



HuMUS

Healthy Municipal Soils

Deliverable 2.1

Work Plan Template

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Table of contents

Executive summary	3
1. Introduction to the HuMUS methodology	4
1.0 Step 0. Adherence to the Soil Mission Manifesto	5
1.1 Step 1. Pre-diagnosis	5
1.1.1-Pre-diagnosis description	5
1.1.2 Methods for pre-diagnosis development	6
1.2 Step 2. Sociogram - map of actors	10
1.3 Step 3. Participatory diagnosis using SWOT	14
1.4 Step 4. Territorial Management Agreements	16
2. Work plan templates	17
2.1 Template #1- Proposal of Adherence to the European Union's Soil Mission Manifesto	19
2.2 Template #2- Pre-diagnosis form	21
2.3 Template #3- Form to request information from public bodies	23
2.4 Template #4- Form to collect participatory processes, preliminary diagnoses, plans and programs	25
2.5 Template #5- Form for the identification, selection, and control of stakeholders	27
2.6 Template #6- Work session planning and evaluation form	29
2.7 Template #7- Sample notice for work session	31
2.8 Template #8- SWOT matrix	32
2.9 Template #9- Communication plan	33
2.10 Template #10- Gender analysis	37
3. Glossary	39

Executive summary

As part of the HuMUS project, this Deliverable presents a toolkit for the implementation of the *HuMUS methodology*, which can be adapted to different socio-economic and geographic scenarios to support the co-implementation of solutions that protect and restore soil health at the municipal and territorial (intermunicipal) levels according to the provisions of the European Union's Soil Mission.

The *HuMUS methodology* concerns the engagement of key stakeholders in local dialogues on soil health and quality. Stakeholders include public and private actors, such as municipal and regional policymakers as well as private firms, academia, and citizens. All these actors are consulted to develop a participatory diagnosis that identifies the strengths, weaknesses, opportunities, and threats associated with soil health.

The co-creation of solutions for the protection and restoration of soil health is based on this process, and is implemented in the form of Territorial Management Agreements that are discussed and agreed upon by all the actors involved.

The toolkit is composed of 10 templates, which are presented in the remainder of this publication, after a brief introduction to the *HuMUS methodology*.

A Glossary concludes the document.

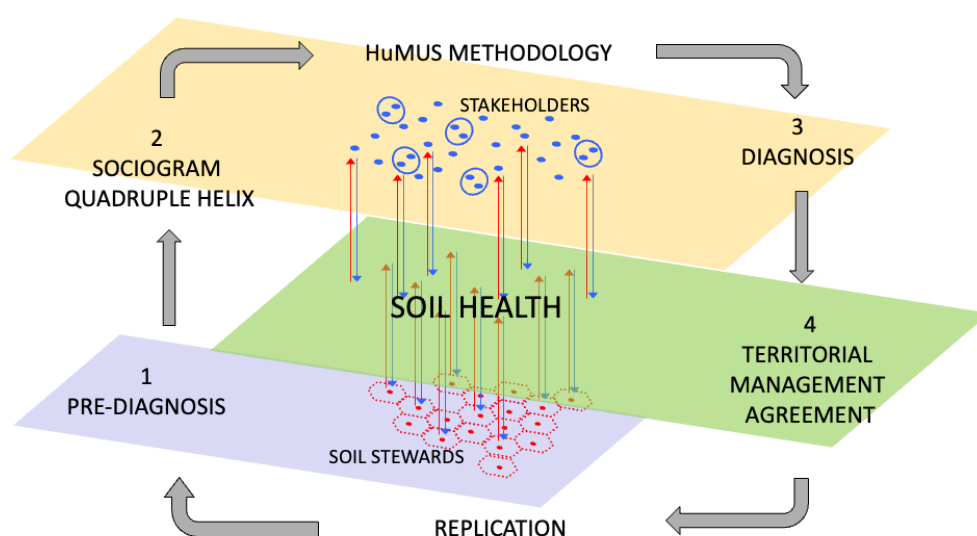
1. Introduction to the HuMUS methodology

The methodology proposed, based on the organic district approach¹, focuses on active participation, understood as the construction of decisions taken collectively by all the actors involved, particularly those who are most affected by these decisions.

As presented in Figure 1, preparatory activities in the HuMUS methodology start by carrying out a pre-diagnosis, which is theoretical in nature, and then a sociogram to map the actors involved in the second step is created. The third step is a participatory diagnosis to establish how soil health is being considered in the field, and this diagnosis identifies existing problems and challenges. Finally, the fourth stage, the Territorial Management Agreements are drawn up using the results of the participatory diagnosis.

Throughout the implementation of the methodology proposed, technical office work is combined with working sessions with political, technical, and socioeconomic actors. This series of steps is for guidance, and they must not be followed strictly, but rather in an adaptive manner, opening up the process to moments of simultaneity, as well as leaps forward and backtracking. The methodology starts out from a participatory idea that emphasises the sheer magnitude of the process and its collective construction. Therefore, although each territory has a different starting point and there is no one-size-fits-all itinerary for the activities to be carried out, certain shared methodological approaches can be presented.

Figure 1. HuMUS methodology.



Source: Self elaboration.

¹ https://gaod.online/wp-content/uploads/2023/05/Organic_Districts_Introduction_Tool_Kit.pdf

A list of the steps, key aspects and tools that are recommended are provided for each of the four stages here below.

1.0 Step 0. Adherence to the Soil Mission Manifesto

The first step (Step 0) to start the process of involvement and participation in the proposal of Territorial Management Agreements is to invite the political representatives of the municipalities or local entities. According to this, a template (see Template #1) is provided to invite the municipal representatives to take a position based on their adherence to the Mission Soil Manifesto², which includes the commitments it entails, suggests the creation of a monitoring commission, and proposes to consider participation in the implementation process.

Once the Mission Soil Manifesto has been signed, a dynamising team, which also monitors the whole process, is established in each municipality in which a participatory HuMUS methodology is applied. Our proposal is based on the creation of positions of the Soil Stewards, and these individuals will make up the motivating groups with the HuMUS project local teams. The size of the teams will vary from territory to territory. This deliverable, which acts as a toolkit, is specially designed for these dynamising teams of Soil Stewards, and a complete open-access online training programme is also being created for them.

The main objectives of these teams are:

- Carrying out monitoring, supervision, and redirection of the participatory process
- Putting forward and debating the different perspectives held by the representatives of institutions and stakeholders on soil health and territorial management
- Facilitating discussion on and negotiation of proposals

1.1 Step 1. Pre-diagnosis

1.1.1-Pre-diagnosis description

The first stage of the process is a territorial pre-diagnosis that the participatory process is based on. This must be developed by the dynamization team with the help of the Soil Steward. Stakeholders could also be involved from the very beginning in the pre-diagnosis if it is possible.

This requires a scenario to be created which enables each territory to be recognised. This must always be carried out in a way that favours participation in actions that are focused on improving soil health and territorial management.

² <https://ec.europa.eu/eusurvey/runner/mission-soil-manifesto>

The identification of pre-existing participatory practices on territorial management could be added at this stage so that they can be included in the process.

1.1.2 Methods for pre-diagnosis development

Pre-diagnosis can be carried out by using the following sub-phases.

SUBPHASE 1. STRATEGIC APPROACH

a. Preliminary territorial area study

- Collect works and existing diagnosis related to soil type, soil use/vegetation cover, and soil health data from each municipality (or municipalities).
- Analyse territorial management in the zone, including plans, ongoing programmes, active or recent projects and processes.
- Collect and evaluate earlier participatory processes and ongoing ones.
- Describe existing supra-municipal structures that could have a connection with soil health and territorial management.
- Study the political make-up of the area.

- Create an initial list of stakeholders that can be called on to draft the Territorial Management Agreement, including actors from the public sector (policy makers, advisory services, etc.) at different levels (municipal, provincial, regional); the private sector (producers, cooperatives, logistic services, economic legal, fiscal, technical, territorial planning, restoration, transformation, processing, and conservation consultants); customers (shops, restaurants, canteens, consumer groups, final consumers, etc.); civil society organisations and NGOs (dedicated to agro-ecology, gastronomy, local food products, unemployed people, etc.); research bodies (academia, research centres); public, semi-public, and private companies (start-ups, alternative food networks; other alternative food, nutrition, health and sustainability networks.); ICT providers, etc.

Find in this document four different templates useful for this subphase:

- Template #2, pre-diagnosis form;
- Template #3, form to request information from public bodies;
- Template #4, form to collect participatory processes, preliminary diagnoses, plans, and programs;
- Template #5, form for the identification, selection, and control of stakeholders.

b. Initial work sessions with the local authority or authorities

- Explanation of the Territorial Management Agreement: main focus and purpose, strategic objectives, reach and opportunity.

- Initial identification of problems and challenges facing a territory from an institutional perspective.
- Creation of an initial idea of needs and priorities, as well as ongoing and planned actions.
- Complete the initial list of stakeholders with new references.
- Develop a communication plan.
- Develop a road map for carrying out the work and produce a timeline of important milestones including potential participatory and communicative actions to be developed.

Find in this document two different templates useful for this subphase:

- Template #6, work session planning and evaluation form;
- Template #7, sample notice for work session.

c. Initial study of information from all the municipalities.

- Drawing conclusions: shared goals, unique features, and local priorities.
- Initial assessment of the strategic direction of the Territorial Management Agreement, including joint challenges and potentialities.
- Analysis of the viability of governance and the participatory process: difficulties and strengths.

Important aspects

In small municipalities, the greatest level of methodological adaptation takes place at the beginning of the drafting process of a Territorial Management Agreement, which is not the case in metropolitan areas. The human resources available in the different types of authorities vary. Those who hold positions of municipal political responsibility and municipal experts cannot exclusively dedicate themselves to this process, and councillors and mayors sometimes are not remunerated for their work. It is also normal for several municipalities to share experts or services that come from other provincial or regional institutions.

Considering these special circumstances, especially in small rural areas, an initial meeting is required with whomever is in charge of the municipality or rural area and their direct team of experts. The potential reach of the drafting work is established in this initial meeting, and expectations are adapted to the reality of the resources available for the drafting and subsequent execution of the Territorial Management Agreement. This previous research combines formal meetings with less formal interviews adapted to the needs and time availability of the local policy makers and other stakeholders.

SUBPHASE 2. INFORMATION, ANALYSIS, AND TECHNICAL DIAGNOSIS

The following sections contain generic information. The structure is presented in template 2 and can be adapted and adjusted to a local scenario, and therefore to small rural areas or metropolitan contexts.

a. Urban and territorial model

Objective

A correct territorial description must be provided so that the diagnosis and implementation of the Territorial Management Agreement can be carried out.

Key data

For the zonal characterisation of the areas, certain factors such as residential zones, commercial zones, industrial zones, public services, public spaces, agrarian spaces, forestry spaces and green infrastructure need to be defined.

b. Natural and cultural heritage

Objective

Recognise the cultural and natural heritage of the territories as a legacy of their historical processes and identify their capacities and social, economic, and environmental potentialities.

Key data

- Identification of natural protected spaces and their specific legislation.
- Identification of assets of cultural interest (immovable heritage; movable heritage; activities of ethnological interest)
- Recognition of cultural heritage zones (Monuments; Complexes of buildings; Heritage sites)
- Identification of landscape typologies.

c. Population and territory

Objective

Recognition of the differences and trends of territorial demographics so that zonal characterisation and its structural dynamic can be identified.

Key Data:

- Population evolution and forecast
- Population structure (average age, pyramids)
- Parameters of demographic capacity (youth, old age, replacement rates. synthetic index of demographic capacity)
- Main household indicators

d. Economy and society

Objective

Recognition of the differences and trends in activity dynamics and local employment, so that zonal characterisation and its structural dynamic can be identified.

Key data:

- Activity and employment.
- Agroecology and extensive livestock farming
- Labour market and hiring.
- Emerging employment sectors.
- Socioeconomic vulnerability affecting individuals
- Business activity

e. Climate change

Objective

Considering the evidence of the environmental emergency and warnings which will condition the future of settlements, an analysis of climate change in different territories is required

Key data:

- Evolution forecasts from climate groups.
- Evolution of temperatures and rainfall.
- Adaptation measures.

Important aspects

- Increasing stakeholder mapping

Each mapping that we carry out is a snapshot, taken at a specific moment of a specific group of people. Therefore, each one reflects the reality that the group of people involved represent (regarding issues such as logic, opinion and interests) at the moment it is produced.

Therefore, new mappings, or extensions of the earlier ones, should be carried out that can provide other names using the snowball effect, or other visions held by stakeholders that have been identified (for example, on their relevance and their relationships with other agents.)

If possible, holding short interviews with stakeholders who are points of reference in the field is recommended to collect information and facilitate their later involvements in the participatory process.

- Interaction with local actors

Obviously, when a project starts in a territory, it is because different issues have already arisen there. Institutional actors have already been working on issues or in directions that are concurrent with the Territorial Management Agreements, and measures are already in place. These agreements need to be contextualised in these processes, and there needs to be awareness of possible initial reluctance as overlaps and conflicts about competences can occur.

- Documenting works and sectoral processes

The different departments of the institutions that dynamise the process have been setting up their own projects and programmes for decades. Other authorities have also deployed planning processes in the different territories documenting work done and understanding the ongoing processes, as well as recent processes to achieve complementarities and avoid the same actors becoming overwhelmed by being called to too many meetings over short periods of time, often to discuss similar issues.

- Developing the territorial interface – universities- research centres.

As a part of the initial contact with key actors, teams of teachers and researchers linked to a territory or issues which could potentially be applied to the Territorial Management Agreement are contacted.

- Territorial presence

As this stage is focused on the office work that the sectoral analyses require, a presence in the field must also be established and opportunities to make direct contact with individuals and stakeholders in the territory must be found. Informal and formal conversations can bring forward opinions and generate trust.

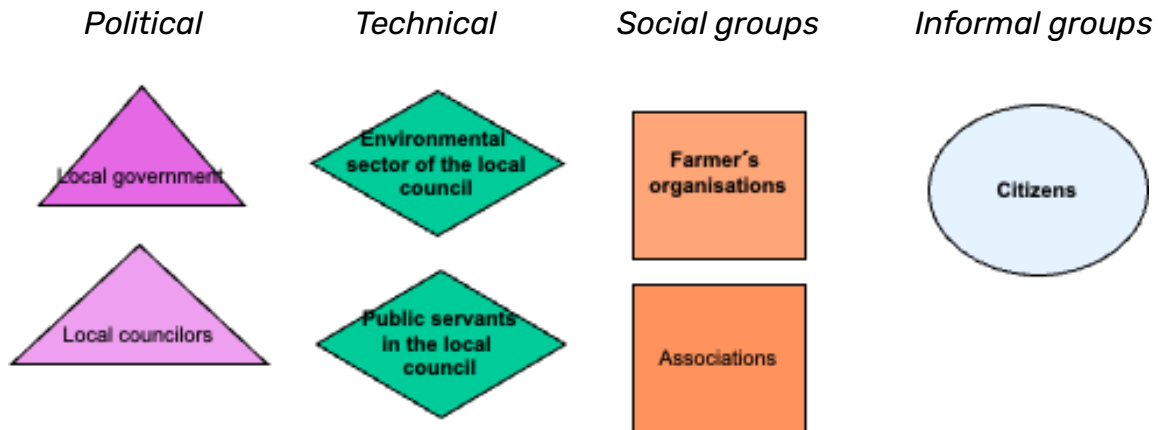
1.2 Step 2. Sociogram - map of actors

According to the initial list of actors described in the pre-diagnosis, the second step of the HuMUS methodology includes the creation of a sociogram to identify and map the main and most important actors involved in soil health. The sociogram includes the following phases.

1: Listing the stakeholders who are considered important during the pre-diagnosis for the participatory process.

2. Differentiating the actors: Firstly, by considering the typology of their fields, for example, political figures (triangle), technical figures (diamond), formal social and economic groups (Rectangle), informal groups (oval). Secondly, the perception of the presence, dimension, and importance of the actors (the size of the forms can be used also for this purpose as in the following figure.

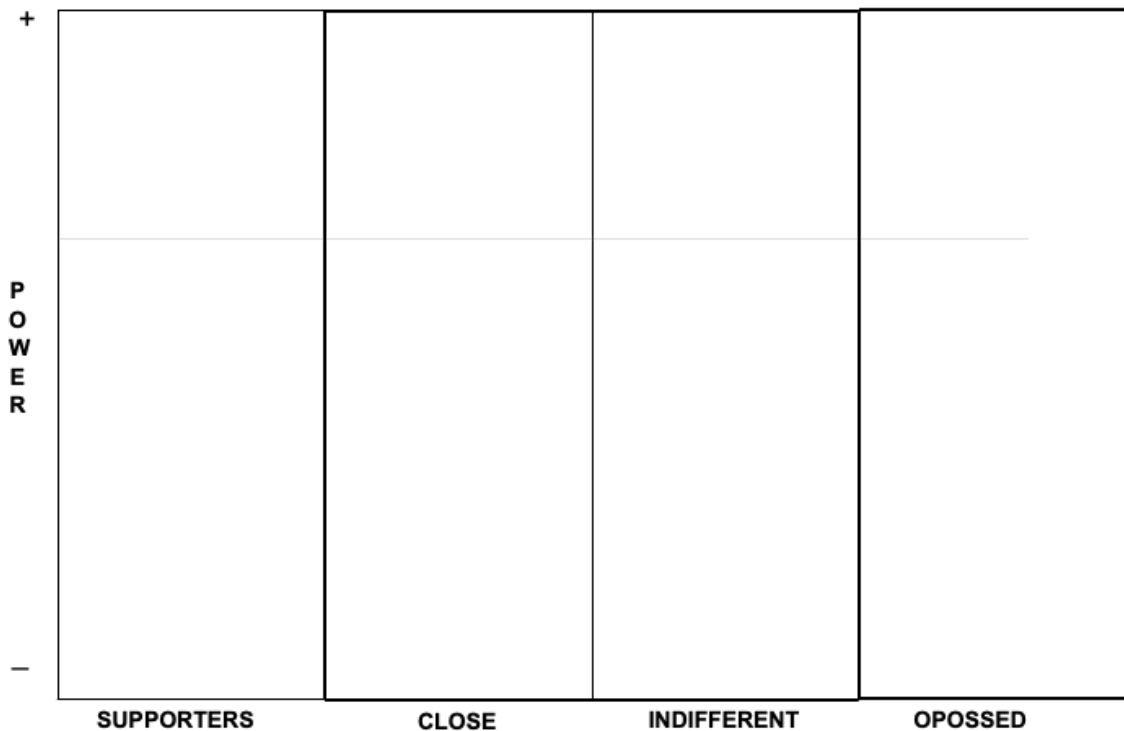
Figure 2. Differentiation of actors.



Source: Self elaboration.

3. Drawing an axis of coordinates: The perception of the group of their power and importance within the context is represented on the vertical axis; the axis is categorised in four sections that represent the perception of the similarity of the actors regarding soil health and the potential for developing a Territorial Management Agreement (stakeholders who are supporters, close, indifferent and opposed) are represented on the horizontal axis.

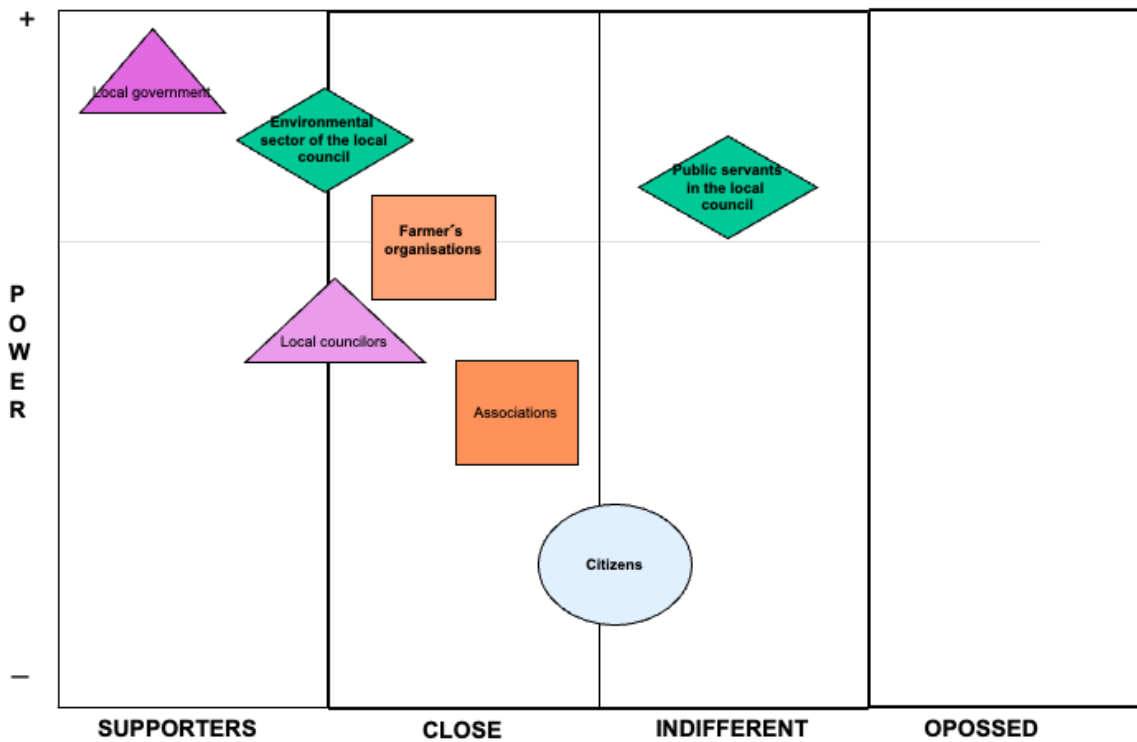
Figure 3. Axes of the sociogram



Source: Self elaboration.

4. Drafting the pre-diagnosis as a team and, if possible, in a participatory manner. The actors defined are located between these axes (in the sociogram). Intermediate positions can be placed between the boxes.

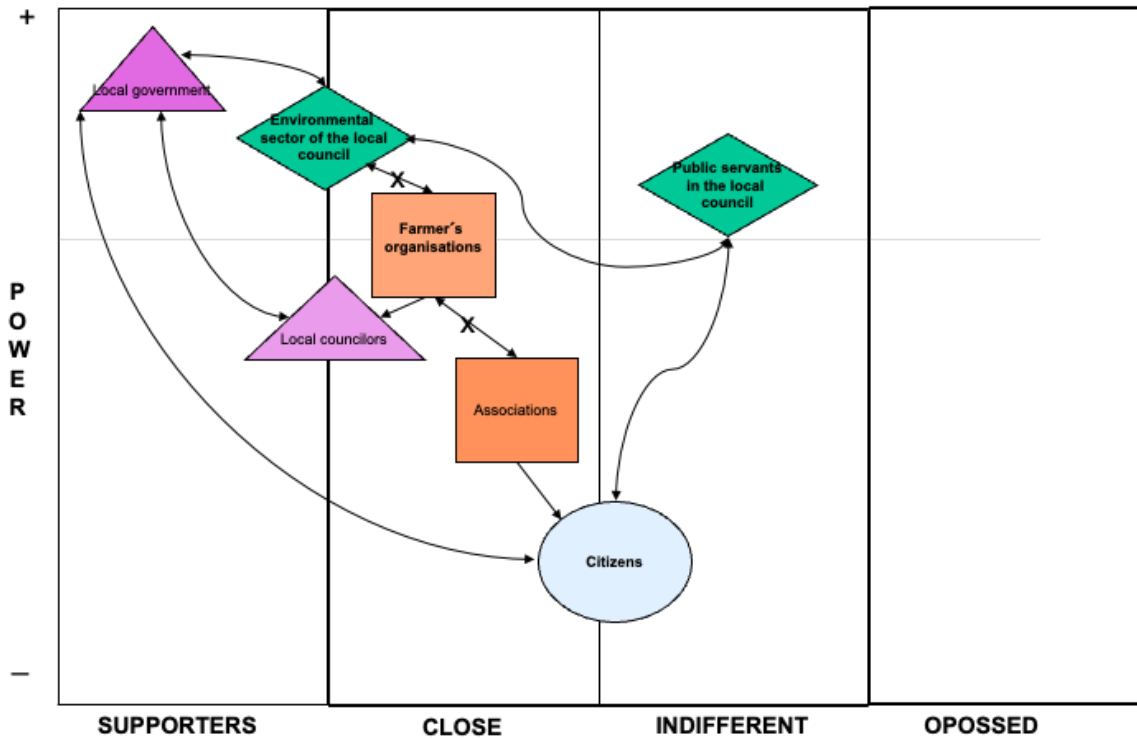
Figure 4. Example of sociogram



Source: Self elaboration.

5. Establishing the perception of the existing relationships between the actors in a participatory manner, using arrows to connect them. These arrows can differentiate between different types of relationships, such as: relationships of greater and lesser intensity (using thickness for this purpose as in the following figure), discontinued relationships (using dotted lines for this purpose as in the following figure), conflictive relationships (using a cross on the arrow, uni (or bi) directional relationships for this purpose as in the following figure).

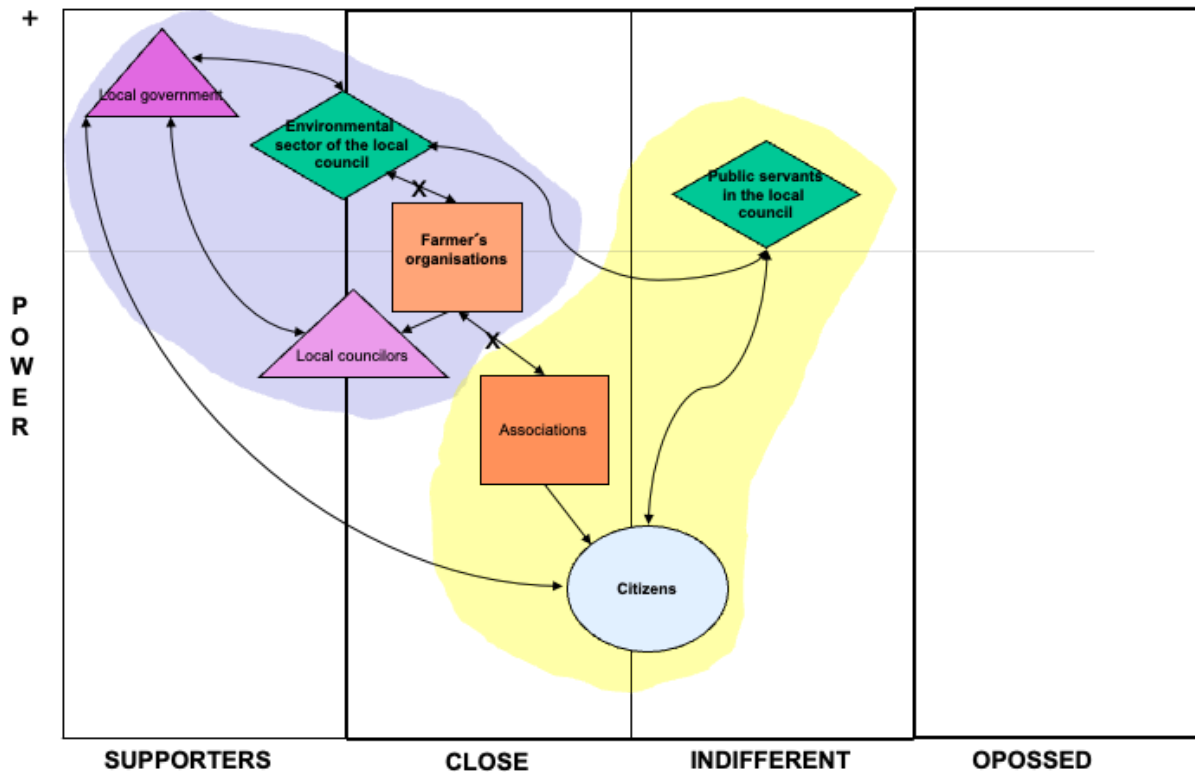
Figure 5. Example of sociogram including existing relationships.



Source: Self elaboration.

6. Finally, identifying potential alliances that show close relationships between a group of actors using colours and/or shapes as in the following figure.

Figure 6. Example of sociogram including potential alliances.



Source: Self elaboration.

Important aspects

The final sociogram produces a wealth of information on both how power is perceived and the relationships and alliances between groups and their affinity to the proposal of a Territorial Management Agreement to improve soil health.

If the sociogram is created in a participatory manner, it is important that the group feels that shared understanding has been produced. The dynamic needs to finish by defining group strategies to bring those who are opposed or indifferent to the project closer to its objectives.

The sociogram is a snapshot (if it were created at another time, it could provide different perceptions), and it belongs to a specific group who have made the sociogram in a participatory manner, (if it was carried out by other groups, it would also be different). It needs to be used as the start of the action and periodically reviewed.

Gender needs to be considered when identifying actors and their roles.

Do not forget to take various pictures of the sociogram.

1.3 Step 3. Participatory diagnosis using SWOT

The diagnostic workshops using SWOT supplement the research process of the pre-diagnosis to establish the starting point on which to base the challenges faced by a territory.

One way in which this technique can be used: The purpose of the process is considered in a clear and concise way. From this starting point, the group can speak about, using brainstorming, the positive or “successful” aspects of the process. These can be internal (Strengths) and external (Opportunities), and they connect this issue with the territory in question.

The ideas that they agree upon can be written on a board or a screen.

Later on, brainstorming is also used to consider the negative or “risky” aspects. These can be internal (Weaknesses) or external (Threats). These must also be considered, and the results of the debate can be added to the board or screen.

As has been shown, after using SWOT, a more in-depth diagnosis can be performed using new questions from a strategic perspective, and these can be the basis for the Territorial Management Agreements: Correct weaknesses, face threats, maintain strengths, and Take advantage of opportunities.

Finally, the diagnostic document and an accountability report must always be handed over to the participants of the process. The whole process needs to be useful and transparent, and this includes handing over this documentation. This fact has to be clear at the beginning of the participatory process and must be completed for every phase.

As a participatory process, the diagnosis becomes a tool of self-diagnosis, as the results it produces are shared by the groups that have created it. This process means that the situation and values of a territory are recognised, and that those participating in the process increase their awareness of the area where the process has taken place.

Find in this document two different templates useful for this subphase:

- Template #6, work session planning and evaluation form;
- Template #7, sample notice for work session;
- Template #8, SWOT matrix.

Important aspects.

The spaces in which and the times when people can (and want to) participate must be considered. It is often better if the space is neutral, it does not need to be from the municipal or regional administration.

How to get people to participate? What is going to challenge them to be a part of this? For example, in an urban setting, improvement of public spaces, peri-urban spaces, and urban agricultural projects can be useful for sparking interest and participation. In a rural setting, the generation of support strategies for agriculture and the commercialisation of products can help encourage participation.

In the operative sphere, working in small groups functions well, and later, in a plenary meeting, the results of this group work can be shared and contrasted by everyone present. In other words, the process is a key factor for the emergence of ideas, and actions are taken within the process to achieve a better result.

Finding a way in which agreements can be made between all parties and how these can be brought together to achieve the participation of different actors, whatever level of power they have. The complexity of actors can grow side by side with the process, because if the number and complexity of actors is greater, the results are more reasonable.

As far as possible, formal validation of the participatory diagnosis from the municipalities promoting the Territorial Management Agreement is recommended. This enables the agreements made at each step to be established.

Training is a key part of the work of the dynamising team. A space for channelling technical training must be created. In the HuMUS project, this is an open access online training programme that will be available from April 2024 for Soil Stewards in humus-project.eu. It helps to prevent the difficulties that exist in technical-methodological areas.

Differences exist between people, but group management and emotional management can be carried out to achieve interesting results. Spaces can be found in which shared positions can be developed. A shared language is needed for results to be obtained.

1.4 Step 4. Territorial Management Agreements

As a result of the information gathered in the previous phases, a second, and in some cases a third, workshop needs to be organised, in which solutions for the protection and restoration of soil health are discussed. The aim of these workshops is to develop full Territorial Management Agreements. Trained Soil Stewards lead these workshops to facilitate the generation of ideas, "thinking outside the box", and the identification of viable solutions and specific actions that can be developed by the stakeholders participating in the process or by other actors that are not present at the workshops. The Territorial Management Agreements can be used to implement solutions used in other areas, and other similar regions can be replicated.

In summary, the final Territorial Management Agreement transforms the conclusions of the public workshop(s) into a pact for soil health, a protocol of intent or a memorandum of understanding, which are binding on all signatories. The Territorial Management Agreement contains a set of local actions, which can be implemented, at least in part, during the lifetime of the Pilot Project and in a possible future living lab that could further develop the co-creation process.

This final phase will be detailed in another document by the HuMUS project in 2024.

2. Work plan templates

The following scheme is intended to serve as a reference in the use of the different templates. It shows which step each template contributes to.

The communication plan and the gender template serve for the entire development of the project.

Step 0	Template #1.- Proposal of Adherence to the European Union's Soil Mission Manifesto
Step 1. Pre-diagnosis	
Subphase 1. Strategic approach. Section a. Preliminary territorial area study	<p>Template #2, pre-diagnosis form</p> <p>Template #3, form to request information from public bodies</p> <p>Template #4, form to collect participatory processes, preliminary diagnoses, plans, and programs</p> <p>Template #5, form for the identification, selection, and control of stakeholders</p>
Subphase 1. Strategic approach. Section b. Initial work sessions with the local authority or authorities	<p>Template #6, work session planning and evaluation form</p> <p>Template #7, sample notice for work session</p> <p>Template #9, communication plan</p>
Subphase 2. Information, analysis, and technical diagnosis	Template #2, pre-diagnosis form
Step 2. Sociogram	

1. Select the stakeholders of the area	Template #5, form for the identification, selection, and control of stakeholders
Step 3. Diagnosis	<p>Template #6, work session planning and evaluation form</p> <p>Template #7, sample notice for work session</p> <p>Template #8, SWOT matrix</p>
Template #9. Communication plan	
Template #10. Gender analysis	

2.1 Template #1- Proposal of Adherence to the European Union's Soil Mission Manifesto

The first step (Step 0) to start the process of involvement and participation in the proposal of Territorial Management Agreements is to invite the political representatives of the municipalities or local entities. According to this, a template is provided to invite the municipal representatives to take a position based on their adherence to the Soil Manifesto, which includes the commitments it entails, suggests the creation of a monitoring commission and proposes to include its dissemination from participatory processes.

[Name of Municipality/City Council] [Date]

Proposal to Join the European Union's Soil Mission Manifesto

Soil is a critical resource for life on our planet, playing a crucial role in food production, biodiversity conservation, climate change mitigation, and overall human well-being. Recognising the critical importance of protecting and sustainably managing this resource, the European Union has established the Soil Mission with the aim of ensuring the health and sustainability of European soils for present and future generations.

Considering the commitment to environmental protection and sustainable development, we propose that [Name of Municipality/City Council] adhere to the European Union's Soil Mission Manifesto.

Proposal:

1. Declaration of Adhesion: The [Name of Municipality/City Council] declares its adherence to the European Union's Soil Mission Manifesto and recognises the importance of preserving and sustainably managing local soils in line with the objectives set by the European Union.
2. Commitments: a. Promote sustainable agricultural practices that protect soil health and encourage biodiversity conservation. b. Implement measures to prevent soil erosion and desertification, including reforestation and proper water management. c. Promote education and public awareness of the importance of soil and the actions citizens can take to protect it. d. Collaborate with other local, regional and national entities, as well as with civil society organisations or the private sector, especially those participating in the HuMUS project, to develop and implement policies and actions for the benefit of the soil.
3. Creation of a Monitoring Committee: Establish an interdisciplinary committee within the [Name of Municipality/City Council] to monitor the progress towards the goals set out in the Mission Soil Manifesto.

4. Outreach and Participation: Regularly inform the community about the actions taken within the framework of adherence to the Soil Mission Manifesto, as well as encourage citizen participation in initiatives related to the protection and sustainable management of soil.

We therefore propose that the [Name of Municipality/City Council] approve this proposal of adherence to the European Union's Soil Mission Manifesto and commit to actively working to protect and preserve this vital resource for present and future generations.

Signature:

[Name of Proposer] [Position/Municipality Representative] [Date]

NOTE: This proposal can be adapted according to the specific needs and procedures established by the municipalities.

2.2 Template #2- Pre-diagnosis form

The territorial pre-diagnosis must include at least the following chapters.

1. STRATEGIC APPROACH

1.1. Preliminary territorial area study

- 1.1.1. Soil type, soil use/vegetation cover, and soil health.
- 1.1.2. Territorial management.
- 1.1.3. Participatory processes.
- 1.1.4. Supra-municipal structures connected to soil health and territorial management.
- 1.1.5. Political make-up of the area.
- 1.1.6. Initial list of stakeholders.

1.2. Initial work sessions with the local authority or authorities

- 1.2.1. Initial identification of problems and challenges facing a territory from an institutional perspective.
- 1.2.2. Initial idea of needs and priorities.
- 1.2.3. Ongoing and planned actions.
- 1.2.4. Initial list of stakeholders with new references.
- 1.2.5. Communication plan.
- 1.2.6. Road map and timeline for carrying out the work.

1.3. Initial study of information from all the municipalities.

- 1.3.1. Conclusions: shared goals, unique features, and local priorities.
- 1.3.2. Initial assessment of the strategic direction of the Territorial Management Agreement.
- 1.3.3. Analysis of the viability of governance and the participatory process: difficulties and strengths.

2. INFORMATION, ANALYSIS, AND TECHNICAL DIAGNOSIS

2.1. Urban and territorial model

- 2.1.1 Residential zones.
- 2.1.2 Commercial zones.
- 2.1.3 Industrial zones.
- 2.1.4 Public services.
- 2.1.5 Public spaces.
- 2.1.6 Agrarian spaces.
- 2.1.7 Forestry spaces.
- 2.1.8 Green infrastructure

2.2. Natural and cultural heritage

- 2.2.1. Natural protected spaces and their specific legislation.
- 2.2.2. Assets of cultural interest.
- 2.2.3. Recognised cultural heritage.
- 2.2.4. Landscape typologies.

2.3. Population and territory

- 2.3.1. Population evolution and forecast.
- 2.3.2. Population structure (average age, pyramids)
- 2.3.3. Parameters of demographic capacity (youth, old age, replacement rates. synthetic index of demographic capacity)
- 2.3.4. Main household indicators

2.4. Economy and society

- 2.4.1. Activity and employment.
- 2.4.2. Agroecology and extensive livestock farming.
- 2.4.3. Labour market and hiring.
- 2.4.4. Emerging employment sectors.
- 2.4.5. Socioeconomic vulnerability affecting individuals
- 2.4.6. Business activity

2.5. Climate change

- 2.5.1. Evolution forecasts from climate groups.
- 2.5.2. Evolution of temperatures and rainfall.
- 2.5.3. Adaptation measures.

2.3 Template #3- Form to request information from public bodies

This form is useful to request for information to local and regional administrations for the pre-diagnosis.

Dear [Name of Relevant Officer or Department],

I am writing to you on behalf of [Your organization or yourself] with an interest in the field of soil health in our community/locality/region as leading partner in our territory of the Humus Project that belong to the EU Soil Mission.

Recognising the critical importance of this issue for environmental sustainability, I would like to solicit information and offer feedback on current or proposed activities of the Humus project.

We understand that local or regional soil health policies and regulations are often aligned with guidelines and standards set at EU level. Therefore, we would like to know more details about how these directives are being implemented at the local/regional level, as well as any additional initiatives that are ongoing to address the specific challenges our community faces in relation to soil health.

In this regard, we would appreciate it if you could provide us with the following information:

- Details on how EU directives or laws related to soil health are being implemented at local/regional level, including specific measures being taken to protect and improve soil quality in our area.
- Information on any specific local or regional legislation that complements or goes beyond EU directives in terms of soil health protection and management.
- Up-to-date data on soil quality in our community/locality/region, including special interest zoning, pollution assessments, degradation trends, and potential impacts on human health and the environment.
- Opportunities for public participation in the formulation of policies and decisions related to soil health, including public consultations, briefings, or any other mechanism for citizen participation.
- Any ongoing local or regional initiative to promote sustainable agricultural practices, soil conservation, or restoration of degraded areas.

We are committed to contributing constructively to the development and implementation of policies that promote soil health and environmental sustainability in our community/locality/region. Therefore, any additional information you can provide or any opportunity to participate in public consultations or decision-making processes would be greatly appreciated.

We thank you in advance for your attention to this request and look forward to hearing from you. If there are any specific procedures we need to follow to access the requested information or to participate in public consultations, we would appreciate it if you could let us know.

We remain at your disposal for any further clarification you may need and look forward to collaborating on this important issue.

Kind regards

[Your Name]

[Your organisation (if applicable)]

[Your Contact Information]

2.4 Template #4- Form to collect participatory processes, preliminary diagnoses, plans and programs

This is a form to generate a collection of previous participatory experiences carried out and currently underway in the pilot case, including: pre-existing analyses and diagnoses that help to approach the state of the situation in relation to soil health and territorial management; and plans and programs related to soil health and territorial management.

Title of the participatory process, diagnosis, plan or program			
Promoter			
Responsible for implementation			
Typology	Participatory Process	Diagnosis	Plan or Program
Date			
Country/ Region/ Municipality			
Duration			
Main challenges			
Main objective			
Specific objectives			
Stakeholders:			
- Politicians			

- Administration	
- Academy	
- Enterprises	
- Civil Organizations	
- Other	
Direct impact on soil	
Indirect impact on soil	

2.5 Template #5- Form for the identification, selection, and control of stakeholders

This form includes the identification of stakeholders according to the level of involvement in soil health and territorial management agreement.

It also includes a register to control their participation in the process.

A. Identification of STAKEHOLDERS	
Title (and name) of the stakeholder	
Level of involvement in soil health and territorial management	
What are the main interests of this stakeholder in relation to soil health and territorial management?	
Can the stakeholder influence the soil health and territorial management in the pilot case?	
Can the stakeholder participate in the Territorial Management Agreement?	
What is the most effective communication strategy for this stakeholder?	
Stakeholder selection	
Is the stakeholder relevant for the process? (YES/NO)	
Register of information	

Invitations to participatory sessions

Progress reports sent to the stakeholder

Stakeholder's answers

2.6 Template #6- Work session planning and evaluation form

This is a form to plan and evaluate the working sessions at two key moments in the process:

- Step 1: PRE-DIAGNOSIS. SUBPHASE 1: STRATEGIC APPROACH. B) Initial working sessions with the local government(s)
- Step 3: PARTICIPATORY DIAGNOSIS. Workshops on the collective construction of the SWOT matrix.

1. Preparation

For what?. (Context of the session)	- What do you hope to accomplish in the session?
Who? (participants)	- How many people are going to participate? Age and gender? - Is there a brief presentation of all the participants? - Have participants' expectations been identified?
What? (Contents)	- What are the contents of the session? - Do the contents correspond to the previous experiences and expectations of the participants?
How? (Methods/Techniques/Activities)	- Which methods/techniques are appropriate? - What are the activities that will be developed during the session? - What are the conditions that could facilitate the application of participatory methodologies?
With what? (means of support)	- Materials needed (flip charts, markers, cards, projector, etc.) - Other tools
When? (date and time)	- Session duration. - Duration of each of the sections of the session. Recommended: min. 1h - max. 3h
Where? (place)	- Is the chosen location suitable for the session? - Does the venue have spaces available to work in smaller subgroups? - Do you have the necessary equipment for the comfort of the session (heating, ventilation, lighting...)?

2. Execution

Introduction	Its purpose is to guide and motivate the attendees, create an atmosphere of trust, collect difficulties (uncertainties) and expectations, and present the expected objectives.
Development	<ul style="list-style-type: none">– Clear explanation of what is expected from the session and the content to be worked on.– Divide into operational groups according to the number of participants and help the participants to develop the methodology.
Conclusions	<ul style="list-style-type: none">– Sharing the conclusions with all the group.– Review of conclusions.

3. Evaluation

Resources	Good / average / bad
Activities	Good / average / bad
Results	Good / average / bad
Impact	Good / average / bad

2.7 Template #7- Sample notice for work session

A model to invite stakeholders is offered in order to facilitate the communication of information and to register the session's information.

SESSION N°	
<i>Session title:</i>	
General and Specific Objectives	
Contents to be discussed	
Activities	
Methodology	
Timing	
Resources	
Place	
Hour	

2.8 Template #8- SWOT matrix

This matrix enables soil health and territorial management to be defined and contextualised in any pilot case using four analytic frameworks: Strengths, Weaknesses, Opportunities, and Threats.

Strengths	Weaknesses
Opportunities	Threats

2.9 Template #9- Communication plan

This form is a basic description of the communication plan that needs to be developed in order to achieve a successful participatory process.

Title of the pilot case	
Coordinating entity of the	

Analysis
Brief analysis of the entity itself and its communication activities apart from the HuMUS project.
<i>Example: Almost weekly presence on social networks. There is an outdated website.</i>
General objective and specific objectives (if any)
Identify what you want to achieve with the communication activities that you want to develop. The more clearly it is defined, the better the communication success can be evaluated later. That is why the objectives have to be quantified, in order to be able to measure them and know to what extent they are achieved and be realistic and achievable.
Public
Determine the targets of the proposed communication plan, as this conditions the channels to be used and the message to be transmitted.
<p><i>Example:</i></p> <p><i>Non-university children and young people</i></p> <p><i>Retired owners of agricultural or forestry plots</i></p> <p><i>Farmers or people whose main activity is not agriculture but manage agricultural or forestry plots</i></p> <p><i>Professional farmers</i></p>
Message

Indicate what idea you want to transmit. Identify the specific messages considering the audiences and contents of the communication. Identify the communication style: informal, specialized for certain sectors, etc.

Example:

Generating hope and social cohesion around land stewardship

To provide a realistic vision to show the way to reorient existing productive activities towards a more sustainable model without incurring in a social conflict.

Generate dialogue that leads to the compatibility of development and economic prosperity with the care and protection of the soil, the landscape and its biodiversity.

Budget

Indicate the detail of the budget for communication.

Media Plan

Indicate the channels through which communication will take place. At this point it is important to bear in mind that the means used will determine and condition the information to be provided.

Example: The main means of communication will be digital and audiovisual, after surveying the social media applications used mainly by age range and other forms of network presence.

Planning of communication actions

Criteria to define communicative actions

Take into account the communication actions necessary to achieve the objectives adequately, consider the needs to maximise the success of each action in the pilot case and link to the schedule of actions or participation program.

Example:

Action 1: Training course for technicians from local authorities.

Previous steps: Inform the management the head of department in advance to clear the time slot of responsibilities and guarantee attendance.

Action 2: Participation Workshop

Previous steps: Visible call in public spaces well in advance, invitation by email or through group managers, publication on social networks, etc.

Action 3: Dissemination about the causes of environmental problems that affect soil health.

Previous steps: preparation of infographics, videos.

Action 4: Enhancement of traditional knowledge in agricultural management with an impact on soil.

Previous steps: List of relevant traditional activities, search for representatives of each one, previous contact, request permission to interview, scheduling, editing of the material, publication.

Action 5, 6...

Implementation and evaluation

For implementation and, fundamentally, subsequent evaluation, a non-exhaustive list of indicators is proposed.

Number of expected impacts in local, regional or national press

Radio	
Television	
Newspapers	
Magazines	
Digital Media	
Offline and online advertising	
Other	

Number of posts on social media	
Twitter - X	
Facebook	
YouTube	
Instagram	
Tik Tok	
Other:	
Number of outreach and awareness-raising materials	
Newsletters	
Short videos for social media	
Infographics	
Section/microsite within the website of the entity/s	
Number of news/publications on the website of the entity(ies)	

2.10 Template #10- Gender analysis

Integrating the gender perspective into a project is crucial to promote equity and social justice, ensure more meaningful results, or prevent negative impacts. Providing a project with a gender perspective is essential for its success and its contribution to equality.

This form serves as an application for the entire development of the project and aims to be a tool for transversal application, to make people reflect, at each phase, on the implications of considering egalitarian approaches and the consequences of their absence.

Title of the pilot case	
Coordinating entity of the pilot case	
Describe how gender perspectives have been incorporated or planned to be incorporated in the different phases of the pilot case	
1.- In the pre-diagnosis phase of the pilot case: describe the existing gender gaps in the project's scope of intervention (example: lack of women in decisions making positions, lack of women representative, lack of public services to conciliate and favour participatory processes)	
2.- In the sociogram phase of the pilot case: describe the gender perspective in the identification of actors and their roles and positions.	
3.- In the implementation of the participatory process: describe whether specific positive gender measures are considered.	
<i>Example: Explore and work on roles socially assigned to men and women and on the equal participation of men and women in the workshops.</i>	
4.- Describe how the gender perspective is integrated in relation to the structure and human resources of the pilot case.	

Actions and expected results related to gender strategies in the pilot case

Indicate the proposed actions and the expected results. Mention the results of the **pilot case** that may be related to the reduction of the gender gap (e.g. training, training for women, or outcomes related to achieving equal conditions, etc.). Include one result per row (add as many rows as needed).

Action

Result

Expected obstacles.

Indicate the circumstances that are expected to hinder the achievement of the expected results.

3. Glossary

Agroecology: An approach to agriculture that integrates ecological, economic, and social aspects to create sustainable and resilient agricultural systems, fostering biodiversity and natural cycles.

Bioregional Territories: Areas defined by natural and ecological criteria, such as watersheds, landscapes and biological characteristics, rather than political or administrative boundaries, promoting integrated and sustainable management of resources.

Brainstorming: A group creativity technique that encourages the generation of a large number of ideas in a short period of time, in order to solve a specific problem or explore opportunities for improvement.

CAME Analysis: A method that complements the SWOT analysis, focusing on the strategies to be followed to Correct Weaknesses (C), Face Threats (A), Maintain Strengths (M) and Exploit Opportunities (E).

Circular Economy: An economic model that seeks to maximise the reuse, restoration and recycling of products and materials, minimising the generation of waste and the consumption of resources.

Climate Change: A global phenomenon that involves significant changes in weather patterns influenced by human activities such as the emission of greenhouse gases, with direct impacts on land management and soil health.

Climate Change Adaptation: The process of adjustment in human or natural systems in response to current or expected climate stimuli and their effects, in order to moderate harms or take advantage of beneficial opportunities.

Community Resilience: A community's ability to anticipate, prepare for, respond to, and recover from adverse effects, such as natural disasters or economic crises, strengthening its ability to adapt and survive.

Desertification: The process of land degradation in arid, semi-arid and dry sub-humid areas, resulting from several factors, including human activities and climatic variations.

Ecological Footprint: A measure of the environmental impact generated by human demand on the Earth's natural resources, expressed as the amount of productive land needed to sustain such consumption.

Ecosystem Services: Benefits provided by ecosystems to humans, including provisioning (such as food and water), regulation (such as regulating climate and disease), support (such as pollination and nutrient cycling), and cultural (such as spiritual and recreational benefits).

European Union Soil Mission 'A Soil Deal for Europe': A European Union initiative aimed at improving soil health through sustainable soil management practices. Its objectives include reducing desertification, conserving soil organic carbon stocks, halting soil waterproofing, enhancing soil restoration, preventing erosion, and improving biodiversity and soil literacy.

Good practices: Examples or success stories that serve as a reference for the implementation of effective strategies in soil health and territorial management.

HuMUS methodology. The "HuMUS Methodology" represents a holistic and integrative approach within the "Healthy Municipal Soils" project to support the co-implementation of solutions for soil regeneration and territorial management, underlining the importance of community collaboration, environmental sustainability and adaptability to specific local contexts.

It is based on the following key aspects:

1. **Participatory Approach:** The Humus Methodology places a strong emphasis on the participation of the community and local actors from the initial stages of the project. To ensure inclusive management and decision-making, it seeks to engage a wide range of stakeholders, including policymakers, municipal technicians, civil society, the private sector and academics.

2. **Sustainable Soil Management:** The main objective is to promote practices that improve soil health and ensure its long-term sustainability. This includes implementing regenerative agricultural practices, managing natural resources sustainably, and protecting biodiversity.

3. **Methodological Phases:** Although the document provides specific details on stages such as the pre-diagnosis, sociogram, participatory diagnosis and territorial management agreements, the Humus Methodology follows a structured process that begins with the understanding and evaluation of the current state of the soil and territorial resources, followed by the planning and execution of strategic actions based on the collaboration and consensus of the actors involved.

4. **Education and Training:** An important component of the methodology is the education and training of local actors, especially in roles such as Soil Stewards, who lead and facilitate the territorial management process. This involves providing the tools, knowledge and competencies necessary for the effective implementation of sustainable land management practices.

5. **Tools and Resources:** The methodology uses various tools and resources, including territorial studies, stakeholder mapping (sociogram), and participatory workshops or SWOT analysis to facilitate informed decision-making and strategic planning.

6. **Adaptability and Flexibility:** It recognises the diversity of territorial contexts and the need to adapt the approach to specific local conditions, allowing

flexibility in its implementation and the possibility of adjustments according to the needs and results of the participatory process.

Living Lab: An approach that allows the experimentation and co-creation of innovative solutions in real-world conditions, promoting the active participation of citizens and other stakeholders in improving soil health.

Natural and Cultural Heritage: A set of natural and cultural resources that possess significant value to a community or society, including landscapes, biodiversity, monuments, traditions, and cultural practices.

Organic Agriculture: Agricultural practices that promote a sustainable production system, avoiding the use of synthetic fertilisers and pesticides, to maintain and improve the health of the soil, ecosystem, and people.

Organic District: A territorial management model that promotes organic agriculture and agroecology as the basis for the sustainable management of local resources, integrating public and private policies on food and agriculture.

Participatory Action Research (PAR): A research approach that engages participants in the research process to address concrete problems and develop practical solutions, focused on improving soil health and land management.

Participatory Diagnosis: A collaborative process through which local actors jointly analyse the situation of their territory, identifying problems, opportunities and strategies for action.

Participatory Methodology: An approach that integrates local actors into the decision-making process, ensuring their active participation in each of the phases of the project.

Participatory Planning: A process that involves diverse stakeholders in decision-making and the development of action plans such as Territorial Management Agreements, ensuring that the needs and expectations of the community are considered.

Pre-diagnosis: Preliminary analysis that allows the identification of the initial conditions of a territory or community, enabling zonal knowledge and facilitating the planning of strategic actions for the participatory process.

Public Policies for Soil: A set of guidelines and regulations established by government authorities to manage and protect soils, ensuring their sustainable use, conservation and custody.

Quadruple Helix: A cooperation model that includes four types of actors: public authorities, industry, academia and citizens, to foster innovation and address complex challenges such as soil health.

Sociogram: A tool that allows you to map and visualise the relationships between the different actors involved in a process or project, highlighting their level of influence and the connections between them.

Soil Erosion: The process of erosion and displacement of the soil or topsoil, usually caused by water, wind, or human activities, which can have a significant negative impact on the productive capacity of the soil and the health of the ecosystem.

Soil Manifesto: Document that establishes principles and shared commitments for the protection and sustainable management of soil, promoting their adoption by local administrations.

Soil Restoration: A set of actions aimed at recovering the structure, function, and diversity of soil ecosystems that have been degraded by human activities or natural phenomena.

Soil Sealing: The process by which the soil cover is modified with impermeable materials (such as asphalt or concrete), limiting the soil's organic ability to absorb water and perform other ecological functions.

Soil Stewards: Individuals or groups committed to the protection and sustainable management of soil, acting as facilitators in participatory and territorial management processes.

Stakeholders: Individuals or groups with an interest or influence on the outcome of a project, policy, or decision. It includes the local community, non-governmental organisations, government entities, private companies, and others.

Strategic Planning: A process aimed at defining the long-term direction of an organisation or territory, establishing general and specific objectives, and determining actions and resources necessary to achieve them.

Sustainable Land Management: Practices and policies aimed at managing land use in a way that conserves its ecosystem functions and services over time, without compromising the ability of future generations to meet their needs.

Sustainable Transition: The process of change towards development models and practices that are environmentally sustainable, economically viable and socially just, ensuring the well-being of present and future generations.

SWOT (Strengths, Weaknesses, Threats, Opportunities): A shared strategic analysis tool that allows you to evaluate the current and future situation of a project or territory, facilitating decision-making.

Territorial Diagnosis: Comprehensive evaluation that considers physical, social, economic and environmental aspects of a differentiated territory to identify its characteristics, potentialities, limitations and conflicts that make it unique.

Territorial Governance: A decision-making framework where multiple actors interact and collaborate in the management of a territory, based on the principles of participation, transparency and consensus.

Territorial Management: The process of planning and administration of a territory that seeks to promote its sustainable development through the efficient use of its resources and generally the active participation of its actors.

Territorial Management Agreements: is a type of pact between different Quadruple Helix actors and stakeholders in a specific geographical area, who share a common vision and objectives for the soil health, based on the principles and practices of sustainability. The actors and stakeholders may include local communities, farmers, businesses, civil society organisations, public authorities, and others. The agreement defines the roles, responsibilities, rights and obligations of each party, as well as the actions, indicators and monitoring mechanisms to achieve the desired outcomes. The objectives of the agreement are to enhance the social, economic, and environmental well-being of the inhabitants of a certain area, by promoting cooperation, innovation, participation, and accountability. The essence of the agreement is to establish a common pathway with reciprocally supporting actions engaging the signatories towards a shared goal.

Urban and Territorial Model: Conceptual or physical representation that differentiates the spatial, structural, and functional characteristics of an urban or territorial area, establishing lines of identification based on its organisation, land use, or planning.