National portals addressing national challenges

Programme: CESP
Project ID: CESP2023-010
Project page: https://www.gbif.org/project/CESP2023-010/national-portals-addressing-national-challenges
Project lead organization: Real Jardín Botánico - CSIC
GBIF Participant Represented: Spain
Project implementation period: 30/10/2023 - 5/12/2024
Report approved: 17/12/2024

Declaration: The information provided in this report has been provided by and is the responsibility of the project lead.

Narrative Final report

Executive Summary

The ultimate goal of the project is to identify, document, and promote the use of biodiversity data portals to respond to specific conservation and biodiversity challenges at the national level. Throughout the project, we focused on two key areas: the implementation and management of the most commonly used technologies for GBIF national portals—Living Atlases and Hosted Portals—as well as the identification of use cases demonstrating how these portals are used to address specific biodiversity-related issues.

The aim of the project is to make GBIF Nodes project partners more aware and capable of responding to national challenges in various spheres (science, management, conservation, policy). However, during the development of the project, we realized that the type of portal—ALA or Hosted Portals—influences how national challenges are addressed. For this reason, we included a detailed comparative analysis of these technologies, the development of a catalog of biodiversity use cases, and the creation of online training courses aimed at sharing knowledge across nodes.

In general, we have achieved all the objectives, although the participation of GBIF Ecuador is minimal, which is why an extension of the deadline was requested and no use cases from them are included in the catalog.

As part of the post-project activities, the online course will remain open to all nodes, a webinar will be held in coordination with the GBIF Secretariat, and we will leave the possibility for continuous updates to the use case catalog with new contributions from other nodes to increase future synergies and projects.

Report on Activities

Activity progress summary

The project activities were completed with delays. Both workshops were held later than originally planned in the project schedule. On one hand, the conflicts in Ecuador delayed the date of the Discovery Workshop, and we took advantage of the LATAM node regional meeting in June to later hold the Workflow Workshop. Additionally, the Use Case Catalog experienced delays for two reasons: 1) improvements were made after the midterm report review, and 2) the Ecuador node never completed the information for their use cases, online course content, or contributions to the best practices guide. Despite attempts to contact Víctor Chocho, the node manager, we did not receive a response, so some activities and deliverables lack the Ecuador node's input.

The syllabus, initially planned for face-to-face training sessions, was ultimately changed to a self-paced course with no tutor. However, a webinar will be coordinated with the GBIF Secretariat to complement this activity.

Finally, we have identified some shortcomings in portals with ALA technologies, so a specific workshop for the Living Atlases community will be developed in March 2025.

Completed activities

Activity name: Kick-off virtual meeting

Description: Online meeting with project partners to organize the project's roadmap Presentation of teams, review of commitments, calendar, initial decisions and next steps
Start Date - End Date: 12/9/2023 - 12/9/2023

Verification Sources: Kick-off virtual meeting minutes - document attach

Activity name: Designing the Biodiversity Data Use Case Description Form

Description: Regular online sessions by partners to produce this deliverable. Biodiversity Data Use Case Description Form
Start Date - End Date: 12/9/2023 - 12/12/2023
Verification Sources: The Biodiversity Data Use Case Description Form is available at: https://docs.google.com/forms/d/e/1FAIpQLSdS8_XuGDc-tWf6PAw_ZUB-tVSwgMYN6cka0uWKOxp_yPwi1Q/viewform

Activity name: Producing the national level catalogues of documented national use cases

Description: Partners working internally to compile information to produce National Catalogues of documented national use cases using the "Use case description forms"
Start Date - End Date: 13/12/2023 - 28/6/2023
Verification Sources: Catalog of documented national use cases in the partners' websites: e.g.: https://gbif.es/wp-content/uploads/2024/12/Catalogo-de-casos-de-uso-de-portales-nacionales-para-responder-a-retos-nacionales.pdf. Also in google doc format https://docs.google.com/document/d/1Lj0_U3riVjF9GWPOSMc8fwf0o89lnrAi/edit?usp=sharing&ouid=112121249200034519458&rtpof=true&sd=true

Activity name: Discovery workshop

Description: Cases collected in the previous activity will be compiled, collated, and produces a synthesized view of cases. These will also be discussed, complete, and gaps identified and addressed
Start Date - End Date: 28/2/2024 - 3/3/2023
Verification Sources: We attach the photo report of the Discovery workshop.

Activity name: Workflow workshop

Description: Intended to define and describe workflows to make GBIF nodes participation effective in the identified cases. These may include technical aspects (data formats, standards; data transformation and integration with external sources) as well as sociological aspects such as process drivers, actors, etiquette, language to be use, etc.
Start Date - End Date: 7/6/2024 - 9/12/2024
Verification Sources: We generate the base documentarion for the following activities and deliverables

Activity name: e-Learning materials development

Description: The production of a self-guided training module to be deployed through the SiB Colombia and GBIF Spain e-learning platforms on how to exploit national portals to address national challenges as well as recommendations on how to interact with national actors involved in policy, management and conservation [in Spanish]. It may involve online meetings among partners
Start Date - End Date: 1/7/2024 - 3/12/2024
Verification Sources: eLearning module on using national portal to address national challenges. eLearning module on using the national portal for national challenges. Available at: https://elearning.gbif.es/courses/PORTALESNACIONALES/index.php?id_session=0

Activity name: Syllabus preparation

Description: The production of a preliminary syllabus for building a face to face training session or short course on how to use a national portal for national challenges for the global nodes community [in English]. It may
involve online meetings among
partners.
Start Date - End Date: 12/6/2024 - 10/9/2024
Verification Sources: Syllabus for a global training event for nodes. Available at: https://gbif.es/wp-content/uploads/2024/12/5.-Syllabus-how-to-use-a-national-portal-for-national-challenges.pdf

Activity name: Closing of project

Description: Final reporting, project evaluation. I
will include and end-of-the-project
online meeting
Start Date - End Date: 1/11/2024 - 5/12/2024
Verification Sources: End-of the project materials: final reporting financial reporting, post-project assessment

Report on Deliverables

Based on the deliverables, the following achievements have been made:

The Biodiversity Data Use Case Description Form has been designed to effectively and clearly capture detailed information on how national data portals are used or what developments are required to address specific challenges. By adopting the Dublin Core standard, the form enhances the comprehensibility of documented examples, facilitates smoother information exchange about the use of national portals, and enables other GBIF nodes to share their experiences, fostering broader knowledge sharing and collaboration.

The Use Case Catalog goes beyond merely documenting how portals address challenges. It provides a comprehensive and detailed comparison of the installation, management, and use of the two primary technologies for national data portals: the Atlas of Living Australia and GBIF Hosted Portals. However, it currently lacks specific use case information from the Ecuadorian node.

The Best Practices Guide offers a clear and straightforward roadmap for GBIF nodes, detailing the steps to implement a national data portal that aligns with real needs and supports the identification and addressing of national challenges.

Completed deliverables

Title: Biodiversity Data Use Case Description Form

Type: Resources
Description: A form that allows project partner nodes to provide detailed information on how they apply biodiversity data in their respective portals to address national biodiversity-related challenges. This form uses Dublin Core for the description of use cases and a controlled vocabulary in Google Forms.
Sources of verification: https://forms.gle/4gtCKCfQumz83wR3A

Title: Catalog of documented national use cases

Type: Documentation
Description: Catalog of documented use cases where GBIF Nodes are already making an impact or have the potential to make an impact in the national context. We analyze the characteristics of the two types of data portals, the tools developed, and use cases in different national contexts.
Sources of verification: https://gbif.es/wp-content/uploads/2024/12/Catalogo-de-casos-de-uso-de-portales-nacionales-para-responder-a-retos-nacionales.pdf

Title: A GBIF best practices guide on how GBIF nodes can address national challenges

Type: Documentation
Description: It includes guidance on how to select the technology for a national data portal, recommendations for identifying and addressing challenges and how to interact with different national stakeholders involved in policy, management and conservation.
Sources of verification: English: https://gbif.es/wp-content/uploads/2024/12/Best-Practices-Guide_How-to-make-national-portals-address-national-challenges.pdf Spanish: https://gbif.es/wp-content/uploads/2024/12/Guia-de-buenas-practicas_Como-hacer-que-los-portales-nacionales-respondan-a-retos-nacionales.pdf

Title: eLearning module on using national portal to address national challenges

Type: Resources
Description: A self-guided training module to be deployed through the SiB Colombia and GBIF Spain e-learning platforms on how to exploit national portals to address national challenges as well as recommendations on how to interact with national actors involved in policy, management and conservation [in Spanish].
Sources of verification: Available at:
https://elearning.gbif.es/courses/PORTALESNACIONALES/index.php?id_session=0

Title: Syllabus for a global training event for nodes

Type: Documentation
Description: A preliminary syllabus for building a face to face training session or short course on how to use a national portal for national challenges for the global nodes community [in English].
Sources of verification: https://gbif.es/wp-content/uploads/2024/12/5.-Syllabus-how-to-use-a-national-portal-for-national-challenges.pdf

Discovery Workshop

Dates: 28/2/2024 - 1/3/2024
Organizing institution: GBIF Spain & SiB Colombia
Country: Colombia
Number of participants: 10
Comments: The discovery workshop was held as part of the project activities with the participation of project partners to exchange experiences in the use of data portals to address national challenges. Attached is the programme and photographic memory. The finnal
Website or sources of verification: The final result is the catalogue of use cases: https://gbif.es/wp-content/uploads/2024/12/Catalogo-de-casos-de-uso-de-portales-nacionales-para-responder-a-retos-nacionales.pdf

Workflow workshop

Dates: 7/6/2024 - 9/12/2024
Organizing institution: GBIF Spain & SiB Ecuador
Country: Ecuador
Number of participants: 7
Comments: The final outcome of the event are the online course contents and the good practice guide.
Website or sources of verification:

Communications and visibility

To date, the results have not been shared with the broader GBIF community beyond their publication on the partner nodes' webpages. This is primarily due to the absence of DOIs for the deliverable documents (catalog and guide), which could not be assigned due to technical issues with the CSIC Divulga platform. We expect to resolve this situation within the coming week.
In this regard, we kindly request that the attached documents not be included on the project webpage at this time. We will send the finalized versions once the DOIs have been assigned. Afterward, we will proceed to share the results both on the project webpage and through social media channels.

Monitoring and evaluation

Monitoring, evaluation and lessons learned
Final Evaluation:
Both the activities and deliverables were successfully completed. The documentation and resources generated ensure that the partners' experiences can be adapted to various contexts, challenges, and national objectives.
The Biodiversity Data Use Case Description Form is a key tool for increasing knowledge about how data portals are utilized and the developments implemented by other nodes within the GBIF network. Additionally, the Use Case Catalog and the content hosted on the eLearning platform are available in Spanish, which may limit their accessibility and utility for the entire GBIF network. Efforts to translate these resources could enhance their reach and impact.

Best Practices and Lessons Learned:
GBIF nodes operate within diverse realities and contexts, making it essential to identify their objectives and potential from the outset. This early assessment not only determines the type of portal needed but also how it can maximize its impact within the national context.
Capacity-building activities tailored to local realities proved crucial for ensuring the broader adoption and practical utility of the tools developed. Furthermore, continuous engagement with stakeholders fosters a sense of ownership and ensures alignment with their specific needs.
Encouraging co-development of resources with nodes enhances the applicability of tools and increases the likelihood of long-term adoption. This collaborative approach ensures that resources are both practical and contextually relevant, promoting sustainable outcomes.

Post Project Activity(ies):
Drawing from this experience and feedback from other nodes, the need for a workshop focused on Atlas of Living Australia (ALA) technologies has been identified. This workshop, scheduled for March 2025, aims to strengthen capacity and encourage the adoption of ALA tools for developing and managing national data portals.
A webinar for the GBIF network is also under consideration to disseminate the project's findings and

highlight best practices. This virtual event will promote knowledge sharing and provide practical guidance to nodes interested in replicating the project's successes.

Additionally, once DOIs are assigned to the deliverables, they will be disseminated widely through the project webpage, partner nodes' platforms, and social media channels, ensuring accessibility and visibility for the broader community.

Sustainability plans

The partners involved in this project are committed to building on its results through future collaborative activities. A key initiative is the Atlas of Living Australia (ALA) Workshop scheduled for March 2025, which aims to further develop capacity and promote the adoption of ALA technologies for national data portal development and management. Throughout this project, the exchange of knowledge and experiences among partners has been invaluable. In some cases, documented use cases will be implemented as part of ongoing efforts. For example, GBIF Spain plans to adapt and implement the Biodiversidad en Cifras use case, leveraging it as a model to enhance data visualization and accessibility within its national context. The long-term impact of the project will be monitored through the continued use and adaptation of the deliverables, such as the Use Case Catalog and Best Practices Guide. The planned webinar for the GBIF network will also provide an opportunity to track progress, share updates, and refine tools based on feedback. These efforts ensure the sustainability and scalability of the project's outcomes, fostering ongoing collaboration within the GBIF community.

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