Model for Biodiversity Data Mobilization and Data Quality Training

Brief document, in English, portraying the model used for carrying on this project, capturing the general structure, strategies, resources needed, timelines, expected results and recommendations.

2021-2022 scenario

The COVID19 pandemic has resulted in the closure of activities where people congregate, as well as a large number of travel restrictions either within or between countries.

This scenario continued, to a greater or lesser extent, until mid-2022. To overcome the need for training in both data quality and data publication, the CESP2021-007 project was designed.

General structure

This project contains a series of 2 virtual workshops (2 days, with a total of 5 hours of synchronous connection) and 3 virtual webinars (duration of 2 hours of synchronous connection) with their respective replicas. In addition, both the workshops and the webinars were posted on a YouTube channel for later consultation and potential reuse.

General logistics

- All training sessions were virtual, conducted in Spanish, through open platforms (Zoom, YouTube), live streamed and recorded, to allow for later consultation.
- All training sessions (webinars and workshops) were open to all the Spanish-speaking community. However, workshops required pre-registration to allow distribution of training materials beforehand.
- Training instances were broadly promoted through the project's page in the GBIF website and through social media (with flyers).
- The calendar for the whole training series was available from the beginning of the project to encourage participation, so that people could schedule all the activities to follow the whole project or choose the ones that were most convenient for them.

Workshops

Two workshops were held (and their replicas)

- Biodiversity data cleaning with Open Refine
- Publication of Biodiversity data with the IPT

For both events, the same organization was followed. The times and actions carried out are detailed below:

- One month before: design of the flyer for dissemination + Google form for registration + addition of the event to GBIF.org + dissemination campaign through social networks/ institutional emails, with registration and closing dates.

- Twenty days before: reinforcement of the dissemination campaign, together with the opening of registration. At the same time, a selection process of the participants is started, in accordance with the quotas agreed upon by each node/initiative.
- Ten days before: registration closes + final selection of participants, list of participants is created (who must complete the confirmation form) + waiting list in case free places are generated.
- Five days before (Only Open Refine workshop): once participation is confirmed, information about the program and instructions to install it are sent.
- Three days before: pertinent material is sent, link to join the Zoom call + room in the case of the Open Refine workshop, synchronous space for potential queries due to program installation issues.
- Second day of the workshop: a closing survey of the workshop is sent and for those who met the attendance requirement for both meetings, an attendance certificate is generated.
- One week after completion: certificates of attendance are sent and information on the next project activity (next workshop and webinars) is attached.

The meetings were posted on a YouTube channel at the end of each day, allowing participants to review and revise the content. In addition, it creates a space for those who could not attend (either because they were not selected, because they were left on the waiting list or due to any other unforeseen event).

Webinars

3 webinars were held (and their replicas)

- Data Quality Principles
- Application of Data Quality workflows
- Biodiversity Data Standards: Introduction to Darwin Core

To facilitate the influx of a greater number of participants without compromising the quality of the exhibition, they were held in a Zoom room that was broadcasted live to the YouTube channel, where the queries were collected.

Unlike the workshops, certificates of attendance were not given, since their duration was restricted, and the purpose was to disseminate a topic and be used as preparatory material for the workshops.

Both during the webinar and later in the description of each YouTube video, an opinion survey was provided to be completed by those who watched the videos.

For the three meetings, the same organization was followed. The times and actions carried out are detailed below:

- Fifteen days before: design of the flyer for dissemination + addition of the event to GBIF.org + dissemination campaign through networks / institutional emails.
- A week before: reiterate the dissemination campaign.
- The day before: posts on Twitter, reminding the webinar, speakers, and topics to be discussed.
- Day of the webinar: an opinion poll is distributed, and it is shared in the description of the YouTube video.

Resources used.

All the resources used were free of charge, except for the Zoom license (since space for attendees and functions that the free version does not have were required) and the internet connection service.

- Internet connection
- Basic Zoom license, for 100 people
- YouTube channel
- Google Forms
- Space in Google Drive
- Google calendar for activity tracking
- Trello panel for coordination of activities / meetings of the group of organizers
- Email account
- Open Refine program and data set for didactic use for practice.
- Access to IPT-Test and educational use case for practice

Expected results.

- Synchronous and asynchronous attendance of 100 people was expected for the webinars.
- Full attendance of 60 people for the workshops.
- The opinions of the participants about the contents and development of the activities.
- A list of people interested in the subject for the dissemination of similar activities.
- Dissemination of important topics for the Latin American community in their own language, either in the form of webinars or workshops.
- Access to free tools to improve the quality of data that publishers share in GBIF
- Despite the isolation and mandatory remote work, do not stop and continue training with the publishers of our respective nodes.

Recommendations

- Evaluate the activities and the **time** they require. A webinar consumes less time in your organization, but a workshop consumes much more time than that used in the synchronous meeting.
- Have prepared the **graphics** that the project will use, as well as **hashtags** and **texts**. Plan in advance the communication channels that will be used for dissemination.
- Try to have the **presentations** in a folder hosted in a cloud, shared among the speakers, so that if someone has a problem with their connection, another speaker can replace them.
- If **supplies are needed for the workshops**, share them in the cloud, so that they are easily accessible and do not saturate the participants' mailboxes when sending them.
- Try, in the forms, to **ask for the emails to be repeated**, since many times there are typing errors and then it is almost impossible to communicate with that person.
- If the project is aimed at an audience from **different time zones**, clarify this in the flyers, either by placing the flags or the names of the countries and the corresponding time.
- For workshops, request to complete the survey as the last requirement to obtain the **certificate** of attendance. Also clarify that the certificate will be issued with the name and surname data as they appear in the survey.

- Generate a **Google calendar** (or similar) with all the activities relevant to the organization and dissemination of webinars and workshops and share it with all team members.
- It is desirable that the **survey forms send a copy of the response** to the person who completes it. In the same way, in some cases, such as confirmation forms, it is desirable that they can only be answered once. It is important to **share a contact email** at the beginning and at the end of the form, in case any inconvenience arises and communication with the coordinator is needed.
- If any **survey or form has a closing date**, remind (and reiterate) it to the participants. Once the term has expired, close the form, since the participant who answered on time must be valued. In any case, leave a contact email for any eventuality.
- Regarding the **number of participants** in the workshops, try to maintain a ratio of 10 to 15 participants – 1 trainer, otherwise it will be very difficult to have time to solve all the queries and give the appropriate feedback to the activities.