

Summary Report of the iDigBio Sustainability Working Group Meeting, Boulder, CO May 20-21, 2014

Participants:

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Purpose:

The charge of the Sustainability Working Group (SWG), as per the community discussions held during the iDigBio Summit III in Tallahassee, FL, (November, 2014) is “to investigate the feasibility of charging for the use of data services.” The SWG has concluded that this charge is insufficiently broad and has concluded that it is the role of the working group to investigate the feasibility of maintaining products created and services offered by iDigBio, during and beyond the current funding cycle of the ADBC program at NSF.

With this expanded charge in mind, the SWG met for two days at the National Ecological Observatory Network headquarters in Boulder, Colorado. The goals of the meeting were to:

- develop a set of high-level impact and sustainability goals for iDigBio and a timeline for realizing these goals.
- develop a preliminary plan to identify and gather the necessary information about iDigBio and related projects for the development of a framework for a formal iDigBio/ADBC sustainability plan.
 - The plan design will include preliminary assessments of current and future products, personnel, and other resources; challenges (known and anticipated); and, high-level goals and expectations.
- generate a set of recommendations for additional information gathering and assessment in the areas of institutional and community value proposition, defining user base and audience, competitive environment, and cost and funding models.

Meeting Framework and Discussion:

Using the attached agenda (see end of this document), the SWG spent 1.5 days exploring the idea of sustainability in order to develop a multi-step plan to enable iDigBio to move toward a sustainable future. During our meeting the following topics were discussed and worthy of noting in this report.

Think Big and Think Wide

We began the meeting with an exercise intended to begin the thought process from a different starting point than most of our discussion historically. We began by exploring the concept of Social Entrepreneurialism and the idea that there may be at least one business opportunity available to iDigBio that might at first appear as unrelated to the immediate activities of the organization, but that could, with minimal effort support iDigBio's activities into the long term. While we did not identify a specific business opportunity, the exercise served its purpose and opened the remainder of our discussion to a much broader range of ideas than previously discussed.

What is Sustainability?

As a means to determine the scope of the working group's efforts we felt it important to define what we meant when discussing sustainability. The group agreed that the definition provided by Maron, Smith, and Loy (2009) in the Ithaca S+R report, *Sustaining Digital Resources: An On-the-Ground View of Projects Today*, fit well with our collective understanding of the concept. The definition is:

“Sustainability is the ability to generate or gain access to the resources – financial or otherwise – needed to protect and increase the value of the content or the service for those who use it.”

Meeting Results and Recommendations:

As a result of a productive discussion the SWG has identified seven (7) specific products that we propose are important to the creation and implementation of a sustainability plan for iDigBio. The products, and the processes to create them should help us to answer the question: What do we need to do, or need to know, to develop a sustainability plan?

A timeline for the following products is included at the end of this section.

Product One: Picture of True Investment

Although iDigBio is able to support its current activities at the rate of ~\$2M annually, the reality is that the sum is only a portion of the total investment and input into iDigBio's services and products. Other projects contribute a considerable amount of resources of their own toward the success of iDigBio's efforts. For example, iDigBio may be the primary developer of its data portal, but the TCNs, each receives supplemental funding in addition to iDigBio's operating expenses. Without those projects, there would be no data or digitization to populate the portal. For the SWG to understand the extent of the resources necessary to realize its charge, the SWG needs a detailed picture of the true investment in iDigBio's products and services.

This product will be developed and presented in both written and visual form (*e.g.*, pie charts) detailing the actual contribution to the ADBC as a whole, including TCNs and other existing projects, such as MorphBank, VertNet, Symbiota, and others.

SWG members Barbara Theirs and Kevin Love (with David Bloom) will work with iDigBio and representatives of other projects as necessary to complete this project.

Completion Goal: It is our intent to report on our findings at the iDigBio Summit IV, in October, 2014.

Product Two: Value Proposition of iDigBio and ADBC

Defining the value proposition of iDigBio and ADBC is a critical piece to the sustainability puzzle. It is well-known that a project must be of value to its audience(s), but it is rare (especially in the biodiversity research community) for a project to understand and become capable of communicating its value to its community. For iDigBio to be successful in its mission to create a “permanent database of digitized information from all biological collection in the U.S.” for the purpose of “improved environmental and economic policies”, the project must understand its value to the community it serves, including a constant revision of this understanding.

This product will be presented in written form as a statement for public review.

SWG members David Bloom, Robert Gropp, and Kevin Love will work with iDigBio staff – specifically Shari Ellis – to canvas the community and to develop a public statement of value.

Completion Goal: It is our intent to report on our findings at the iDigBio Summit IV, in October, 2014.

Product Three: Audience/User Base Analysis

A clear understanding of the audiences and users of products and services created by iDigBio and other ADBC-related projects is key to understanding future steps for the project. Although we would like to believe that we know who the users of these products are services may be, we don’t really have a good sense of who uses them currently or, more importantly, who could be using them. A clear understanding of the audience and user-base will not only provide opportunity for the development and improvement of products or services in the future, it will provide a guide for future implementation of a sustainability plan, specifically in the realm of potential funding opportunities and even potential hosts for the project once the ADBC program has been completed.

This product will be presented in written and visual form (*e.g.*, pie charts).

SWG members Hank Bart, Dave Bloom, and Kevin Love, will work with iDigBio staff – specifically David Jennings and Shari Ellis – review existing audience assessments,

iDigBio documentation, and analytics and to canvas the community as needed to identify underserved or new audiences.

This product will be informed (and updated by) in part by the research conducted for product Six, as much as time will permit.

Completion Goal: It is our intent to report on our findings at the iDigBio Summit IV, in October, 2014.

Product Four: Assessment of the Competitive Landscape

Much like the audience assessment, knowing potential competitors and collaborators, and their activities, is key to the development of a sustainability plan. Knowledge in this realm should help iDigBio to make decisions about how it will evolve its products and services, including decisions made not to pursue specific ideas due to a competitor's expertise in a given area. It is our understanding that iDigBio may have already begun this process, so we are eager to understand the scope of the current endeavor and to improve up it as necessary.

This product will be presented in written form.

SWG member Rob Gropp with assistance from Dave Bloom, will work with iDigBio staff – specifically David Jennings and whomever is already working on this assessment – to review existing data and to canvas the community for additional information.

This product will be informed in part by the research conducted for products Two, Three, Five, and Seven, as much as time will permit.

Completion Goal: It is our intent to report on our findings in early Q1 of 2015.

Product Five: Assessment of Potential Funding and Revenue Sources

Although we feel we have a good understanding of current funding landscape, it is important that the SWG and iDigBio have a more comprehensive knowledge of potential funding opportunities. These opportunities may come from government agencies, private companies, philanthropic interests, or from the ADBC audience-base. We propose a comprehensive assessment of these possible funding opportunities that will involve both online research as well as direct communications with possible funding entities.

This product will be presented in written form.

SWG members Hank Bart and Kevin Love will lead this effort and work with iDigBio staff to complete this assessment (see Work Group Needs below).

This product will be informed in part by the research conducted for products Two, Three, and Four.

Completion Goal: It is our intent to report on our findings in early Q2 of 2015.

Product Six: Priority Recommendations for Sustainability

iDigBio and other ADBC-related projects are the subject of an extensive number of reports written by both iDigBio staff and external reviewers. We wish to review these reports with the intention of identifying any persistent priority recommendations made by reviewers. We consider this to be an additional way to understand what some audiences expect from iDigBio moving forward. Although this will take some time, we believe it is an important effort in order to make use of existing documentation from and by iDigBio, TCNs, NSF, and other bodies reporting on the efforts of ADBC and iDigBio.

This product will be presented in written form.

SWG member Michael Denslow will lead this effort and work with iDigBio staff – specifically David Jennings and Kevin Love – to secure the reports and other documentation.

This product will be informed in part by the results of products Two, Three, and Four.

Completion Goal: it is our intent to report on the state of our findings in early Q3 of 2015.

Product Seven: Presentation of Impact/Sustainability Goals

Based on all of the products mentioned above, we will present iDigBio with a set of recommended sustainability, or impact, goals. These impact goals will clarify the overall end goal for iDigBio and the sustainability goals will be the tactical steps recommended by SWG to iDigBio to realize the impact goals. This product will evolve as products One through Six are completed. It should also adapt and evolve over the course of iDigBio's lifetime.

This product will be presented in written form.

SWG members Barbara Theirs and Dave Bloom will lead the creation of this product and will work with iDigBio and ADBC-related project staff as needed.

This product will be informed by the results of products One through Six.

Completion Goal: It is our intent to report on the state of our findings in Q3 of 2015.