

2017 RFP External Reviewer Guide

First, thank you. Your reviews are essential to our award selection process. You will narrow the field of about 30 applicants to a small pool of semi-finalists from which the JRS Board will select 4-8 finalists.

Please read this guide carefully and endeavor to understand our strategy and priorities. We are looking for projects with the potential for long-term impact in the context of our [strategy](#) and [Programs](#). Time spent up-front to get to know JRS will greatly speed your reviews and rankings.

Please ask me questions! I'll respond right away and I'm happy to share FAQs and to modify the ranking form for clarity per your feedback. Call or write anytime: (206) 454-7915, ddoering@jrsbiodiversity.org

- **The RFP Scope:** <http://jrsbiodiversity.org/how-to-apply/current-opportunities/2017rfp/>
- **FAQs for applicants:** <http://jrsbiodiversity.org/how-to-apply/current-opportunities/2017faqs/>
- **Instructions for applicants:** <http://jrsbiodiversity.org/how-to-apply/current-opportunities/instructions/>
- **The review portal:** <https://review.wizehive.com/voting/login/2017rfprev>

1. Assess applications through the lens of JRS' strategy.

Our goal is to increase the access to and value of biodiversity data and information services in sub-Saharan Africa. We achieve our goal by funding projects where the *demand* for knowledge for conservation and economic development will sustain and grow our investments in people, systems and infrastructure. Freshwater Biodiversity and Resources and Pollinator Biodiversity and Services are the two program areas where we seek demand-driven projects that will increase the access to and value of biodiversity data and information services.

We achieve our goal by supporting capacity development in sub-Saharan Africa. We prioritize projects with long-term strategies for building and maintaining capacity in Africa. We are not funders of research nor seeking to answer research questions; the data, information services and capacity that we support may be applied to research as well to conservation action and economic development.

Please take a moment to read about our [Strategy](#) and our [Programs](#) on the JRS website.

2. View these applications as subject to revision.

The grant applications can be viewed as “pre-proposals.” We work with potential grantees and can request significant revisions to raise the quality of the project plans, improve partnerships, and to align with our strategy. Please add notes of what would improve the project - if the core elements are worth funding. In my experience, every project team can benefit from refining their plans.

Any application might be deferred to do additional planning. If an application isn't quite ready for funding, let us know. A few of these applications could be offered some time and funds for better planning and better partnership formation.

3. Rank planning grant applications based on their final goal.

Only rank a planning grant highly if you think the product of that planning process would rank that high! We only fund planning processes when we are keenly interested in the eventual project. Planning grants must be specific about where they are going and specific about the uncertainties that they will address in the planning phase.

4. Your comments and insights are very valuable.

Every scoring question in the form has a place for comments. Be candid, honest and constructive. Reviewers' comments have a significant impact on how we ask applicants to revise their proposals. Please don't waste any effort restating any aspect of the proposal – just share your judgment.

5. We ask you to rank the proposals by funding priority.

Grantmaking is not a science. We will award about \$1,700,000 among 6-9 proposals. Our questions ask you to score the proposal on absolute or relative scales and then, finally, to rank them. Please try to use the full five-point scale among your reviews so the differences among the ratings of proposals can be discerned. Don't be shy about ranking low to use the full 1-5 scale as I must use your scores and rankings to differentiate proposals.

Our question: Will this investment create biodiversity information resources that serve the needs of conservation and development users to foster capacity development and sustained access to biodiversity knowledge?

6. Another take on what we are looking for:

We want to foster a critical mass of valuable biodiversity knowledge resources and the trained individuals to help kick-start locally-sustained biodiversity information systems. We believe that takes a “demand pull” on the information and not only the push from biodiversity scientists. We know biodiversity data is not a high priority for most stakeholders and African governments, but we seek projects with clear or very plausible end use and value in Africa. And even when there is demand, there must be strategic communications and outreach to create awareness.

Biodiversity data and informatics capacity must be central to the projects we fund. We're a niche funder who funds information technology and its applications to conservation. Our value isn't to fund ecological research, to support recurring costs of field surveys, or to resolve taxonomic questions. We use our funds to catalyze information systems that could be powerful tools over the long-term for many stakeholders and that are more valuable than any single data set they may hold and serve. Some proposals may need to strengthen the informatics components to ensure their long-term value.

We want to support capacity development that is motivated by, and serves priorities of, Africans for local needs. We don't need safe bets and JRS can bear more risk in funding in Africa than is typical of foreign donors. JRS is too small a funder to build institutions, but we can invest in people, projects, networks, and outreach so that our successes attract attention, resources, imitation, and growth.

Our impact will come from networks and the diffusion of ideas, models people, technology, and tools.

We don't want "one off" success; we seek projects led by institutions and individuals who have the talents and legitimacy to succeed and to grow. We hope to connect our projects literally and virtually through training, conferences, resource sharing, partnerships, outreach, and visibility. We can do that best when grants are in the same countries or in ecosystems/regions within eastern and southern Africa. We also can add the most value to our grants the more we know about the national context, institutions, and people. Our 2016 grants operate in South Africa, Kenya, Tanzania, Uganda, Malawi, and Botswana and we may only expand by one country this year.

Freshwater biodiversity data and pollinator biodiversity data are currently valued in different ways.

The water sector is highly developed as is the awareness of the economic importance of water – though not of ecosystem services. There is only an emergent awareness of pollinators' biodiversity and ecosystem services and there are few or no conservation policies or agricultural policies formulated or implemented to conserve pollinators. We expect that the freshwater projects will have more applied and evident uses of data than do the pollinator projects. Our pollinator projects are building the foundation for data and knowledge that will inform future policy and practice.

Our projects succeed or fail due to management, leadership and institutional issues, and not due to underlying technical reasons. Read that again! You'll find that few or none of these proposals are at the cutting edge of technology. Our projects use well-established technology and good project managers will find and adapt good technical solutions. Success is driven by "institutional solutions" such as partnerships, technical competence to implement the plan, management structure, leadership talent, assessment methods, plans for adaptation, politics, and institutional legitimacy. All of these proposals address important places under threat. Please pay as much attention to whether the project, the partnerships, outreach, and the team appear designed for success as you do to the technical issues.

Finally, and scores aside, your intuition is a powerful integrator of complex information and factors.

Try to step back, consider all the projects, and do not rank them based upon the best written proposal or the one most likely to succeed. Consider JRS' ability to bear risk and our goal to catalyze sustainable biodiversity information systems that serve local needs and ask yourself, "which are most worth doing?"

The On-line Review Form Guide

Please use the full range of 1 to 5 so that your scores meaningfully differentiate the proposals.

A. How important is the conservation and information problem addressed by this project?

Most Relevant Proposal Sections: C. Problem in Conservation and D. Problem in Biodiversity Information

Do you consider the focus of the project to be an important problem to address? Remember, they can't all be equally important! Please comment on the choice of the ecosystem or on the species as important for future data value. Consider if there is a plausible link that lack of data and knowledge contributes to the challenge of conservation. And are the problems generalizable so that the solutions might be applied elsewhere in Africa or is this highly specific?

B. Is the project demand-driven and reflect users' involvement and their needs?

Most Relevant Proposal Sections: D. Problem in Biodiversity Information, F. Institutional Solutions, M. Organization, and N. Partners

This is the driver of JRS' strategy. Please look carefully and between the lines as to whether this is 'supply-driven' by data providers who hope for future use or is it 'demand-driven' and involves or will be shaped by users. As I like to say: "hope is not a strategy." Do the applicants seem to know and work with the end-users or is that partnership formation a planned activity at the start of the project? Plans that have all the outreach and training at the end, always short-change and under-perform in that aspect. A user-driven mindset should be apparent in the plans and the budget.

C. How likely is the technical strategy and approach to succeed?

Most Relevant Proposal Sections: D. Problem in Biodiversity Information, E. Technical Solution, H. Project Work Plan, and I. Data Access Plan

Do you think that the team is taking the right technical approach to solve the stated problem in biodiversity data and knowledge access? Do they show awareness of or exploration of alternatives and justify their choices? Does the Project Director, Partners, and Organization appear to have the stated technical expertise? If they are collecting field data is there a good rationale of methods, timing, and sampling? If they are collecting or mobilizing museum data, do they have a good handle on work flow, data quality, and access? If they are building user-facing interfaces, do they have plans for design, testing, and adaptation? If you see missed opportunities or different approaches that should be considered, please note them! One of the most valuable things JRS does for grantees is to connect them to technical solutions.

D. How likely is the institutional approach to succeed?

Most Relevant Proposal Sections: F. Institutional Solution, H. Project Work Plan, N. Partners

The question on institutional solution is often the least understood and most poorly answered question in our proposals – I'm working on it. The lack of data and information systems is not due to global absence of technology, lack of high potential people, or lack of biodiversity to assess. The information gap is due to the motivation, incentives, relationships, resources, politics, priorities, historical biases, and legitimacy of the involved society, institutions, economies and governments. There are many good

and many disappointing reasons why there isn't accessible biodiversity information. Does this proposal seem to get at some of those local or systemic barriers?

This is a question about the lead institution and the choice of partners. This is a question of whether the project team is purely technical in mindset or is thinking about what will engage users, partners, and supporters in the near-, medium-, and long-terms. To the extent that you can tell, are the right players involved in this project? Please note if you have doubts about the partners or individuals or whether key actors do not seem to be at the table.

E. What is the quality of the informatics product and open access plan?

Most Relevant Proposal Sections: E. Technical Solution, H. Project Work Plan, and I. Data Access Plan

Data and knowledge access is everything to JRS. Consider whether the project team appears knowledgeable about global data repositories, standards, data quality, software platforms, and the time involved to create software, website, or new apps? In Section G. on Goals and Measures of Success, do they have clear metrics and time-bound targets for data and knowledge access? Please comment on potential improvements or gaps.

F. What is the potential of this solution to be sustained and expanded?

Most Relevant Proposal Sections: F. Institutional Solution, K. Sustainability, J. Capacity Development, N. Partners

Sustainability does not mean that the project will be miraculously self-funding, but that the project team can continue with reduced external backstopping, that stakeholders will contribute to system sustainability, and there is an ongoing need for the product. If ex-African partners are leading the project, have they devolved authority and responsibilities to local partners? Every foundation fantasizes (and sometimes succeeds) that its projects can be expanded in their locations or transferred elsewhere. Do you see the solution(s) presented by this project as one(s) that might be transferred to other African countries, institutions, ecosystems, or species? Please note any specific ideas and whether some learning or plans in that direction could be added to the project plan.

G. What is the quality of the capacity development for biodiversity informatics in the project?

Most Relevant Proposal Sections: F. Institutional Solution, K. Sustainability, J. Capacity Development, N. Partners.

Capacity development is the heart of our work. Section J. comes late in the proposal but is a key and make-or-break question. We find that formal and experiential training over time that is coupled with roles, responsibility, and authority in the project is what helps local actors develop capacity to serve local needs. Network participation and development is a powerful tool. We believe that training workshops at the end of a project have limited value and are often a sign of a weak concept of how to build relationships and foster capacity development. Please consider not only the activities labelled as 'training' but the overall impact to the recipient organization and partners from conducting the project; formal training complements the more important experiential capacity development.

H. What appears to be the likelihood that the Project Director will succeed?

Most Relevant Proposal Sections: L. Project Director Profile.

Project leaders determine success and we give a lot of latitude to adapt to circumstances during the grant award. From what you know or what is presented here, do you think the leader has the “right stuff?” We put a lot of effort into project planning and management and this might also be a time to look at the Goals section and workplan to sense whether the Project Director has a good handle on what success looks like and how to manage progress on the way.

I. How well is the project resourced?

Most Relevant Proposal Sections: O. Budget Narrative

I’m often surprised that we receive very weak budget sections given it is an application to a financial institution and even though this is the one with no word limit. The Foundation’s job is to connect dollars to activities and results. If something looks off, it probably is and let us know. A very common mistake is that the budget does not reflect the timing of the stated activities. For example, we often see plans for a new hire but salaries start in Month 0 or that episodic or cyclic expenses are constant throughout the project.

How would assess the level of resources proposed to complete the stated goals? Consider all resources such as the direct funding, the project leader's percentage time, the applicant’s organization and partners, duration of the project, and co-funding. Please look at the budgets and their approach to assess if the resources are in the right ball park. If the budget is too low, please estimate where it might be lacking and by how much. If the budget is excessive, please let me know where it might be cut or what other activities and products we might ask for. My job is to do the detailed analysis, the question we ask you is whether the resources are sufficient, +/- 10% or +/- 20%.

J. The Final Ranking

It has come to this, the bottom line. Proposals don’t exist in isolation and we fund in comparison among the pool of proposals. We will likely make our final funding choice among the top third of proposals. Ranking helps reveal the terciles of which proposals appear most worthwhile to fund, which are good but not exceptional, and which do not make the grade. You might feel uncomfortable ranking proposals that seem equal in your mind or could be equal, but single positions in your rankings will get averaged across the 4-5 reviews. The portal provides an unweighted total of your scores that you can use for comparison. I am happy to send you a summary sheet of your scores to help, if you’d like.

Thank you!