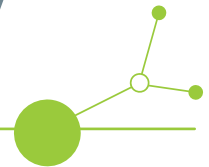


Joint peer review methodology for peer-review trips (D.2.3.1)



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Responsibility for the content of the methodology lies solely with the author and the project team and can in no case be treated as a reflection of the position of the European Union.



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1. Introduction

The ReCo project aims to address the challenges facing the Central European Green Belt (CE EGB). To improve the protection and conservation of habitats along the CE EGB, ReCo focuses on transnational cooperation, recognising that ecological connectivity extends beyond national borders. An important part of the project is the Joint Pilot Actions, which focus on restoring valuable habitats and supporting endangered species through innovative ecological restoration approaches.

In the second year of the project, each pilot region implementing the Joint Pilot Actions (hereafter "Actions") will be visited by a joint peer review team composed of Joint Pilot Team members, ASPs and PAB members. The teams will carry out an in-depth analysis of the Actions, focusing on challenges identified, perceptions of the Actions among stakeholder alliances, and potential community-based leverage effects achieved. The visits will also include a discussion with selected local stakeholders. The results of the visits, including recommendations for policy improvements, will be included in a written peer review report. The recommendations of the peer review team and the results of the meetings will lead to increased knowledge on ecological restoration and will be summarised in Joint Practitioners' Guides as a transnational solution of Joint Pilot Actions.

The aim of this methodology is to describe the preparation, implementation and evaluation of peer review visits, and to provide guidance and practical recommendations. A template for the peer review report is attached.

2. Peer review teams

Each pilot region will be visited by the peer review team consisting of:

- Core team, which will be the same (if possible) for all pilot regions. The Core team members ensure that all relevant information and data have been collected, all important issues have been discussed, and report from all peer review visits are of equal quality.
- Representatives of 2 PPs selected according to their expertise. It is highly desirable that all partners participate in peer reviews; therefore, representatives of each of the partners will attend at least one visit.
- Representatives of selected ASPs and PAB members.
- Other interested ReCo project team members (optional).

Roles in the peer review team roles may be distributed differently if agreed by the peer review team, but it is necessary to ensure that all tasks have a responsible person):

- Leader (responsible for the whole review visit and its outcomes, completes the final version of the report). The leader is nominated by the LP after discussion with the core team and representatives of the partners.
- Note takers (1-2 people to take notes during the visit)
- Photographer (responsible for photos documenting restoration activities, stakeholders, etc.)
- Technical organiser (prepares the visit in practical terms with the local PP - meeting place, accommodation, transport...)
- Other team members (all team members should ask additional questions, provide feedback after the visit and comment on the draft report)



Expertise: At least one (if possible more) team member should have knowledge and experience of assessing impacts on target species and habitats. However, other expertise is also desirable: e.g. public relations, stakeholder communication, working with local communities.

3. Timing

According to the project, the peer review visits should be carried out by the end of Period 4 (02/2025). They can start after the online training (D.2.3.2) foreseen in summer 2024. The timing of each visit depends on the agreement between the peer review team and the PPs responsible for the implementation of the Action in the pilot region concerned. In general, the peer review visit may take place between 06/2024 and 11/2024 to allow drafting of the final working paper summarising the learning from the visits, which is due by 02/2025 and which is needed for follow-up activities. The peer review team needs to take into account that the visit will include a field visit.

It is expected that each visit will take approximately 2 days, depending on the scope of the Action implemented.

4. Preparation of the visit

Initial online meeting:

- The peer review team led by the leader and the PPs responsible for implementing the Action, meet at the beginning of Period 3 to agree on the dates of the visit, roles in the team and responsibilities.
- The peer review team agrees on how the peer review report will be completed.
- The local PPs provide information which documentation is available on the Action. It is recommended to provide the peer review team with key documents in advance (if available): e.g., feasibility study, baseline survey reports, technical documentation or other plans and monitoring results.
- Additional meetings can be carried out if necessary.

Local PPs:

- Cooperate with the technical organiser from the peer review team to ensure the practical organisation of the visit (securing the meeting room for the indoor part, including necessary equipment, transport during the field visit, providing tips on accommodation, pre-booking the accommodation if needed);
- Suggest the sites for the field visit;
- Select relevant stakeholders, discuss the selection with the peer review team and arrange the meetings;
- Prepare the available documentation of the Action (see the D.2.1.3 Joint implementation and evaluation methodology) for the peer review, submit selected documents to the peer review team;
- May also complete the questionnaire (see Annex 2, part 3) in advance if agreed with the peer review team.

Peer review team leader:

- Calls and manages the initial online meeting;
- Drafts the agenda for the visit;



- Discusses the selection of stakeholders and sites to be visited with local PPs (and peer review team) and approves them;
- Ensures that relevant PAB members are invited to join the peer review team (in collaboration with the LP).
- Announces the date of the visit to the entire ReCo team. If other partners are interested in participating, they inform the leader and the technical organiser.

Technical organiser from the peer review team:

- Makes practical arrangements for the visit with the local PP;
- Arranges accommodation and transport for PAB members (unless otherwise agreed).

Peer review team members:

- Read information about the pilot region and the Action in the project documents (e.g., Categorisation of common challenges through pilot region fiches D.2.1.1, Common pilot action development form);
- Read the publicly available information on the pilot region and the Action;
- Read the submitted documents from local PPs;
- Prepare questions and topics for discussion.

5. During the visit

The visit consists of three main parts: presentation of the Action and discussion (indoor), field visit and meeting with stakeholders. The time needed for each part depends mainly on the nature of the Action and the size of the area affected. It is possible to save some time with good preparation, e.g. by filling in the questionnaire and reviewing the available documentation in advance.

It is recommended that the peer review team discusses the results of the visit before departure.

5.1. Indoor meeting

Presentation of the restoration measures:

- The local PPs present the Action carried out: initial situation, preparation phase, implementation, results and impacts (environmental, socio-economic, political).
- They present the problems encountered and their solutions.
- If the Action has not yet been completed, the local PPs present the results achieved so far and the plans for completing and evaluating the Action. They should assess the likelihood of achieving the planned results.
- The presentation should also include communication, cooperation and conflicts with stakeholders and the public.
- If relevant, they present synergies and conflicts with existing plans, strategies, policies and laws and the impact of the Action on them.
- Discussion.



Presentation of documentation:

- If not previously submitted or included in presentation of the restoration measures, the local PPs also briefly present the available documentation on the Action.
- Discussion.

Questionnaire:

- The peer review team and the local PPs go through the questionnaire and address all relevant questions if they are not addressed during the presentation. If the questionnaire has been completed in advance, they discuss only the most important questions, highlights and problems.

Discussion:

- Additional questions needed to assess the Action and prepare the Peer Review report.

5.2. Field visit

Presentation of the results in the field:

- The local PPs present the measures carried out and their results.
- If the area covered by the Action is too large or there are several sites, only a part of it may be visited, as previously agreed with the peer review team.

Discussion.

5.3. Meeting with stakeholders

The local PPs arrange meetings with stakeholders as agreed with the peer review team. They may be visited at their premises or invited to the project site. Individual meetings are recommended, but a larger meeting with more stakeholders (e.g. a round table) is possible if the PPs consider this to be a better option.

The Peer Review Team discusses with the stakeholders how they perceive the implemented measures and the Action as a whole, their participation, benefits and inconveniences resulting from the Action. Future cooperation should also be discussed.

The content of the discussion and the time needed will depend on the nature of the Action and the involvement of the stakeholders.

Possible stakeholders to be visited are for example:

- representatives of local community,
- landowners and land users ,
- duty holders (especially public bodies responsible for nature conservation),
- local NGOs,
- subcontractors,
- local businessmen.

5.4. Evaluation of the Action

The peer review team should discuss the outcomes of the visit before leaving. Depending on the time available, this could be a short brainstorming session focusing on the main strengths and weaknesses of the



Action, or a discussion structured according to the peer review report template, in particular parts 6, 7 and 8. The second option is preferred as it would facilitate the preparation of the report, but it can be replaced by online meeting and joint editing of a shared document.

6. After the visit

The most important final task is the preparation of the peer review report. It must be clear before the visit who will prepare it and how.

The assessment in the report should not only be based on the information from the responsible PP, but mainly on the independent expert assessment of the peer review team.

The parts 1-5 of the report (agenda of the visit, participants, questionnaire, notes from field visit and meetings with stakeholders) are drafted by the note takers (see the roles in the peer review team in Chapter 2) shortly after the visit. If parts 6-8 (evaluation, summary of strengths and weaknesses, key messages) were discussed during the visit, the note takers will also draft these. If not, it is possible to share a document in which all team members give their opinions; this is then discussed in an online meeting and the document is edited by the peer review team leader or a designated team member. The draft report is shared, commented on by all team members and preferably discussed in an online meeting. The team leader finalises it and shares it with the whole project team and presents the findings and in particular the recommendations to the local PPs.

The report can be prepared in different ways if agreed by the peer review team. In any case, the team leader is responsible for its timely completion and quality.

Keep the report short! The aim of the report is to provide recommendations for the ReCo pilot actions and for future restoration projects; therefore, it should focus on highlights, best practices, replicable measures, as well as weaknesses and problems and their solutions.

Before any publication, sensitive data should be removed, especially the names of stakeholders, unless they explicitly agree to their publication.

7. Annexes

7.1. Annex 1: List of participants



List of participants
ReCo Peer review visit to Pilot region X
Place, date:

Surname	Name	Organisation	Country	Signature

(Mark the members of the peer review team with *.)



7.2. Annex 2: Peer review report template

Joint peer-review [Action name] Report from the peer review visit



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Title: Peer review report template
Deliverable: D.2.3.1, Annex 2





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Try to be brief. Focus in particular on the highlights, best practices, replicable measures as well as weaknesses and issues that are important to formulate the recommendations for the Action implementation team and general recommendations for restoration activities.

Write in black. Delete the blue instructions and examples after the completion of the report.

8. Agenda and participants

Agenda (date) - day 1

Time	Place	Agenda item
9.00 - 11.00	Koper - Škocjanski zatok - visitors centre	Presentation of the implemented Action

Agenda (date) - day 2

Time	Place	Agenda item
		Field visit
		Meeting with stakeholders
		...

Participants

Name	Organisation, role in the Project	Role in the peer review
Martin Kuba	BUND Naturschutz in Bayern e.V. (LP)	Peer review team

Role in the peer review: e.g., peer review team, Action implementation team, landowner, representative of the municipality...



9. Basic information about the visited Action

Name of the Action	
Implementation period	DD.MM.YYYY - DD.MM.YYYY
Responsible Project partner	Name and (number)
Total budget	
Location	Name of the place, GPS
Map	
Target species/habitats	
Bullet points style	
Background	
Initial situation, issues (to be) solved, important circumstances.	
Objectives	
General objective of the activity, specific objectives if relevant.	
Expected results	
Bullet points style, qualitative and quantitative	
Measures implemented	
Brief descriptions of measures	
Stage of implementation at the time of the peer review	
Started / In progress / Nearly completed / Completed. Provide more details if needed.	



10. Questionnaire for the Action implementation team

Address the questions as far as they are relevant for the Action and its implementation stage. If the Action has not been completed yet, discuss the plans and anticipations. This chapter should focus on the Action's description and present the view of the Action implementation team.

Answer Yes / No / Not applicable for each question. Provide more details in the comments. Blue instruction in the comment boxes indicate what (among others) you may state.

If you need more space for comments, add a row below the commented item, e.g.:

Did you cooperate with external experts during the measures planning?		
Additional comment of the Action implementation team		
Additional comment of the peer review team		

10.1. Initial and preparation phase

Question	Y/N/ N/A	Comment
Restoration planning and preparation		
Did you carry out the baseline survey during the restoration planning?		Who prepared them and what did they focus on?
Did you prepare a feasibility study?		
Did you identify any conflicts between different protection subjects?		If yes, how did you solve the issue?
Do you have a technical documentation or management plan?		Who prepared them?
Did you cooperate with external experts during the measures planning?		If yes, how? Do you find the cooperation beneficial for the Action?
Did you face problems in obtaining the necessary permits and approvals?		
Did you face any legal barriers or conflicts with policies and official strategies?		Describe the conflicts and how did you address them.
Stakeholder involvement (including the local community)		
Did you identify relevant stakeholders in advance?		If yes, who are the important stakeholders and why are they relevant for the Action?



Question	Y/N/ N/A	Comment
Did you inform and/or involve them during the preparation phase?		If yes, how? Was it beneficial for the Action? Focus on the most important stakeholders. Usually, the local community and landowners are important but there may be other important stakeholders as well. If relevant, provide the information separately for each stakeholder group.
Did you face any conflicts with stakeholders during the preparation phase?		Describe the conflicts and their solution.
Communication and involvement general public		
Did you start communication with general public during the preparation phase?		If yes, how? Was it beneficial?

10.2. Implementation phase

Question	Y/N/ N/A	Comment
Restoration measures implementation		
Have you implemented the restoration as foreseen (so far)?		If yes, describe the (potential) changes needed and reasons for them.
Have you faced any unexpected conditions (e.g., extreme weather, different situation on the site than expected, lack of workers...)?		If yes, describe their impact and measures applied to eliminate/minimize negative impact.
Do you cooperate/have you cooperated with external experts during the measures implementation (e.g., continuous monitoring, scientific studies, etc.)?		If yes, describe their involvement and benefit of cooperation.
Have you noticed any negative impact of the restoration measures during their implementation on species, habitats, people, economic values...?		If yes, describe the issue and measures taken to solve it.
Stakeholder involvement (including the local community)		
Are you communicating with stakeholders and involving them in the Action's implementation?		If yes, specify who do you involve and how.



Question	Y/N/ N/A	Comment
		You can provide the information separately for each stakeholder group.
Have you faced any conflicts with stakeholders?		If yes, describe the issues and measures taken to solve them.
Communication with general public		
Do you communicate with general public?		
Do you carry out public events?		
Do you work with volunteers?		

10.3. After-implementation phase

Question	Y/N/ N/A	Comment
Restoration evaluation		
Have you carried out / do you plan monitoring surveys to assess the impact?		
Do you / will you cooperate with external experts in the assessment?		
Stakeholder involvement (including the local community), communication with general public		
Are the stakeholders (going to be) involved in the after-implementation phase?		If yes, who and how.
Will you continue to communicate with general public?		
Sustainability, replicability		
Have you taken measures / do you have plans how to assure sustainability of the Action's results?		
Is any further financing necessary and have you assured it?		



Question	Y/N/ N/A	Comment
Is it possible to replicate the measures in different locations?		
Do you have any replicability tools which can be shared?		
Do you disseminate the project results?		Which results, how, to whom?

10.4. Recommendations, lessons learnt

Lessons learnt during the preparation and implementation of the Action and recommendations for restoration projects

[The PPs responsible for the Action](#) should give here their opinion. What was useful, functional? What to avoid, what didn't work? Consider all relevant aspects (restoration planning and implementation itself, stakeholder involvement, communication and dissemination, sustainability...).

11. Field visit

Describe the place(s) visited. Assess the implemented measures and their impact. List all important findings from the field visit. You can add photos here which are important for presentation of the field visit outcomes. You can put more photos to part 9.

12. Meetings with stakeholders

If you met representatives of the local community or other stakeholders during the peer review trip, describe their perception of the Action, e.g.:

- Do they have enough information?
- How are they involved in the Action's implementation?
- How do they perceive the cooperation with the Action implementation team?



- How do they perceive the implemented measures and impact of the Action on target features / area / local community / on them personally?
- Are they willing to cooperate in future?

In case of individual meetings, fill in the table below for each stakeholder.

Name	
Organisation/institution	
Relation to the Action	
Outcomes of the meeting	

If you carry out a bigger meeting (e.g., a round table) and the opinions of all stakeholders are similar, you can first list all participating stakeholders and then summarize their views:

1	Name	
	Organisation/institution	
	Relation to the Action	
2	Name	
	Organisation/institution	
	Relation to the Action	
3	Name	
	Organisation/institution	
	Relation to the Action	
Outcomes of the meeting		



13. Evaluation of the Action

In this chapter, the peer review team assesses the preparation, implementation and impact of the project. Focus on the evaluation, not the simple description of the individual elements, which is already included in previous chapters. Identify good practice as well as any weaknesses that can be improved.

13.1. Assessment of procedures

Availability of documentation
Were all documents necessary for the peer review available?
Preparation and implementation of restoration measures
Assess how the restoration measures were prepared and implemented from technical point of view.
Stakeholder involvement
Was communication and involvement of stakeholders (local communities, municipalities, authorities, landowners, NGOs...) appropriate?
Communication with general public
Was communication with general public appropriate?
Sustainability, continuation
Assess the sustainability of Action's results (difficulty and cost of measures to ensure sustainability, who is responsible, financing...).
Replication and dissemination
Assess the replication potential and achieved replications. Assess how the results and knowledge are disseminated to other experts/nature conservationists.

13.2. Environmental impact

Assess the (anticipated) impact of the implemented measures on the target species/habitats
Compare the expected and achieved/actual results. Evaluate the results qualitatively and quantitatively. If the Action has not been completed yet, assess how likely it is that the expected results will be achieved.



How does the Action contribute to the ecological connectivity along the EGB?
How does the Action contribute to increasing biodiversity?
Does the Action take into account the climate change? Does it include adaptation measures?
Has the Action any negative impact?

13.3. Socio-economic impact, policy

Assess the (anticipated) impact on the local community
<ul style="list-style-type: none"> - Relationship to own homeland - Relationship to nature and nature conservation - Ecosystem services - Climate change adaptation -
Assess the (anticipated) economic impact
<ul style="list-style-type: none"> - Jobs - Tourism - Direct income (e.g., using of meadows for hay or as pastures) - Possible use of CAP or other subsidies - Economic loss - ...
Policy issues
<ul style="list-style-type: none"> - Describe conflicts with policies, strategies or laws and how they are/should be addressed.



- Has the Action influenced existing strategies/plans? Has it initiate preparation of a new/updated strategy/plan?

14. Summary of strengths and weaknesses and lessons learned

List in bullet points the main strength and weaknesses of the Action. List the lessons learned. Refer to the parts above for details if needed.

Main strengths, highlights
Main weaknesses
Lessons learned

15. Key messages

Recommendations for reviewed Action
What can the Action implementation team do to enhance positive impacts and mitigate negative impacts (both environmental and socio-economic)? How communication and cooperation with stakeholders and public can be improved? How to improve the Action's monitoring? Etc.
Recommendations for all project partners: transferable results
List here general recommendations for restoration projects resulting from the visited Action and peer review, e.g.: <ul style="list-style-type: none">- Recommendations for restoration planning and implementation to increase its impact on biodiversity and connectivity (not only) along the EGB- Recommendations for stakeholder involvement



Policy messages

Recommendations for new/updated policies, adjustments of official strategies, changes of laws

16. Photodocumentation

Please give a short description for each photo.