Convention on Biological Diversity (CBD)

Clearing-House Mechanism (CHM)

Guidance for Developing National Clearing-House Mechanisms

Olivier de Munck
Programme Officer, CHM, CBD Secretariat

United Nations Decade on Biodiversity

Life in harmony, into the future
COP10/MOP5 AICHI-NAGOYA, JAPAN 2010

Roadmap

Contents

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

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

CHM

Level 0 – No CHM

Contents

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

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

CHM

CHM Guidance

Contents

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

CHM

Level 0 – CBD NFP vs. CHM NFP

CBD NFP	CHM NFP
• Political Role	• Technical Role
• Government representative	• Project Manager
• Diplomat skills	• Entrepreneur skills
• Decision-making process - Negotiation - National Policy - National Planning	• Implementation process - Scientific & tech. cooperation - Information Management (gathering, disseminating) - Webmaster

- Both roles are important & time-consuming
  → Adequate capacity to be effective
- Importance of collaboration between CBD & CHM NFPs
  → **CHM NFP should serve the CBD NFP**

CHM Guidance

Contents

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

CHM

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

CHM Guidance

Contents

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

CHM

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

CHM Guidance

Contents

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

CHM

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

CHM Guidance

Contents

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

CHM

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

CHM Guidance

Contents

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

CHM

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

CHM Guidance

Contents

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

CHM

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

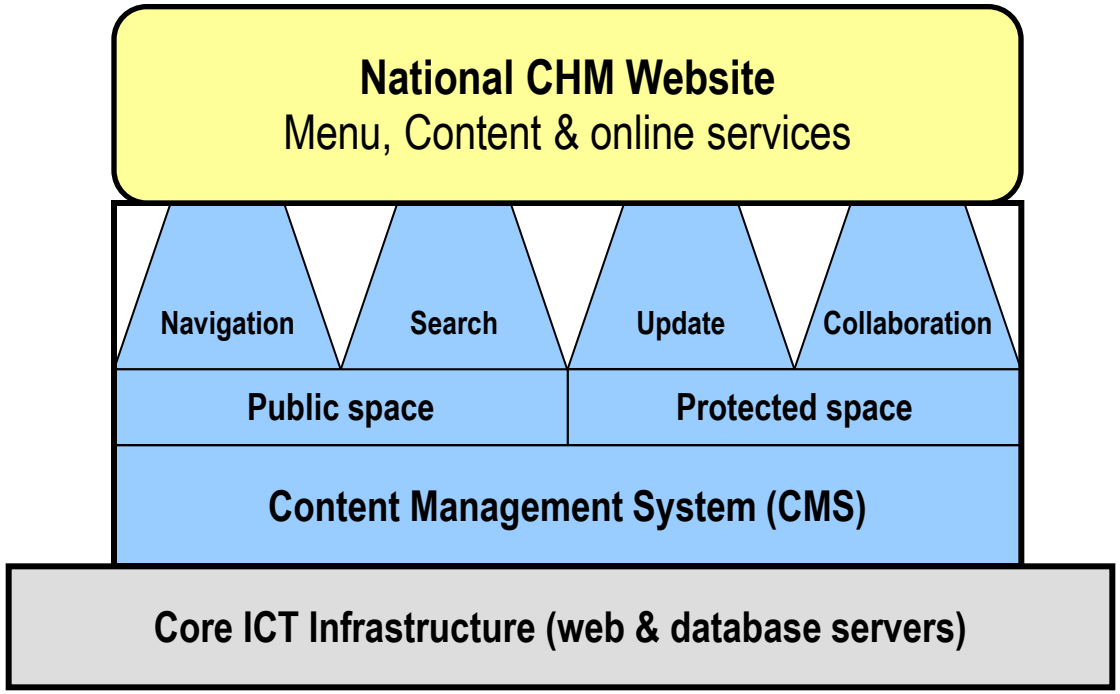
- **Selecting a CMS**
  - Several good open-source CMS
    WordPress, Drupal, Joomla, Typo3
  - European Portal Toolkit (PTK)
    Customized open-source built for CHM
  - Commercial CMS or custom solution
    Depends on existing situation

Level 2 – No National CHM Website

Contents

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

CMS-based website infrastructure



CHM

CHM Guidance

Contents

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

CHM

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)

CHM Guidance

Contents

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

CHM

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**

Level 3 – National CHM Web Presence

Enhance web content

Contents

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

- **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

CHM

CHM Guidance

Contents

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

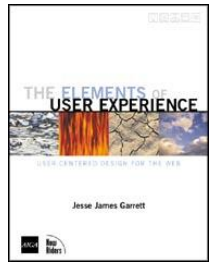
CHM

Level 3 – Web Content

References

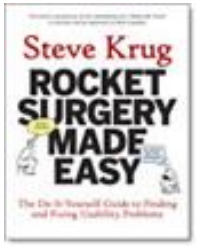
1. **Content strategy for the web** (2ª Ed.)
   - Kristina Halvorson & Melissa Rach
   - http://www.contentstrategy.com

2. **The elements of user experience** (2ª Ed.)
   - Jesse James Garrett
   - http://www.jjg.net/elements



3. **Don't make me think** (2ª 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



Level 3 – Web Content

Contents

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

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

CHM

CHM Guidance

Contents

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

CHM

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]

Overview
- Introduction
- ...

Ecosystems
- ...

Species
- ...

Threats
- ...

Protected Areas
- ...

Strategy & Implementation

NBSAP
- Vision
- Priorities
- Targets
- Indicators

Actions
- Initiatives & Projects
- Progress
- Reports

Actors
- Government
- Others

Cooperation
- National & Local
- Regional
- International

References & Services

For
- Everyone
- Educators
- Journalists
- Government
- Scientists

About
- Protected Areas
- Species
- Indicators data
- More >

References
- Events
- Directories
- Publications
- Legislation
- Databases
- Maps
- Videos
- Links

Participate & Contribute

Your actions
- Suggestions
- Join us
- Your opinion

For members
- Forum
- Share data
- ...

About

Us
- Who we are
- Our mission

CBD
- Strategic Plan
- Aichi Targets

CHM
- Information Exchange
- Network

Contents

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

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

CHM

CHM Guidance

Contents

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

CHM

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

CHM Guidance

Contents

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

CHM

Level 4 – Information Services

Typical CHM information services

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

CHM Guidance

Contents

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

CHM

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

CHM Guidance

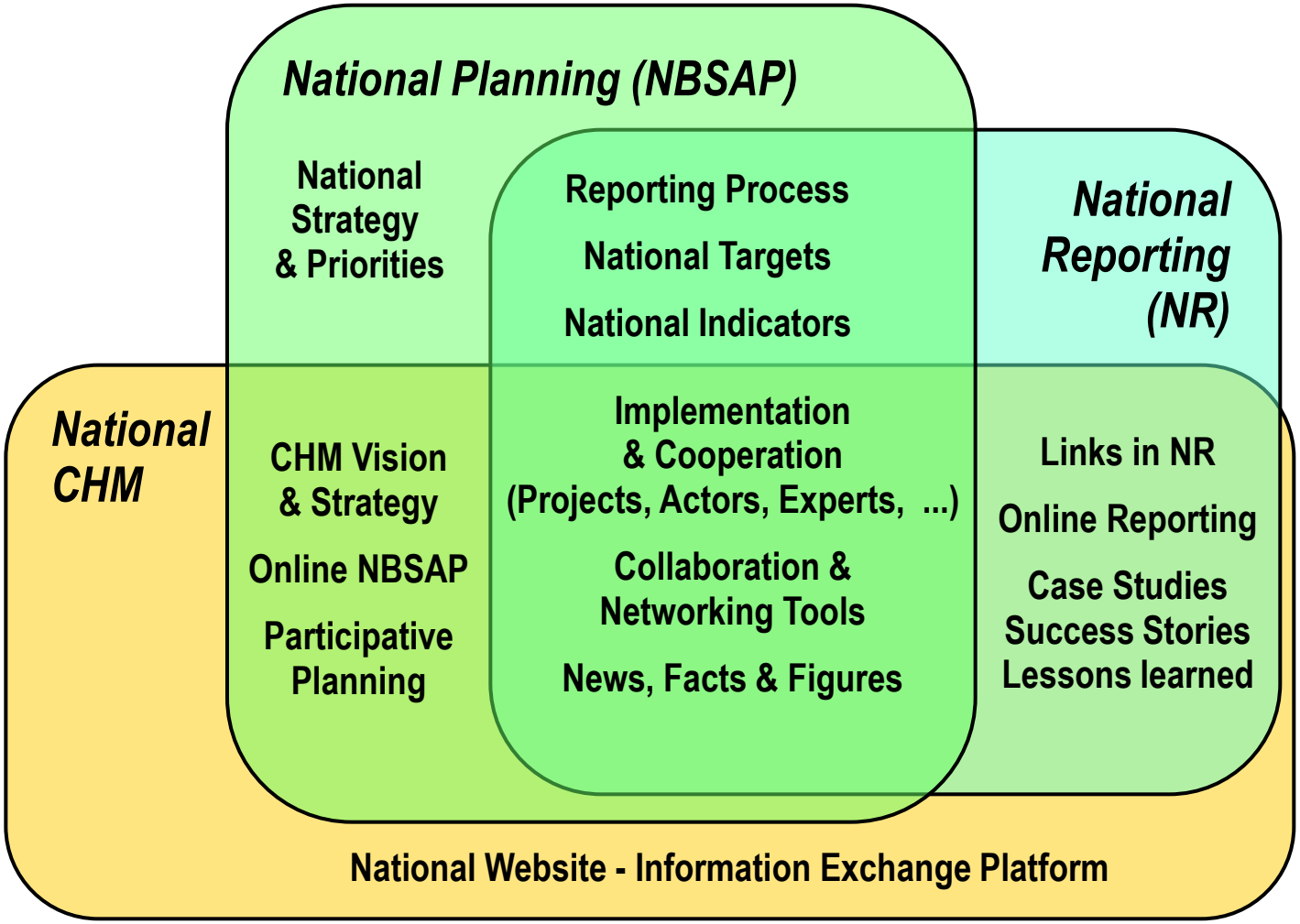
Contents

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

CHM

Level 4 – Information Services

Specialized information services for planning and reporting



CHM Guidance

Contents

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

CHM

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

Contents

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

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.informea.org
  - GFIS RSS formats (News, Events, Publications) www.gfis.net

CHM

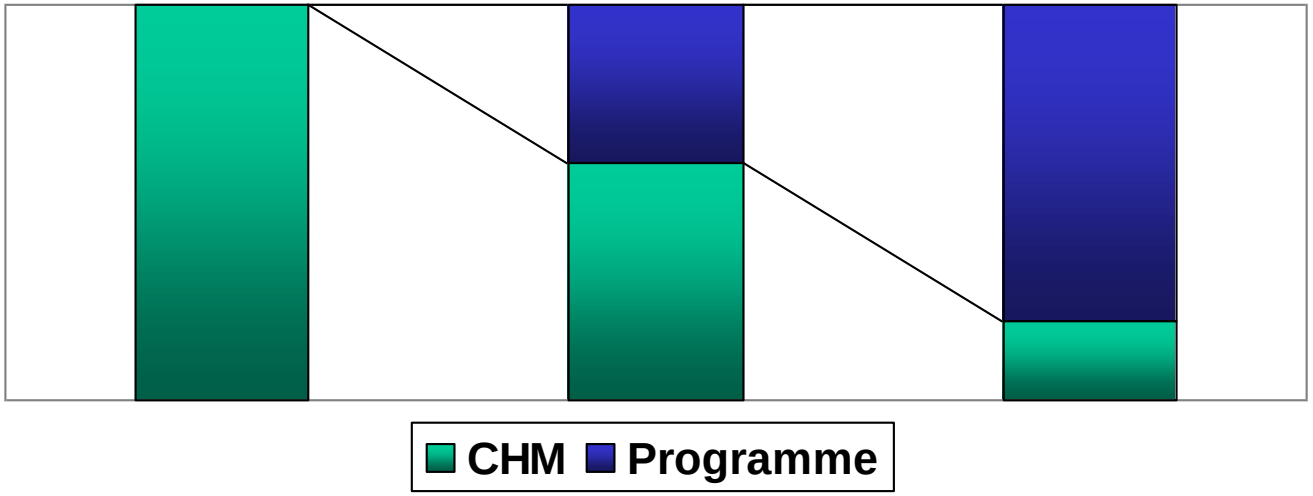
CHM Guidance

Contents

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

CHM

Level 4 – Information Types



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

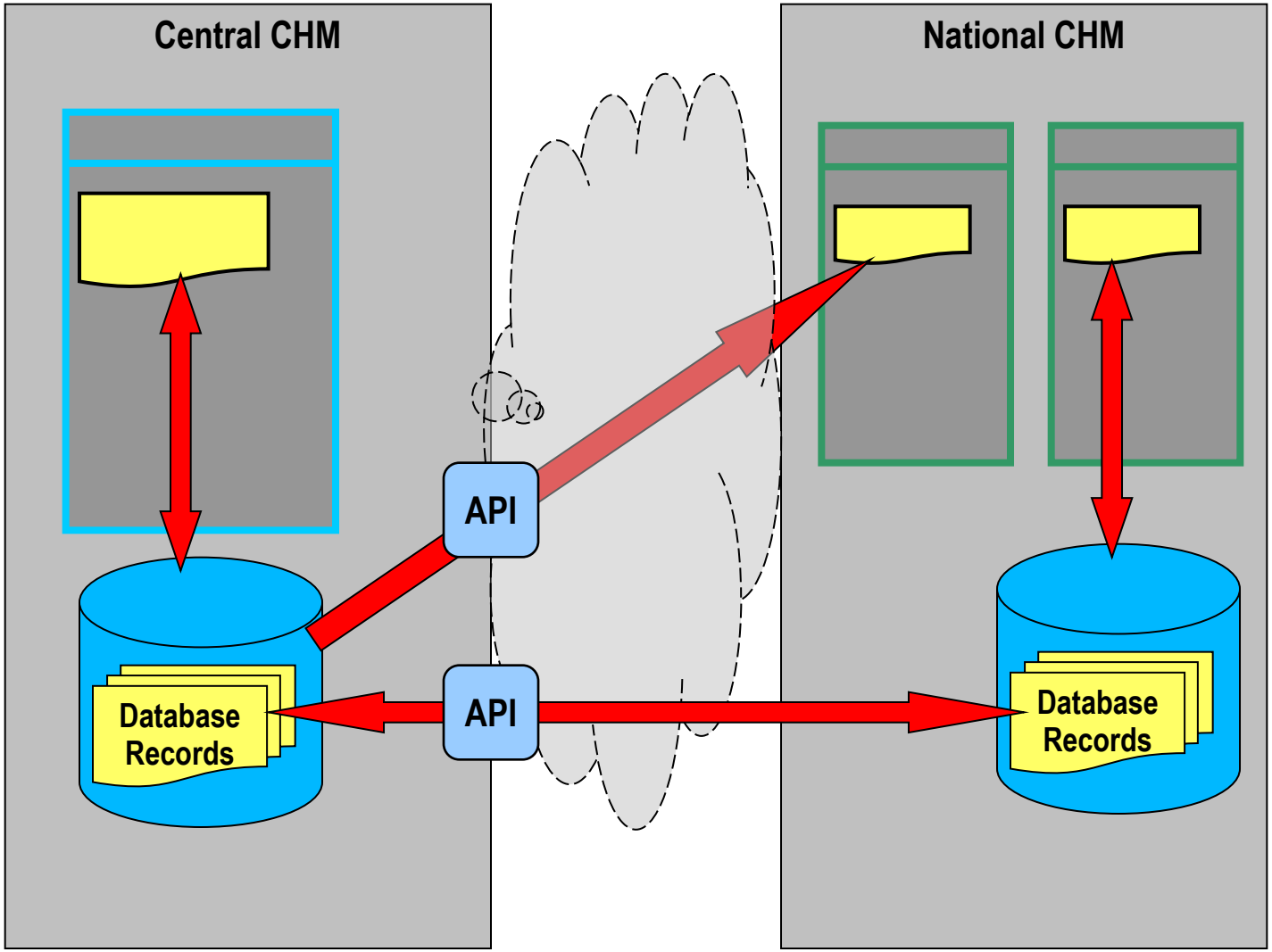
CHM Guidance

Level 4 – Information exchange mechanism

Contents

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

Interconnection & Interoperability



CHM

Level 4 - Good National CHM Website

Encourage sharing of expertise to support other national CHMs

Contents

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

- **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

CHM Guidance

Contents

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

CHM

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

Convention on Biological Diversity (CBD)

Clearing-House Mechanism (CHM)

Guidance for Developing National Clearing-House Mechanisms

Olivier de Munck
Programme Officer, CHM, CBD Secretariat

United Nations Decade on Biodiversity

Life in harmony, into the future
COP10/MOP5 AICHI-NAGOYA, JAPAN 2010