



# coeso

connecting research and society

COLLABORATIVE ENGAGEMENT ON SOCIETAL ISSUES

## WP4 - Funding Citizen Science Funding advocacy action plan

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## Deliverable 4.3

### Funding advocacy action plan

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# I Introduction

The COESO project<sup>1</sup> seeks to overcome the obstacles that hinder the development of citizen science in the social sciences and humanities. The lack of funding opportunities, or rather the mismatch of calls for funding and potential recipients of funding, is one of the main barriers for a strong uptake of social sciences and humanities citizen science projects in Europe, and targeted actions are therefore necessary.

The measures developed in this funding advocacy action plan are tailored for the specificities of the social sciences and humanities disciplines:

*“These disciplines can be characterized by a diversity of publication languages, an entrenchment in diverse cultural backgrounds and the need for specific forms of scholarly communication (such as, amongst others, monographs, critical editions, and edited bibliographies). In addition, the small size of resource providers, the historical underfunding and lack of sustainability in this area, and the variety of technical skills and resources across the community lead to different practices of citizen science. Often under different names (such as e.g. public humanities), citizen science in the social sciences and humanities involves intensive collaborations in small-scale projects. When developing citizen science practices, they therefore face specific challenges at different levels and lack the needed support.”<sup>2</sup>*

The targeted audiences are the communities of funders and potentially funded organizations in the social sciences and humanities disciplines interested in citizen science.

Advocacy in the context of social sciences and humanities can be described as follows:

*“The term “advocacy” is often used to describe an activity or process of “supporting a cause or proposal” and especially gaining “public support” for this activity or idea. The activity can be carried out either by an individual or group. Organizations describing their advocacy activities most commonly use the term to show how they create central positions and use them to influence positions of political, public or economic institutions, e.g. the bodies of the European Union. This process often takes place by including a broader public community, both from within the organizations and from without. The advocacy process often works in two directions: organizations include public opinion in their creation of central positions and strive to influence public opinion at the same time.”<sup>3</sup>*

This document first outlines its purpose and target audiences in more detail before developing general measures directed at funded organizations and funders and specific actions the COESO consortium will take over the course of the project duration.

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<sup>1</sup> See <https://coeso.hypotheses.org/>. COESO is coordinated by EHESS and OpenEdition Center under the umbrella of the [OPERAS research infrastructure](#).

<sup>2</sup> See <https://coeso.hypotheses.org/about/mission-vision-value>.

<sup>3</sup> Ernst, Elisabeth; Ekanger, Aysa; Franczak, Mateusz; Katsaloulis, Iraklis; Töpfer, Marlen; Wnuk, Magdalena. “How-to-advocacy: OPERAS practical guide on advocating for open scholarly communication in the social sciences and humanities.” DOI: [10.5281/zenodo.5043438](https://doi.org/10.5281/zenodo.5043438).

## II Purpose

This document aims to provide clear and tangible actions for improving citizen science funding in the social sciences and humanities. It forms a key part of the COESO consortium's work program, directly feeding into the strategic development of targeted funding advocacy actions. The actions presented in this document also have great relevance beyond the COESO consortium, and interested parties are encouraged to use this document as input or to modify their own strategy (see, for example, ch. "IV Strategy and examples of actions").

The document first gathers actions that can lead to raising awareness. Funding organizations as well as recipients of funding need to be aware of the problems and barriers related to citizen science funding in the social sciences and humanities and need to understand that these obstacles also concern them and their own actions. These barriers are a particular issue in the context of competitiveness, as the lack of experience or grant writing skills for a new application can make some funding opportunities look unattainable at first. Our measures therefore seek to build one or several communities to ensure a strong community uptake of suggested funding advocacy actions to support new and existing applicants. Lastly, the actions seek to build a "community in action", i.e. to have an animated network that sustainably builds on and continues to work on funding schemes for citizen science in the social sciences and humanities disciplines.

The main actions that COESO as a consortium will pursue are:

- 1) A collaboration with the fundit website<sup>4</sup> by further developing a specific filter option for citizen science projects in the social sciences and humanities. These calls for funding citizen science projects will be imported into the VERA platform developed by COESO and could also be embedded in the institutional websites of organizations that are potentially funded entities.
- 2) The organization and conduction of two workshops to open the COESO funding tool to new funding opportunities. The first workshop will be directed at funding stakeholders to discuss their needs, inclusion, and possible development of citizen science grants in the funding tool. The second one towards the end of the project will be directed at future users of the tool to test its application against community needs. COESO will also create resources to share with funders and funded parties about these actions.

In order to concretize our strategy and actions, we start from the main recommendations, taken from the COESO landscape study on funding schemes for social sciences and humanities' citizen science activities<sup>5</sup>, for a successful funding policy capable of enhancing citizen science activities in the social sciences and humanities. These recommendations come from the analysis in which, in addition to desk research, different channels of dialogue with funders and fundees have been established (surveys, semi-structured interviews, open interviews):

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<sup>4</sup> See <https://fundit.fr/en>.

<sup>5</sup> Pelacho, Maite; Sanz, Francisco. "COESO Deliverable 4.1: Landscape study on funding schemes for Social Sciences and the Humanities' Citizen Science activities." 23 July 2021. DOI: <https://doi.org/10.5281/zenodo.5137246>.

- Diversification of funding schemes. Promoting a wide variety of models that respond to the characteristics and needs of different geographical, cultural or socio-economic contexts: making possible projects involved in large international partnerships with far-reaching global objectives, alongside the promotion of a rich and wide diversity of small projects and local networks, through the infinite number of possible intermediate situations.
- Promotion and support for the countless third sector<sup>6</sup> entities, both as recipients of funding to carry out their projects and as providers of funding that can promote other projects at very different scales.
- Taking into account the diversity of terms for referring to citizen science or participatory research, depending on the country. Using at least two different expressions in the same call (in title, description, and/or keywords) - according to the different contexts and scopes - is needed for the different actors to connect and develop their common interests.
- Promoting alliances and networks, both among funding agencies and recipients of funding.
- Transparent and findable communication of funding received or provided by corresponding organizations.
- Development of tools for finding funding opportunities at different levels taking into account the necessary diversity of funding schemes.
- Explicitly highlight the presence and value of social sciences and humanities disciplines in multidisciplinary projects.
- Dissemination and continuity of studies on the diverse impacts of social sciences and humanities research with citizen science methodologies.

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<sup>6</sup> By third sector we refer to “the part of an economy or society comprising non-governmental and non-profit-making organizations or associations, including charities, voluntary and community groups, cooperatives, etc.” (Oxford Dictionary).

### III Target audiences

Advocacy processes can work in different directions and target various actors in strategic positions or mainly public opinion. Our advocacy action plan mainly focuses on two types of communities: funding organizations and recipients of fundings. These actors have the power and the experience to instigate and support sustainable change in citizen science funding in the social sciences and humanities. By directly engaging these parties, they can collectively contribute to solving the barriers at local, national and international levels.

To fully realize the purpose of this advocacy action plan, we first need to better understand the diversity of who the citizen science funders and funded entities are. Answering this question is essential to be able to reach our audiences and then build and mobilize a community, or strengthen and be part of those which already exist. But it is not an easy task because both these groups are characterized by their great diversity in terms of:

- Activity and type of entity
- Size / resources
- How they define and name “citizen science”
- Geographic scope / governance level
- Disciplines
- Collaborations

Entities needing to fund citizen science research often are research centers, universities and research public organizations. However, they can also be other public entities or private actors (companies) or actors in the third sector (foundations, NGOs, associations...). Moreover, citizen science encourages collaborations between different kinds of actors such as academic actors and civil society actors. This leads to even more challenges regarding different institutional, disciplinary and working cultures as well as combining resources. Resources, time, money and workforce are key factors determining both the access to funding and the amount of funding for research project holders.

The majority of funders identified in the [landscape study](#) are public entities, but private, third sector and mixed entities are also represented. Among the public actors, different levels of government are represented, including national, regional, European and local government. These different levels of government often imply different levels of funding, different project sizes and different levels of complexity to answer funding calls. These government bodies are key targets for the advocacy plan because they are both funders and policy makers, having decision powers dealing with citizen science research policies and, more precisely, funding schemes definition.

## IV Strategy and examples of actions

Visibility and comprehension of citizen science and its impact are the main issues for both applicants and funders in social sciences and humanities. Barriers like language, terminology, diversity of disciplines/methodologies etc. lead to misunderstandings that translate to a mismatch in funding between funders and funded entities. This is seriously limiting the growth, potential and impact of citizen science in social sciences and humanities. The following paragraphs summarize the main barriers and some potential solutions for this dilemma as described in the [“Landscape study on funding schemes for Social Sciences and the Humanities’ Citizen Science activities”](#), with suggestions on how to create tailored advocacy actions for the challenges described. The Landscape Study has identified 105 European funding organizations, characterizing them through eleven attributes, such as "duration of funded projects" or "geographical scope of calls", among others. Although not all characterizing attributes have been covered for each entity, a good number of them have been described, which allows a first adequate approximation of the issue.

Within the identified funding organization, the majority of funding for citizen science projects in the social sciences and humanities (and we may wonder if this also holds true for many other projects in the social sciences and humanities disciplines) comes from public entities, such as for instance national ministries or the European Commission. This naturally leads to calls for large-scale projects that require a certain minimum amount of budget, which is often not possible for local or small-scale initiatives. In addition, the excessive bureaucracy associated with applying for and managing many projects is not feasible for smaller organizations. They don't have experience (staff, time, knowledge), access to “pre-funding” and they find the criteria too complicated or specific. The short funding period for local and national grants is an additional deterrent, as smaller organizations are less resilient to losing staff and their expertise. The co-financing model is also problematic for smaller organizations, as it often leads to internal financial troubles (e.g. when recruiting personnel). Funding schemes therefore need to be diversified and take into account the variety of geographical, cultural, or socio-economic contexts - for funded entities to be able to apply to citizen science calls and for funders to have a good number of quality applications to their calls.

Many projects and initiatives describe themselves as doing participatory research rather than citizen science. This can lead to them missing calls that mention “citizen science” and therefore to a situation where potentially funded projects don't find enough calls and funders don't receive enough applications. It is thus necessary for funders to take into account the diversity of terms for referring to citizen science or participatory research.

It is difficult to tailor funding to the huge diversity of disciplines in the social sciences and humanities, especially when they are multi-, inter- or transdisciplinary and categorized differently. E.g. Environmental Studies is often included in natural sciences rather than in the social sciences and humanities. This leads to a situation where some disciplines feel and are disadvantaged. In addition, current funding policies often rely on impact indicators. Yet, as with funding in general, both the concept of impact and its measurement are controversial.

Competitiveness is also a major limiting factor which makes people feel their ideas are unattainable. While this issue is difficult to tackle, creating more confidence (through e.g. grant writing training) already helps smaller organizations.



The following two subchapters within ch. “V Action plan” look at funded entities and funders separately. It suggests actions to raise awareness, to build a community, for community uptake, and for community in action for both groups of stakeholders.<sup>7</sup> We have differentiated actions towards the targeted communities because we assume that the community of funders are connected via networks and align their funding streams with European levels/standards. The suggested actions include ones that the COESO project will pursue in the following years and a display of ideas and possible initiatives that interested parties could make further use of.<sup>8</sup>

The actions are suggestions that should be adapted to the country or cultural context they are being deployed in. We encourage people using these ideas to consider the best approach, and to seek further guidance from relevant actors in their context if they are uncertain about this.

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<sup>7</sup> For a more detailed description see ch. “II Purpose”.

<sup>8</sup> To find out which actions COESO will pursue, see ch. “V Action plan”.

## V Action plan

The actions presented here can be carried out by a variety of actors to advocate for better citizen sciences funding opportunities in social sciences and humanities disciplines. It is structured according to the two types of actors we want to reach as audiences but also to connect and mobilize as communities: funded entities and funders.

We try to underline relevant actors for each action, both among the COESO partners and outside of the COESO consortium, to ensure they are implemented in the most effective way possible. However, these indications are not exclusive as this plan can be seen as a tool to build an advocacy strategy for any actor interested in citizen sciences funding, e.g in NGOs/NPOs, policy, educational practitioners.

The suggestions for actions are based on the COESO “[Landscape study on funding schemes for Social Sciences and the Humanities' Citizen Science activities](#)” and the OPERAS study “[How-to-advocacy: OPERAS practical guide on advocating for open scholarly communication in the social sciences and humanities](#)”.

## Actions for funded entities

### Raise Awareness

#### Disseminate reader-friendly documents

The COESO consortium will create a leaflet version of its landscape study on funding schemes for social sciences and humanities' citizen science activities with a nicely designed layout and distribute it to all consortium partners to use at conferences and workshops. You will be able to access the uploaded version of the leaflet on the COESO website and distribute it freely.

#### Signpost funding options

Make sure your own researchers and employees are aware of funding opportunities. Administration and communication offices of research organizations and societal entities, e.g. NGOs/NPOs, associations, etc. can signpost funding options by posting them on their organization's website and distributing leaflets and blog posts found on EU-Citizen.Science.

#### Events to promote funding streams

Organize online and on-site events to promote the funding streams you are aware of to the larger community. If you are a well established NGO/NPO that promotes citizen science or the social sciences and humanities disciplines or a national contact point in these areas, you can spread useful information to your peer organizations. Useful resources for preparing for such events are the COESO landscape study on funding schemes for social sciences and humanities' citizen science activities and the OPERAS How-to-Advocacy guide. COESO will organize two workshops<sup>9</sup> to promote funding streams.

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<sup>9</sup> See ch. “II Purpose”.

### Grant writing workshops

As an experienced funded entity, you can expand your community of potential project partners by developing or promoting grant writing workshops for interested parties to learn the skills and processes necessary for writing citizen science grants. This could happen via grant writing workshops locally or at conferences and could be linked to timelines for grant calls. There are also paid grant writing workshops available from commercial organizations. Remember to contact national contact points or equivalent support organizations for feedback/tips (such as finding the right contact person) when developing and organizing the workshops.

## **Building community**

### Build a glossary of terms

Promote a country- and language-specific glossary of terms used to describe citizen science activities in the social sciences and humanities.. COESO has started a glossary in its landscape study on funding schemes for social sciences and humanities' citizen science activities and will continue building this glossary of terms with its partners. Yet, COESO's efforts can only be a support for local and national efforts. The main drivers of the building of a glossary can be national citizen science or social sciences and humanities organizations and contact points. The glossary could be hosted on eu-citizen.science to aid dissemination.

### Webinars and on-site events at local levels

Organize webinars and on-site events at local levels to contribute to building a strong local community. This is especially relevant for organizations with a higher maturity in terms of receiving funding for citizen science in the social sciences and humanities or local and national citizen science and/or social sciences and humanities organizations or contact points. These community events could also be used to initiate the building of a glossary of terms.

### Community events

Host community events to share concerns, good practices, and useful information - especially as a smaller entity that struggles with the barriers described in the previous chapter. This strengthens your collaboration potential and supports building alliances for funding advocacy.

## **Community uptake**

### Start with your own organization

Lobby in your organization for some amount of flexibility when receiving funding that involves co-financing. Meet the personnel in charge to anticipate possible administrative bottle-necks and how to dissolve them. You can start talking about participatory research and citizen science if activities with this approach are not yet visible at the organization/institution level.

### Start small

Get involved with the networks that run participatory research/citizen science projects and find a place to participate as a Third Party or to collaborate with a Work Package. Once you get familiarized with the language, procedures and way of working, applying for funding will be easier and the funding will enable you to onboard experienced people.

### Expand to your research fields

Share your experiences in your research fields in conferences and panels to highlight how others could get access to funds for their citizen science research.

### Provide material to funders

Use the momentum of a conference, workshop or funding stream announcement to organize with other local, regional or national organizations or with colleagues from your research field(s) on the writing of a policy brief, an open letter, or a leaflet. It should be directed at particular policy makers and funding organizations, clearly having an addressee in mind and not be of a more general nature. COESO will contribute to this action by writing a policy brief on this topic as well, targeted at the European Commission.

### Events with funders

Host events for funders. Building community is especially important for funding organizations as they need to be strongly engaged in social sciences and humanities citizen science communities to better design and evaluate their funding programs. This is even more important because it mitigates the risk of unintended consequences of evaluation models. Events that are directed at funding organizations should always take into account the availability of the most important funders, the venue and time should be most convenient for funders and they need to distinguish this particular event from the many events they are invited to. Therefore, a clear and long-term strategy is needed.

### Follow-up-events

Engage with funders outside of formal events. Funders often do not stay at conferences for the whole time and leave after they or another organization have given the opening speech. A general recommendation for reaching funding organizations, not just for citizen science activities within the social sciences and humanities, is to ensure that funders are targeted often and over a long period of time on the same topic.

## **Community in action**

### Liaise with other applicants

If e.g. funding periods are too short or the bureaucracy of a call is too much for you, communicate about this and other structural hurdles, in a joint effort with other applicants. It is extremely important that the funding bodies receive practical feedback from their “users”. If you do this as a single organization, it can have less impact than if you do it as a block, with sister organizations that have a similar perception. It is not an easy fix, but you set a precedent and there will be a track record about this and other alternatives presented by applicants.

### Continue the actions

Do what you’ve done again. Many advocacy actions require a long-term perspective and rely on repetition and persistence. Actions such as the one described in the example above illustrate this approach. At the same time, persistence must always be supported by convincing reasons and/or verifiable facts. This is why the evaluation of the results and impacts of projects must be carried out continuously and over time. Importantly, the projects themselves must emphasize an idea that society as a whole should be aware of: that many objectives - for example, those related to sustainability or cultural changes - can only be achieved in the long term through continuous actions, whether they are more or less disruptive.

### Explicitly highlight the presence and value of social sciences and humanities disciplines in multidisciplinary projects

Clearly showcase and outline the advantages of multi- or transdisciplinary elements in citizen science projects in the social sciences and humanities disciplines. This will strengthen your project proposal.

### Develop tools for finding funding opportunities

COESO is contributing to these efforts in collaboration with the fundit website<sup>10</sup> by further developing a specific filter option for citizen science projects in the social sciences and humanities. These calls for funding citizen science projects will be imported into the VERA tool developed by COESO and could also be embedded in the institutional websites of organizations that are potentially funded entities.

## Actions for funders

### Raise awareness

#### Consider allocation and advertising of grant calls

Determine if your grant calls are effective by doing an annual evaluation of the uptake of grants in different disciplines. This will ensure that funding streams are matching the research priorities and focus points at local, national and international level. This evaluation should also include an analysis of how and where the grants were advertised, to maximize their visibility and relevance to the broadest possible range of communities. It is also important to remember to ensure you clearly state that you are funding citizen science in your calls.

#### Case studies and informational material

Listen to the community you'd like to fund. Request input and case studies from organizations interested in receiving funding for their citizen science social sciences and humanities projects, and then use it to develop your grant calls. Make sure to outline the necessity of clear, focused, evidence-based, and short material that highlights why citizen science funding in the social sciences and humanities can be of great societal benefit.

#### Identify appropriate terminology

Ensure that you use a variety of terms to describe citizen science approaches within the grant call in order to align with the various communities' practices. Some suggestions have already been included in the COESO "Landscape study on funding schemes for Social Sciences and the Humanities' Citizen Science activities," but these are not intended to be a definitive list, and a larger consultation with some more relevant communities is essential.

## Connecting communities

#### Understanding the networks and practices of the funders' communities

Smaller and local funding organizations need to actively engage with the larger European networks and practices of the funding communities in order not only to be aware of what they are doing but also to bring in their expertise and knowledge of the needs of funded organizations at a local level.

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<sup>10</sup> See ch. "II Purpose" for more information on the funding tool.

### Events

Funders should organize events with other funders to foster their networks and to share their experiences and best practices. These events, both at local and at national and European level, should also be open to potentially funded organizations and/or the national contact points or equivalent organizations to receive feedback.

### Personal contacts

Make it easy for national contact points and potential applicants to contact you. Since you (the funder) are more likely to attend events if you know the person issuing the invitation, it's important to ensure there are multiple ways for people to connect with you. Smaller organizations that are interested in funding for citizen science in the social sciences and humanities should be able to contact and connect with their national contact points or equivalent organizations in order for them to issue invitations on their behalf to you (the funders).

### Actively follow the discourse

Engage with citizen science in the social sciences and humanities communities on a local, national, and European level in order to be aware of the many and diverse reasons for a funding mismatch. This can e.g. be achieved by actively taking part in conferences, workshops and other events that the communities organize to present their funding schemes but also to collect information from the potentially funded organizations on what they are actually doing.

### Contribute to the development of tools for finding funding opportunities

Be aware of the many tools that researchers and other stakeholders interested in citizen science projects in the social sciences and humanities disciplines use and ensure that their calls are included in these. COESO is contributing to these efforts in collaboration with the fund; it website by further developing a specific filter option for citizen science projects in the social sciences and humanities.

The full potential of citizen science in social sciences and the humanities is limited by various barriers, and both funders and funded entities/applicants must address these. Success will require change in the systems and structures underpinning the funding systems as well as in behaviours and community. This action plan is intended to signpost those opportunities which will directly enable this success, but this will only work if all parties proactively undertake the actions outlined here. The COESO consortium intends to catalyse and sustain this change by sharing this document as widely as possible and by adopting these actions into their own work programs within and beyond the work packages of the COESO project.