop	On track		
Translation in English and Portuguese of the procedures.	-	-	When the document in Spanish is ready	-
Validation and evaluation of other species checklist data sets available in the region using the agreed procedure and requirements (see deliverable #1).	Skype calls Workshop	On track	-	https://docs.google.com/spreadsheets/d/1pletrwptdHOzZ2OX2ySqxIjiFRCZaH4RCWRGIq2B-U8/edit#gid=474362415
Survey on the ongoing activities related to national checklists in the participant countries (in Spanish)	Skype calls	On track	-	-
Translation in English and Portuguese of the survey.	-	-	When the document in Spanish is ready	-

Documentation and exercises prepared for the workshop, and to make them available later on for the wider community.	Skype calls	On track	-	-
Pilot checklist data sets (one by participant as minimum) uploaded to the GBIF data network.	Skype calls	On track	-	-

5. Project calendar - status update by mid-term

No change until now of the original calendar

Activity	2018							2019					Notes
	J	J	A	S	O	N	D	J	F	M	A	M	
Project starts, basic infrastructure for online collaboration deployed. Key document list defined: That involves selecting sources and people in charge of delivering them (that may imply identifying documents, or translating, adapting or writing them).	X	X	X										
Skype calls for: documentation review, generation of new documentation, workshop	X	X	X	X	X	X	X	X	X	X	X	X	

planning and organization													
Key documents initial versions available for internal review, consensus and refinement.			X	X									
Interim versions of key documents delivered.				X	X	X							
Test/pilot checklist dataset preparation. Testing and evaluation of key documents.						X	X						
Deadline for mid-term reporting							X						
Pre-workshop activities.								X	X				
Workshop to include: Lessons learnt session. Review of key documents. Capacity building session (train the trainers)										X			
Project wrap-up: Pilot checklist datasets published. Documentation published.											X	X	
Deadline for final reporting												X	

6. Project communications

Regional event in Argentina, at the Museo Argentino de Ciencias Naturales “Bernardino Rivadavia” MACN-CONICET, March 12-14, 2019. This workshop involves participants of ten GBIF national nodes and associations of the LAC region (Argentina, Brazil, Chile, Colombia, Ecuador, México, Perú, Uruguay, AndinoNET and CyTED) and a representative of the Biodiversity National System of National Council of Protected Areas -CONAP of Guatemala.

The main topics will be:

- Presentation of experiences and advances on developing checklists by some participants (do's and don'ts).
- Define consensuated procedures to develop national species checklists
- Define specific requirements considering the existing ones and proven tools
- Transfer of skills and tools to participants in building checklists
- Identify key components that allow the development of interoperable checklists that are not written in existing procedures
- Define the potential checklist to be published from each national node

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

Through virtual meetings, we become aware of the size and variety of areas that influence both the performance and the quality of a checklist. We are agreeing on our ideas regarding the best way to generate high quality checklist; taking advantage of our varied capabilities to test a protocol and generate a series of agreed processes to generate a checklist.

We need to generate a line of work that allows us to add endemic taxa, generally absent from the main references for the field of taxonID, in an easy and updated way to the main references, such as Catalog of Life

The relevance of the checklists is evident for each participant, although the priorities as for the type of checklist is slightly different. This is already reflected in the documentation that two nodes (SiB Colombia and CONABIO Mexico) have developed and that we are using as an input to generate the agreed procedures.

8. Annex 1 – Additional sources of verification

A list of all the existent checklist on each node (under construction):

https://docs.google.com/spreadsheets/d/1pletwptdHOzZ2OX2ySqxIjIFRCZaH4RCWRGlq2B-U8/edit?usp=drive_web&oid=111997381856518471865

Relevant and pre-existing documentation:

https://drive.google.com/open?id=1eQWhcviM0rk_AGHWrSx6MrOI1gLDCZtQ

Checklist test for working on the CESP Project (under development):

Geranium: https://drive.google.com/open?id=1rf6-VBd-rXhI6lJSSE5xGKlp4Qkvm_lu

Amphibians: <https://drive.google.com/open?id=1oMcq1iMqwWqBZelGFqMsLT33CrS7Q6Y3>

Trello board:

<https://trello.com/b/3soYLqZJ/checklist>

Documents of the new participants (Ecuador, Perú and Uruguay), after the invitation to another's participants nodes of the region:

<https://drive.google.com/open?id=1YH9K3qa3D-Gs-Ya6igPxifglgMCIKLFr>