

# National Portals Workshop: taxonomic databases, species data information and visualization

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**Programme:** CESP

**Project ID:** CESP2020-006

**Project lead organization:** Brazilian National Research and Education Network

**Project implementation period:** 1/8/2020 - 31/3/2022

**Report approved:** 1/6/2021

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## Narrative Midterm report

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### Project partners

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#### VertNet

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**Country:** USA

**GBIF Participant Represented:** VertNet

**Role in the project:** Organization team

#### GBIF - Peru

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**Country:** Peru

**GBIF Participant Represented:** GBIF - Peru

**Role in the project:** Workshop participant

#### GBIF - Argentina

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**Country:** Argentina

**GBIF Participant Represented:** GBIF - Argentina

**Role in the project:** Participant

#### GBIF - Chile

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**Country:** Chile

**GBIF Participant Represented:** GBIF - Chile

**Role in the project:** Participant

#### SiB Colombia

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**Country:** Colombia

**GBIF Participant Represented:** GBIF - Colombia

**Role in the project:** Workshop Participant

#### GBIF - Ecuador

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**Country:** Ecuador

**GBIF Participant Represented:** GBIF - Ecuador

**Role in the project:** Participant

#### CONAGEBIO

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**Country:** Costa Rica

**GBIF Participant Represented:** GBIF - Costa Rica

**Role in the project:** Trainer

#### CONABIO

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**Country:** Mexico

**GBIF Participant Represented:** GBIF - Mexico

**Role in the project:** Participant

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## Executive Summary

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The initial proposal of this CESP Project foresaw the realization of a face-to-face workshop in April 2021. Due to the pandemic, it was not possible to travel so the workshop was postponed to October 2021 and, again, to 2022. Thus, the project started to place more emphasis on training and exchange experiences through virtual meetings. Those are designed to build a more accurate diagnosis of the expectations and difficulties of each participating node, thus enabling better performance and focusing on the needs of each country during the workshop. So far, four virtual meetings have been held, and a strategy has been defined to address the main themes of the project, to be developed in 3 modules. First, an online form was built with expectations, key questions and webinar suggestions for each module of the project, having been completed by the participating countries. From the evaluation of this form, the main points of convergence between the participating countries were identified, for each module. Thus, it was defined to hold 3 webinars for the first module and two webinars for the second module: "National Taxonomic Databases" and "Species Catalogs", where the main concepts and experiences from other countries will be treated. Keynote speakers will be invited to the webinars and, as a result, the preparation of good practice documents and guidelines for Latin America is expected. The third module and some topics of the first two modules will be addressed in the workshop.

### Mandatory milestones attached to the midterm report

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Mandatory milestones attached to the midterm report:

1. Kick-off virtual meeting with project partners held.
2. Workshop invitations sent and additional participants selected.
3. Mid-term report submitted.

Information on progress against milestones is provided in the activities and deliverables sections.

### Report on Activities

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#### Activity progress summary

During the first six months of the project, four virtual meetings were held with project partners. The first meeting held in September was key to planning the project year marked by the international pandemic. We all agreed on the importance of virtual meetings to address various topics and thus make the most of the benefits of a face-to-face workshop that we tried to postpone until the end of 2021. Following three virtual meetings were held in October, November and December. The first one was to all agree to postpone the workshop meeting and try to look for other alternatives like the business communication platform Slack to better communicate within the group. The idea of using the slack tool arose from the need to find a more effective and faster communication channel and because it is the main communication channel of the Living Atlas community. Therefore we set up a slack channel and organize an online training to show the main features. The last two meetings were held in order to better understand the expectations and interests of the project, key issues and topics and suggestions from speakers and presentations for the three modules. A form was distributed by country with three main questions of the three modules; key questions, webinar suggestions and workshop expectations. After evaluating the responses to the online form, it was found, for example, that most countries are interested in knowing how to implement a national taxonomic database, step by step. For the second module, an interest in the concept of what is a species catalog and how to use the plinian core was also expressed. For the third module, a greater focus was given to technology and services. From the evaluation of the questionnaire, we understand that it would be very useful for this project to have contact with GBIF and specialists with experiences in the Project's main themes, such as national taxonomy backbone. Thus, after validating the seminar proposal among all participating countries, we will contact experts to expand the knowledge of the proposed themes. In addition, activity four that refers to the official invitation to the event was postponed until the exact date is decided. In general, the possibility of postponing the face-to-face event benefited the group with the possibility of more virtual meetings being able to address more issues and inviting outside experts to a virtual presentation.

#### Completed activities

#### Activity name: Kick-off virtual meeting with project partners

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**Description:** Online meeting with project partners to organize the roadmap, discuss target audience, number of participants, specific dates, program and schedule. Update of survey of expectations, state-of-the-art of implementation of national portal.

**Start Date - End Date:** 1/8/2020 - 2/9/2020

**Verification Sources:** Minute of the kick-off meeting in the Report Attachments

## Report on Deliverables

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### Deliverables progress summary

Deliverables up to date are the kick-off meeting minute and the minute of the first virtual meetings. Moreover, the activity related to the preparation of the documents for the workshop includes two files, the form of expectations by module by country and the programming and preliminary content of the webinar to be discussed and validated which include also pictures of the brainstorming used to define the webinars contents. The list of participants was not delivered because the workshop date was not defined.

### Completed deliverables

**Title:** Minute of the Kick-off meeting

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**Type:** Documentation

**Description:**

**Sources of verification:** Mid-term report attachements

**Title:** Minute of the periodic virtual meeting 1

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**Type:** Documentation

**Description:**

**Sources of verification:** Mid-term report attachements

**Title:** Material fo the Workshop and Webinar

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**Type:** Documentation

**Description:**

**Sources of verification:** Mid-term report attachements

## Communications and visibility

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Once the program and content of the webinars are defined, the program will be posted on national portals and also shared through the GBIF community. In addition, all webinars will be recorded and published on youtube channels and also published on national portals. The results of all webinars will discuss the schedule of the face-to-face meeting or if there is the need to reallocate resources for the benefit of the project. Results will also be published on the thematic portal of the LAC region, which was approved by the GBIF secretariat and built by the partners of the region who are also the project partners. Good practice guides in the implementation of reference lists for a region, in addition to the species catalog, may benefit other GBIF regions. Due to technical problems, the SiBBR github will not be used, but the SiBBR platform where a section was created to insert the results of the project (<https://sibbr.gov.br/page/cesp.html>).

## Monitoring and evaluation

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### Monitoring and evaluation findings

The initial assessment was completed using the different forms based on the expectations of the project by the project partners. The large number of partners makes it difficult for all countries to participate. Moreover, the heterogeneity of demands, needs, capacities and weaknesses of the different countries with regard to the implementation and improvement of national portals in the LAC region hamper the progress of the project. However, it is a challenge and one of the objectives of the project to strengthen the capacities of all nodes and related teams in the region. In that respect, we understand that some countries are in a more mentoring position and others that can better benefit the project outcomes and others that will participate in a more listener way. The definition of the preliminary version of the webinars has the objective of meeting the demands of all, since all the key questions defined by the partners have been all contemplated and some may even be open for other CESP projects and country nodes. According to the preliminary program of some webinars, the support of the GBIF secretariat will be necessary in the selection of an expert who can present some important concepts and guidelines on how to organize and structure a taxonomy database as well as helping to promote the webinar and support on the facilitation and guidance. Finally, the content of all webinars still needs to be validated with all project partners so the relevance and feedback of the content has not yet been assessed by all.

## Impact of COVID-19 pandemic on project implementation

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Due to the pandemic and the delay in vaccination campaigns worldwide, the committee offered the opportunity to reallocate resources and postpone activities opening up the opportunity to travel only when it is safe. The new approach changed some dates and deliveries of the project. In this way, it was decided to postpone the meeting for the first half of 2022 and give more time to organize some online meetings as a basis for the workshop allowing better preparation of all documents and deliveries of the project. Moreover, due to the fact that the project budget was entirely focused on travel expenses during the workshop no resources have yet been spent. It is important to highlight that the project was prepared before Covid. Although webinars were already possible, this feature was little explored. During the quarantine we all had to get used to this tool, which became part of our daily routine. Thus, a positive aspect of the project was to incorporate this format on capacity building, which allowed us more hours of discussion among the participating countries and, thus, the enormous heterogeneity between the countries, even in the conceptual aspect of the themes to be worked on, may be better understood and standardized, during the webinars that will precede the face-to-face workshop.

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