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## SYNTHESYS 3 / Work Package 2 (Network Activity 2) / Objective 1 / Task 1.1

### Report on Deliverable 2.1

#### ("Virtual Collections" Management Policy Meeting: Meeting to Discuss Virtual Collection Management Policies)

#### Framework

The main aim of Task 1.1 (*"Develop policies for virtual CM and integrate JRA outputs"*) is to collate existing European virtual collection policies and to use these as a basis for recommendations on common European virtual (or digital) data management policies and procedures. Like Objective 1, Task 1.1 is led by the MfN, Berlin (Christiane Quaiser). An essential prerequisite for the Tasks work is a close cooperation with the JRA branch of SYNTHESYS 3 as well as the CETAF Collections Policy Board (CPB) and other external experts. It should lead to two Deliverables: **Deliverable 2.1** (*"Virtual Collections" management Policy meeting: Meeting to discuss virtual collection management policies*) (due date: December 2015) and Deliverable 2.2 (*"Virtual Collections" management Policy: Finalized policy for virtual collection management available*) (due date: August 2016).

**Deliverable 2.1** is defined as a meeting with external representatives to discuss and refine the policies developed within Task 1.1 (see also <http://synthesys3.myspecies.info/simpletaxonomy/term/120>).

#### Previous Activities

To determine and discuss overlapping contents between NA 2 Objective 1 and JRA Objective 4, the JRA leaders David Harris and Elspeth Haston (both RBGE) were contacted and a productive telephone conference with Elspeth Haston was conducted in the end of February 2015. Among others, it was agreed to closely cooperate and to adjust schedules. Also, it was decided to use the platform SYNTHESYS 3 Biowikifarm (<http://synthesys3.biowikifarm.net/syn3/>) as one tool for communication and collaboration. Further contacts and exchange of information, for example with Vincent Smith (NHM, lead of JRA Objective 4) and Gregor Hagedorn (MfN, head of Science Programme "Digital World and Information Science"), were initiated and realized.

A questionnaire on the gathering of digital data produced by visiting researchers as well as on the presence of respective procedures and/or policies was designed and circulated within the CPB members (December 2014) and within the SYNTHESYS 3 TAF leaders (February 2015). Additionally, a more general research on already established collections management policies (CMP) covering digital data was conducted. Both, the incoming feedback from the questionnaire and the results of the general research, were used as basis for a draft online handbook or reference text on CMP on digital data. This draft document was prepared at the MfN using the Biowiki platform of SYNTHESYS 3 (<http://synthesys3.biowikifarm.net/syn3/Talk:NA2/objective1/task1/cmp>) and gives rather comprehensive information and recommendations to support natural history institutions in their efforts to create their own CMP on digital data. Ideally, these recommendations will cover all aspects, which should or may be treated in a CMP on digital data. It is still under revision and therefore still solely accessible by Biowiki users. The document will be publicized as soon as the content and format is agreed on.

The draft handbook was circulated and discussed during the CPB core group meeting in Paris (22<sup>nd</sup> to 23<sup>rd</sup> July 2015). There, it was decided to split the final output of Task 1.1 into two components: One will be the online handbook on CMP on digital data mentioned above. The other will be a short policy statement on digital data produced by guests or visitors of natural history collections. The latter is to be prepared by Michel Guiraud (MNHN) and will be further discussed and finalized in cooperation with the CPB.

### **Deliverable 2.1 – “Virtual Collections” Management Policy Meeting: Meeting to Discuss Virtual Collection Management Policies**

As also stated above, Deliverable 2.1 is defined as a meeting with external representatives to discuss and refine the policies developed within Task 1.1.

During the work on Task 1.1 and at several occasions, external experts were involved and asked for advice and for feedback on the intermediate results, for example during the CPB core group meeting in July 2015 (see above). The actual meeting of D2.1 took place in conjunction with the CETAF 38 General Meeting in Geneva in October 2015, which was attended by Christiane Quaisser and Stefanie Krause (both MfN). During the associated CETAF Digitization Working Group (DWG) meeting (13<sup>th</sup> October 2015) and the associated CPB meeting (15<sup>th</sup> October 2015), they presented the scope and aims of Task 1.1 as well as its intermediate results at this point, namely the draft handbook on CMP on digital data. Also, during the CPB meeting, Michel Guiraud (MNHN) presented a first outline of the policy statement on digital data produced by external guests of natural history collections and its content. There were productive discussions on both topics and on how to proceed and to link the Task 1.1 work with the DWG and CPB.

It was decided to distribute the draft handbook for evaluation within the DWG and CPB members as well as within the JRA participants. Their feedback on the draft is to be gathered and incorporated before the completion of the handbook. Also, it was agreed that the handbook, as soon as Task 1.1 is finished, will be adopted by the DWG. The DWG will proceed to implement and also to update the document as necessary. Therewith, the sustainable provision and promotion of a long lasting, regularly updated document will be guaranteed, even after completion of the SYNTHESYS 3 project.

The first outline of the policy statement on digital data produced by external guests was discussed and (in greatest parts) approved. Michel Guiraud will phrase a refined draft of the policy statement and then will circulate and present it again within the CPB in early 2016.

### **Subsequent Activities and Outlook**

At the beginning of December 2015 and in January 2016, NA 2 Objective 1 and JRA participants as well as CPB and DWG members were asked for evaluation of the draft handbook.

To date, comprehensive feedback was provided by Alan Paton (RBGK), Carlos Lado (CSIC, RJB), by Celia Santos as representative of the MNCN (CSIC), and by Karin Wilschke-Schrotta as representative of the NHMW. Along with further feedback, which is anticipated in the near future, it will be incorporated into the draft handbook. The final draft document will be re-circulated within the Task participants and, after agreement on the content and format, publicized. As planned during the DWG meeting in October 2015 (see above), the final online handbook will be adopted by the DWG after completion of Task 1.1 and the SYNTHESYS 3 project.