**JRC Workshop: IMET modular approach and analysis - Way ahead**

**Ispra, 01/07 – 03/07/2019**

**Participants:**

1. Bertille Mayen (GIZ – Cameroon)
2. Leonidas Nzigiyimpa (3C – Burundi)
3. Domoina Rakotobe (WCS – Madagascar)
4. Omer Ntougou (RAPAC – Gabon)
5. Rosa Leny Cuellar (ZICOSUR project – Bolivia)
6. Rodrigo Tarquino (IMET expert – Bolivia)
7. Carlo Paolini (JRC support expert)
8. JRC staff

Invited but could not come:

1. OFAC (Florence Palla, Quentin Jungers, Donald Djossi)
2. IUCN (Tanya Merceron)

|  |  |
| --- | --- |
| **Monday 01/07**  09h30 - 12h45  14h15 – 17h30 | Welcome  Agenda and of the objectives of the workshop  Open discussion on the outcome of the PAME workshop in Cogne  Which are the practical implications and impacts on the biodiversity conservation agenda and on our future work-plans?  ***Lunch***  IMET: way ahead – identification of key questions and prioritization of themes   1. Set-up of informal steering group 2. Communication and visibility 3. Finance (sources and sustainability) |
| **Tuesday 02/07**  09h30 - 12h45  14h15 – 17h30 | 1. Global vs Regional (and National) 2. IMET and next steps   ***Lunch***   1. Capacity building |
| **Wednesday 03/07**  09h30 - 12h45  14h15 – 17h30 | 6) Capacity Building (suite)  7) Analysis and Decision Support Systems  ***Lunch***  8) Regional Observatories and Data Management |

**JRC Workshop: “IMET modular approach and analysis - Way ahead”**

**KEY OUTCOMES – Summary**

***Synthesis of the main recommendations from the IMET: modular approach and way ahead workshop held in Ispra (JRC) from 1 to 3 July 2019, back to back the BIOPAMA Meeting in Cogne (Gran Paradiso, Italy, from 24 to 28 June 2019) on “Fair and Effective Protected Areas.***

***More detailed information on each of the different aspects addressed, is provided in Annex.***

***A specific work-plan, in a format facilitating monitoring and follow-up, and approved by the “Informal Steering Working Group on IMET” is derived from this document..***

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[8 Regional Observatories and Data management 5](#_Toc14682082)

# IMET process – Governance

**Decision 1.1**: to set-up an Informal Steering Working Group on IMET (SWG-IMET) or think tank group to exchange on key questions related to IMET and on the way ahead. In a very 1st period (tentatively 1 to 2 years) it was agreed that membership would be restricted to persons/organizations well-experienced with IMET, in view of setting up a more formal and open Steering Group.

Group initially composed by IMET experts. With regards to the membership, it is proposed to start with the participants to the JRC workshop (JRC, Domoina Rakotobe, Bertille Mayen, Leonidas Nzigiyimpa, Omer Ntougou, Carlo Paolini, Rodrigo Tarquino, Rosa Leny Cuellar) together with representatives of B4 Life, OFAC, IUCN PACO, IUCN ESARO, and of national services (ANPN Gabon, ICCN DRC, OBPE Burundi, KWS Kenya, RAMPAO).

It is agreed that the Group is operationally set-up from now onwards. Invitation will be extended by email to the other members while transmitting the present document on the Ispra meeting, once approved by the members of the Group. The participation to the SWG-IMET is on a voluntary base.

# Communication and Visibility

**Decision 2.1:** to draft a “Communication strategy” in view of ensuring dissemination of information and knowledge about IMET process and the BIOPAMA-IMET approach. Envisage the possibility of organizing specific regional Webinars.

# Sustainability and Finance for assessments

* 1. ***Sustainability***

**Decision 3.1:** to draft strategy and guidelines to support the countries in being autonomous in running and owning the IMET process

* 1. ***Funding new assessments***

**Decision 3.2:** a communication and explanatory note on the use and the importance of IMET shall be drafted and sent to the community of donors and of users (see also decision 2.1)

# Global vs. Regional and National

1. ***Global reporting and compatibility (and weighting modalities) of IMET data - Linkages with other PAME tools and initiatives (GL) - GD/PAME and PAGE***

**Decision 4.1.1:** structure and common reporting format for GD-PAME shared by Prof Hockings and Prof. Leverington will be assessed to evaluate if and how an IMET converter for the PAME analysis of the WDPA database can be elaborated

**Decision 4.1.2:** the IMET-METT Converter will be up-dated for the IMET 2 version to give the equivalent of the global METT value.

1. ***Use of IMET beyond the ACP regions***

**Decision 4.2.1:** to set-up an informal NON-ACP steering group composed by representatives of NON-ACP countries/regions, in view of adopting a coordinated approach towards DEVCO for the development of the use of IMET beyond ACP countries

**Decision 4.2.2:** draft a small concept note (in English, French, Spanish, Portuguese,…) to promote the use of IMET in NON-ACP countries and to adopt a coordinated approach with DEVCO and to ensure coordination on the future use and possible developments of IMET and of its derived products, including capacity-building material.

# IMET Next steps

1. ***IMET 2***

**Decision 5.1:** IMET 2 release: finalized and accessible to everybody(functional and IT improvements still envisaged)

1. ***Marine PAs***

**Decision 5.2:** to further customize and finalize the integration of key marine elements within IMET 2, based on a joint work JRC, KWS and other key marine experts

1. ***Modular approach***

**Decision 5.3.1:** all the modules presented and discussed in the meeting (outlined here below) bring significant added value and support both analysis and management improvement at PA level. It is then important to test them in the field. There is no need to wait for the development of an IT version. The available Excel version is perfectly usable in the field for testing/pilot purposes

**Decision 5.*3.2*:** the Planning-Monitoring-Evaluation approach shall be structurally associated to IMET and its modules to further support improved management effectiveness and related decision-making.

1. ***IMET cross-analysis***

**Decision 5.4.1:** it is recommended to further invest in the development of the cross-analysis as supporting tool for site analysis and many other aspects (thematic, scaling-up, etc.)

1. ***Request from IUCN to integrate in IMET elements of Governance, as well as Evidences to increased alignment with Green List criteria***

**Decision 5.5.1:** IMET already includes elements of Governance supporting management effectiveness of the protected areas. A more detailed module on governance of ecosystem services is under preparation and will be tested in the next months (section above).

**Decision 5.5.2:** IMET already includes the possibility to upload documents, maps or charts, ideally via the “pre-filling exercise” or also during the assessment. This function is available in all IMET sections, with the exception, for now, of “Outputs” and “Outcomes”. This will be addressed by offering the possibility to update evidences/sources of evidence and for these 2 last steps of the PA management cycle. The Group recommends keeping IMET as it is, without adding extra sections or adopting a too strict approach with regards to uploading “evidences”

1. ***Community Based Areas (CBAs)***

**Decision 5.6.1**: to test IMET 2 (as it is) in CBAs and see how it works and how it is perceived

**Decision 5.6.2:** to involve CBAs specialists in a reflection on possible adaptation of IMET 2.0 to a lighter module responding to CBAs’ needs for management effectiveness evaluation.

1. ***IMET and Green List***

**Decision 5.7.1:** coordination with IUCN-Green List (GL) need to be ensured to share experiences, to identify (and operationnalize) synergy at field level and to jointly agree on possible cross-walks between IMET 2 and GL

1. ***Visualization for Decision-Making***

**Decision 5.8.1:** it is recommended to focus on ad hoc visualization and reports for the PA level and on a “tableau de bord” approach for the system level

# Capacity building

1. ***General recommendations on the Coaches and the Coaching process***

**Decision 6.1.1:** define key requirements and process for selection and “certification” of those that who are going to work as coaches, so as to ensure efficiency and uptake

**Decision 6.1.2:** clarify the roles of coaches and what BIOPAMA offers (get trainings, funded when you go on mission, contract conditions, further certification based on experience), to increase transparency

**Decision 6.1.3:** urgently organize a training course for coaches in English and consider the development and organization in the next future (beyond BIOPAMA) of a training course on IMET in Spanish

**Decision 6.1.4:** strong support, training, collaboration and coordination with GL mentors

1. ***IMET and analysis (COMIT ) - strengthening of regional and national levels***

**Decision 6.2.2:** a new and updated version of COMIT will be produced by IUCN PACO. The new COMIT will be focused on IMET 2 and will include a dedicated section on guidelines for analysis at site level and at system level. Ad hoc training material also for the use of the modules shall be produced.

1. ***Capacity Building on the new modules (after tests and development)***

**Decision 6.3.1:** once the new modules will be tested and approved, to include in the capacity-building and coaching approaches all the necessary work and references on the new IMET modules and on

1. ***Widen the scope of IMET training beyond PAs practitioners***

**Decision 6.4.1:** to expand training offer beyond national agencies and to allow the participation of different categories of stakeholders

1. ***IMET Community and community of practice***

**Decision 6.5.1:** the importance of setting-up a community of practice to coordinate the work and to pro-actively communicate with the IMET community is recognized, to keep the community involved, committed, involved and updated on evolution, specific situations, events, lessons learnt, etc.

1. ***IMET training modules***

**Decision 6.6.1**: a list of the different IMET-related trainings available so far or to be developed is agreed

# Analysis and Decision Support Systems

**Recommendation 7.1:** The active involvement of an institution directly engaged in the political and the technical debate with the National Agencies, such as RAPAC, would be particularly needed and beneficial to the process (discussion on national needs, analysis aspects (thresholds, weighting, etc.), reporting and recommendations, etc. )

1. ***Processing vs. Analysis (2 different profiles)***

**Decision 7.1.1:** Regional Observatories and national services need to develop both processing and analysis capacities. In this objective, specific training programs should be proposed, provided the ROs can count on staff with the requested skills (statisticians and analysts).

1. ***Customization of IMET forms to respond to mandatory specific national needs***

**Decision 7.2.1:** some countries might need or want to customize IMET to address specific national needs. It is necessary to formulate specific and clear guidance in this regard (particularly on IT modalities to be followed) and to adopt a coordinated approach, bearing in mind: *i)* the necessity to ensure the necessary link with the database, *ii)* the necessity to maintain the integrity of the IMET tool and *iii)* the fact that the concerned countries will have the rely on own efforts. Capacity building initiatives might be envisaged if necessary.

1. ***Clear distinction of analysis at site level and at national level or beyond***

Analysis at site level and at system level (national or other) require different approaches and, sometimes, different competences.

1. ***Monitoring-Planning-Evaluation approach***

**Decision 7.4.1:** IMET has a great strength in promoting the Planning, Monitoring and Evaluation (PME) approach. This particular dimension need to be explicitly addressed and integrated into the training of the coaches, through a dedicated approach and dedicated training strategy and material. A concept document shall be drafted on this.

1. ***How best pro-actively supporting decision support systems (DSS)***

**Decision 7.5.1:** specific sensitization efforts and visualization products (DSS) need to be addressed to the decision-makers community at different levels

1. ***Statistics and cross-analysis***

**Decision 7.6.1:** continue reflection and developments of the cross-analysis approach to support quality and reliability of field assessments (ref also to 5.4.1)

# Regional Observatories and Data management

1. ***Data access, data sharing, data property and visualization***

**Recommendation 8.1.1:** guidelines for specific data sharing and data property between the countries and the Regional Observatories should be proposed

**Recommendation 8.1.2:** ROs to clarify data sharing and data visualization issues, modalities and limitations, as a matter of urgency, to unblock the current stand-by situation in terms of processing, analysis and visualization. Sharing and credibility of data are fundamental. This should not only apply to IMET data but ideally also to the data collected through other PAME Tools

1. ***Data base access and structure (including statistics)***

**Recommendation 8.2.1:** integrate/associate to the data base package the statistical programs used to process IMET data for scaling-up purposes.

**Recommendation 8.2.2:** support the regional and the national levels in the integration into their RRIS - or in having full access to - the database and the statistical programs allowing them to progressively engage in own processing and analysis tasks, provided appropriate staffing and appropriate capacities and training are ensured

1. ***Governance of data***

**Recommendation 8.3.1**: draft a clear protocol and a framework identifying the key actors and their roles and access rights (decision maker and data collector, user, managers) which includes data collection data analysis and data sharing

1. ***Role of the Regional Observatories, & link with National Agencies***

**Recommendation 8.4.1**: to clarify the role of the ROs vis a’ vis the national services and vis a’ vis IUCN and the JRC, as well as clear milestones and deliverables for everybody (verifiable). This needs to be known by all the stakeholders. More transparency on these aspects is necessary and claimed

1. ***Follow up of ME assessments***

**Decision 8.5.1:** to conceive and develop in the RIS (/RRIS) an ad hoc monitoring tool to support PAs and National services in monitoring the level of implementation of the recommendations resulting from PAME assessments

1. ***Linkages between RIS and IMET***

**Recommendation 8.6.1:** Promote structural and functional link between IMET database and the RIS/RRIS

1. ***Integration of DOPA & Copernicus in the work of the ROs***

**Recommendation 8.7.1:** to agree on timeline and work plan between the DOPA and the Copernicus teams on one side, and the BIOPAMA development team on the other side, in view of ensuring integration and full accessibility to the information through into the RIS/RRIS, in support to local and national planning, monitoring, evaluations and studies

**Recommendation 8.7.2:** ensure possibility to download all relevant information from DOPA and Copernicus to support pre-filling IMET preparatory work (or to facilitate upload of relevant information on the fly while carrying out the IMET assessments)

**JRC Workshop: “*IMET modular approach and analysis:***

***Way ahead*”**

***Annex***

**KEY OUTCOMES – Detailed discussions**

**Proposed roles, leadership and timeline for the different actions envisaged**

1. **IMET process - Governance**

**Decision 1.1**: **to set-up an Informal Steering Working Group on IMET** (SWG IMET) or think tank group to exchange on key questions related to IMET and on the way ahead.

It is agreed that the Group is operationally set-up from now onwards. Invitation will be extended by email to the other members while transmitting the present document on the Ispra meeting, once approved by the members of the Group)

The present workshop de facto represents the 1st meeting of the Informal Steering Working Group.

Group initially composed by IMET experts. With regards to the membership, it is proposed to start with the participants to the JRC workshop (JRC, Domoina Rakotobe, Bertille Mayen, Leonidas Nzigiyimpa, Omer Ntougou, Carlo Paolini, Rodrigo Tarquino, Rosa Leny Cuellar) together with representatives of B4 Life, OFAC, IUCN PACO, IUCN ESARO, and of national services (ANPN Gabon, ICCN DRC, OBPI Burundi, KWS Kenya, RAMPAO).

The group will provide steering and advice on the consolidation and continuation of the work carried out so far on IMET and on the related processes. The work of the Group will be carried out also in view of assessing the opportunity to build a more formal structure of Governance of IMET, involving different stakeholders and donors. Tentative timeline to be further defined.

It is worth noting that this was the 1st time ever that IMET experts met explicitly to discuss about IMET and about possible ways ahead. As a result, it was agreed that before opening the group to more and diverse stakeholders it is preferable to ensure a more solid think tank internally and to adopt a progressive approach.

1. **COMMUNICATION & VISIBILITY**

**Decision 2.1: to draft a “Communication strategy”**

The participants agreed on the necessity to ensure substantial increase in the efforts undertaken so far to communicate about IMET.

The strategy will be organized along the different communication options identified here below. Each of them shall be assessed in terms of cost-effectiveness (time and resources needed with regards to the expected deliverables and to their impact/importance/added value). Different levels of priority, tentative timing and implementation responsibilities will be assigned to each of them::

* Articles (peer reviewed): IMET process; scaling-up approach; other (IMET marine?)
* RIS or BIOPAMA website improved with a specific section on IMET (under the GD PAME-PAGE module?) The development of a specific IMET website would be redundant if a dedicated section is foreseen in the BIOPAMA website.
* Brief document to explain how IMET works (statistics and weighting) in general terms
* Dedicated effort towards ROs and National Services and towards EU Delegations and the donor community
* PANORAMA (case study)
* Add elements from Maria-s approach
* Update the main COMIT manual (including specific sections on analysis) + draft a short version of COMIT (user friendly)
* Massive Open Inline Courses (MOOC)
* Tutorials
* IMET and Coaches Facebook or whatsapp group
* Yammer (set-up a Yammer Group)
* Video to showcase and valorise
* Filming assessments for didactic purposes *(Bolivia – already filmed but need financial support ca 2000 EUR to set it up 🡪 montage)*
* Photo gallery
* Think about a reporting format for knowledge management (ref to Reporting module, section 5.3 below
* Feed-back surveys, quotes and statistics on the visualization of the dedicated pages of the web-site

1. **SUSTAINABILITY and FINANCE for new assessments**
   1. ***Sustainability***

**Decision 3.1: to draft strategy and guidelines to support the countries in being autonomous in running AND owning the IMET process**, very much integrated into national planning exercises and national work plans and fund allocation, aligned on the Planning-Monitoring-Evaluation (PME) process, in the overall objective of ownership and institutional buy-in

Include in the strategy specific considerations on training for PAs practitioners and beyond (Universities, …)

* 1. ***Funding new assessments***

**Decision 3.2: a communication and explanatory note on the use and the importance of IMET shall be drafted and sent** to the community of donors and of users

With reference to the possible sources of funding listed here below, for new or repeated IMET assessments or for the implementation of specific IMET modules, a pro-active approach shall be adopted towards the potential donors and users (EU Dels, EU projects, other projects, PFBC, NGOs, …).

* 1. ***Possible funding sources for IMET exercises (provided coaches are available both in EN and FR)***
* JRC budget for pilot exercises
* EU funded projects
* Other donors
* BIOPAMA IUCN budget
* Action Fund budget
* Regional Observatories on own budget
* National authorities on own budget

1. **GLOBAL vs. REGIONAL (& NATIONAL)** 
   1. ***Global reporting and compatibility (and weighting modalities) of IMET data - Linkages with other PAME tools and initiatives (GL) - GD/PAME and PAGE***

**Decision 4.1.1:** structure and common reporting format for GD-PAME shared by Prof Hockings and Prof. Leverington will be assessed to evaluate if and how an IMET converter for the PAME analysis of the WDPA database can be elaborated in order to explore feasibility of and operational modalities for:

* + Reorganization of the structure of the database, if needed
  + Possible integration of IMET (possible options to facilitate the integration of IMET in a common reporting format at global level
  + Regular update of new assessments
  + Maintenance of the database

**Decision 4.1.2:** the IMET-METT Converter will be up-dated for the IMET 2.0 version to give the equivalent of the global METT value **and further cross-cutting facilities or equivalent between IMET and other PAME tools will be explored and facilitated**

* IMET is a fully-fledged PAME tool
* Ensure sufficient harmonization in the approach to respond to GL needs and purposes as we're moving towards common conservation objectives and outcomes
* Being connected with the community is a way to maintain ourselves
* However, global reporting is not considered by PAs and by National services as priority and it is not a priority for the field level
* PAs managers rarely have the capacity to deal with database, excel and access tables, rarely know how to consult and even more rarely (if not never) actually consult global data bases and information
* PAs have other priorities than this
* Needs at local level are not the same that at global level, especially in terms of interpretation. If a PA manager or a HQs manager receives global “interpretation” he might not be satisfied and might need to go more in detail – on its own – to get its own answers. This stresses the necessity to ensure to national services full accessibility to the database, particularly for the field level.
  1. ***Use of IMET beyond the ACP regions***

**Decision 4.2.1: to set-up an informal NON-ACP steering group in view of adopting a coordinated approach towards DEVCO** in view of jointly defining how to practically support the process; to identify 1 or 2 key persons per region as core members of the NON-ACP steering working group

**Decision 4.2.2: draft a small concept note to adopt a coordinated approach** and make it available via BIOPAMA website

* Material and tutorials to be made available and accessible
* Ensure possibility of cross-regions training to support the training of new coaches
* Ensure transparencies and facilitate interaction between the NON-ACP Steering Group and the Informal Steering Group (define clear IMET Contact person(s)/group)

1. **IMET NEXT STEPS** 
   1. ***IMET 2***

**Decision 5.1.1: IMET 2 release: finalized and accessible to everybody** (**functional and IT improvements still envisaged)**

* Easy installation
* Improve the translation of the French version
* COMIT to be updated and finalized, integrated a section on analysis
  1. ***Marine PAs***

**Decision 5.2.1: to further customize and finalize the integration of key marine elements within IMET 2**, based on a joint work JRC, KWS and other key marine experts

* It is worth noting that this is not a new module: but specific ad hoc sections will be integrated in the current version of IMET ("Marinization" of IMET so that the tool can suit the needs of both terrestrial and marine PAs).
* We are waiting for specific feedback from KWS (once they will complete 3 marine IMET assessments). We expect to work on further developments together with KWS.
  1. ***Modular approach***

**Decision 5.3.1: all the modules presented and discussed in the meeting (outlined here below) bring significant added value and support both analysis and management improvement at PA level. It is then important to test them in the field**. There is no need to wait for the development of an IT version. **The available** **Excel version** (once validated/commented by the Group) **is perfectly usable in the field for testing/pilot purposes**

**Decision 5.*3.2*: the Planning-Monitoring-Evaluation approach shall be structurally associated to IMET and its modules to further support improved management effectiveness and related decision-making**

* OFAC has specific resources (via JRC) to undertake test of the pilot modules each of them in 3 different Pas in Central Africa
* As for IMET, the key words are: "quantitative", "comparable", "scalable" and "repeatable". This is the philosophy underpinning the conception of the modules below
* There is an important question to be addressed about the interest/importance/possibility to carry out in the frame of the same IMET exercise (for instance 5 days or more in total, rather than the current 3 days) different steps such as assessment, analysis, recommendation, planning and monitoring, or only some of them. This is a question for the informal steering work group but it is difficult to answer it now, before the field tests, IT development and new tests based on the IT version
* All the modules proposed will be analysed by the Coaches members of the SWG-Group to get their feedback and suggestions based on their field experience. Then, after this first revision, they will be shared with the other members of the Group for additional comments if needed.

***Planning***

* Identify National Agencies interested in testing
* Associate IUCN and Coaches to the field test
* Cannot rely on 1 person only for the training process: coaching, coaching, coaching
* Promote ownership and dissemination and develop a cultural approach to this within the PAs and the National Agencies

***Monitoring***

* Very useful tool to focus on monitoring activities and to provide structured guidance to the PAs
* Needs to be carried out just after the planning exercise
* Ensure associating an action plan to the monitoring table

***🡪 🡪 🡪 MODULE 1: Planning and monitoring (🡪 field test)***

* The 2 above modules need to be treated at the same time with PAs staff, one after the other. As a result, they need to be on the same page: it's a single module
* To be implemented in PAs already “IMET assessed”
* Estimated duration for the implementation in PAs: from 2 to 4 days, depending on the complexity of the PA

***🡪 🡪 🡪 MODULE 2: Law enforcement (🡪 field test)***

* Very useful for park managers, considered as a priority
* National Agencies need to have a "tableau de bord" with the different radars
* It is essential for them to be able to access the database, to carry out their own analysis
* Explore synergies and direct linkages with SMART
* Explore possible synergies with “Domain Awareness System, DAS” (Vulcan technology)
* Ideally, to be implemented just after an IMET assessment
* Estimated duration for the implementation in PAs: 1 day

***🡪 🡪 🡪 MODULE 3: Governance of ecosystem services (🡪 field test)***

* Very useful and needed module
* Careful with the concept of Equity (does not address key impacting issues beyond the local level, such as Bad Governance)
* Suggested possibility to further disaggregate (and customize) the categories of stakeholders considered in the assessment
* IMET Group should exchange on the current version of the table and comment to come out with a final and testable version
* Focus on Governance of ES as it's already complex to address this little part of the Governance of a PA. Still, this limited assessment requires time: we need to carefully reflect on implementation modalities, duration and practical constraints for its implementation and repetition in different PAs
* Assessments need to be implementable (in terms of time and means)
* The objective is, particularly where we know from IMET assessments that this sort of more detailed analysis can bring value added, to go more in detail in order to be able to provide some orientations to improve the field situation (and, accordingly, conservation outcomes)
* Estimated duration for the implementation in PAs: 3 to 4 days, depending on the finalization of the module and on the consequent methodology which will be decided

***🡪 🡪 🡪 Automated Reporting (🡪 IT development)***

* It is necessary to undertake a specific reflection on the different types of reporting formats to be conceived for different purposes and IMET sections or modules, including to provide synthetic evidence and support to decision-makers to facilitate their understanding and operational follow-up
* Identify which key conservation questions we should like to address as a priority to set-up an automated system to generate the requested information or the baseline information allowing to address our question/s
* Quick glance (factsheets, already available; however, the integration of relevant information from the DOPA is not yet fully automated)
* Analysis: empty field to be filled with the stakeholders during IMET assessments (already available but not yet integrated in the IMET module itself to be undertaken with PA staff during the assessments)
* Short term recommendations for Action Fund and/or other: empty field to be filled with the stakeholders during IMET assessments (already available but not yet integrated in the IMET module itself to be undertaken with PA staff during the assessments)
* Medium to long term recommendations: to be created at the end of the current version of the factsheets – still to be assessed if this implies adapting the list of IMET elements to be retrieved and displayed as a support for the reflection – and to be included in the factsheets)
* Automated reporting "factsheets-like" to be embedded in the IMET in order to allow filling analysis and recommendations at the very end of the IMET assessment during the exercise in PAs, together with PAs staff )
  1. ***IMET cross-analysis***

**Decision 5.4.1: it is recommended to further invest in the development of the cross-analysis as supporting tool** for site analysis and many other aspects (thematic, scaling-up, etc.

* It supports understanding inconsistencies during the assessment
* It is of great help to the coaches in facilitating discussions and in deepening discussions when there are inconsistent answers
* It allows better understand where there are difficulties or strange things which need to be more carefully assessed and addressed
* Possible to ensure the cross-analysis at regional level only (and not in the field)
* Use different colours as the red is misleading
* It is recommended not to make it available to the park managers. We need to be very careful as when they make assessments this could be used as sort of Magic Formula “to make it right” and to demonstrate that a PA works well, independently from the field reality (not honest assessments). There would be a high risk to get “flat assessments”, one very similar to the other. In other words, not honest assessments.
* Possible to use it to assess (or to score?) the quality of IMET assessments. Focus on the inconsistencies and not on the values.
  1. ***Request from IUCN to integrate in IMET elements of Governance, as well as Evidences***

**Decision 5.5.1**: IMET already includes elements of Governance supporting management effectiveness of the protected areas. A more detailed module on governance of ecosystem services is under preparation and will be tested in the next months (section above).

**Decision 5.5.2**: IMET already includes the possibility to upload documents, maps or charts, ideally via the “pre-filling exercise” or also during the assessment. This function is available in all IMET sections, with the exception, for now, of “Outputs” and “Outcomes”. This will be addressed by offering the possibility to update evidences/sources of evidence and for these 2 last steps of the PA management cycle. The Group recommends keeping IMET as it is, without adding extra sections or adopting a too strict approach with regards to uploading “evidences”.

* Careful with the fact that Evidences in the GL process are requested to be there as audit for certification process
* In reality, the concept of "evidence" is no more than simply uploading existing information when available, such as manage plans, or geospatial info. IMET already has this possibility
* Most of the evidences requested would come from the Context of Intervention (supposed to be pre-filling)
* “If we make IMET too heavy and too strict we shoot down ourselves”
  + not possible to make IMET heavier than what it is now, for instance by adding extra Governance questions and layers
  + not mandatory to upload "evidences". Of course it is the objective and we have to promote as much as possible upload of documents and maps, but we cannot make it formally mandatory otherwise we interrupt the process
  1. ***Community Based Areas (CBAs)***

**Decision 5.6.1: to test IMET 2 (as it is) in CBAs and see how it works and how it is perceived**

**Decision 5.6.2: to involve CBAs specialists in a reflection on possible adaptation of IMET 2.0 to a lighter module responding to CBAs’ needs for management effectiveness evaluation**)

* It seems difficult to derive from IMET a shortened CBAs module, while keeping the spirit and the approach to the exercise. This does not prevent a specific reflection to be undertaken. However, considering the very specific needs and constraints, it is opportune that CBAs specialists are directly involved in this work
* Ensure a pilot test of IMET 2 as it is in a CBA
* Recommendation from the Group to have an approach in 2 levels: 1) sending the request to a technical person working with/in local community (Domoina can help finding a test CBA in Madagascar) 2) based on a 1st technical screening see whether there are specific recommendations on shortening/cutting to ensure it's feasible in less time (definitely less than 3 days, too heavy for detailed assessments with communities)
* Ask Pacific RO to come out with a concrete proposal based on their knowledge of the context
  1. ***IMET and Green List***

**Decision 5.7.1: coordination with IUCN-Green List (GL) need to be ensured to share experiences, to identify (and operationnalize) synergy at field level (eg. IMET Coaches and GL Mentors) and to jointly agree on possible cross-walks between IMET 2 and GL**

* IMET can support the Green List Standards by:
* identifying values and elements in the intervention context
* prioritizing key elements of management or governance
* supporting monitoring and planning for a better achievement of outputs and outcomes
* picking out common elements from a scaling-up analysis
* ensuring synergy and consistency between the IMET Coaching and the GL Mentorship approach
* promoting interactivity in the field
  1. ***Visualization for Decision-Making***

**Decision 5.8.1: it is recommended to focus on ad hoc visualization and reports for the PA level and on a “tableau de bord” approach for the system level**

* At site level the available visualization tools are enough
* Visualizations of the different modules are already very useful and self-explanatory as such
* We should reflect more on the system level
* Quick report with the key information
* Specific "tableau de bord" with the situation of all the main PAs of the country (ensure the link with the data base to allow them accessing the direct information "a' la source")
* Comparison within the same PA of situation in different years (either globally or on specific topics/items) could be a valid option (also from other areas)
* Specific extraction (report) of information from certain parts of IMET which could be of relevance for decision-makers such as for instance the section on resources (inputs)
  1. ***Road map for IMET development***
* To be defined with the JRC-IT team, based on the prioritization of the developments discussed above

1. **CAPACITY BUILDING**
   1. ***General recommendations on the Coaches and the Coaching process***

**Decision 6.1.1: define key requirements and process for selection and “certification” of those that who are going to work as coaches so as to ensure efficiency and uptake**

**Decision 6.1.2: clarify the roles of coaches and what BIOPAMA offers (get trainings, funded when you go on mission, contract conditions, further certification based on experience), to increase transparency**

**Decision 6.1.3: urgently organize a training for coaches in English** **and consider the development and organization in the next future (beyond BIOPAMA) of a training on IMET in Spanish**

**Decision 6.1.4: envisage exchange, collaboration and coordination with GL mentors**

* It is necessary to make a distinction between “Coach” and “Person trained on IMET”
* A good coaching mechanism is a way to ensure the quality of data collection, and other aspects related to “Planning-Monitoring-Evaluation” process and analysis
* It is fundamental to put a very strong emphasis on analysis
  1. ***IMET and analysis (COMIT ) - strengthening of regional and national levels***

**Decision 6.2.2: a new and updated version of COMIT will be produced. The new COMIT will be focused on IMET 2 and will include a dedicated section on guidelines for analysis at site level and at system level**. Ad hoc training material also for the use of the modules shall be produced.

* A short version of the COMIT will also be produced
* Spanish versions of COMIT shall be envisaged, beyond BIOPAMA
  1. ***Capacity Building on the new modules (after tests and development)***

**Decision 6.3.1: include in the capacity-building and coaching approaches, as well as in the COMIT all the necessary work and references on the new IMET modules**

* The coaching approach shall include also the evolution of IMET (new modules along the PME approach)
* Develop ad hoc sections in the COMIT for each of the new modules once tested
* Organize ad hoc training sessions for the new modules
* Different/specific training sessions (ERAIFT?) might be necessary for different modules (to be further defined how)
  1. ***Widen the scope of IMET training beyond PAs practitionners***

**Decision 6.4.1: to expand training offer beyond national agencies and to allow the participation of different categories of stakeholders**

* Organize IMET trainings for NGOs, Private companies/organizations and Donors
* Involve Universities and regional schools
  1. ***IMET Community and community of practice***

Decision 6.5.1: the importance of setting-up a community of practice to coordinate the work and to pro-actively communicate with the IMET community is recognized, to keep the community involved, committed, involved and updated on evolution, specific situations, events, lessons learnt, etc.

* Rely on key documents and products as discussed on item 2 “Communication and Visibility”
  1. ***IMET training modules***

**Decision 6.6.1: a list of the different IMET-related trainings available so far or to be developed is agreed**

* IMET 2
* COMIT and coaching
* Critical thinking, Problem solving and Analysis
* New modules
* Analysis at site level
* Analysis at system level
* Advocacy and lobbying based on IMET results (could be inserted in the coaching training, in the COMIT, or in the other products of communication)
* Cross-analysis

1. **ANALYSIS AND DECISION SUPPORT SYSTEMS**

**Recommendation 7.1:** The active involvement of an institution directly engaged in the political and the technical debate with the National Agencies, such as RAPAC, would be particularly needed and beneficial to the process (discussion on national needs, analysis aspects (thresholds, weighting, etc.), reporting and recommendations, etc. )

* 1. ***Processing vs. Analysis (2 different profiles)***
* Regional Observatories and national services need to develop both processing and analysis capacities. However, it is worth recognizing that for these different tasks, different competences and profiles are needed: IT (and or statistics) for processing: thematic knowledge for analysis
* Processing (and/or statistics) can be performed by experts with mainly an IT profile
* Analysis require specific technical competences (analyst profile)
  1. ***Customization of IMET forms to respond to mandatory specific national needs***

**Decision 7.2.1: some countries might need or want to customize IMET to address specific national needs. It is necessary to formulate specific and clear guidance in this regard** **(particularly on IT modalities to be followed) and to adopt a coordinated approach**, bearing in mind: *i)* the necessity to ensure the necessary link with the database, *ii)* the necessity to maintain the integrity of the IMET tool and *iii)* the fact that the concerned countries will have the rely on own efforts.

* Capacity building initiatives might be envisaged if necessary.
* IMET IT development group cannot directly cope with customizations by countries
* This does not prevent countries to customize (on their own capacities) IMET to integrate specific needs/requirements BUT in a coordinated way:
  + **The integrity and the spirit of the main tool needs to be maintained**
  + Addition of extended modules can be envisaged (APIs, plugs-in)
  + However, integration of new modules and possibilities/modalities to link it to the main database for national analysis of the information and for scaling-up shall be assessed and addressed in a coordinated way
  + The JRC-IT team might consider drafting specific guidelines for API-IMET related development, as well as to supporting consistency with the database structure. Ad hoc capacity building initiative might be envisaged if necessary
  + Suggestion to rely on the Bolivian case study to see feasibility and define a possible framework for “extension”
  1. ***Clear distinction of analysis at site level and at national level or beyond***
* Analysis at site level and at system level (national or other) require different approaches and, sometimes, different competences
* This entails different specific trainings sessions and training material to be prepared
  1. ***Monitoring-Planning-Evaluation approach***

**Decision 7.4.1:** IMET has a great strength in promoting the Planning, Monitoring and Evaluation (PME) approach. This particular dimension need to be explicitly addressed and integrated into the training of the coaches, through a dedicated approach and dedicated training strategy and material. A concept document shall be drafted on this

* Include a specific section in the COMIT
  1. ***How best pro-actively supporting decision support systems (DSS)***

**Decision 7.5.1: specific sensitization efforts and visualization products (DSS) need to be addressed to the decision-makers community at different levels**

* Consider a specific training for decision-makers
  + Ensure presence of key persons at different levels of the decision chain
  + Envisage possible participation (or specific session?) for key donors and partners in the countries, together with the Heads of the National Agencies
  1. ***Statistics and cross-analysis***

**Decision 7.6.1: continue reflection and developments of the cross-analysis approach to support quality and reliability of field assessments**

* Further exploit the potentiality of the approach, including to assess reliability of IMET assessments
* Support capacity building at national and regional level

1. **REGIONAL OBSERVATORIES (ROs) AND DATA MANAGEMENT**
   1. ***Data access, data sharing, data property and visualization***

**Recommendation 8.1.1: guidelines for specific data sharing and data property between the countries and the Regional Observatories should be proposed**

**Recommendation 8.1.2: ROs to clarify data sharing and data visualization issues, modalities and limitations, as a matter of urgency, to unblock the current stand-by situation in terms of processing, analysis and visualization. Sharing and credibility of data are fundamental. This should not only apply to IMET data but ideally also to the data collected through other PAME Tools**

* + In Central Africa, OFAC to launch the study already foreseen in the service contract with the JRC and clarify if the Creative Commons license (baseline for OFAC) allows publishing information on the OFAC website (or even on other websites)
  + In Western Africa, UEMOA and WARO to clarify with WA countries data sharing and data visualization criteria and authorization
  + In the ESARO, Caribbean and Pacific regions, ROs to propose specific modalities and engage agreements with the countries
* Consider the opportunity/necessity to get from the countries (/PAs), prior to carry out assessments, explicit authorization to share data
* More direct interaction with National Agencies is more than necessary so that mutual understanding is improved
* To consider the organization of a specific meeting with mandated representatives of the National Agencies (in CA, OFAC will organize a workshop, back to back the bi-annual meeting of the “Sous Groupe Faune Sauvage”)
* Define clear chain of rights and access to the information
  1. ***Data base access and structure (including statisticss)***

**Recommendation 8.2.1: integrate/associate to the data base package the statistical programs used to process IMET data for scaling-up purposes.** Once the ROs - or even the National Agencies when requested- will directly access them or will integrate them into their RRIS, they will have the possibility to undertake their own assessments

**Recommendation 8.2.2: support the regional and the national levels in the integration into their RRIS - or in having full access to - the database and the statistical programs allowing them to progressively engage in own processing and analysis tasks, provided appropriate staffing and appropriate capacities and training are ensured**

* Ad hoc training on the use of the data base (processing) and on the analysis must be granted at regional and national levels
* Special care on securing integrity of the data (no hackers, manipulation or data stolen)
  1. ***Governance of data***

**Recommendation 8.3.1: draft a clear protocol and a framework identifying the key actors and their roles and access rights (decision maker and data collector, user, managers) which includes data collection data analysis and data sharing**

* 1. ***Role of the Regional Observatories, & link with National Agencies***

**Recommendation 8.4.1: to clarify the role of the ROs vis a’ vis the national services and vis a’ vis IUCN and the JRC, as well as clear milestones and deliverables for everybody (verifiable and monitored). This needs to be known by all the stakeholders. More transparency on these aspects is necessary and claimed**

* Define how to ensure connection with other data providers and data integration into the RIS or ROs’ platforms
* To communicate more towards the countries
* To set up within the BIOPAMA project clear monitoring and evaluation processes to ensure that the above is done
  1. ***Follow up of ME assessments***

**Decision 8.5.1: to conceive and develop in the RIS (/RRIS) an ad hoc monitoring tool to support PAs and National services in monitoring the level of implementation of the recommendations resulting from PAME assessments**

* For all types of PAME tools, including IMET it is essential to work on the development of a template/matrix/system allowing the PAs (and the National Agencies) to easily follow-up the level of implementation of the recommendations
  1. ***Linkages between RIS and IMET***

**Recommendation 8.6.1: Promote structural and functional link between IMET database and the RIS/RRIS.** Beyond supporting the ROs in the development of own processing and analysis capacities, this will allow, where relevant, to use the IMET database framework and structure to store quantitative information available from other sources and to integrate it in the processing chain for analytical purposes

* 1. ***Integration of DOPA & Copernicus in the work of the ROs***

**Recommendation 8.7.1: to agree on timeline and work plan between the DOPA and the Copernicus teams on one side, and the BIOPAMA development team on the other side, in view of ensuring integration and full accessibility to the information through into the RIS/RRIS, in support to local and national planning, monitoring, evaluations and studies**

**Recommendation 8.7.2: ensure possibility to download all relevant information from DOPA and Copernicus to support pre-filling IMET preparatory work (or to facilitate upload of relevant information on the fly while carrying out the IMET assessments)**

* Automated modalities/rest services should be developed
* Considering making the access via the RIS