Is Participatory Mapping (PGIS) Right for You?
A Checklist

There is no "one size fits all" approach or "right" answer when it comes to participatory mapping. Here are some things to consider:

Considerations

Before – Planning the activity

- ☐ **Purpose** – What is the project goal, and can participatory mapping assist in addressing all or some of the needs? How will the information be used to inform coastal management decisions? It will be important to have a concise message for stakeholders.
- ☐ **Stakeholders** – Identify stakeholders early in the process based on the goal. It may be wise to test ideas with supportive representatives from this group. Building consensus, inventorying information, and setting priorities may shift the types of stakeholders participating in the process.
- ☐ **Required resources** – Inventory existing data and understand the budgetary and staff resources available for the project. These items, along with the purpose, help steer the project team toward an appropriate method.
- ☐ **Setting** – Will the activity take place in a workshop, on an individual basis, or via mail or Web? This decision depends on the resources available.
- ☐ **Type of activity** – Will the organizing team be collecting new information, commenting on or validating existing data, or using spatial information in a decision-making process? The purpose of the activity will help steer the process.
- ☐ **Technology** – Consider the stakeholder group when choosing technology. Some stakeholders appreciate high-tech software, while others may find it cumbersome or intimidating. Always be sure to orient your stakeholders to the technology and data as part of the participatory-mapping process.
    - GIS software – Specialized desktop software that allows users to create, edit, and analyze spatial data. Examples include ArcGIS, Google Earth, and MapWindow.
    - Map viewers – These offer nonexpert users the ability to interactively display and view geospatial data that are accessed across the Web. Examples include Google Earth, Marine Map, Open Street Map, and ArcGIS Online.
    - Interactive whiteboards – A large interactive display that connects to a computer and projector. Allows users to interact with mapping software or Web viewers using a pen, finger, stylus, or other device. Examples include Ebeam, Interwrite, and SmartBoard.
    - Paper maps – Select a map that resonates with the particular stakeholders engaged.

  Before conducting the participatory activity, test the methods, process, and messaging with members of the stakeholder group and the staff members who may be running the activity.

- **During** – Conducting the activity
    - ☐ **Process** – Use clear and concise messages with language familiar to stakeholders when introducing the purpose. Introduce participants to the support staff. Demonstrate the method or have a tutorial using reference data.
    - ☐ **Roles and responsibilities** – Identify the staff members who are critical to the method of choice. This might include technical staff members, facilitators, moderators, or others.

Ensure that all staff members know their roles and responsibilities, and if necessary provide training before the activity.

- **Data Management** – It's important to set data standards, such as scale, information being collected, and symbols to be used. Standardize the collection of contextual information provided by stakeholders, which is the story behind the spatial information.
  Adapt – When engaging stakeholders in any method, leaders must be willing to adjust the process as needed to allow for consistent quality information gathering.

- **After** – Presenting and sharing the information
  - **Processing the data** – Information collected should be cleaned up and standardized. Staff members with skills and time to dedicate to this task should be identified.
  - **Sharing the results** – Sharing the final results with stakeholders who contributed the information is important. Will the results be compiled into a report, shared electronically, or presented in a follow-up meeting? The final format should consider future uses of the information. If the activity will be repeated in the future to update the information, it's important to let stakeholders know.

Techniques – There are a range of approaches and technologies that can be incorporated while engaging people in these mapping activities. Annotating paper maps, for instance, is fast, simple, and cheap. Interacting with digital mapping tools makes data collection, commenting, and visualization easier to do.

Some common items that are often needed to successfully conduct a participatory-mapping exercise include a clear goal and a mapping method to match the stakeholders; reference data for stakeholder orientation; process facilitators; technical experts for assistance and support; and staff members to manage the data. Pre- and post-data processing is a very important step for the development of high-quality results.