

**Ecosystem Thematic Network  
Fifth Quarterly Report  
November 1, 2007**

**Submitted by**

**Vincent J. Abreu  
Project Coordinator**

***Table of Contents***

	<b>Page #</b>
<i>Specific Accomplishments during the Fifth Quarter</i>	2
<i>Performance Measures</i>	4
<i>Sixth Quarter Activities</i>	9
<b>APPENDIX I:</b>	<b>10</b>
EXPRESSION OF INTEREST DEVELOPMENT OF A SYSTEM TO CROSS-WALK AMONG TERRESTRIAL ECOSYSTEM CLASSIFICATIONS UTILIZING THE STANDARD FORMAT AND THE REFERENCE CLASSIFICATION FOR IABIN'S ECOSYSTEM THEMATIC NETWORK	
<b>APPENDIX II:</b>	<b>15</b>
Reunión con NatureServe Septembre 20, 2007 Minutes	
<b>APPENDIX III:</b>	<b>17</b>
Data Content-Building Grant using Marine Ecosystem Standard Format	
<b>APPENDIX IV:</b>	<b>25</b>
TERRESTRIAL WORKSHOP ANNOUNCEMENT	
<b>APPENDIX V</b>	<b>27</b>
Caribbean Workshop: Proposed First-day General Agenda	
<b>APPENDIX VI:</b>	<b>28</b>
2008 Annual Activities Plan	

**Ecosystem Thematic Network  
Fifth Quarterly Report  
November 1, 2007**

**I. Specific Accomplishments during the Fifth Quarter:**

1. **Version 1 of the ETN Portal was updated as needed.** This can be accessed at: <http://biogeodb.stri.si.edu/bioinformatics/IABIN/>
2. **Activities during the fifth quarter directed toward the development of the pilot project recommended at the Experts Committee Meeting in March, in Panama City.**
  - The Web versions of the Terrestrial and Marine Standard Format are being developed.
  - An announcement of opportunity (AO) was posted for a firm to develop the Terrestrial Cross-Walk system. Expressions of interest are due by November 23, 2007. The AO is presented in APPENDIX I.
  - Contract with NatureServe to develop the Terrestrial and Marine Reference Systems has been signed and Pilot Project activities have begun.
  - Bolivia, Uruguay and Argentina were awarded Component 2 data digitalization grants. Contracts have been signed.
  - A meeting took place at NatureServe on September 20 to discuss the beginning of the Pilot Project. The minutes are presented in APPENDIX II. The key issues discussed were:
    1. Desarrollo del Formato Estándar Marino – Carmen Josse, Chris Madden y Vincent Abreu
    2. Desarrollo del Formato Estándar Terrestre y Cross-walk – Carmen Josse, Pat Comer y Vincent Abreu
    3. Coordinación de actividades de Miguel Blanco (RTE) con NatureServe para el desarrollo de la base de datos – Carmen Josse, Miguel Blanco y Vincent Abreu
  - An announcement of opportunity (AO) was posted for countries to apply for IABIN Component 2 Grants to place Marine Ecosystem Classification data in the Standard Format. See APPENDIX III

- An announcement of opportunity was posted for countries to apply to attend a Terrestrial Standard Format tutorial which will take place in Panamá City, Panamá December 13-14, 2007. See APPENDIX 1V.

**3. Participation of the ETN in the IABIN Caribbean Marine Workshop**

A IABIN Workshop, to be focused on Caribbean countries, is planned to take place at the beginning of December, 2007. The ETN participation in this workshop has been discussed with Richard Huber. The first day agenda proposed by the ETN is presented in APPENDIX V.

**4. The project coordinator has worked on the sustainability and development of the ETN in the area of urban ecosystems and health:**

The ETN coordinator was funded by the World Bank's Trust Fund for Environmentally and Socially Sustainable Development (TFESSD) to carry out the project entitled "Integrating Ecosystem and Species Data into Disease Forecasting Models". The amount awarded is \$200,000 for two years. This project will be carried out in coordination with the ETN.

This project began in Nicaragua the week of October 29 with three days of meetings with the Ministry of Health, SINIA and the School of Medicine of the National University. A second meeting is being planned in Panamá City on November 10-11 to coordinate with PAHO, the Ministry of Health in Panamá, a similar GEF Project in Bogotá, Colombia, a similar IDRC Project in Cali, Colombia, the Smithsonian Institute, the Environmental Protection Agency (USA) and the US Army.

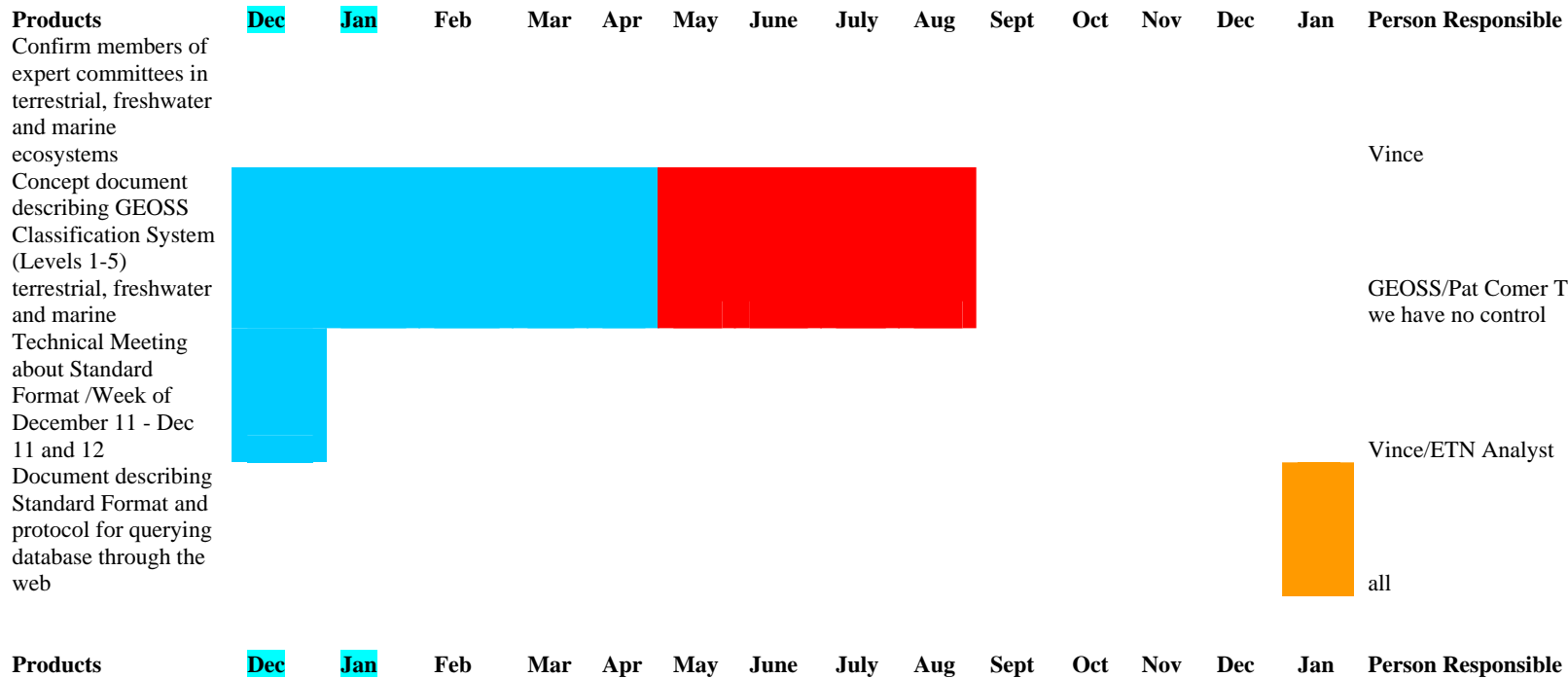
**5. Develop the Infrastructure to provide geospatial Ecosystem data on line.**

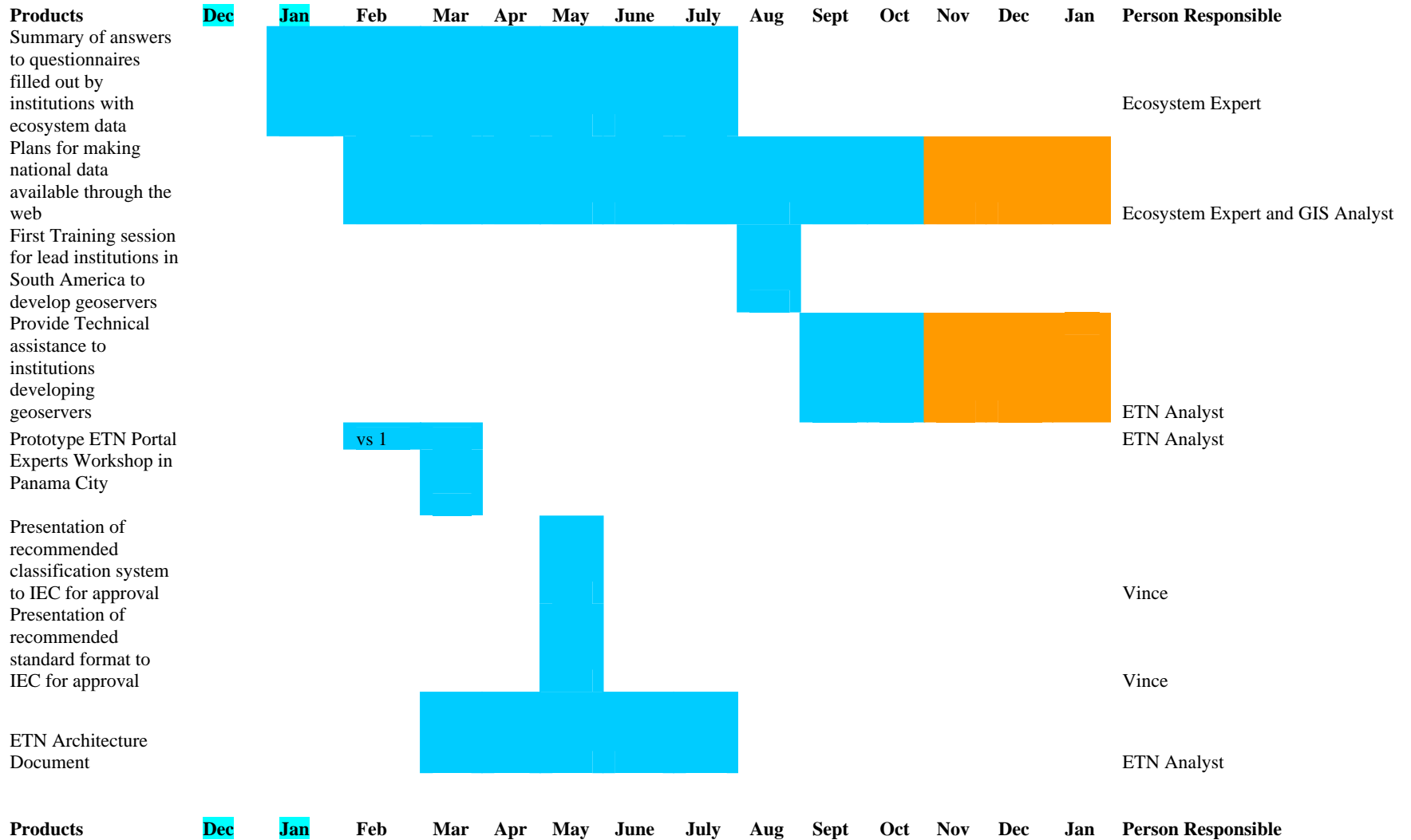
- Preliminary work began to provide technical assistance to institutions in 4 countries in South America who are installing geoservers through the GeoSUR Project.
- Requested the countries to develop implementation plans to provide data through the system.

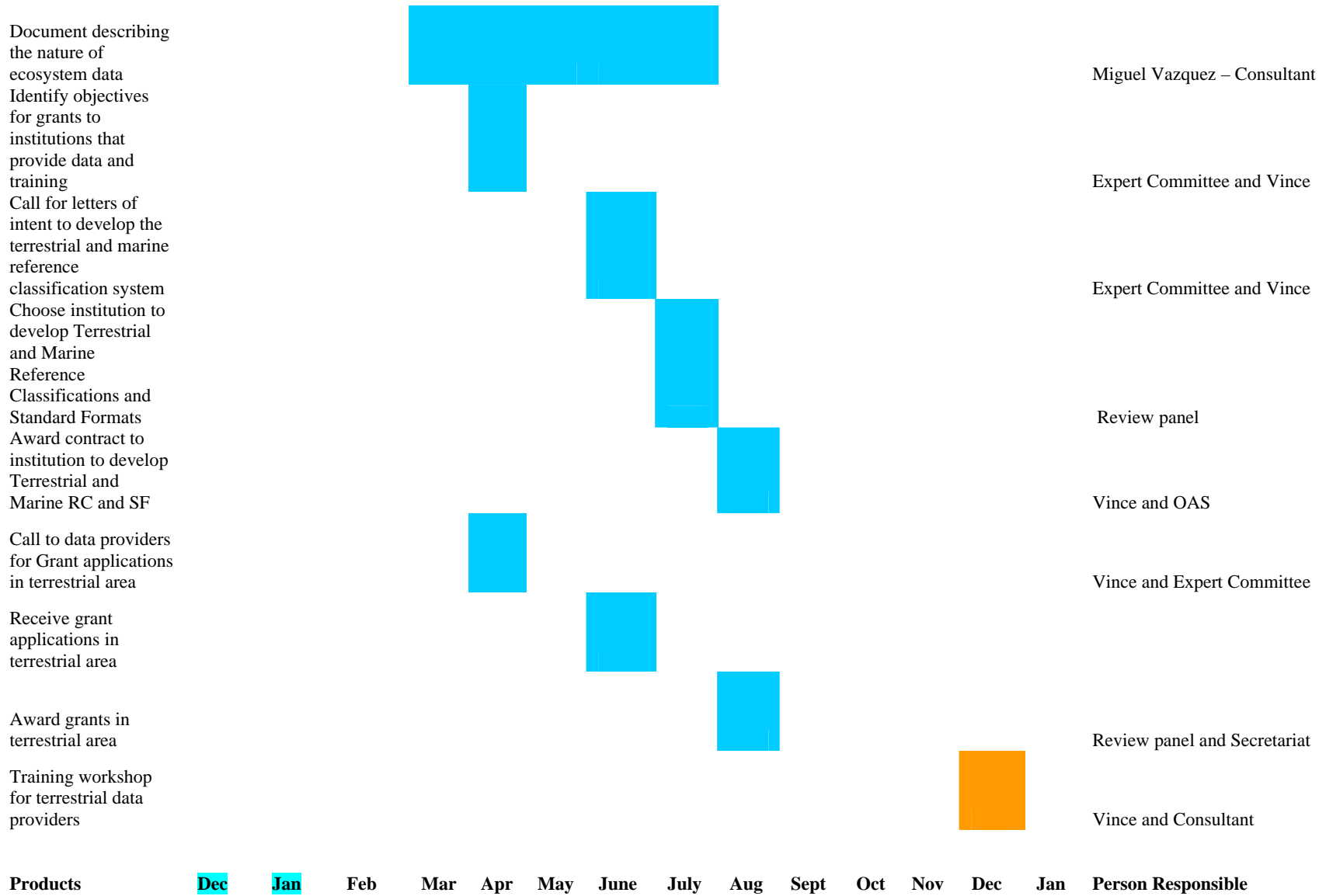
**6. Prepared 2008 Annual Activities Plan. See APPENDIX VI.**

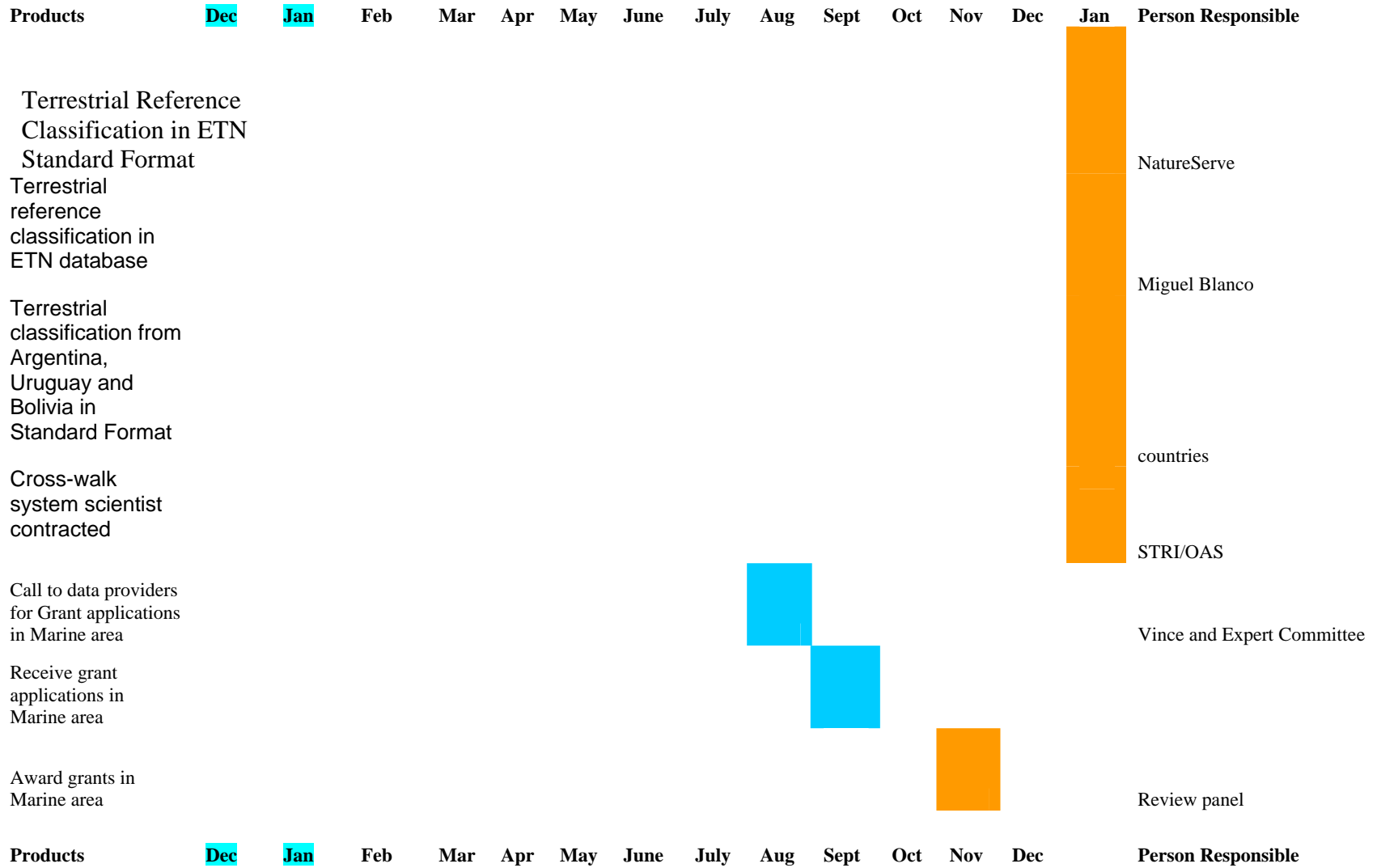
### 6. Performance Measures

A Chronogram for ETN activities from Nov, 2006 to Dec, 2007 is presented below. The Chronogram has been modified to changes in the project. Items that have been completed are indicated in blue; activities in which we are behind are indicated in red. When we are behind an explanation is given under the column “person responsible”. Planned activities are in orange.









Document: Roles and responsibilities of ETN participants (vs 1)

Caribbean Focused Workshop



Final Version



Vince, consortium members, experts and focal points



### **III. Planned Fifth Quarter (August 1 to November 1, 2007) Activities**

The following activities will be carried out during the fifth quarter:

- a. Complete the formulation of the standard for terrestrial and marine ecosystems.
- b. Design of a relational database with the Standard Format data.
- c. Develop training materials in the use of the Standard Format.
- d. Fill out terrestrial Standard Format form and develop metadata for 3 countries that use different classifications and are capable of filling it out at least to Level 5.
- e. Establish links with the national data in the chosen countries.
- f. Fill out the marine Standard Format form with data obtained from Grants to countries (at least to Level 4).
- g. Fill out the Standard Format for all classes in the Terrestrial Reference Classification System.
- h. Enter standard format data in the relational database, as they become available.
- i. Modify portal to demonstrate the functionality (cross-walk, Standard Format queries, access to national databases, link to databases in other thematic networks, link between the standard format relational database and geospatial information in geoservers.
- j. Provide technical assistance to countries establishing geoservers.
- k. Carry out the Terrestrial workshop
- l. Hire a consultant to develop the semi-automatic cross-walk system.

# APPENDIX I

## EXPRESSION OF INTEREST

### DEVELOPMENT OF A SYSTEM TO CROSS-WALK AMONG TERRESTRIAL ECOSYSTEM CLASSIFICATIONS UTILIZING THE STANDARD FORMAT AND THE REFERENCE CLASSIFICATION FOR IABIN'S ECOSYSTEM THEMATIC NETWORK

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#### Request for Expression of Interest

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<b>Country:</b>	IABIN eligible countries <sup>1</sup>
<b>Implementing Agency:</b>	<b>International Bank for Reconstruction and Development / World Bank</b>
<b>Executing Agency:</b>	<b>General Secretary of the Organization of American States</b>
<b>Project:</b>	<b>Building the Inter-American Biodiversity Information Network (IABIN)</b>
<b>Thematic Network</b>	<b>Ecosystem Thematic Network</b>
<b>Period:</b>	<b>3 months</b>
<b>Type:</b>	<b>Individual Qualifications - Firms</b>

#### I. GENERAL INFORMATION

Responding to the importance in the Americas of protection of biodiversity (the Americas houses 8 of the 25 biodiversity hotspots), the Inter-American Biodiversity Information Network (IABIN) was officially mandated at the Summit of the Americas on Sustainable Development, convened by the Organization of American States (OAS) in Santa Cruz de la Sierra, Bolivia, in December 1996. IABIN is an Internet-based forum for technical and scientific cooperation that seeks to promote greater coordination among Western Hemisphere countries in the collection, sharing, and use of biodiversity information relevant to decision-making and education.

The objective of IABIN is to promote sustainable development and the conservation and sustainable use of biological diversity in the Americas through better access to and management of biological information. While IABIN is envisioned as a distributed system of data providers in which the data are maintained and controlled by the provider, coordinated access to the integrated resources of the network is a key component of IABIN.

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<sup>1</sup> The List of IABIN eligible countries can be found in  
[http://www.iabin.net/index.php?option=com\\_content&task=view&id=237&Itemid=38](http://www.iabin.net/index.php?option=com_content&task=view&id=237&Itemid=38)

A five year Global Environment Facility (GEF) Grant of US\$6.0 million for the Building the Inter-American Biodiversity Information Network (IABIN) Project (the project) is executed by the General Secretariat of the OAS (GS/OAS) and Implemented by International Bank for Reconstruction and Development (World Bank, the Bank).

The IABIN Ecosystem Thematic Network (ETN) is an electronic and institutional network dedicated to ecosystem information that supports the decision making process. In practice each country may have its own ecosystem classification system. One of the requirements of the ETN is to be able to cross-walk among classification systems.

- A Reference Classification System and an Ecosystem Standard Format are being adopted by the ETN in order to provide users with a facilitated “cross-walk” capability; i.e., a mechanism to document conceptual similarities among classes from different classification systems.
- The Reference Classification being adopted is based on the GEOSS Classification structure (see Annex 2).
- The Standard Format is a template to be filled out for each class in an ecosystem classification (Level 1-6), with fields that describe the class according to a series of attributes, criteria or characteristics .These attributes include the ones associated with the Reference Classification structure. A draft template can be found at the ETN Portal: <http://biogeodb.stri.si.edu/bioinformatics/IABIN/>. This template is still under development and it is expected to be ready by November, 2007.
- The standard is the basic unit for a relational database that will allow queries by users.
- A Web template allows data providers to fill out the standard and incorporate it into the database.
- This Request for expression of interest is directed for firms with expertise in terrestrial ecosystem classifications and cross-walks.

### **I.1. Rationale**

Given that many countries share ecosystems and/or ecoregions and each one has a different approach to ecosystem, vegetation, and/or land cover maps, central to this objective is the need of creating a common language to which each of the existing national ecological classifications can relate. Since it would be labor intensive to cross-walk each classification to all other ones, this “reference classification” will be the conceptual tool to facilitate crosswalk. By means of filling out a format with fields that describe the class according to a series of pre-determined attributes or criteria, each class in each existing classification will be related to a class in the reference classification, and using the adequate data base structure, it will be possible to list all classes related to a specific class in the reference classification, allowing for the needed crosswalk.

### **I.2. Responsible Officers**

The consultant will be supervised by Vincent Abreu, IABIN Ecosystem Thematic Network Coordinator

### **I.3. For further information**

Contact Vincent Abreu (Ecosystems Thematic Network Coordinator) at [abreu@umich.edu](mailto:abreu@umich.edu) or Boris Ramirez (Thematic Network Coordinator) at [bramirez@iabin.net](mailto:bramirez@iabin.net)

#### **I.4. Contract Information**

The Consultant shall perform the Services during four (3) months commencing on the date of signature, **not exceeding a payment of \$15,000.**

The Organization of American States will make the payments either by a wire transfer to the bank account to the firm or through the OAS Offices in the country where the firm resides. The taxes and expenses that the consultant will incurred will be responsibility of the consultant.

## **II. OBJECTIVE**

Develop a semi-automatic system to carry out cross-walks among terrestrial ecosystem classifications. This semi-automatic system is part of a Pilot Project to show that the Reference Classification system and a Standard Format (that can be found at: <http://biogeodb.stri.si.edu/bioinformatics/IABIN/>) can be utilized to carry out semi-automatic cross-walks.

## **III. ACTIVITIES**

1. Develop a semi-automatic system to carry out cross-walks.
2. Evaluate the system utilizing existing data (Reference Classification and the classifications provided by countries who obtain grants to digitalize data under component 2 of the IABIN project) in the Standard Format database, and if necessary provide recommendations for improving the system.
3. Demonstrate the cross-walk process utilizing GIS.
4. Provide support to the ETN's technical personnel on matters related to the development of Standard Format relational database, and the interface that will allow the users to carry out automatic cross-walks and other queries.

## **IV. PRODUCTS**

- ❖ A system to carry out cross-walk among terrestrial ecosystem classifications.
- ❖ A final report explaining how the cross-walk system works.
- ❖ A preliminary cross-walk table utilizing the Reference Classification and the classifications provided by the countries who obtained digitalization grants.
- ❖ Maps generated with the cross-walk system utilizing GIS.

## **V. CRONOGRAMA**

The described activities will be carried out between January 15, 2008 and April 15, 2008.

## **VI. COPYRIGHTS**

Relative to the CONSULTANT WORK: The Consultant shall not have any title, copyright, patent, or other proprietary rights in any Work furnished under this Contract. All such rights shall lie with GS/OAS and IABIN. The Consultant shall deliver such Work to the GS/OAS with a copy to the ETN Coordinator no later at the end of the Contract. All Work shall comply with the IABIN access to information and intellectual property regulation found on [http://www.iabin.net/index.php?option=com\\_content&task=blogcategory&id=11&Itemid=21](http://www.iabin.net/index.php?option=com_content&task=blogcategory&id=11&Itemid=21)

Relative to the DATA SOURCE: The data provider shall retain title, copyright, patent, or other proprietary rights of their data and shall hereby grant to GS/OAS and IABIN a non-exclusive unlimited license at no cost.

## **VII. WHO CAN PARTICIPATE**

Firms with legal status, such as NGOs, Government Agencies, Academic and Scientific Institutions.

## **VII. SELECTION CRITERIA**

A firm will be chosen through a competitive process based on the consultant's qualifications and the criteria established below. The selection will be carried out by STRI, as the Coordinating Institution for the IABIN Ecosystem Thematic Network (ETN) and the IABIN Secretariat. The Expression of interest should be submitted by Sunday June 10, 2007.

The criteria that will be used for selection are the following:

- Experience with terrestrial ecosystem classifications in Latin America, USA and Canada.
- Experience in GIS and Machine Learning-assisted methods.
- Knowledge of the GEOSS ecosystem classification
- Experience working internationally
- Quality of personnel

Expressions of interest must be sent to Vince Abreu [abreu@umich.edu](mailto:abreu@umich.edu) (with copy to Boris Ramírez [bramirez@iabin.net](mailto:bramirez@iabin.net)), in MS Word or PDF.

The tentative dates for the process are as follows:

- November 23 2007: Firms must send their expression of interest
- November 30, 2007: The evaluation committee will select a firm with the best qualifications and the OAS will ask them to submit a technical and financial proposal.
- December 31, 2007: Last day for the selected firm to submit its financial and technical proposal.
- January 7, 2008: Final day for the evaluation committee to turn in its evaluation of the proposal to the OAS.
- January 15, 2008: Beginning of contract.

**APPENDIX II**  
**Reunión con NatureServe in Washington D.C.**  
**Septiembre 20, 2007**  
**Minutas**

**Objetivo:**

Planificar la ejecución del desarrollo del Formato Estándar Terrestre y Marino que NatureServe va a ejecutar bajo contrato con la OEA. Este contrato también incluye llenar el Formato Estándar Terrestre para la Clasificación Referencia Terrestre en America Latina y el Caribe.

**Temas discutidos:**

Se discutieron tres tópicos:

4. Desarrollo del Formato Estándar Marino – Carmen Josse, Chris Madden y Vincent Abreu
5. Desarrollo del Formato Estándar Terrestre y Cross-walk – Carmen Josse, Pat Comer y Vincent Abreu
6. Coordinación de actividades de Miguel Blanco (RTE) con NatureServe para el desarrollo de la base de datos – Carmen Josse, Miguel Blanco y Vincent Abreu

**Acuerdos y recomendaciones**

**Desarrollo del Formato Estándar Marino:**

1. Se revisó el cronograma de trabajo y se acordó que el Formato Estándar Marino estaría listo para mediados de noviembre, incluyendo el diseño de la base de datos.
2. Se acordó tener un taller de entrenamiento para los países a principios de Diciembre. Lugar tentativo para el taller es Ciudad de Panamá.
3. Al taller podrán atender no sólo los países que ya han recibido Grants, sino que estará abierto a todos los países que tengan datos marinos y que puedan contribuir al desarrollo de la base de datos del Formato Estándar Marino.
4. Aproximadamente 10-12 países serán escogidos en una forma competitiva de acuerdo a la calidad de los datos que tengan. Se espera que los países escogidos apliquen para obtener Grants para llenar el Formato Estándar durante una segunda llamada que se efectuará después del taller.
5. El contacto principal con Miguel Blanco será Chris Madden.
6. Invitar a GEOSS a participar en el taller.

**Desarrollo del Formato Estándar Terrestre**

1. El Formato Estándar Terrestre estará definido para mediados de Noviembre, 2007.

2. Se acordó tener un taller de entrenamiento para los países el 13 y 14 de Diciembre. Lugar tentativo para el taller es Ciudad de Panamá.
3. Al taller podrán atender no sólo los países que ya han recibido Grants, sino que estará abierto a todos los países que tengan datos de ecosistemas terrestres y que puedan contribuir al desarrollo de la base de datos del Formato Estándar Terrestre.
4. Aproximadamente 10-12 países serán escogidos en una forma competitiva de acuerdo a la calidad de los datos que tengan. Se espera que los países escogidos apliquen para obtener Grants para llenar el Formato Estándar durante una segunda llamada que se efectuará después del taller.
5. Se hizo un costo preliminar del taller.
6. Vincent Abreu preparará los términos de referencia para contratar a la firma que va a efectuar el taller y también preparará las invitaciones a los países a participar en el taller.
7. El contacto principal con Miguel Blanco será Carmen Josse.
8. Invitar a GEOSS a participar en el taller.
9. Se discutieron ideas sobre como se va a hacer el cross-walk y se acordó tener una teleconferencia con Pat Comer en las próximas semanas sobre este tema.
10. Se discutió la necesidad de tener como producto final del proyecto piloto una serie de mapas de ecosistemas terrestres de America Latina y el Caribe que reflejen los niveles de la estructura GEOSS.

#### **Coordinación de actividades de Miguel Blanco con NatureServe**

1. Se acordó que Miguel Blanco va a estar trabajando directamente con Carmen Josse y con Chris Madden, desarrollando la página web y la base de datos para el Formato Estándar Terrestre y Marino.
2. Se informó a Miguel de las actividades que NatureServe va a llevar a cabo, y en general del proyecto piloto, incluyendo fechas, taller, etc.
3. Se acordó tener una teleconferencia entre Miguel, Chris Madden y Kathy Goodin para coordinar la página web del Formato Estándar Marino.



## APPENDIX III

### Request for Proposals

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Country:	IABIN eligible countries <sup>2</sup>
Implementing Agency:	International Bank for Reconstruction and Development / World Bank
Executing Agency:	General Secretary of the Organization of American States
Project:	Building the Inter-American Biodiversity Information Network (IABIN)
Thematic Network	Ecosystem Thematic Network
Period:	4 months
Type:	Data Content-Building Grant using Marine Ecosystem Standard Format

#### I. GENERAL INFORMATION

Responding to the importance in the Americas of protection of biodiversity (the Americas house 8 of the 25 biodiversity hotspots), the Inter-American Biodiversity Information Network (IABIN) was officially mandated at the Summit of the Americas on Sustainable Development, convened by the Organization of American States (OAS) in Santa Cruz de la Sierra, Bolivia, in December 1996. IABIN is an Internet-based forum for technical and scientific cooperation that seeks to promote greater coordination among Western Hemisphere countries in the collection, sharing, and use of biodiversity information relevant to decision-making and education.

The objective of IABIN is to promote sustainable development and the conservation and sustainable use of biological diversity in the Americas through better access to and management of biological information. While IABIN is envisioned as a distributed system of data providers in which the data are maintained and controlled by the provider, coordinated access to the integrated resources of the network is a key component of IABIN.

A five year Global Environment Facility (GEF) Grant of US\$6.0 million for the Building the Inter-American Biodiversity Information Network (IABIN) Project (the project) is executed by the General Secretariat of the OAS (GS/OAS) and Implemented by International Bank for Reconstruction and Development (World Bank, the Bank).

One of the objectives of Component 2 of the IABIN GEF is to provide grants to institutions with high quality data to support institutional efforts to make data available through the network.

The IABIN Ecosystem Thematic Network (ETN) is an electronic and institutional network dedicated to ecosystem information that supports the decision making process. In practice each country may have its own marine ecosystem or marine habitat

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<sup>2</sup> The List of IABIN eligible countries can be found in [http://www.iabin.net/english/governance/national\\_level.shtml](http://www.iabin.net/english/governance/national_level.shtml)

classification system. One of the requirements of the ETN is to be able to cross-walk among classification systems.

- A Marine Reference Classification System and a Marine Ecosystem Standard Format are being developed by the ETN in order to provide users with a facilitated “cross-walk” capability; i.e., a mechanism to document conceptual similarities among classes from different classification systems.
- IABIN will use the Coastal and Marine Ecological Classification Standard (CMECS) classes, definitions and units within the GEOSS structure as a starting point to develop the IABIN Reference Marine Classification.
- The content of the Marine Standard Format will reflect the variables that define CMECS classes. The Marine Standard Format is a template to be filled out for each class in a marine habitat or ecosystem classification, with fields that describe the class according to a series of attributes, criteria or characteristics. These attributes include the ones associated with the Marine Reference Classification structure. The template for the Marine Standard Format is still being developed and will be ready by the beginning of the project, but in order to give an idea of the kind of information we are after, Annex 2 presents a list of descriptors that will likely be included.
- The standard is the basic unit for a relational database that will allow queries by users.
- A Web template allows data providers to fill out the standard and incorporate it into the database.
- The chosen applicants will fill out a similar web template for each class in their classification system.
- This Request for Proposals (RfP) seeks proposals from institutions that have access to marine ecosystem classifications at the national level, including digital maps and supporting information.

### **I.1. Rationale**

Given that many countries share marine ecosystems and/or ecoregions and each one has a different approach to classifying and mapping marine habitats and ecosystems, central to this objective is the need of creating a common language to which each of the existing national marine ecosystem classifications can relate. Since it would be labor intensive to cross-walk each classification to all other ones, this “reference classification” will be the conceptual tool to facilitate crosswalk. By means of filling out a format with fields that describe the class according to a series of pre-determined attributes or criteria, each class in each existing classification will be related to a class in the reference classification, and using the adequate data base structure, it will be hopefully possible to list all classes related to a specific class in the reference classification, allowing for the needed crosswalk.

### **I.2. Responsible Officers**

Vincent Abreu, IABIN Ecosystem Thematic Network Coordinator, and Rita Besana, IABIN Data Content Manager.

### **I.3. For further information**

Contact Vincent Abreu at [abreu@umich.edu](mailto:abreu@umich.edu) or Rita Besana at [rbesana@iabin.net](mailto:rbesana@iabin.net).

#### I.4. Eligibility

Organizations from IABIN eligible countries, vested with legal personality that have high-quality marine habitat or ecosystem data, such as:

- a. Non-Governmental Organizations,
- b. Government agencies (only if they can establish that they (i) are legally and financially autonomous, (ii) operate under commercial law, and (iii) are not dependent agencies of the GS/OAS or any Coordinating Institution of IABIN),
- c. Academic and scientific institutions

**The grantees must explicitly agree to make data and metadata developed through the project available through the IABIN network and the ETN central website under conditions described in the section "ACCESS TO INFORMATION AND INTELLECTUAL PROPERTY REGULATION" found at**

**<http://www.iabin.net/english/documents/governance.shtml>, and conditions found on**

**[http://www.iabin.net/english/bioinformatics/protocols/standards & formats.shtml](http://www.iabin.net/english/bioinformatics/protocols/standards&formats.shtml).**

#### I.5. Award Information

- **Size of awards:** Grants of up to a maximum award of \$10,000 US, depending on the number of ecosystem classes and classifications the grantee will work with.
- **Estimated number of awards:** Up to 5 awards.

#### I.6. Cost Sharing Requirements

There is a matching funds requirement of at least 1:1 in order to obtain an IABIN Content-Building Grant. The matching can be achieved through one or more of the following:

- Project funds from non-IABIN sources
- salaries of people involved in the project that are paid by non-IABIN funds (at a percentage equal to the percentage of their working week spent directly on the project)
- volunteer time spent directly on the project calculated at an hourly wage equivalent
- in-kind support to the project (donation of hardware, software, travel costs, etc.)

It should be noted that overhead will not be eligible as a cost to be covered with IABIN funds administered by the General Secretariat of the Organization of American States (GS/OAS), but it will be acceptable as matching funds.

#### I.7. Target Dates

1. RFP released by August 24, 2007.
2. Proposals due by September 20, 2007
3. Proposal reviewed by October 10, 2007
4. Successful Proposal applicants contacted by October 15, 2007

#### II. THE APPLICANT MUST CARRY OUT THE FOLLOWING ACTIVITIES:

1. Apply the Marine Standard Format for Marine Habitats or Ecosystems (to be provided) to each class in the classification(s) system(s) under consideration. This implies filling out a Web template for each class. We encourage the submission of proposals in which

more than one classification system is considered for a country, in order to do historical cross-walks.

2. Provide existing marine habitat or ecosystem maps and/or related information in a server in their institution or hosting institution.
3. Develop metadata utilizing IABIN standards for all the information provided.
4. Attend a training session on how to fill out the Standard Format.
5. *Support the IABIN philosophy by* demonstrating a commitment to making the resulting data freely available to the public and explicitly agreeing to conditions given under Section I.4.

### III. PROPOSAL REVIEW CRITERIA

Overall, the selection of proposals will satisfy the need of the ETN to prove the feasibility of the cross-walk concept and other functionality that will be demonstrated through a pilot. We are looking for data on a diversity of habitat types. For example, we are currently proposing to identify several major classes - 1) unconsolidated bottom, 2) rock bottom, 3) aquatic beds (Seagrass or algal beds), reefs - 4) coral, 5) mollusk, 6) worm, 7) rocky shore, 8) unconsolidated shore, intertidal wetlands - 9) salt marshes and 10) forested wetlands (e.g. mangroves). These classes occur at different latitudes and by maximizing the diversity of habitat types present in the pilot, we will also maintain a geographical balance among countries in the region receiving grants. Applicants must provide a list of classes that are known to occur in the country and identify what percentage of the occurring classes are included in the data set being provided.

An important evaluation criteria will be the quality of data. Proposers should provide evidence on the quality of the data to be provided.

Previous experience working with ecosystems and submittal of budgets that reflect an appropriate balance among direct and indirect costs will be additional aspects taken into consideration during proposal evaluation.

Other important criteria are:

1. Availability of qualified personnel.
2. Availability of co-financing (at least 1:1)
3. Adherence to the preparation and submission instructions below.

Annex 1 describes the proposal evaluation procedure.

#### **IV. PROPOSAL PREPARATION AND SUBMISSION INSTRUCTIONS**

Proposals should be sent via e-mail to Rita Besana at [rbesana@iabin.net](mailto:rbesana@iabin.net) (with cc to Vincent Abreu, [abreu@umich.edu](mailto:abreu@umich.edu), in MS Word or PDF using the following outline. Please note that proposals should be no more than seven (7) pages long and will only be accepted if they follow the format indicated.

##### **IV.1. REQUIRED FORMAT OF PROPOSAL:**

Proposals may be submitted in Spanish, English, or Portuguese; abstracts are required to be in both the original language as well as in English and Spanish.

##### **PAGE 1:**

###### **A. Title of Proposed Project**

###### **B. Contact Information for Principal Investigator(s)**

- Name:
- Address:
- Country:
- Telephone:
- Fax:
- Email:
- Website:

###### **C. Contact information for Managing Institution**

- Institution Name:
- Address:
- Institutional Contact Person
- Name:
- Telephone:
- Fax:
- Email:
- Website:

#### **D. If Applicable, a List of other participating Institutions**

**PAGE 2:**

**E. Project Summary: An abstract of the proposal (200 words or less). This must be submitted in the proponent's native language and in English and Spanish (as the case may be).**

**PAGES 3-6:**

#### **F. Classification System Description (Maximum four pages)**

- **A description of the marine classification(s) system(s) under consideration.** This description should include information about spatial resolution, date when it was developed, related information (GIS layers, documentation, etc.).
- **Provide timeframe/work plan (including preparation of technical and financial progress reports).** Projects are expected to last 4 months, starting **November 1, 2007**.
  - i. Provisions to ensure data quality.
  - ii. Monitoring and evaluation methodology.

**PAGE 7**

#### **G. Project budget**

A one-page project budget should be submitted. All costs should be presented in US dollars. The budget should show how IABIN's data content grant would be spent, and how that support fits together with the 1:1 matching provided by the institution if applicable (please note the description of allowable cofinancing items in Section 1.6). Clearly indicate budget items for which IABIN funds would be used.

The Project Budget table should have one column for the requested IABIN funding, and one column for matching funds. Rows should represent all cost categories and associated amounts for the period of the project. An example budget table format:

Item	IABIN	“Matching funds”	Total
<b>Total</b>			

The categories of items to be financed by the IABIN are goods, consultant services, non-consultant technical services, training and operating costs.

(i) the term "Non-consultant technical services" means contractual expenditures incurred for logistics and printing services under the Project;

(ii) the term "Training" means expenditures incurred for logistic arrangements of meetings, reasonable transportation costs and per-diem of trainees and trainers (if applicable) and rental of training facilities and equipment under the Project; and

(iii) the term "Operating Costs" means reasonable recurrent expenditures that would not have been incurred by the Eligible Institution absent the Project, for transportation, and per-diem costs, salary for the Eligible Institutions' incremental staff, Project administration costs, operation and maintenance of office equipment, and non-durable goods, all needed for the implementation of the Project.

**Note:** Annex 1 describes the proposal evaluation matrix.

## Annex 1 – EVALUATION TO AWARD GRANTS

### PROCEDURE TO EVALUATE PROPOSALS

There will be an Evaluation Committee (EC) that will revise all proposals received. This EC will be made up of one expert from ETN Working Group (other than a member of the Coordinating Institution), the ETN Coordinator (or someone appointed by this person), one member of the Secretariat, and one IABIN Focal Points representative.

Matching grants will be awarded to institutions with high quality data, to support their efforts to improve the availability of critical data and metadata through the network. The following criteria will be used to evaluate the proposals. Institutions with the highest scores will qualify to receive grants. It is important that a sub regional balance is achieved within each of the TNs during the life of the IABIN-GEF project.

Name of Institution: \_\_\_\_\_

Country: \_\_\_\_\_

Objective of Proposal:

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Criteria	Points	Score	Remarks
More than one classification system being provided	5		
If digital map of marine ecosystem classification is available through the web	10		
Quality of data being	10		
Availability of co-financing (at least 1:1)	10		
Availability of qualified personnel	10		
Project has sound performance and impact indicators and shows how these will be measured	10		
Adherence to the preparation and submission instructions	5		
TOTAL SCORE	60		

Date of Evaluation: \_\_\_\_\_



## APPENDIX IV

Estimados Puntos Focales,

Como recordarán, durante la V Reunión del Consejo de IABIN, se aprobó la metodología para implementar la capacitación en el uso de las herramientas de digitalización de datos bajo el Componente 2. Se dispuso que cada Punto Focal identificaría a una persona en su país para que ésta fuese capacitada como capacitador en el uso de la herramienta de digitalización de datos de cada Red Temática.

La Red Temática de Ecosistemas (ETN) tendrá lista su herramienta de digitalización de datos de ecosistemas terrestres (el Formato Estándar Terrestre) para noviembre, por lo que estamos planificando llevar a cabo un taller de capacitación sobre esta herramienta en Ciudad de Panamá durante Dic 13 - 14, 2007.

Al taller asistirán representantes de las instituciones a las cuales se les está otorgando fondos semilla para digitalizar datos de ecosistemas terrestres (Argentina, Uruguay y Bolivia), pero también se invitará a otras instituciones que tengan datos de ecosistemas terrestres sobre otros países o regiones y que potencialmente aplicarían para obtener donaciones semilla para digitalizar datos de ecosistemas terrestres en el segundo llamado a concurso . Se escogerán a representantes de otros 10 países para que participen.

Por ello, les solicito que identifiquen a la persona en su país quien será capacitada y envíen su hoja de vida a Vincent Abreu (con copia a mi). La persona debe contar con la siguiente experiencia:

- ❖ Experto en ecosistemas terrestres y estar familiarizado con las clasificaciones terrestres utilizadas en el país.
- ❖ Estar asociado con una institución u organización que tenga acceso a los datos de ecosistemas terrestres del país y que potencialmente pueda aplicar por una donación semilla en el segundo llamado a concurso de ecosistemas terrestres.

Les agradecería que identifiquen a esta persona y confirmen que puede viajar a Panamá para participar en la capacitación, llegando el 12 de diciembre y saliendo el 15. Necesitamos

tener esta información antes del 31 de octubre ya que es necesario hacer todos los trámites de logística antes de que finalice octubre. Una vez la persona sea confirmada, Jeannette Gálvez del Secretariado de IABIN la contactará para hacer los arreglos logísticos.

Si tienen cualquier pregunta, no duden en contactar a Vincent Abreu o a mí.

Saludos cordiales,

## APPENDIX V

### Caribbean Workshop Proposed First-day General Agenda

9:00 am	IABIN Thematic Networks	TN representatives
10:30	Break	
10:45	Review of complementary projects in the region	TNC, UNEP, GEF Projects in the region, etc.
12:45	Lunch	
02:00	IABIN's Marine Classification Standard and The ETN Marine Ecosystem Standard Format	Madden
3:00	Facilitated discussion to: How to facilitate Caribbean countries participation in IABIN Thematic Networks? What kind of coordination should exist among existing projects to best serve the region?	
6:00	Adjourn	

## APPENDIX VI

Objective: Implement an electronic and institutional network dedicated to regional ecosystem information that supports the decision making process. Ultimately, tools developed by the Network should allow the user to consult specimen, species and ecosystems databases in an integrated manner (in coordination with other Thematic Networks)																		
Activity	Output	CRONOGRAM (monthly)												Responsible	Indicator	Budget		
		1	2	3	4	5	6	7	8	9	10	11	12			IABIN-GEF	Co-Financing	Total (in US\$)
<b>1.4.1 Coordinating Activities</b>														0	0	0		
	1. Coordinate activities with GeoSUR program	x	x	x	x	x	x	x	x	x	x	x	x	Vincent Abreu	Activities to be carried out with GeoSUR planned	0	50,000	50,000
	2. Coordinate activities with World Bank project "Integrating Ecosystems and Species Data into Disease Forecasting Models"	x	x	x	x	x	x	x	x	x	x	x	x	Vincent Abreu	Activities to be carried out with dengue project planned	0	100,000	100,000
	3. Coordinate activities with other thematic networks	x	x	x	x	x	x	x	x	x	x	x	x	Vincent Abreu	Activities to be carried out with other thematic networks planned	0	0	0
	4. Coordinate GeoIntegrator development with NBII	x	x	x										Vincent Abreu	GeoIntegrator developed and available through ETN Portal	0	20,000	20,000

1.4.3 Reference Classification System, Standard Format, Database and Cross-walk													20,000	20,000	40,000		
1.4.3.1 Development of Pilot Terrestrial Reference Classification system, database and crosswalk																	
1. Terrestrial Reference Classification in ETN Standard Format	x												NatureServe	Terrestrial reference classification available in Standard Format database	0.00	0.00	0.00
2. Terrestrial reference classification in ETN database	x												Miguel Blanco	Terrestrial reference classification available in Standard Format database	0.00	0.00	0.00
3. Terrestrial Reference Classification Final Report		x											NatureServe	Report submitted to OAS	0.00	0.00	0.00
4. Terrestrial classification from Argentina, Uruguay and Bolivia in Standard Format	x												Countries	Classification data available in Standard Format database	0.00	0.00	0.00
5. Cross-walk system developed		x											Programmer	Cross-walks carried out for countries participating in pilot project	15,000.00	10,000.00	25,000.00
6. Cross-walk tested			x										Programmer and NatureServe	Cross-walks verified for classes in classifications of countries participating in pilot	0.00	0.00	0.00
7. Terrestrial Pilot presented to the IEC for approval				x									STRI	Presentation to IEC	0.00	0.00	0.00
Second call for Terrestrial Grants		x											STRI	Second call received by IABIN Friends	0.00	0.00	0.00
Terrestrial Grants Awarded					x								OAS/Secretariat/STRI	Countries putting their terrestrial ecosystem data in Standard Format	0.00	0.00	0.00
9. Terrestrial system modified if needed						x							NatureServe, Miguel Blanco, programmer	Modifications carried out	0.00	0.00	0.00
10. Classification systems of countries awarded Grants in database									x				Miguel Blanco	Classification data available in Standard Format database	0.00	0.00	0.00





1.4.4 Administration																		
(i) Translate documents generated by ETN	Ensure effective communications in the network	X	X	X	X	X	X	X	X	X	X	X	X	Contractor	Number of ETN generated documents translated and made available to ETN and IABIN members	2,000.00	0.00	2,000.00
(ii) ETN Coordination of the Ecosystem Thematic Network	Develop Sustainability Plan; ToRs for consultants to be hired ; implementation Plan for Year 3 ; Prepare quarterly and semester reports; Assist IABIN Secretariat to choose the countries that will provide the National databases to be included in version 2 ETN and will receive Grants under the GEF Component 2 • Organize and convene training workshops; vfollow-up on all ETN activities	X	X	X	X	X	X	X	X	X	X	X	X	Vincent Abreu	Sustainability Plan and Implementation Plan for Year 3 completed • National databases selected included in the ETN v.2. Quarterly and semester reports delivered; training workshops	38,000.00	12,000.00	50,000.00
<b>Sub-Total</b>																105,000.00	262,000.00	367,000.00



2.4. Ecosystem Thematic Network																		
	Second call for Terrestrial Grants	x												STRI	Second call received by IABIN Friends	0.00	0.00	0.00
	Terrestrial Grants Awarded			x										OAS/Secretariat/STRI	Countries putting their terrestrial ecosystem data in Standard Format	50,000.00	50,000.00	100,000.00
	Marine Workshop	x												STRI	Training session carried out for countries which were awarded Marine Grants	25,000.00	0.00	25,000.00
	Second call on proposals for Marine Grants			x										STRI	Second call received by IABIN Friends	0.00	0.00	0.00
	Second call Marine Grants awarded					x								STRI/OAS/Secretariat	Countries receiving Grants chosen	50,000.00	50,000.00	100,000.00
	Call for proposals Freshwater Grants		x											STRI	Call received by IABIN friends	0.00	0.00	0.00
	Freshwater Grants awarded to countries				x									STRI/OAS/Secretariat	Call for proposals announced and countries receiving Grants chosen	50,000.00	50,000.00	100,000.00
	Freshwater Workshop							x						STRI	Traning of countries on freshwater standard format carried out	25,000.00	0.00	25,000.00
	Second call on proposals for Freshwater Grants								x					STRI	Second call received by IABIN Friends	0.00	0.00	0.00
	Second call Freshwater Grants awarded									x				STRI/OAS/Secretariat	Countries receiving Grants chosen	50,000.00	50,000.00	100,000.00
<b>Sub-Total</b>																<b>250,000.00</b>	<b>200,000.00</b>	<b>450,000.00</b>

