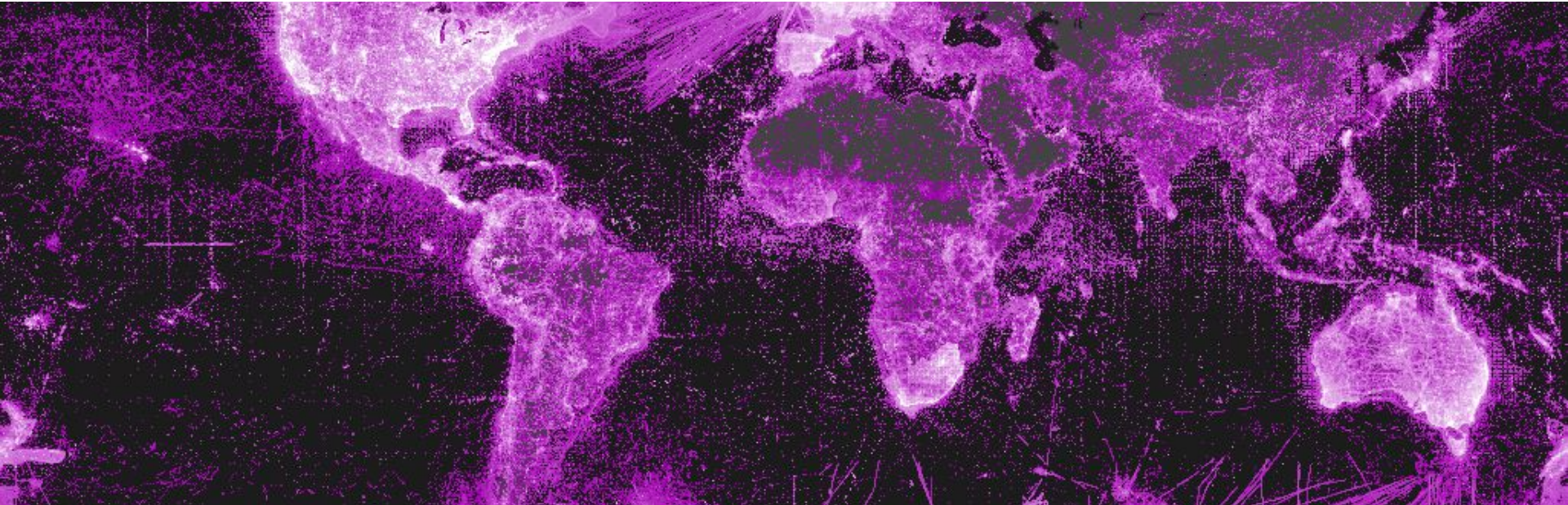




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2020 NORTH AMERICA REGIONAL MEETING

David Jennings, iDigBio Node Manager, GBIF Nodes Regional Representative North America

Carole Sinou, Canadensys Node Manager, GBIF Deputy Nodes Regional Representative North America

Abby Benson, United States Node Manager, OBIS Node Manager

David Bloom, Vertnet Node Manager

Sharon Grant, Field Museum of Natural History IPT Manager

DAY 1 - 05 MAY 2020

AGENDA







- **Session 1 - Today (5 May)**
 - **Welcome & introductions**
 - **Protocols & norms**
 - **Meeting objectives**
 - **Updates from the North America region**
 - **Updates from the GBIF Secretariat**
 - **GBIF Global Nodes Strategy**
 - **Regional Engagement Strategy**
 - **Vision for the Future**
- **Session 2 - Tomorrow (6 May)**
 - **Questions & Answers**
 - **Discussion**

PROTOCOLS & NORMS

- Sessions are being recorded
- Please keep yourself muted when not speaking
- Use Chat for questions or raise your hand via the Participants tab
- We have created a North America Slack workspace for further discussion

Participants (5)

AB	Abby Benson (Me)	 
	David Jennings (Host)	 
D	davidbloom	 
CS	Carole Sinou	 
S	Sharon	 

Raise Hand      

yes no go slower go faster more

Invite Unmute Me

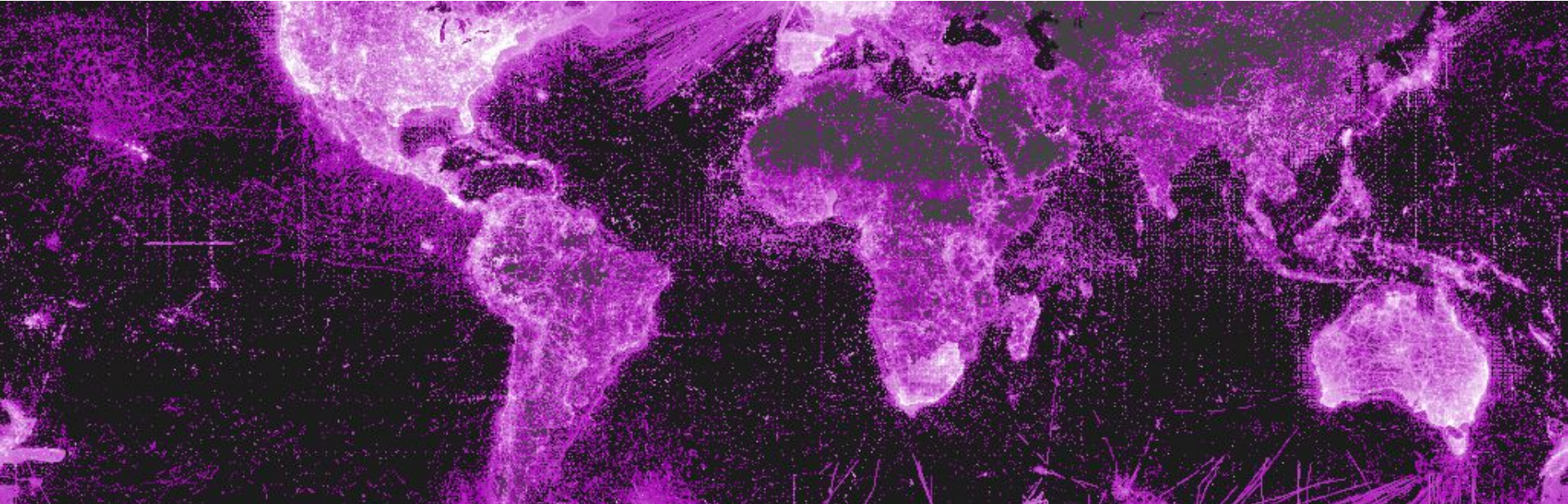
MEETING OBJECTIVES

- Bring together representatives from GBIF Nodes, IPT installations, and other organizations/ stakeholders in North America
- Inspire collaboration and discussion of shared goals, challenges, and opportunities
- Principal outcomes are updates from the represented organizations and development of regional strategies/goals for the coming year
 - Meeting summarized via Regional Report



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Updates from the NA Region

GBIF NETWORK – NORTH AMERICA REGION

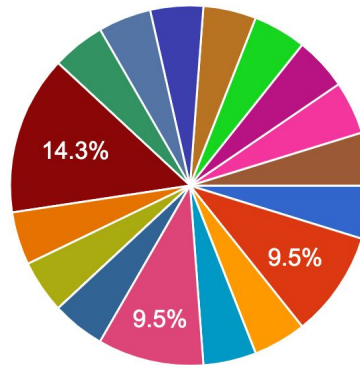
- 
- A map of North America, including Alaska, Canada, and Mexico, with the landmasses highlighted in a solid green color. The surrounding oceans and other landmasses are shown in a light gray color.
- Biodiversity Heritage Library
 - **Canada**
 - Canadensys
 - Consortium for the Barcode of Life
 - Discover Life
 - Encyclopedia of Life
 - iDigBio
 - Integrated Taxonomic Information System
 - International Barcode of Life Consortium
 - Natural Science Collections Alliance
 - NatureServe
 - Society for the Preservation of Natural History Collections
 - Specify Collections Consortium
 - Taxonomic Databases Working Group
 - **United States**
 - VertNet

PRE-MEETING SURVEY

Please select the GBIF Participant node or other organization for which you are completing this survey:

21 responses

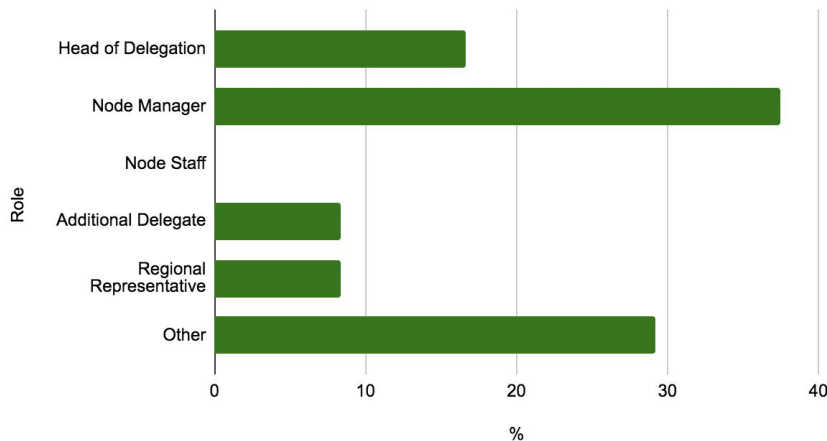
17 responses representing 9 of the 17 regional nodes, and 8 other institutions



- International Barcode of Life Consortium
- Mexico
- Natural Science Collections Alliance
- NatureServe
- Society for the Preservation of Natural...
- Specify Collections Consortium
- Taxonomic Databases Working Group
- United States

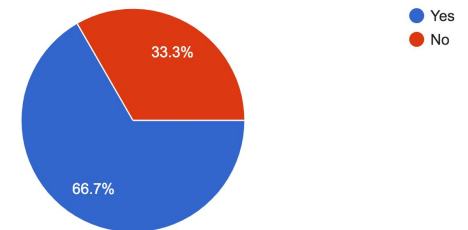
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Role within the North American region



Do you host an IPT?

21 responses



PRE-MEETING SURVEY

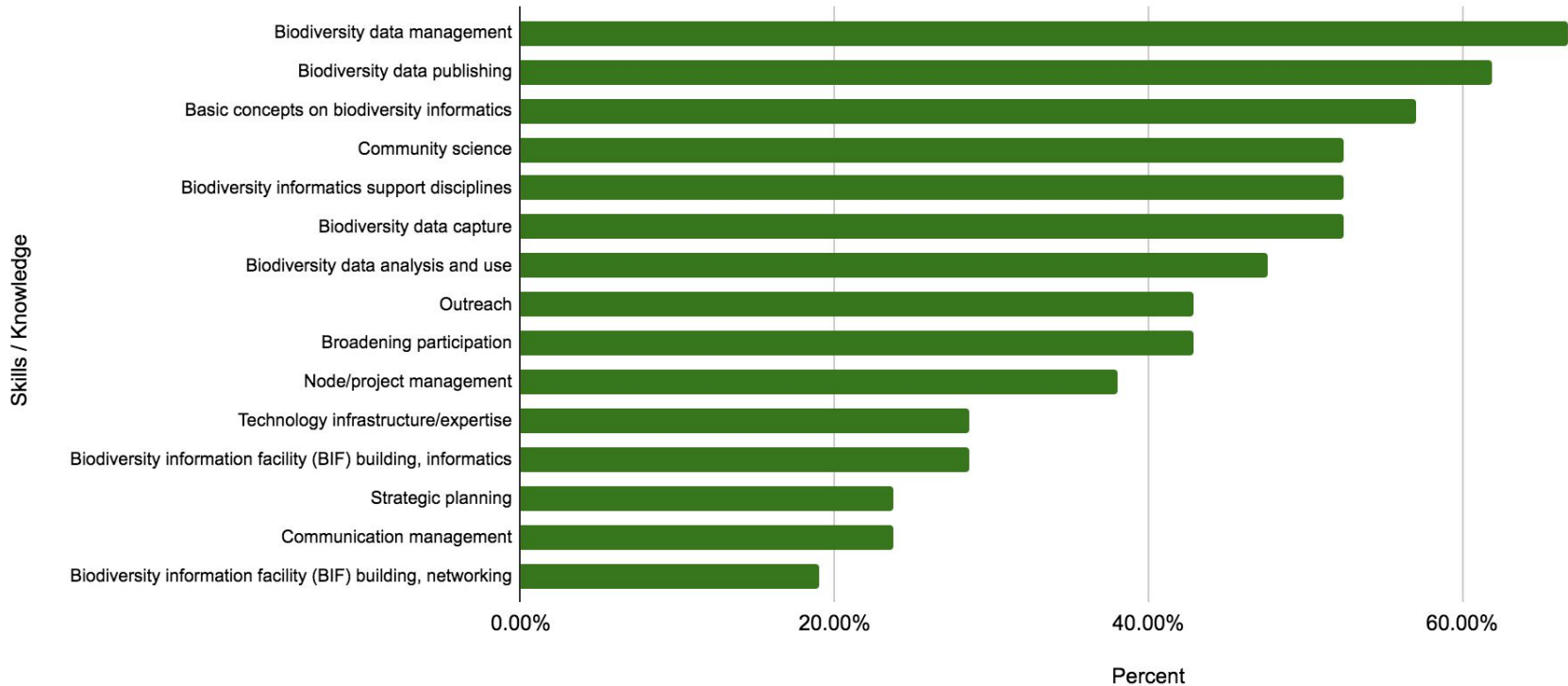
Involvement within GBIF community:

- Alliance for Biodiversity Knowledge
- Global Collections Catalog
- GBIF webinars
- Grant proposals (CESP, BID, ...)
- Living Atlases Community
- Data provider and user
- GBIF Forum and social media
- Node steering group, budget committee
- Translation team
- Community mentors

SKILLS IN THE COMMUNITY

What can you share with others within the North American biodiversity community?

Skills / Knowledge



SKILLS IN THE COMMUNITY

More than half of responders have skills in:

- Biodiversity informatics support disciplines (52.4%)
- Basic concepts on biodiversity informatics (57.1%)
- Biodiversity data capture (52.4%)
- Biodiversity data management (66.7%)
- Biodiversity data publishing (61.9%)
- Community science (52.4%)

But we lack expertise in:

- Strategic and communication planning
- Biodiversity information facility (BIF) building, networking

PRE-MEETING SURVEY

Needs from Biodiversity Community in NA:

- Collaboration and coordination
- Knowledge transfer
- Capacity enhancement
- Commitment to a goal
- Use cases
- Better transparency and communication (data flows, who does what)
- Tools development
- Standardization of practice
- Involvement in university and colleges curriculum
- National and regional funding planification

PRE-MEETING SURVEY

What should we achieve together in NA?

- Centralized data publishing
- Training
- Joint projects and vision
- Better communication within the region and sharing to stakeholder groups
- Filling the data gaps through targeted mobilization of data
- Improving Darwin Core for specific fields (ex. ecology)
- North American (including Mexico)/continental GIS view of biodiversity
- Promote the value of digitized biodiversity data to researchers and the public
- Better coordination between all players

PRE-MEETING SURVEY

STRENGTHS

- Efficiency & experience
- Relevance & recognition
- Strong community support
- Good publication workflow
- Autonomy
- Biodiversity data accessibility
- Training & development

INTERNAL

WEAKNESSES

- Coordination
- Sustainability (IT support, staffing, funding)
- Lack of freedom/agility
- Communication
- Data quality
- Integration between type of data
- Awareness & interest

HELPFUL

OPPORTUNITIES

- Coordination
- Collaboration & integration
- Local approach
- Data quality improvement
- Learn from other fields & communities
- Broaden audience
- Liberate “dark data”

EXTERNAL

THREATS

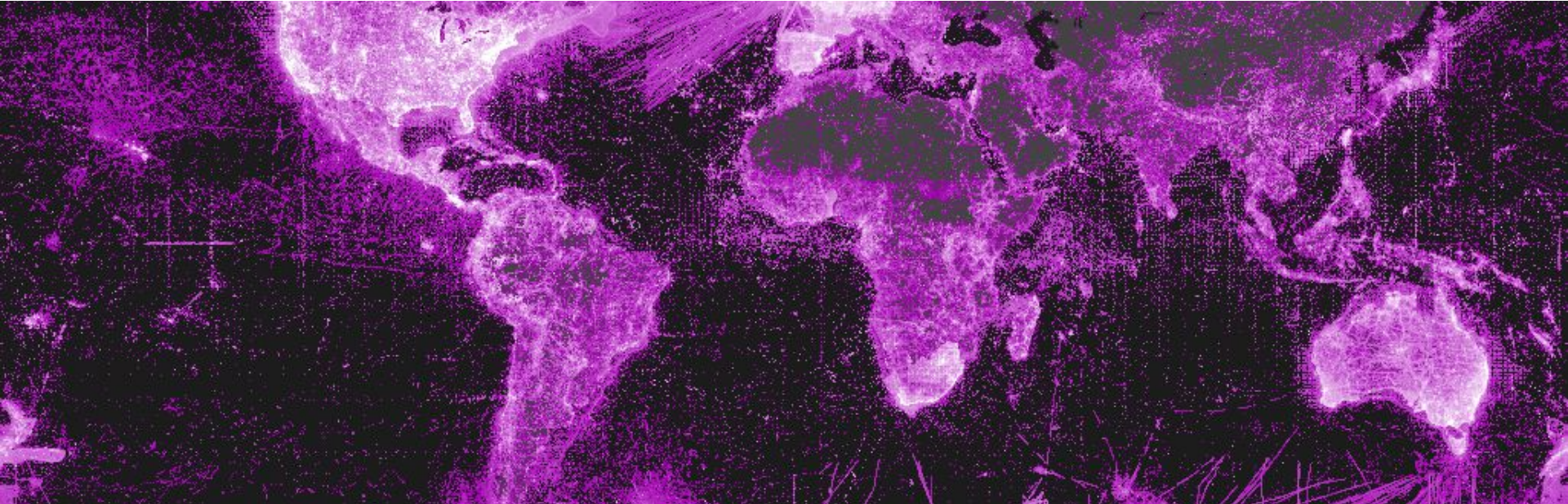
- Staffing (difficulty to keep IT staff)
- Economical uncertainty
- Cyberinfrastructure maintenance
- National / global disinterest in science
- Dependence on governmental / institutional funding
- Battle for leadership

HARMFUL



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Updates from the Secretariat

GBIF COMMUNITY WEBINAR

- GBIF hosted a community webinar on 28 April: “Framing the 2020 virtual regional meetings”
- Goal was to provide updates from the Nodes Committee and the GBIF Secretariat as background for the regional meetings
- Agenda, presentations, and recording:
<https://www.gbif.org/event/1fP9076vVBQUhjBohWJjEL/>

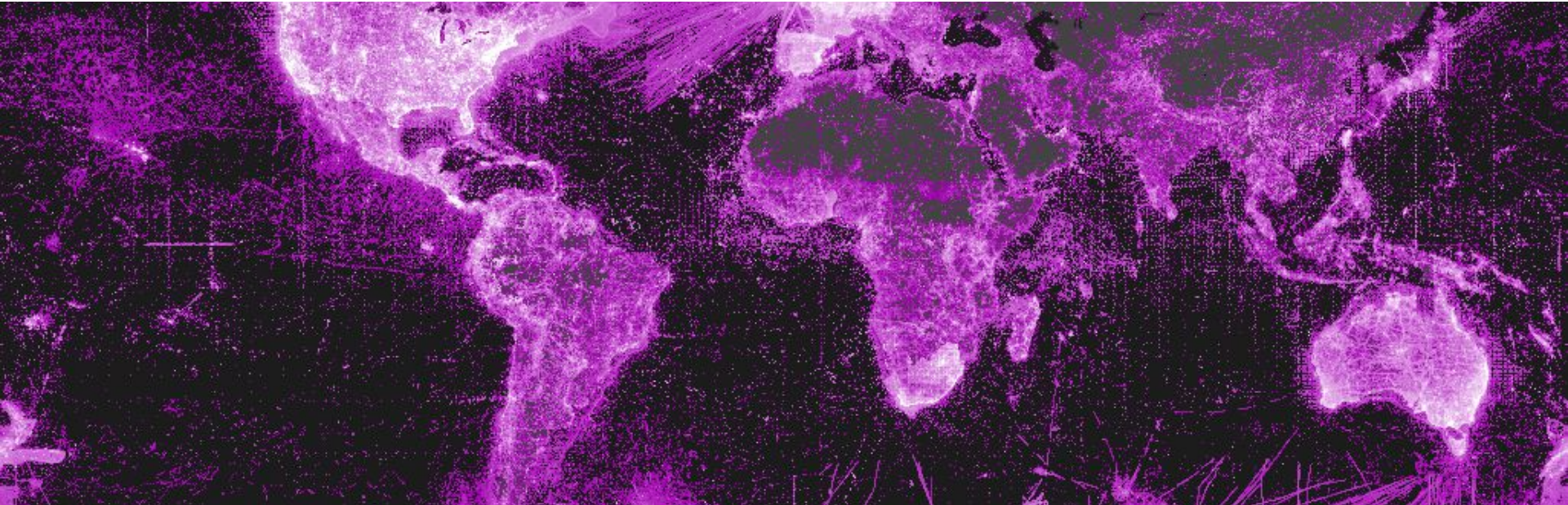
GBIF COMMUNITY WEBINAR

- Introducing the 2020 virtual regional meetings—André Heughebaert, Nodes Committee Chair
- Updates on GBIF planning in response to the COVID-19 pandemic—Joe Miller
 - GBIF 20-year Review:
<https://www.gbif.org/news/1QfpUIGByxjqBktiYAfyIK/>
- Status of plans for virtual regional meetings —Mélanie Raymond
- Regional statistics on GBIF data mobilization—John Waller
- Informatics update—Federico Mendez
- Update on projects and participation—Tim Hirsch



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GBIF Global Nodes Strategy

2020-2021

GBIF GLOBAL NODES STRATEGY 2020-2021

- Strategic objectives developed by the Nodes Committee with support of Secretariat under supervision of Node Steering Group (NSG)
- Regional reports will show progress against these strategic objectives
- NSG will assess progress towards these strategic objectives at the 2021 Global Nodes meeting (GB28)
- All global objectives are of equal importance, and regions are welcome to add their own objectives

GBIF GLOBAL NODES STRATEGY 2020-2021

Nodes strategic objectives are linked to GBIF Strategic priorities:

1. Investigate Regional coordination

- Priority 1: Empower Global Network

2. Improve data relevance

- Priority 3: Fill Data Gaps
- Priority 4: Improve Data Quality
- Priority 5: Deliver Relevant Data

3. Explore new data types

- Priority 3: Fill Data Gaps

4. Lower technical threshold

- Priority 2: Enhance Biodiversity Information Infrastructure

5. Strengthen our network

- Priority 1: Empower Global Network

6. Redefine participation

- Priority 1: Empower Global Network

1. INVESTIGATE REGIONAL COORDINATION

- GBIF regions rely on voluntary efforts of Node Managers and Regional Representatives
- Many regions desire investigation of more structural coordination of Regions
- Nodes are encouraged to:
 - Investigate possible forms of regional coordination
 - Define possible tasks under this coordination
 - Assess implications in terms of governance and relation with the Secretariat
 - Identify potential alignment with other regional initiatives
 - Suggest possible funding schemes
 - Evaluate relevance of regional cloud-based IPTs

2. IMPROVE DATA RELEVANCE

- Some biodiversity data are more relevant to science (and therefore decision making) than others
- Collections specimens and long-term monitoring surveys are more relevant than opportunistic unvalidated observations
- Nodes are encouraged to:
 - Assess users needs
 - Focus activities and resources on data that matters “most” to users: complete and relevant data

3. EXPLORE NEW DATA TYPES

- Occurrences data and Checklists are central to our data mobilization activities
- Nodes often encounter other kinds of emerging data (e.g., sampling events, abundance data, camera traps, DNA sequences, etc.)
- Publishing these new data comes with challenges as standards and tools probably need to adapt
- Nodes will report on these new data types as well as DwC evolutions and/or extensions necessary to publish them

4. LOWER TECHNICAL THRESHOLD

- GBIF offers wonderful tools for data publication, storage, and visualisation
- Demand for light-weight solutions lowering technical barriers on both sides of the pipeline (data publishers and users) is a requirement we all must address
- Although such new tools will be developed & maintained by the community at large, the nodes should:
 - Gather requirements
 - Design mockups and prototypes of simplified solutions of hosted portals and data repositories

5. STRENGTHEN OUR NETWORK

- All nodes have limited resources
- Technical resources can be solved through cloud-based solutions
- Human resources (i.e., a skilled/stable team) are more difficult to address
- Nodes shall seek to improve their human resources:
 - Ideal team = 4 FTEs per country node:
 - Node Manager, IT, data manager, & scientific outreach/ communication
 - This is a combined responsibility of Node Managers and Heads of Delegation

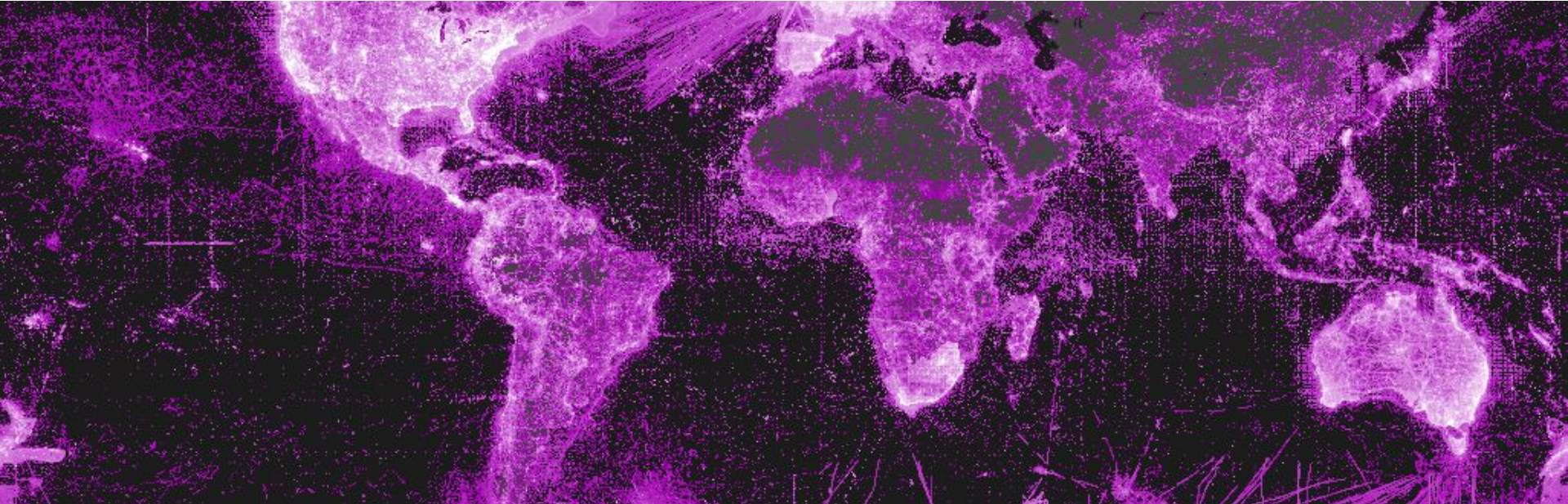
6. REDEFINE PARTICIPATION

- The current participation status (of countries and organizations) does not always reflect the level of effort in data publication, in data use, and in support to the community
- Nodes should suggest ways to:
 - Recognize and expose the value of national/thematic efforts beyond the formal official/financial participation to GBIF
 - Engagement of new country/organization participants should also be considered



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Regional Engagement Strategy

North America

REGIONAL ENGAGEMENT STRATEGY

- Driven by feedback via pre-surveys from this year and prior years
 - Desire for better coordination, collaboration & sharing
 - Desire clarity in data publishing process
 - Desire joint projects & training
- Regional strategy aligns with several Global Nodes strategic objectives:
 - #1 Regional Coordination
 - #2 Improve Data Relevance
 - #6 Redefine Participation

REGIONAL ENGAGEMENT STRATEGY

North America Regional Engagement Goals:

1. Agree that a collaborative effort is needed, and define best practices for participation in the North American data-sharing community.
2. Solicit ideas for better coordination across the region, define roles and responsibilities, and clarify the pathway for data mobilization.
3. Encourage future projects to participate in the community using the outcomes from the first two goals.

REGIONAL ENGAGEMENT STRATEGY

Ideal Outcomes:

- **Short-term:**

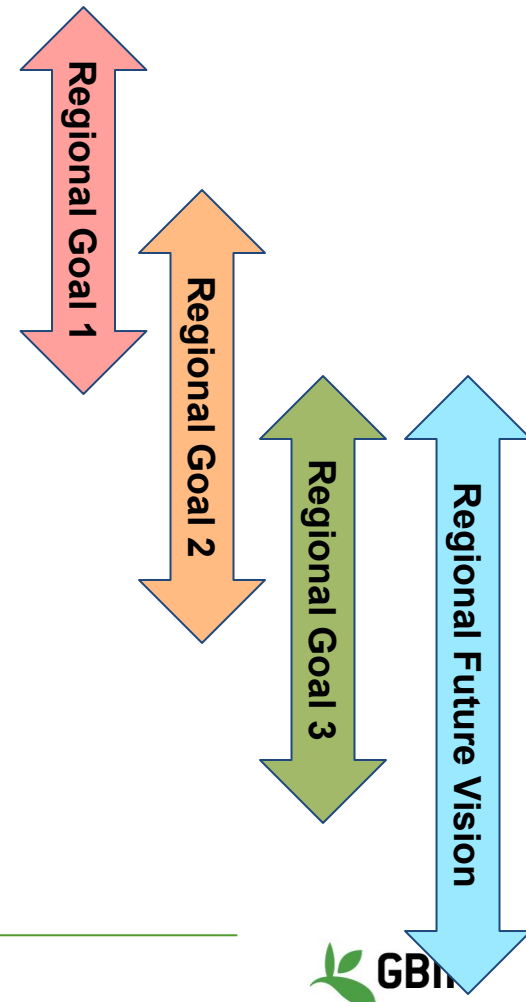
- What can we do together now by meeting, agreeing, & documenting?

- **Medium-term:**

- What can we do with more focused organisation and some funding?

- **Longer-term:**

- What can we do with more funding, dedicated people, and coherent structure?



1. COLLABORATIVE EFFORT IS NEEDED

We agree to work together to define the most productive pathways to achieve:

- High-quality participation from individuals and institutions;
- Clear channels for communication about regional activities and events;
- Access to high-quality resources, tools, and support to facilitate data-sharing and data quality from digitization to publication across the North American region.

1. COLLABORATIVE EFFORT IS NEEDED

We seek to bring together our extensive knowledge and resources as a region to:

- Improve our communication with one another,
- Reinforce our existing connections,
- Build more effective collaborations that leverage limited financial resources, and
- Streamline the development and deployment of services and tools to avoid duplication of effort and promote interoperability and sustainability of regional efforts.

2. IDEAS FOR BETTER COORDINATION

- Communication & Coordination
 - Regional Slack workspace
 - Quarterly regional virtual get-togethers (e.g., “happy hours”)
 - North America region = all biodiversity stakeholders including GBIF nodes, OBIS nodes, IPT instances, other initiatives
 - Regional steering group or core
 - Regional Social Media, newsletter

2. IDEAS FOR BETTER COORDINATION

- Data Publishing/Mobilization
 - Endorsement through national nodes
 - Document best practices
 - Regional data portal
 - Shared digitization effort
 - Shared publication effort, e.g., Regional IPT

- Expertise & Training
 - Expanded region page on GBIF
 - Expertise map
 - Easy access to relevant training resources

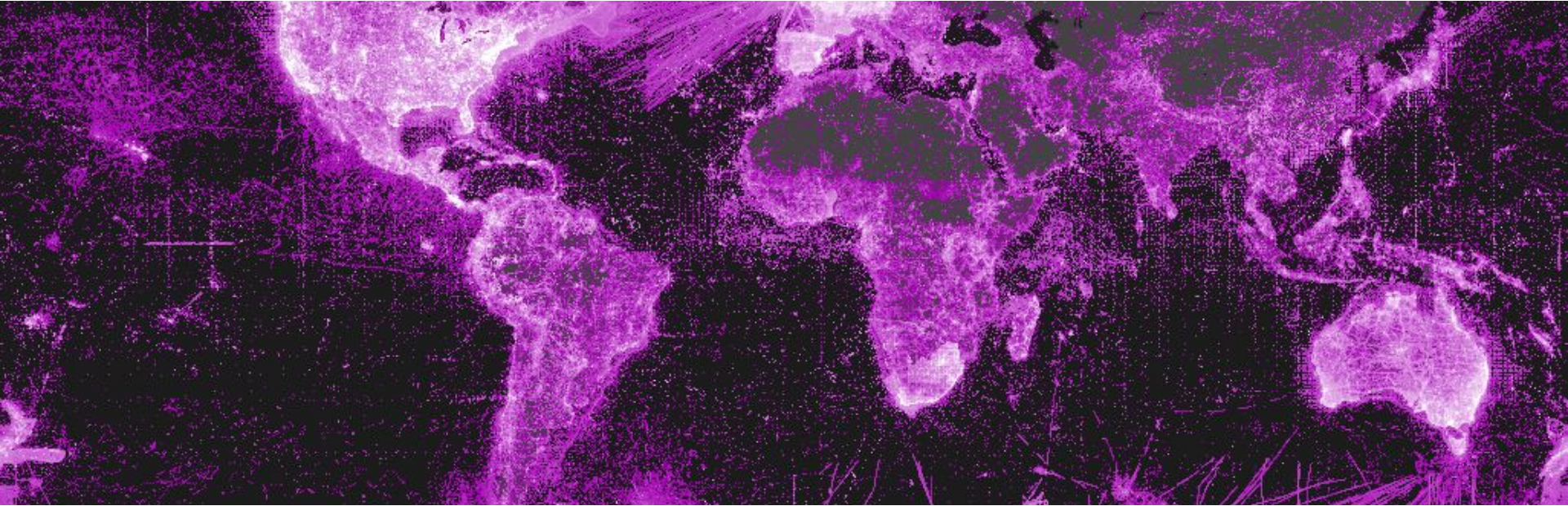
3. FUTURE COLLABORATIVE PROJECTS

- Articulate unmet or perceived community needs
- Regional, collaborative strategic planning
- Document regional tools, services, resources, and expertise
- Pipelines for data flow for different types of data/needs
- Develop regional strategic plan
- Regional collaboration on funding, e.g., CESP grants



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Vision for the Future

REGIONAL STRATEGIC VISION

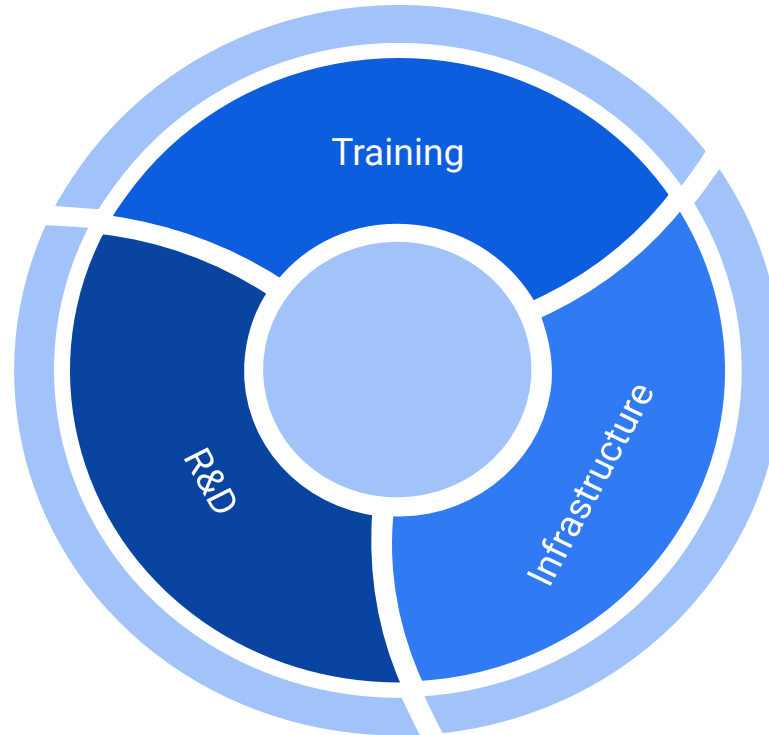
- **Work together to develop a long-term vision**
 - Coordinate regional efforts to provide stable and persistent resources
 - Coordinate regional efforts to identify needs/gaps
 - Coordinate regional efforts to develop solutions
 - Align regional efforts to achieve the objectives stated in the global nodes strategic document

REGIONAL STRATEGIC PLAN

- Process for regional strategic planning
- Steps to achieve long-term vision of a Community Support Infrastructure
- In-person regional meetings will be held in 2021

KEY TENETS

- Infrastructure
- Training
- R&D



COMMUNITY SUPPORT INFRASTRUCTURE

Leverage expertise and experience within the region to create something larger than the sum of our parts:

Development

e.g., Locality Services, georeferencing calculator, data publishing software (IPT)

Standards

e.g., New data sharing/publishing protocols, new vocabularies, new data types/integrations

Data Quality

e.g., Data testing and validation services, quality assessment tools



Mobilization

e.g., Consultation services for publication and organization, registration services, storage solutions

Education/Training

e.g., Workshop creation, facilitation services, educational and professional reference materials

Management

e.g., Project organization, project management, socio-technical network integration

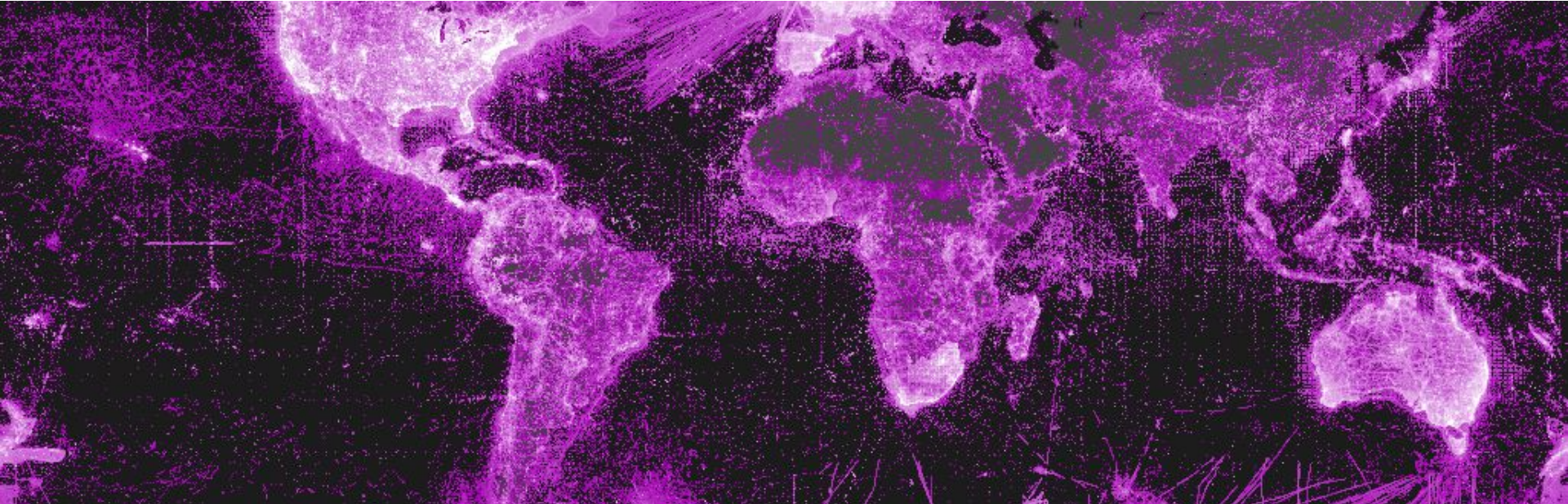
MEETING - DAY 2

- Review Regional Engagement Goals for North America
- Discuss the key pieces of a community support structure for planning and action
 - Focusing especially on communication, coordination, and collaboration moving forward
- Consider practical next steps



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Wrap-Up

WRAP-UP

- THANK YOU!
- Materials and resources:
 - Presentation will be added to event page:
<https://www.gbif.org/event/5iluOArQeYT29U402zDrwi/>
 - GBIF overview: <https://www.gbif.org/document/81771/>
 - Notes Doc: <https://shorturl.at/zFNY7>
 - North America Slack: <https://gbif-north-america.slack.com>
- Tomorrow - 6 May
 - Q&A and discussion
 - 09:00 Pacific / 10:00 Mountain /
11:00 Central / 12:00 Eastern

WRAP-UP

- **David Jennings** <djennings@flmnh.ufl.edu>; iDigBio Node Manager, GBIF Nodes Regional Representative North America
- **Carole Sinou** <canadensys.network@gmail.com>; Canadensys Node Manager, GBIF Deputy Nodes Regional Representative North America
- **Abigail Benson** <albenson@usgs.gov>; United States Node Manager, OBIS Node Manager
- **David Bloom** <dbloom@vertnet.org>; Vertnet Node Manager
- **Sharon Grant** <sgrant@fieldmuseum.org>; Field Museum IPT Manager