



*Regional Workshop for the Caribbean Countries
on the Clearing-House Mechanism (CHM)*

16-20 September 2013 Gros Islet, Saint Lucia



***Guidance for Developing National
Clearing-House Mechanisms***

*Olivier de Munck
Programme Officer, CHM, CBD Secretariat*



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- ▶ Roadmap
- 0 - No CHM NFP
- 1 - No Capacity
- 2 - No Website
- 3 - Web Presence
- 4 - Good Website
- Final comments



CHM

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September 2013 – # 2*

Roadmap for establishing and strengthening national CHMs

| Level | Situation | Action |
|-------|---------------------------|---|
| 0 | No CHM NFP | Convince Party to nominate CHM NFP |
| 1 | CHM NFP not equipped | Find solutions to provide basic infrastructure & communication facilities |
| 2 | No national CHM website | Get tools & support to establish web presence |
| 3 | National CHM web presence | Enhance web content Improve user experience |
| 4 | Good national CHM website | Expand information services Establish interoperability mechanisms Support other national CHMs |

Adapt guidance to national situation

- No one-size-fit-all solution
- Various needs → Various approaches and responses

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Level 0 – No CHM

Convince Party to nominate CHM NFP

- Explain the important role of the CHM
 - Support to the NBSAP process
 - Portal for national knowledge on biodiversity
 - Useful as national dissemination tool
Public education & awareness
 - Can increase international visibility
Country image, promotion of eco-tourism, ...
 - Should facilitate scientific & technical cooperation

- Identify the right person or partner institution
 - Survey of national biodiversity actors
(scientific institution, museum, university, ...)
 - There may be a strong sustainable existing institution interested
in carrying out the role of CHM NFP
→ Win-Win situation
 - Role of CHM NFP is very different from CBD NFP

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Level 0 – CBD NFP vs. CHM NFP

| CBD NFP | CHM NFP |
|--|--|
| <ul style="list-style-type: none">• Political Role• Government representative• Diplomat skills • Decision-making process<ul style="list-style-type: none">- Negotiation- National Policy- National Planning | <ul style="list-style-type: none">• Technical Role• Project Manager• Entrepreneur skills • Implementation process<ul style="list-style-type: none">- Scientific & tech. cooperation- Information Management (gathering, disseminating)- Webmaster |
| <ul style="list-style-type: none">• Both roles are important & time-consuming<ul style="list-style-type: none">→ Adequate capacity to be effective• Importance of collaboration between CBD & CHM NFPs<ul style="list-style-type: none">→ CHM NFP should serve the CBD NFP | |

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Level 0 – Planning the new CHM

- **Promote and plan the CHM at national level**
 - Convince national decision-makers that CHM is useful
 - Integrate the CHM in the NBSAP
 - Identify & mobilize resources (National, GEF/NBSAP, other)
 - Prepare a plan with sustainability in mind
 - Establish inter-institutional coordination mechanism
 - Identify and capture national information & knowledge

- **Involve stakeholders and users**
 - Involve representatives of your target audience when planning, testing and collecting feedback
 - Joint ongoing process to improve effectiveness

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Level 0 – Planning the new CHM

Prepare a "business plan" for the New CHM

- **Institutional arrangements**
 - Responsibilities & Terms of references
 - Partnership arrangements
- **Resources allocation**
 - Human resources
 - Technical: graphic design, programming, webmaster
 - Content: management, update, validation
 - Website hosting options
 - Web content production & management
- **Activities**
 - Building national contact network
 - Learn about NBSAP priorities, targets & implementation
 - Information gathering & disseminating
 - Information architecture & web content preparation
 - Outreach & awareness activities

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Level 1 – CHM NFP Not Equipped

Provide basic infrastructure & communication facilities

- **Party's responsibility**
 - CHM NFP should be operational
 - Donors insist on sustainability
- **Prepare realistic project proposal**
 - First assess sustainability potential
 - Provide a detailed description/justification of needs
 - Project funding is temporary
- **Identify sustained resources**
 - At least small budget to maintain operations
 - Resources may be allocated if effectiveness is proven

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Level 2 – No National CHM Website

Establish web presence

- Several options to establish web presence
 - New or existing website
 - Hosted in-house or externally
 - Select a content management system (CMS)
- **Important decision**
 - Based on available resources and expertise
 - Each option has advantages and drawbacks
 - Big impact on maintenance
 - Political aspect
 - Choose the safest and easiest approach
 - Don't undertake a big project without adequate resources

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Level 2 – No National CHM Website

Options to establish web presence

- **Hosting a website**
 - Requires a solid infrastructure:
Web server + Firewall + High speed Internet + Support 24/7
 - Don't do it unless you have a special team
- **Obtaining space on existing website**
 - Agreement with a strong supporting partner
 - Many African Countries have their website hosted in Belgium
- **Using a web hosting service**
 - Many options
 - Price depending on usage

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Level 2 – No National CHM Website

Use a Content Management System (CMS)

- **Highly recommended**
 - Avoid reinventing the wheel
 - Many features, including multi-lingual capabilities
 - Easier maintenance
 - Adherence to modern web standards (XHTML, CSS)
 - Extensible
- **Selecting a CMS**
 - Several good open-source CMS
WordPress, Drupal, Joomla, Typo3
 - European Portal Toolkit (PTK)
Customized open-source built for CHM
 - Commercial CMS or custom solution
Depends on existing situation

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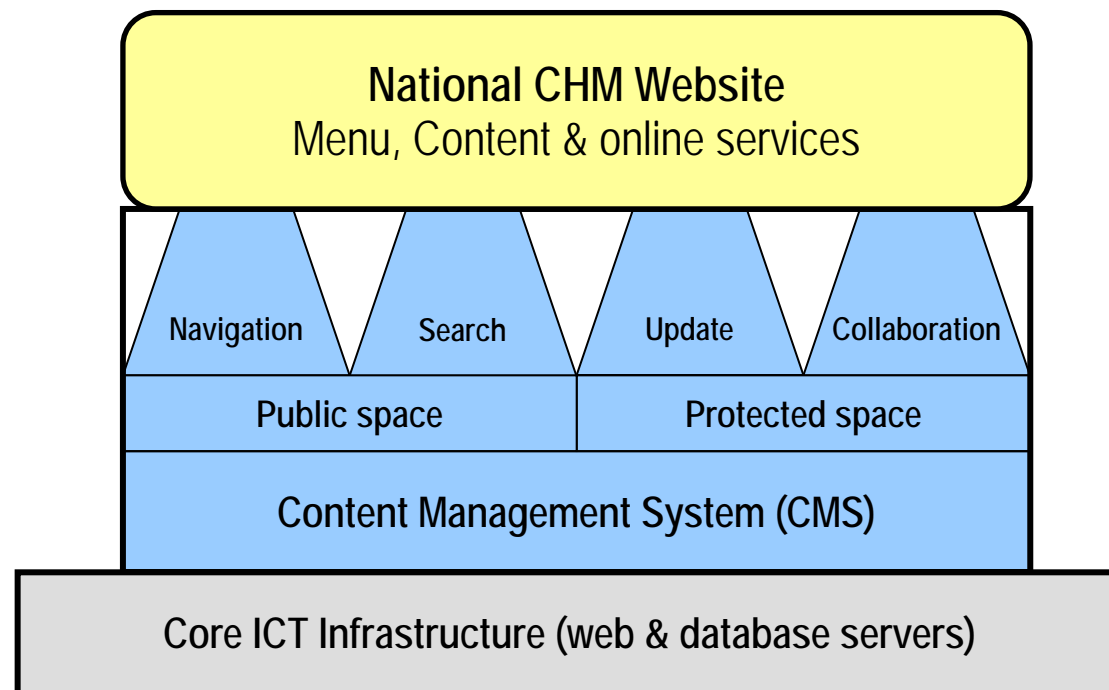
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Level 2 – No National CHM Website

CMS-based website infrastructure



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Level 3 – National CHM Web Presence

Join the CHM Network

- Notification 2008-066
www.cbd.int/doc/notifications/2008/ntf-2008-066-chm-en.pdf
- Show CHM Logo
- Common domain chm-cbd.net
 - National URL can be maintained
 - To strengthen CHM networking
 - Each country/partner is encouraged to join cc.chm-cbd.net (where cc is the country code)
- How to join the domain
 1. Configure the web server to accept the URL
 2. Give URL & IP address to Secretariat
 3. The Secretariat will activate the URL in their Domain Name System (DNS)

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Level 3 – National CHM Web Presence

Enhance web content

- **Information Architecture:**
Structure of web navigation (menus, header, footer, search) to provide access to various website sections
- **User Experience:**
Web content must be attractive, easy to find, up-to-date and relevant
- **Usability Testing:**
Prepare test scenarios and involve users in testing the website
- Requires a permanent effort

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Level 3 – National CHM Web Presence

Enhance web content

- **Reasons of no-use**
 - Nobody knows that it exists → audiences
 - It is not useful / no demand → strategic vision (marketing)
 - Product that does not sell because nobody needs it
 - Badly organized; too much information; not up-to-date
 - Technical issues, bugs

- **Solutions**
 - Target audiences → For whom? What for?
 - User monitoring → Feedback, Statistics, "User Testing"
 - User experience (UX) → **"User-Centric"** Design
 - Information architecture (IA) → Home page & Navigation

*Perfection is achieved not when there is nothing to add,
but when there is nothing to remove*

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Level 3 – Web Content

References

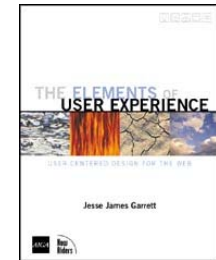
1. Content strategy for the web (2^a Ed.)

- Kristina Halvorson & Melissa Rach
- <http://www.contentstrategy.com>



2. The elements of user experience (2^a Ed.)

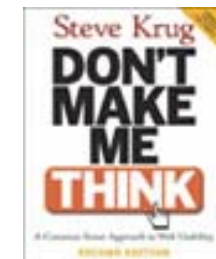
- Jesse James Garrett
- <http://www.jjg.net/elements>



3. Don't make me think (2^a Ed.)

A common sense approach to web usability

- Steve Krug
- <http://www.sensible.com/dmmt.html>



4. Rocket surgery made easy

The DIY Guide to Finding and Fixing Usability Problems

- Steve Krug
- <http://www.sensible.com/rsme.html>



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Level 3 – Web Content

Role of a national CHM

1. Entry point for country biodiversity

- Search result for "[Country] + Biodiversity"

2. Organized menu of available information

- Biodiversity
- NBSAP
- Activities / Actors / Cooperation
- References and services (per categories and/or audiences)
- Interactive area (participation / contribution / collaboration)
- About us

3. Home page

- Should answer 2 questions:
 - **Where am I?** (in the Internet shopping mall)
 - **What can I do here?** (What can I buy?)
- Promotion of what's recent or most important

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Level 3 – National CHM Web Presence

Enhance web content to disseminate information

- **Disseminate biodiversity-related information**
 - Biodiversity in the country
 - NBSAPs & national reports
 - Other national biodiversity-related documents
 - Information by programme areas relevant to the country
- **Support NBSAP implementation**
 - National targets and indicators
 - Build an inventory of projects/initiatives
 - Links to expertise (experts, centres of excellence)

Potential Menu for a National CHM Website

| Biodiversity [Country] | Strategy & Implementation | References & Services | Participate & Contribute | About |
|--|---|---|--|---|
| <p>Overview - Introduction - ...</p> <p>Ecosystems - ...</p> <p>Species - ...</p> <p>Threats - ...</p> <p>Protected Areas - ...</p> | <p>NBSAP - Vision - Priorities - Targets - Indicators</p> <p>Actions - Initiatives & Projects - Progress - Reports</p> <p>Actors - Government - Others</p> <p>Cooperation - National & Local - Regional - International</p> | <p>For - Everyone - Educators - Journalists - Government - Scientists</p> <p>About - Protected Areas - Species - Indicators data - More ></p> <p>References - Events - Directories - Publications - Legislation - Databases - Maps - Videos - Links</p> | <p>Your actions - Suggestions - Join us - Your opinion</p> <p>For members - Forum - Share data - ...</p> | <p>Us - Who we are - Our mission</p> <p>CBD - Strategic Plan - Aichi Targets</p> <p>CHM - Information Exchange - Network</p> |

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Level 3 – National CHM Web Presence

Examples of national CHM

- Canada
 - <http://www.biodivcanada.ca>
 - Good federal structure
- Europe - BISE
 - <http://biodiversity.europa.eu>
 - Good information architecture
- Switzerland
 - <http://ch.chm-cbd.net>
 - Good repository
- Colombia
 - <http://www.humboldt.org.co/chmcolombia>
 - Used by expert community

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Level 4 – Good National CHM Website

- **Expand information services**
 - Typical services
 - Specialized services contributing to the Strategic Plan
- **Establish information exchange mechanisms**
 - Interface specification
 - Interoperability
- **Support other national CHMs**
 - Advice and support
 - Cooperation

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Level 4 – Information Services

Typical CHM information services

- Information search
- Databases (species, experts, calendars)
- Directories
- Videos
- Maps
- Forums
- Social networking

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Level 4 – Information Services

Specialized information services contributing to the Strategic Plan

| | Aichi Strategic Goal | Information Services |
|---|-----------------------------------|--|
| A | Underlying causes & mainstreaming | Knowledge of biodiversity and of ecosystemic services |
| B | Reduce pressures | Information on invasive species, threatened species, vulnerable ecosystems |
| C | Safeguard biodiversity | Information on protected areas, ecosystems, species |
| D | Increase benefits | Information on sustainable use |
| E | Enhance implementation | NBSAP Indicators Cooperation Funding sources |

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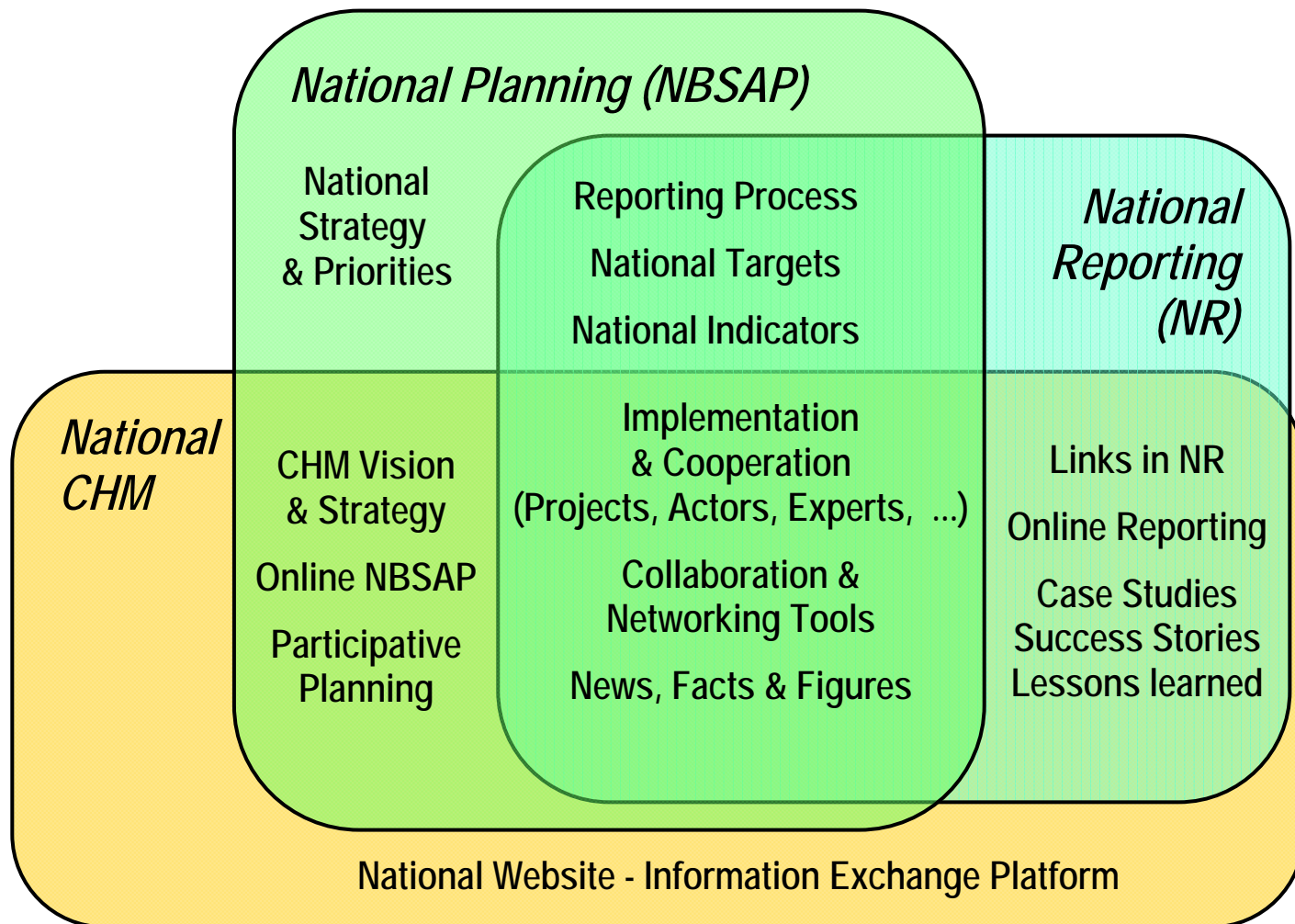
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Level 4 – Information Services

Specialized information services for planning and reporting



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Level 4 – Information Services

- CHM → Planning
 - Raising public awareness on national challenges and priorities
 - Participative planning through stakeholder consultations to collect views, comments and suggestions
 - Dissemination of NBSAP to stakeholders and the public
 - Mobilization of support for participation and implementation
 - Getting feedback on existing NBSAP for review and further planning
- CHM → Reporting
 - Central collection of stakeholders' inputs for national reports
 - Provision of relevant sources of information/data for reporting
 - Online collaboration to collect comments/suggestions on draft report
 - Sharing case studies and success stories
 - Dissemination and promotion of national report
 - Providing up-to-date content for links in national reports

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Level 4 – Good National CHM Website

Establish exchange mechanisms with other networks

- Define information exchange interface
 - Basis for data exchange & aggregation
 - Important to define good formats and classifications
 - Agree on single update point
- **Interoperability**
 - Automated information exchange between computer systems
 - Various technologies based on standards (REST, RSS/Atom, Open Data Protocol, ...)
 - Requires some IT expertise
- **Examples**
 - European Portal Toolkit (RSS/RDF News & Events)
 - InforMEA using Open Data Protocol www.informe.org
 - GFIS RSS formats (News, Events, Publications) www.gfis.net

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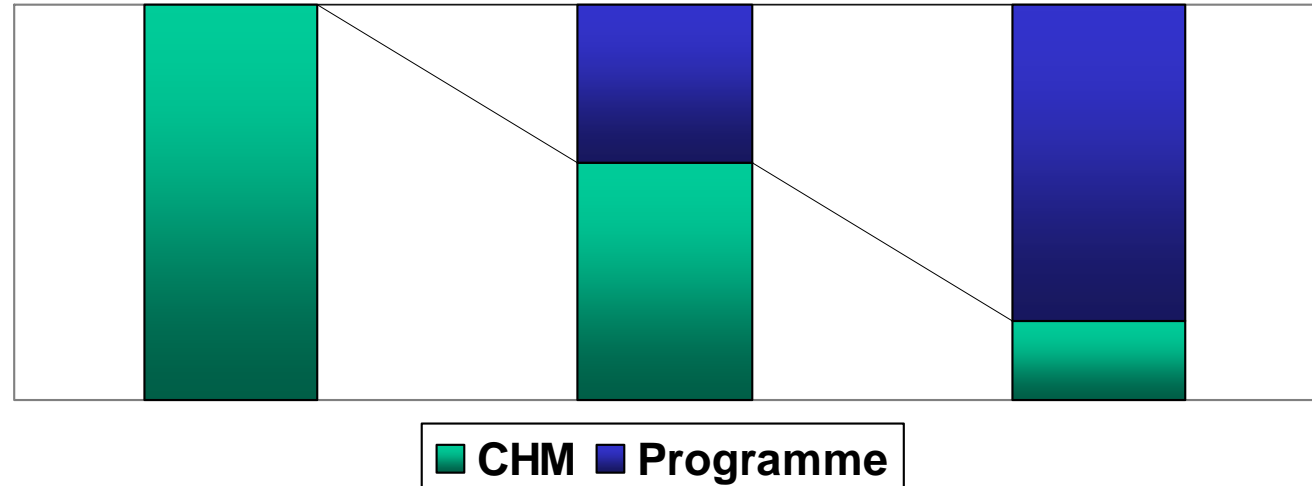


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Level 4 – Information Types



| Core Types | Customized Types | Specific Types |
|--|---------------------------------------|--|
| Meeting Decision Side event NFP | Expert Case study Best practice | Protected Areas Invasive Alien Species EBSA map ABS Certificate of Compliance |

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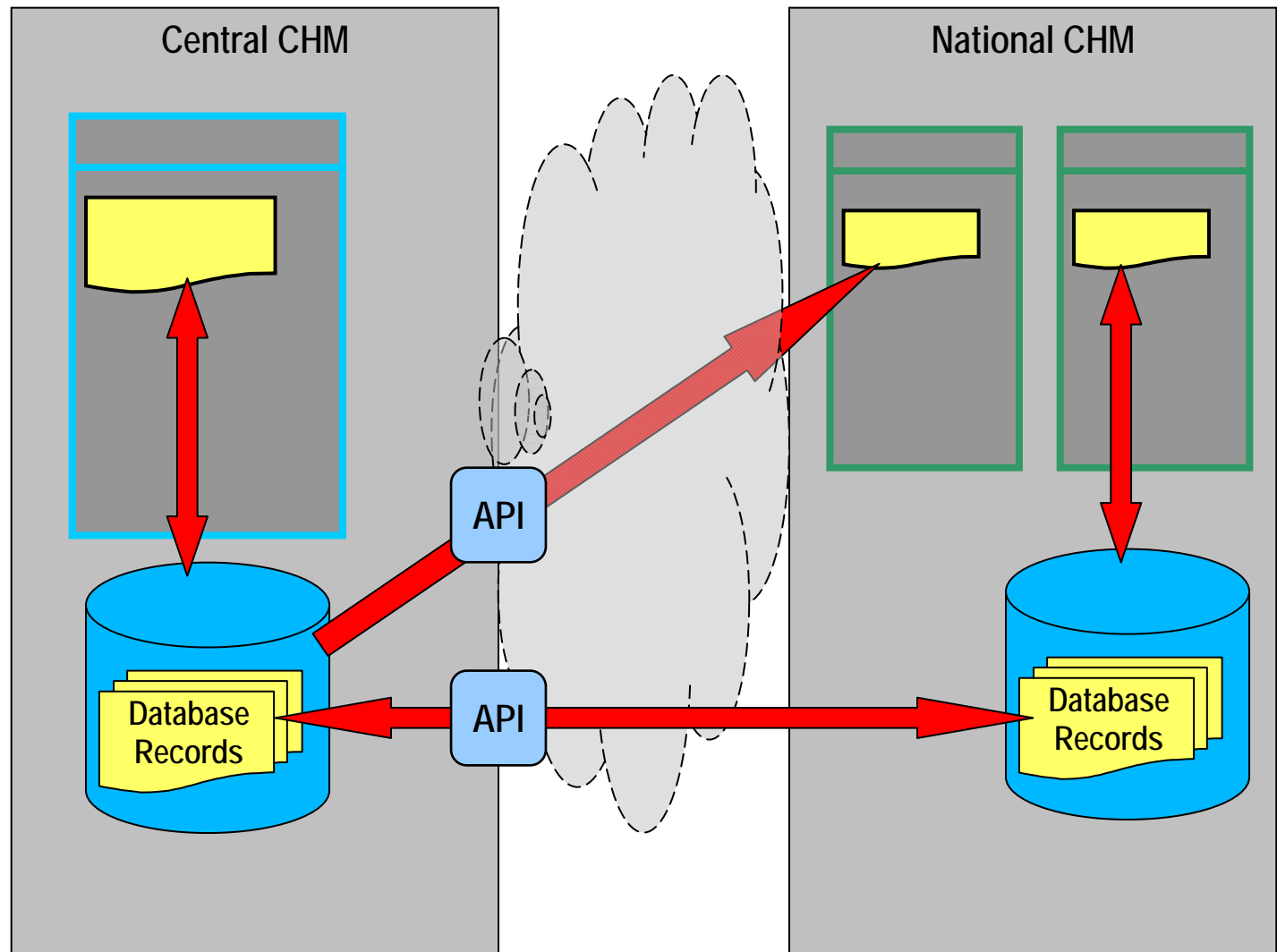
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Level 4 – Information exchange mechanism

Interconnection & Interoperability



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Level 4 - Good National CHM Website

Encourage sharing of expertise to support other national CHMs

- **But do not neglect your own National CHM**
 - Make sure information is kept up-to-date
 - Ensure sustainability
 - Be ready to adapt to new situations
- **Support other National CHM**
 - in the same region / speaking the same language
 - Share expertise & data
 - Provide advice and technical support
- **Facilitate Scientific & technical cooperation**
 - Meet national actors and facilitate scientific and technical cooperation
 - Link to all cooperation agencies in the country (UN, EU, Bilateral Cooperation, NGOs, ...)
 - Promote transfer of technology

CHM Guidance

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Final comments

- General guidance (No one-size-fit-all)
- Importance of high-level commitment
- Often possible to do something even with limited support
- Do not hesitate to contact the CBD Secretariat
- Questions or comments

Thank you



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*Olivier de Munck
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