

# EuMon Phase II Report

## The Social Science of Participatory Monitoring Networks:

### Executive Summary

#### 1. Introduction

Increased demands for data on flora and fauna require more time and cost-effective monitoring techniques to assess the abundance, distribution and conservation status of flora and fauna. These demands far outstrip the capacity of professional scientists. Large numbers of volunteer naturalists will be needed if the aspirations of policy makers and scientists are to be even partially met.

The urgency of the current situation regarding biological monitoring was a stimulus to include research into volunteer monitoring within the overall scope of the EuMon project. This report represents one outcome of that decision. It is based on the qualitative, ethnographic research element of a social scientific investigation into nature based monitoring organisations that rely on the services of volunteers to collect records and assist with surveys. We refer to these organisations as participatory monitoring networks (PMNs), a broad term that includes a host of very different arrangements and involves collaboration between a range of ‘nature specialists’, both professional and amateur (section 2). We seek to understand the “inner workings” of PMNs.

Research focused on nine institutions consisting wholly or partially of volunteers.

Names and descriptions of the organisations are set out below.

Fig.1

Name of PMN - in native language and English	Acronym or abbreviation	Country	Taxonomic group	Type of organisation
Akcja Carpatica Operation Carpatica	–	Poland	Birds	Participatory Environmental Research Tourism
Tethys Research Institute	Tethys	Italy	Cetaceans	Participatory Environmental Research Tourism
Lietuvos ornitologu draugija Lithuanian Ornithological Society	LOD	Lithuania	Birds	Participatory Environmental Research Tourism
Northumberland and Tyneside Bird	NTBC	UK	Birds	Local

Club				Association
Stowarzyszenie dla Natury "WILK" Association for Nature "WOLF"	Afn WOLF	Poland	Mammals (large carnivores and bats)	National NGO sharing characteristics of Virtual Network
British Trust for Ornithology	BTO	UK	Birds	National NGO
Dansk Ornitologisk Forening Danish Ornithological Society	DOF	Denmark	Birds	National NGO
Društvo za opazovanje in proučevanje ptic Slovenije Birdwatching and Bird Study Association of Slovenia	DOPPS	Slovenia	Birds	National NGO
UK Phenology Network	UKPN	UK	Varied	Virtual Network

## 2. Background to Volunteering

There is a great deal of variation in the amount and types of volunteer monitoring and the organisations in which it takes place. The lines between paid members of staff and volunteers are not always firmly demarcated. Volunteers may or may not contribute to the operation and governance of their organisations and some even pay to take part in monitoring activities (section 3.1).

In the democratic nations of Europe the willingness of citizens to undertake voluntary activities of any kind has to be understood in terms of social, political and economic contexts (section 3.2.). Voluntarism thrives in EU member states with a relatively undisturbed tradition of democratic political institutions and where voluntary associations have long formed a significant portion of civil society. In postcommunist countries historical circumstances mean that economic, social, political and religious factors can obstruct the expansion of voluntarism. Our research discovered that in trying to sustain a viable volunteer base each PMN adapts to its shifting socio-cultural surroundings.

## 3. Recruitment and retention of volunteers

Strategies for both recruiting and retaining volunteers differ according to the types of PMN in question (section 4). A general gauge for success is the extent to which the organisational culture and approach to volunteering matches the desires and aspirations of participants. The level of trust that obtains between volunteers within PMNs can be affected by the means of recruitment.

Webpages are important for recruitment in Participatory Environmental research Tourism (section 4.1) and of major significance for Virtual Networks (section 4.2). The virtual network studied in this project, UK Phenology Network, also relied heavily on its association with TV broadcasting. National NGOs often seek publicity through stories about their work in print and broadcast media. In all types of organisations interpersonal relationships are vital to the retention of volunteers (SECTION 4.3). Good social relations energise and stabilise volunteer activities. They also support the careful management of the volunteer/amateur/professional nexus which can otherwise prove problematic.

Balancing recruitment and retention is an ongoing dynamic for most PMNs. The degree of effort needed to bring in new volunteers while consolidating and motivating the existing body of participants requires lots of effort and inventiveness. Organisational issues demand the same levels of attention and resources as those that are given over to the production, management and analysis of data (section 4.5).

#### **4. Producing and analysing data**

The skills and levels of commitment required from volunteers varies according to the types of PMNs in which they participate (section 5). Volunteering can range from that exemplified by the garden bird watchers of Britain to the fully trained licensed bird ringers who work for Akcja Carpatica, camping in cold and damp conditions amidst Poland's Beskidy Niski Mountains.

Volunteers are willing to take responsibilities beyond recording work, such as the DOF volunteers who act as managers of a team to monitor Denmark's specially designated Caretaker Sites and the NTBC members who collate, analyse and publish data. The responsibility and commitment volunteers bring to their monitoring activities means they care deeply about what happens to the data they produce and the uses to which it is put (section 5.1). All biological records collected by amateur volunteers are personalised to some degree, because they hold unique meanings for the person who on their own accord went out and collected them. PMNs need to inform volunteers about the fate of their data and consult them about decisions relating to its use.

## **5. Motivation in Volunteering**

Volunteer monitors are motivated by a combination of drivers that integrate cognitive, social and emotional elements (6.0). It is the synthesis of these things rather than any single factor that stirs the volunteer to action. The desire to learn is a hallmark of serious volunteer recorders who display a hunger for increasing their knowledge and skills. In common with previous research volunteers spoke to us about their enjoyment of being outdoors and feeling close to nature, but these pleasures can be achieved without recourse to volunteer monitoring projects (6.1). The difference for volunteers is that the sense of intimacy with the natural world relies on developing a better understanding of how nature works; a goal that is sought through mutually supportive learning.

Commitment to knowing nature commonly transforms into the urge to protect nature (6.2). There is a marked tendency among volunteer monitors to want the scientific knowledge they contribute to be placed at the service of conservation. In seeking to achieve this goal PMNs do not fit into easily identifiable patterns according to size or type of organisation or criteria based on their styles of participation. However, the organisations represented here share an approach to conservation issues that prioritise scientific arguments above moral, political, aesthetic or philosophical ones and are wary of being associated with radical strands of environmentalism

PMNs need to find ways to reflect and harness volunteer naturalists' desire to follow their love of nature through the acquisition of knowledge and skills. But they must also ensure that volunteers - driven by interest and passion - have opportunities to become ever more adept at collecting data. Volunteers want assurance that their work carries a sufficient degree of scientific legitimacy to carry weight in policy domains where results drawn from data as opposed to expressions of feelings or ideals take precedence.

Two important elements of volunteer motivation initially appear contradictory, but on closer examination prove reconcilable and interrelated. The first is associated with the

attraction of being alone with nature, while the second relates to the pleasure of socialising with like minded people. The sense of slipping into a “*different*” reality via an unusually intimate and absorbing connection with nature resolves the danger of isolation stemming from solitariness (6.3). Naturalists are drawn into fellowship with others of similar disposition. Even in the less socially intense organisations, exemplified by Virtual Networks, we found members’ beliefs and confidence in social trust crucial to the cohesion of organisations and members’ loyalty.

## **6. Professionals, Amateurs and Volunteers**

The management of relations between professionals and amateurs in monitoring networks in favour of amateurs is an important mechanism for achieving institutional stability and continuity (section 7). When processes of professionalisation are allowed to degrade the amateur status and make it appear an inferior version of professional practice problems arise. These circumstances lead to lack of opportunities for amateurs to build expertise through participation in monitoring projects, creating disillusionment among an organisation’s membership, dissent between amateurs and professionals and eventual institutional decline.

## **7. Collaboration with Other Organisations**

Monitoring programmes being interrelated, or even nesting within one another, could prove to be extremely efficient and cost effective model for future monitoring programmes elsewhere in Europe (section 8). Cooperation in all manner of forms brings benefits because it increases pools of available volunteers enabling them to learn from one another and extend their skills. Where an organisation has professional paid staff collaboration also brings together complementary expertise among managers.

## **8. Key Messages**

We present our conclusion in the form of key messages that emerge from the body of the report.

### ***8.1. Contexts***

Success is a relative term and any evaluation of the performance of PMNs has to include an understanding of the socio-political background and cultural status of

amateur naturalists. For example, the current success enjoyed by DOPPS owes a great deal to the recent discourse associating nation building with environmental awareness (see section 3.2. and 3.3.).

### ***8.2. Recruitment***

The characteristics of an organisation generally lend itself to certain types of recruitment methods (see section 4). For example, Participatory Environmental Research Tourism organisations rely heavily on word-of-mouth. Volunteers often make repeat visits and involve their friends and family – the quality of their experience becomes part of the recruitment. Any PMN should be wary of recruiting more volunteers than it can manage. If numbers become unmanageable, communication and interaction can suffer leading to negative experiences and demotivation amongst volunteers. Good communication is a key attribute of vibrant PMNs.

### ***8.3. Acquiring knowledge***

A major motivation for volunteers is to acquire more knowledge. Formal training can fulfil this need but requires much investment in the form of time and resources. An informal source of training emerges from ‘mentoring’ where the more experienced act as teachers or mentors to the less experienced. This provides a source of satisfaction for all involved and contributes to the creation and nurturing of social bonds thus strengthening solidarity within the PMN (see section 6.1.).

### ***8.4. What happens to the data?***

Volunteers care about what happens to the data they collect, particularly how it used and what it is used for. Volunteers’ records are their gift to a PMN and this gift requires reciprocation in the form of acknowledgement and feedback, both informal (such as newsletters) and formal (scientific reports). Among larger organisations such as National NGOs, interpersonal relations should be used to mediate the feedback (see below and section 5.).

### ***8.5. Motivating and retaining volunteers***

The motivation of volunteers involves a synthesis of wanting to learn, passion for nature and the desire to be with other like-minded people. PMNs need to cater for the combination of these factors and find creative ways of addressing them. National NGOs like DOF and BTO have created networks where volunteer representatives act as advocates and intermediaries for organisations, working to recruit other volunteers and managing monitoring schemes at the local level (see section 4.3. and 6.2.).

### ***8.6. Professionalisation***

While professionalisation can benefit certain types of PMNs, particularly national NGOs, potential negative effects need to be acknowledged and managed to create a balanced relationship between professionals and volunteers so that neither category of people feel under valued or isolated (see section 7).

### ***8.7. Work with what you have got***

Biological monitoring methods often have to be adapted to suit the particular habitat and species requirements of each country. It is the same with building, nurturing and maintaining a network of volunteers. PMNs should inform themselves of schemes in other organisations/countries and adapt models to suit their own circumstances (See EuMon WP1 Phase 1 report).

### ***8.8. Look for what else might be out there***

The case of the UK Phenology Network reveals that many ordinary people may have accrued long data sets on their own account. These data present a valuable resource. Those in search of data to meet monitoring requirements should advertise and go in search of unknown amateur recorders (see section 5.1.).

### ***8.9. Collaboration***

Collaboration with other organisations has many benefits and can be an efficient and cost-effective tool for monitoring programmes. Collaboration provides a means for PMNs to pool volunteers and expertise of their staff and share the financial burden. There is also an added benefit of creating wider networks for greater dissemination of information and results.

### ***8.10 Enthusiasm***

The most important driver for the expansion and sustainability of volunteer participation in PMN-led monitoring is enthusiasm. We have found that enthusiasm for nature is encouraged through collaboration and social interactions within and between PMNs. Thus, management efforts should be geared towards enlivening and inspiring participants and providing an environment where trust, respect, recognition, value and enjoyment can flourish.