D1D2 - Update 2009
Annex 11

Suggestions for avenues of integration

1) Competency framework for curators

a. Career development and expected competencies

➔ Setting up / harmonisation to establish common standards & provide standardised training (starting point = grid established by NHML ? also MNHN grid?)

b. Database curation and specimen curation

➔ Two different frameworks?

➔ Specific training needed for database curation

c. Recognition and evaluation of work

➔ Performance indicators

Build upon SYNTHESYS

2) Collection Policy

a. Material acquisition

i. Criteria for material acquisition

1. Specimen conservation status

➔ standards for preservation condition

2. Information quality

➔ quality standards (cf discussions on GBIF data quality / Taxacom)

3. Compliance with CBD / species conservation status

➔ set up a charter / common standards & perhaps a common statement

ii. Procedures

1. Old collections (already housed somewhere)
2. New collections (from the field)

➔ set up a procedure / protocol

Build upon SYNTHESYS

b. Management

i. Complementarity / Redundancy/ Exchange

➔ agree on principles & set up (administrative / legal) modalities

ii. Information management

➔ what is open access / protected / shared / mirrored

iii. Databasing incl. incl digitisation of specimens and sustainability of databases

➔ Common policy, common implementation?

Information / informatics: maintain ISTC. Set up a sustainable / permanent informatics' task force within a partner institution or by subcontracting the task to a specialised organism (INRIA ? BGBM? Private firm?)

Create formally / Maintain Directors of Collections committee?

c. Access

i. Loans

ii. Visits
iii. On-line access
iv. Communicate about who has access and to what
v. Advertise collections

➔ set up rules & standards + communication

3) Scientific Evaluation Metric

a. Complementing ISI standards
b. Recognising taxonomic specificities (monographs, species descriptions, etc.)
   i. Using long time-scales for citation
   ii. Electronic publication
   iii. Service providing (identification, training, teaching…)
c. Science community involvement (refereeing, reviewing, etc.)
d. Including new technologies such as databases contribution.

4) Integrated research

➔ ATBIs / task force
Requirement : coordination, communication (partnerships), expert database ?

➔ Support joint research among EDIT partner institutions through exchange of researchers
Requirements: Travel funds
Staff for organisation (small additional task for existing staff at each participating institution)

➔ Funding directly joint research projects
Requirements: using some of the core funds for grants
Staff for organisation

5) Tools for taxonomic research

a. Adoption of the Internet Platform on an institutional basis, together contributing to the open-source development of the platform

➔ task force for maintenance / development of the platform (in addition to collection information management)

b. Common support to taxonomic journal (s)

➔ e-publication?
Requirement : invest some (most?) of the publication staff time (and publication budget?)

6) Training

➔ DEST
➔ Including training for curation (specimens and databases), and for users

Requirement: some staff time and financial support: explore e.g. Marie Curie Research Training networks funding, ESF, NATO, UNESCO, ...

7) Instruments for common institutional policy

a. Staff, expertise

➔ Information service on taxonomic experts, their expertise and ongoing and planned taxonomic research projects

➔ Information service on taxonomic societies

These two information services could be integrated and/or maintained by the same institution
Requirements: Infrastructure: basically a server (possibly mirrored in another institution)
Staff for maintenance and organisation of update ~ 1 person

b. Science Policy: development require recommendations/report from the Science Policy Group (4th JPA)

c. Board of Directors

Requirements: travel money + Directors time + secretariat

8) Promoting taxonomy & collections to stakeholders (science & society)

a. Scientific events & conferences
b. Promotion towards the scientific community (publication of a bulletin…)
c. Training for scientific & non scientific stakeholders & users (from conservation…)
d. promoting interdisciplinary research
e. promoting demand driven research NEXT to basic science
f. promote collaborations with the amateur community in publication, projects and fieldwork
g. Broaden the user base of collections

9) Instruments of long term integration

To develop and maintain all this in the long term, needed:

- BoD permanent
- Coordinator (+ small team?)
- ISTC permanent.
- Directors of Collections committee permanent
- Should we encompass a Directors of Science committee (to work out 3) and 4) above)?
- IT task force (specimen databases (+ others?) and internet platform).(staff time + possibly additional IT staff dedicated to common tasks)
- Legal / administrative task force (staff time)
- Publications (coordination and/or common e-journal) (staff time and possibly budget transfer)
- Outreach: integrated PA & PR activities (staff time)
- Distributed European School of Taxonomy (staff time + external support)

Do the elements needed above justify a) a simple contract / agreement between partners (revised consortium agreement) or b) a common legal status (= a new legal entity)?

If b) is retained, is the CETAF status enough? Is the EC Infrastructure status applicable (ERI) / worth being implemented? Is a new "association" (Belgian, French, etc. status) needed?