Expanding the Network: Bringing marine research stations and library collections into the data-sharing community

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Programme: CESP
Project ID: CESP2022-009
Project page: https://www.gbif.org/project/CESP2022-009/expanding-the-network-bringing-marine-research-stations-and-library-collections-into-the-data-sharing-community
Project lead organization: Museum of Vertebrate Zoology, University of California Berkeley
GBIF Participant Represented: VertNet
Project implementation period: 1/8/2022 - 31/7/2023
Report approved: 23/2/2023

Narrative Midterm report

Executive Summary

"Expanding the Network" is moving forward positively and has met its goals and objectives for the midpoint of the project. The mandatory milestones; (1) Kick-off meeting meeting was held and (2) planning for the "Fieldbook to Portal" training workshop is underway. Beyond the mandatory milestones we have made progress toward several other goals, including the creation of training materials, a community survey and workshop and helpdesk scheduling.

During the first half of the project window we monitored the progression of the project through monthly planning-group meetings and semi-regular communications via a project Slack channel. David Bloom (VertNet) is primarily responsible for these activities and checks proposed project benchmarks against the project calendar weekly. As we enter the second half of the project window, we have moved to twice-weekly meetings for workshop planning and to perform regular monitoring of our progress toward the completion of our goals and the creation of materials in a timely manner.

At this time, there are no changes that we wish to make toward successful implementation. We have, however, already made two minor, but significant changes to our focus. First, we have added a member to the planning team, Elizabeth Lawrence, who is a Capacity Development Officer at the OBIS Secretariat. Second, based on the responses to our survey and the level of experience of potential workshop participants, we will not create a use-case for the workshop. Instead, we will build the use-case for use by GBIF, OBIS, and others for future trainings.

Report on Activities

Activity progress summary

Overall, the implementation of project activities has proceeded with minimal issue and we are on track to complete all of our proposed activities and project products within the project window. No new activities have been undertaken at this time, however, the planning group has agreed that we may choose to provide as many as four helpdesk sessions after the workshop (rather than two, as proposed) based on the needs and interest of the workshop participants. This will be a decision made in response to requests by the target audience.

We have had to make two minor adjustments to our schedule. First, our Kick-off meeting was pushed back to September 8, 2022 (originally intended for August, 2022). The cause of this was simply the unfortunate timing of personal vacations for members of the project team. This change has not affected the project in any way. Second, we had to push the scheduling of the Fieldbook to Portal workshop back to the very end of the proposed window. Thus, the workshop will begin on the last day of the proposed time period and run into March, 2023 (schedule Feb 28 - Mar 2). The cause for this is two-fold; (a) the combination of the winter holidays and a slow response time to our survey caused us to wait until we had enough feedback to build a suitable workshop agenda. In the scope of the project, this will not cause any significant impact or affect our activities moving forward.

Completed activities

Activity name: Kick-off and planning meeting

Description: Virtual meeting of the partners to map out the project, assign responsibilities, document/resource sharing and define project and community communication strategies.
Start Date - End Date: 8/9/2022 - 8/9/2022
Verification Sources: https://docs.google.com/document/d/10U2tZkrz-IeujtfPCoLl4igU_LoizErsu1dij5wJ7fU/edit?usp=sharing

Report on Deliverables

Deliverables progress summary

Progress continues for each of our deliverables, although none are expected to be completed until the workshop has been presented. Of these deliverables, four are of the highest priority currently.
1. Participant List - currently contains 15 individuals from 15 institutions that have been invited to participate in the training workshop. This list continues to evolve as we learn of additional individuals interested in participation.
2. Training materials - are being developed for the workshop and helpdesk sessions. We are in the process of moving away from slide presentations and toward a single, online (and pdf) document that contains all of the relevant information, links and resources. This document will evolve after the workshop to include training and discussion topics from subsequent helpdesk sessions.
3. Workshop - the virtual workshop has been scheduled for February 28 - March 2, 2023. It will run approximately 3.5 hours per day, beginning at 10:00 Pacific Time.
4. GBIF/OBIS publication template - is being developed as a pair of documents, including a pdf that details OBIS and GBIF requirements and strongly recommended content and an editable spreadsheet that contains the key Darwin Core terms.

The remainder of the deliverables will rise in priority after the workshop is completed. The only deliverable that has been delayed is the Marine-based case study. Because of the short time available during the virtual workshop, and due to the low levels of experience with data mobilization processes, we will not provide a case study until after the workshop is completed. This will give us more time to focus on the basics of mobilization, but will still provide GBIF and OBIS with a use case for future training opportunities. A specific date of completion has not been set, but this deliverable will be completed before the end of the project.

Completed deliverables

Events

Kick-off and planning meeting

Dates: 2022-09-08 - 2022-09-08
Organizing institution: VertNet
Country: US
Number of participants: 4
Comments: Link leads to meeting minutes.
Website or sources of verification: https://docs.google.com/document/d/10U2tZkrz-IeujtfPCoLl4igU_LoizErsu1dij5wJ7fU/edit

Communications and visibility

The project communication plan identifies three primary modes of communication that we will use to promote the project and its deliverables. Of these three, we have fully engaged with mode #2 - Direct communications - to identify and invite individuals to respond to our community survey and to invite individuals to participate in our workshop. As we get closer to the workshop, we will engage more directly with mode #1 (existing listservs, mailing lists, and websites) to promote our activities and the location of public resources. This includes the use of the GBIF events calendar, NA Regional portal and NA node networks, and the targeted use of mode #3 - social media - from project participants. Much of the use of modes #1 and #3 will begin in March, 2023 when we have materials to share and events to announce.

Currently, there are no resources or links to add to our GBIF project page, but we will share those as they become available in March, 2023 and beyond.

Monitoring and evaluation

Monitoring and evaluation findings
Currently, we believe the current planning and development processes are acceptable and effective. We have, however, made some changes to accommodate the needs of the project.
- We have separated the marine-base use case from the workshop, and will provide that as a separate training product after the workshop has been completed.

- We have moved to twice weekly meetings to prepare for the workshop. It is likely that we will reduce the frequency of our meetings to weekly or bi-weekly after the workshop and its associated products are complete.

In addition to these logistical changes, we have learned some valuable lessons about how we provide training and support to our target audience.
- As word has spread about our project, we have learned that there is much interest in the marine community beyond the libraries. This is something we will keep in mind for future projects.
- Librarians are very interested to learn more about data mobilization, but they are exceptionally over-burdened and under-resourced - in many instances, even more so than the museum collections we have supported historically. As a result, we have reduced the duration of our intended workshop and we are preparing at least one dataset that can be used by workshop participants who cannot provide one of their own.
- Many of our potential participants are responsible for collections administratively, but do not actually maintain them themselves, they rely on grant or contract labor instead. As such they may not be the individuals doing the work to prepare and publish the data, but they will be the ones to teach others how to do it for them.

We are working actively to build training and documentation that responds to these specific realities and supports our audience in ways that support them directly.

Impact of COVID-19 pandemic on project implementation

To date, COVID-19 has not impacted the process, schedule or implementation of the project. No changes are required.

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