



# Handbook for GBIF regional representatives

Nodes Steering Group • GBIF Secretariat

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# Colophon

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## Cover image

Nodes Steering Group at their 2024 meeting during the GBIF Governing Board in Portugal. Photo 2024 by Mélianie Raymond, licensed under [CC BY-NC 4.0](#).

# 1. Introduction

## 1.1. Welcome message

*Welcome from Joe Miller, GBIF Executive Secretary and Director*

“On behalf of the GBIF Secretariat and our broader network, we are delighted to share this practical guidance to assist you in your role as regional representative. Your experience and expertise is invaluable in strengthening collaboration across the regions and advancing GBIF’s mission to make biodiversity data openly and freely available for the benefit of all.

As a regional representative, your leadership will play a key role in supporting and connecting the GBIF Participant nodes, fostering knowledge exchange, and helping to identify regional priorities and opportunities.

In this role, you will:

- Represent the interests and perspectives of your region in the Nodes Committee and Nodes Steering Group decision-making and discussions
- Build partnerships and foster regional collaboration on biodiversity data mobilization and use

- Support and guide nodes in your region, helping to strengthen their capacity to participate in and benefit from the GBIF network
- Help direct attention and resources to regional needs and opportunities
- Welcome and mentor new nodes as they join the GBIF network
- Make a visible contribution to GBIF’s work through participation in regional and global events, working groups, and committees

We look forward to working closely with you in this role and supporting your efforts in facilitating communication and engagement within the network. Thank you for your leadership.”

## 1.2. About your work with the GBIF community

As regional representatives, you have an essential role in working with the GBIF community. The GBIF Secretariat wants you to be successful. To help we have developed this handbook which provides informal guidance to support you in fulfilling your roles and responsibilities. The roles of a regional representative are broad, encompassing: assisting in coordinating regional activities, ensuring effective communication between the region and other GBIF bodies, and promoting regional engagement and participation in implementing the GBIF work programme (see Terms of Reference and further information below). Please refer to this document as you lead your fellow node representatives in these important regional activities.

### 1.2.1. Values

GBIF’s network comes together around shared values that form part of our strategic framework. These values guide how we work across our community (Box 1).

#### *Box 1: GBIF’s values*

**Trust and Transparency:** Expectations that all decisions and processes are open; that data is properly attributed and of the highest-possible quality; and that infrastructures are robust, documented and persistent

**Collaboration and Collective Benefit:** A recognition that only through a spirit of cooperation can we fulfil GBIF’s mission by sharing skills, data, tools and experiences, avoiding duplication, and growing a global community of practice

**Diversity and Inclusiveness:** A commitment to engage and welcome people of all nationalities, cultures, genders and backgrounds while recognizing all contributions to our global community

**Innovation:** An ambition to lead by example in advancing open science and data services and in adopting novel techniques for collaboration and learning, recognizing that simplicity is often the best means of reaching our goals

**Integrity:** An assurance that professional norms and scientific integrity are respected; and that data-sharing safeguards the rights of indigenous peoples and local communities as well as potential risks to sensitive species

### 1.2.2. Code of conduct

The **code of conduct** for GBIF activities, endorsed by the Executive Committee, applies to “speakers, staff, volunteers, attendees, visitors and other business collaborators” and is, therefore, an important

reference for your work.

## 1.3. Key planning documents

GBIF's work is guided by key documents that provide the framework for your work on the regional level.

### 1.3.1. Strategic framework

At the highest level, **GBIF's strategic framework** includes GBIF's vision, mission and describes four priority areas. It is based on consultation with GBIF's standing committees and is approved by the Governing Board.

#### Annual work programmes

To implement the strategy, GBIF develops annual work programmes which outline activities and indicative tasks in the four priority areas. Draft work programmes are sent to all the Heads of Delegation and Node Managers for consultation, and the work programme and budget are then up for approval by the Voting Participants at the annual Governing Board meetings.

#### Nodes implementation plans

To frame the global priorities for the Nodes Committee as important contributors to the implementation of GBIF's vision and mission, the Nodes Steering Group (NSG) oversees the development of annual Nodes implementation plans. These provide strategic objectives for the nodes, aligned with the priority areas of the work programme, and describe actions that the nodes are encouraged to take to contribute to these.

Annually, the GBIF Secretariat requests that nodes provide updates on Participant progress and plans aligned with the priority areas of the work programme. These reports are included within the Nodes implementation plan for the year, helping to give an overview of the expected and achieved contributions of individual Participants and their nodes.

## 2. Roles and responsibilities

### 2.1. Regional Representatives and the Nodes Steering Group

The **Terms of Reference for the Participant Node Managers Committee** outline the roles of the committee. It also describes specific mandates for the Nodes Steering Group (NSG) and the regional sub-committees, including responsibilities of the regional representative and deputy. The Nodes Steering Group comprises the nodes committee chair and two vice-chairs, and the regional representatives and deputies.

#### 2.1.1. Key Responsibilities

The main objective of the regional representative is to serve as a liaison between the Nodes Steering Group, the GBIF Secretariat, and their respective regional subcommittee.

Regional representatives are expected to:

- Help with the coordination of regional-level activities

- Ensure the flow of information and communication between the region and the other GBIF bodies and groups
- Play a key role in promoting GBIF regionally and engaging the Participants in the implementation of the GBIF Work Programme
- Help onboard new nodes in the region

Deputies can assist regional representatives with their tasks upon request and could substitute for the regional representatives in NSG meetings if required.

You can always find on GBIF.org the contact details or the members of the:

- [Node Managers committee](#), which includes all the node managers
- [Nodes Steering Group](#), which includes the chair, vice-chairs, regional representatives and deputies
- [Regional sub-committees](#), by selecting the appropriate tabs from the network page

## 2.2. Election processes

The Nodes committee chair and two vice chairs are elected by the Governing Board according to Article 7.4 of the [Rules of Procedure](#).

The election process for the regional representative and deputy is outlined in the [operational guidelines](#) document. The Secretariat is available to assist with election processes and answer any questions. The Secretariat will track the duration of terms for regional representatives and notify representatives of impending deadlines.

## 2.3. Regional reporting

Regional representatives are expected to provide annual regional reports to the Nodes Committee chairs, typically around July or August. The NSG has a template for these reports that is updated annually to reflect the strategic objectives outlined in the Nodes Implementation Plan. Regional representatives and deputies should agree on a process to receive input from the nodes in their region from which to generate the report.

The regional reports are used by the Chair to generate their report to the Governing Board on behalf of the whole Nodes Committee. The Chair's report is one of the official Governing Board documents, sent to all delegations six weeks prior to the meeting, and is up for approval during the Governing Board meeting.

# 3. Getting started

## 3.1. NSG meeting schedule

As a regional representative or deputy, you are expected to attend NSG meetings to provide input to the discussions based on your knowledge of regional priorities and challenges. You are always welcome to suggest agenda items to the Chair, who is responsible for setting the agenda and running the meetings. There are three types of NSG meetings, as outlined here.

### 3.1.1. Regular online meetings

The NSG meets via online calls every few months, with the precise schedule agreed by the Chair and members. Meetings are supported by the GBIF Secretariat that oversees the circulation of the meeting invitations, draft agenda, and supporting documents. Please inform the Secretariat and Chair if you are unable to attend a meeting.

The Secretariat will circulate the draft minutes of all meetings for your review and approval. Once the minutes are finalized, a short decision summary document will be shared with the entire nodes committee.

### 3.1.2. Midterm meetings

The NSG are regularly invited to join the GBIF midterm committee meetings, typically held as in person meetings in Copenhagen in February, March or April. These meetings are an opportunity to have detailed discussions and to share ideas with the other GBIF standing committees.

For the GBIF midterm meetings, the group members' expenses for participating will be covered by the Secretariat. The Secretariat will contact the NSG members well in advance of the meeting with information about travel and accommodation.

### 3.1.3. NSG meetings alongside Governing Board meetings

The NSG typically meets just prior to the Governing Board meeting. This meeting is usually a half-day meeting, with a focus on discussion topics best handled in person. It is also a time for refining the messages and recommendations that are presented in the Chair's report to the Governing Board.

For the NSG meetings held in conjunction with the annual Governing Board meeting and related events, the travel, hotel and per diem costs are normally to be paid by the Participant from which the group member comes. However, committee members from Voting Participant countries that meet both of the following criteria may apply for partial travel support:

1. The country's per capita GDP is below USD 13,500 (according to the 2020 World Bank figures, the benchmark used to apply discounted contributions in the current GBIF funding period, 2023-2027).
2. The country is a Voting Participant in good financial standing.

Approval for this support is at the discretion of the Secretariat and depends on the availability of funds.

The NSG members who are not part of any delegation may attend the Governing Board meeting in their capacity as NSG members.

## 3.2. Global and Regional nodes meeting cycles

In addition to the NSG meetings, there is a regular cycle of Nodes Committee meetings. The Nodes Committee meets regionally in even numbered years and in odd years meets globally alongside the Governing Board meeting.

### 3.2.1. Global nodes meetings

Global nodes meetings are typically a single-day, in-person meeting held just prior to the Governing Board meeting. They are often preceded by a two-day training event for node managers. You can always find the materials from the latest global meetings online at [globalnodes.gbif.org](https://globalnodes.gbif.org).

As regional representatives, you will typically be asked to Chair regional breakout sessions during the global nodes meeting. You will be able to suggest topics for the meeting and training via the NSG meeting and may also wish to participate as trainers or mentors in other sessions.

### 3.2.2. Regional meetings

Nodes are welcome to self-organize regional meetings as often as they consider appropriate. The GBIF work programme typically includes funding to support nodes with the organization of regional nodes meetings every other year. This funding is a shared resource for organizing meetings across the six GBIF regions, and the NSG will be involved in the discussions regarding funding allocations per region. The NSG has approved some [guiding principles for the hosting of regional nodes meetings](#) that should be referred to during these discussions.

The GBIF Secretariat will initiate discussions with the NSG about regional meetings in the year prior to a regional meeting year. These discussions will help the regional representatives understand their roles in helping the nodes in the region to identify:

- The specific objectives of the regional meeting
- The meeting format (virtual, hybrid, in-person)
- Regional agreement on a host for in-person meetings (see [guiding principles](#))
- Possible sources of co-funding to support the meeting
- Other relevant events taking place in the region that could be linked to the regional meeting

#### Objectives

The regional nodes meeting agendas are organized by the regional representatives in consultation with the NSG and GBIF Secretariat. In general, regional nodes meetings aim to:

- **Support regional coordination**, led by the regional representatives
- **Facilitate regional collaboration** by allowing nodes to share updates on their activities, receive peer feedback, and discuss joint project proposals through the [Capacity Enhancement Support Programme \(CESP\)](#) and other programmes
- **Provide feedback to the Secretariat and NSG** on regional issues and priorities
- **Develop stronger regional engagement** in GBIF by identifying outreach strategies and actions, such as the recruitment of new participant countries and linking with relevant regional organizations and networks

#### Meeting format

The meeting format choice should be discussed in the region. Virtual, hybrid and in-person events each bring their own set of challenges and advantages if well prepared. Box 2 outlines some considerations.

#### ***Box 2: Recommendations regarding formats for regional meetings***

##### **Virtual meetings**

With the right approach, virtual meetings can be just as impactful as in-person discussions. The nodes committee has built up experience with holding virtual events, leading to the following recommendations:

- Keep online sessions under 2 hours if possible, with scheduled breaks for longer meetings.
- Share a detailed agenda and any discussion materials well in advance.
- Use pre-recorded presentations to help participants prepare and keep live sessions focused.
- Include interactive elements like polls or Q&A (e.g., Slido, Mentimeter) to maintain engagement.
- Use breakout rooms for smaller group discussions.
- Assign roles (host, facilitator, note taker, chat moderator) ahead of time.
- Do a technical test run with key speakers.
- Set clear housekeeping rules at the start (muting, chat use, questions, recording).
- Record sessions for those who can't attend live.

### Hybrid meetings

This format is particularly challenging and requires detailed preparation to ensure that both onsite and offsite participants feel connected and comfortable interacting with each other.

- Highlight priority sessions for remote attendees (e.g., key discussions or decisions) as it is unrealistic to expect them to join the whole meeting online.
- Prepare the chair to balance input from both online and onsite participants.
- Use tools like Slido for equal participation.
- Consider how to include remote participants in informal activities (e.g., post-meeting virtual drinks).
- Ensure proper room equipment (mics, speakers, screens, cameras) to enable contributions from all participants to be heard and seen clearly both in the remote and physical settings.

### In-person meetings

Apply lessons from virtual meetings to make the most of in-person meeting time. For example, consider whether parts of your agenda can be handled via pre-recorded presentations, prepared documents and/or surveys, allowing you to focus your in-person sessions on active discussion rather than one-directional information sharing and updates.

## Invitees and funding support

The main goal in allocating support for regional meetings is to bring as many node managers from the region together as possible. In years where funding support is available through the GBIF work programme, the NSG will be involved in the suggested allocation of funds per region to support the organization of regional meetings, in line with the [guiding principles](#). The regional representatives will run a consultation with nodes in the region to identify the preferred format of the meeting, and a node interested in hosting the meeting for hybrid or in-person meetings.

The GBIF Secretariat will provide a list of all the node managers in the region to be included in the invitation list. The invitation list should be developed in collaboration with the local host (for in-person meetings), the regional representatives, and the GBIF Secretariat based on the list of regional node managers. Regional representatives are welcome to propose attendance by observers and local hosts may wish to engage local collaborators.

For in-person events, the GBIF Secretariat, regional representatives and the node hosting the

meeting (local organizing team) will work closely together to prepare the meeting. Details on the roles are outlined in Box 3 and the Secretariat will share further guidance documentation with the meeting host as appropriate.

***Box 3: Roles and responsibilities for the organization of hybrid and in-person regional nodes meetings with Secretariat support***

**Contracts with local organizers**

In agreeing to host a regional nodes meeting, a node should be prepared to support the local logistics. Meeting hosts are encouraged to provide local facilities through in-kind support where possible. The GBIF Secretariat can sign a grant letter with the meeting host institution to allocate funding, where needed, to support venue hire and catering, accommodation, and local transportation.

**Travel support**

Once agreement has been reached on the location of a meeting and the list of invitees, the meeting host or the GBIF Secretariat will typically organize travel support working with a travel agent to book flights to and from the meeting. Priority for the use of GBIF core funds in assisting with booking flights will be for Voting Participant node managers, followed by Associate Participant node managers, with funding for observers available only if the budget allows. Node managers able to fund their own travel are encouraged to do so.

**Meeting reports**

Regional representatives are expected to ensure narrative reporting from regional nodes meetings, to enable the outcomes of the discussions to be shared with other nodes and the Secretariat. The meeting hosts will need to prepare a financial report of the costs incurred relating to any contracts with the Secretariat.

## 3.3. Tools and platforms

### 3.3.1. GBIF Directory

All documents related to the NSG and its meetings are available on the GBIF Directory, which can be accessed at: [https://directory.gbif.org/documents/nodes\\_steering\\_group/](https://directory.gbif.org/documents/nodes_steering_group/).

The Directory is password protected. If you do not already have access to the Directory, please email: [info@gbif.org](mailto:info@gbif.org) who will send you the login information for you to access the documents.

### 3.3.2. Mailing lists

The GBIF Secretariat maintains mailing lists for all official contacts.

**Global lists**

- [nodes\\_committee@cemail.gbif.org](mailto:nodes_committee@cemail.gbif.org) – all node managers
- [nodes\\_ig@cemail.gbif.org](mailto:nodes_ig@cemail.gbif.org) – all node managers + registered node staff

**Regional lists**

All node managers:

- [nodes\\_africa@cemail.gbif.org](mailto:nodes_africa@cemail.gbif.org)
- [nodes\\_asia@cemail.gbif.org](mailto:nodes_asia@cemail.gbif.org)
- [nodes\\_europe\\_centralasia@cemail.gbif.org](mailto:nodes_europe_centralasia@cemail.gbif.org)
- [nodes\\_latinamerica\\_caribbean@cemail.gbif.org](mailto:nodes_latinamerica_caribbean@cemail.gbif.org)
- [nodes\\_northamerica@cemail.gbif.org](mailto:nodes_northamerica@cemail.gbif.org)
- [nodes\\_oceania@cemail.gbif.org](mailto:nodes_oceania@cemail.gbif.org)

All node managers + registered node staff:

- [nodes\\_IG\\_Africa@cemail.gbif.org](mailto:nodes_IG_Africa@cemail.gbif.org)
- [nodes\\_IG\\_Asia@cemail.gbif.org](mailto:nodes_IG_Asia@cemail.gbif.org)
- [nodes\\_IG\\_Europe\\_CentralAsia@cemail.gbif.org](mailto:nodes_IG_Europe_CentralAsia@cemail.gbif.org)
- [nodes\\_IG\\_LatinAmerica\\_Caribbean@cemail.gbif.org](mailto:nodes_IG_LatinAmerica_Caribbean@cemail.gbif.org)
- [nodes\\_IG\\_NorthAmerica@cemail.gbif.org](mailto:nodes_IG_NorthAmerica@cemail.gbif.org)
- [nodes\\_IG\\_Oceania@cemail.gbif.org](mailto:nodes_IG_Oceania@cemail.gbif.org)

Please note that only people who are on the lists can send to the lists. Others will be blocked.

Any requests for updates should be sent to the GBIF Secretariat at [info@gbif.org](mailto:info@gbif.org).

### 3.3.3. Online meeting platforms

GBIF currently uses [Zoom](#) as an online meeting platform. Information on how to join online meetings will be circulated together with agendas.

## 3.4. Key Secretariat contacts

The GBIF Secretariat is available to assist you with getting started and with any questions as you progress. The best point of contact is to email [nodes@gbif.org](mailto:nodes@gbif.org), which will redirect to multiple contacts at the Secretariat that support the work of the nodes committee.

# 4. Best practices for regional engagement

## 4.1. Regional coordination

Each region develops its own approach to regional communication and coordination, led by the regional representatives, and often involving the regional support teams. Some examples of the tools and platforms being used are linked in this section.

### 4.1.1. Africa

- In addition to the use of the regional mailing list, the main communication channel is a WhatsApp group “GBIF Africa Node Managers”. This is used to promote upcoming opportunities and events, remind nodes of deadlines, and share informal updates.
- The Africa Regional Support Team hosts webinars to support the biodiversity data community in Africa. These webinars cover a range of topics, including data publishing, data quality, GBIF Hosted Portals, and capacity building opportunities, and alternate in the use of English or French as the primary language. The webinars are aimed at GBIF nodes, researchers, and anyone

interested in biodiversity data in the region. They are advertised on the [events section](#) of GBIF.org and nodes are invited to email [africa\\_support@gbif.org](mailto:africa_support@gbif.org) with suggestions of topics or presentations.

#### 4.1.2. Asia

- The Asia region has established [working groups](#) to engage nodes, researchers and the regional support team members in discussions related to the four priority areas of the GBIF work programme.
- The Asia regional support team holds [open office hours](#) for nodes and researchers from the region to drop in with questions and to learn more about GBIF.

#### 4.1.3. Europe and Central Asia

- [Main communication channel](#)
- [Communication strategy](#)

#### 4.1.4. Latin America and Caribbean

- In addition to the use of the regional mailing list, the main communication channel is a WhatsApp group “GBIF - LAC”. This is used to promote upcoming opportunities and events, remind nodes of deadlines, and share informal updates. Most of the communication is in Spanish and English.
- The region organizes regular online meetings to facilitate communication and coordination among the nodes.

#### 4.1.5. North America

- There is a [GBIF North America Slack channel](#) for nodes and other interested researchers and institutions to share regular updates.

#### 4.1.6. Oceania

- The region holds regular online meetings to share progress and discuss priorities.

## 4.2. Regional events

### 4.2.1. Workshops alongside regional meetings

During regional nodes meeting years, you can consider whether you could also organize a regional training event or workshop alongside the meeting. Some regions have successfully mobilized co-funding from other sources, including via CESP projects, to support training activities for the nodes in the region benefiting from the nodes coming together for the regional meeting.

### 4.2.2. Conferences

As regional representatives, you are well placed to suggest regional events that would be relevant for GBIF to be represented at. GBIF maintains a [calendar of events](#) on the website and invites all nodes and collaborators to [suggest events](#) to be listed here. Even if you are unable to attend the event yourself, it may be possible for a [Biodiversity Open Data Ambassador](#) or another node to represent GBIF at the event.

## 4.3. Supporting outreach efforts

GBIF is committed to engaging new Participants following the [process for becoming a member](#). Regional representatives are encouraged to lead discussions with the nodes in their regions on possible new Participants and to help identify the appropriate contact persons to engage with towards their formal participation in the network. It is important to coordinate with the Secretariat on engagement efforts, as the Secretariat may also have active contacts from other engagement efforts and can support with sending of formal invitation letters to ministries, when appropriate.

You may also want to involve any relevant contacts as observers to regional events so that they can become more familiar with GBIF and the work of the nodes committee prior to formal Participation.

## 4.4. Promoting engagement in capacity enhancement efforts

The [capacity development framework](#) outlines GBIF's approach to empowering its global network through activities to facilitate the mobilization of biodiversity data and the use of GBIF-mediated biodiversity data.

As regional representatives, you can encourage strong participation in these capacity development activities (see section on [capacity development tools and approaches](#)), and provide regional feedback to the Secretariat to ensure these activities are meeting regional needs.

# 5. Engagement with GBIF regional support teams

## 5.1. Roles of the regional support teams

GBIF has established distributed regional support teams of part-time contractors in several GBIF regions.

These regional support teams play a key role in fostering active communities of practice by organizing online training workshops and webinars, providing technical assistance to data publishers, and supporting the discovery and engagement of biodiversity data-holding institutions. This includes updating the [Global Registry of Scientific Collections \(GRSciColl\)](#) and reaching out to data holders to promote the benefits of open data sharing. They may also support data mobilization projects and training workshops funded through GBIF-led programmes, such as [Biodiversity Information for Development \(BID\) programme](#). They focus their efforts on engaging data holders and publishers in countries that do not yet formally participate in GBIF and therefore do not have a GBIF node.

## 5.2. Possible areas of collaboration

We encourage regional representatives to work closely with the regional support teams to ensure good collaboration for strengthening regional engagement in data mobilization and use. Areas of collaboration include:

- Coordination around the administration of regional cloud-hosted IPT installations
- Providing support to new or prospective data publishing institutions
- Updating GRSciColl records for collections in the region and providing training to new or

prospective GRSciColl editors

- Organizing online regional training events and webinars that can involve node managers and/or node staff, as well as other contacts from the region
- Providing support for the onboarding of new node managers in the region, for example, by setting up online meetings and providing data mobilization guidance

We encourage you to keep the GBIF Secretariat informed of requests for support from the regional support teams to ensure good management of workloads and expectations.

### 5.2.1. Travel

GBIF regional representatives and nodes can also invite members of the regional support team to attend community-organized events and workshops when their participation aligns with the event's objectives and contributes to GBIF's overall mission. Please **inform** the GBIF Secretariat during the early planning stages to help identify the most effective way for them to participate. As the Secretariat does not currently have a travel budget to support in-person attendance, organizers should include travel support in their invitations.

Regional support team members should also notify the Secretariat of any direct invitations they receive from the community. This allows the Secretariat to consult relevant nodes, Heads of Delegation, regional representatives, or other key contacts as needed to coordinate GBIF's representation effectively.

### 5.2.2. Contact information for regional support teams

Nodes are welcome to reach out to the regional support teams via the following mailing lists: Africa: [africa\\_support@gbif.org](mailto:africa_support@gbif.org) Asia: [asia\\_support@gbif.org](mailto:asia_support@gbif.org) Europe & Central Asia: [eca\\_support@gbif.org](mailto:eca_support@gbif.org) Latin America & the Caribbean & Pacific: [lac\\_support@gbif.org](mailto:lac_support@gbif.org)

## 6. Tracking progress

When compiling regional reports, you may wish to include trends to show progress in data mobilization and use. GBIF produces **regional trends** in data mobilization that are always available from the website. It is also always possible to view data use trends for regions in the annual **science reviews**.

In addition, the NSG performs an annual review of indicators of minimum node performance with a view to identifying nodes that may be at risk of becoming inactive. The Secretariat will initiate this work, in discussion with the NSG, and regional representatives can assist in following up to encourage more active engagement from any nodes concerned.

## 7. Further assistance

If you have any remaining questions, please contact the Secretariat at [nodes@gbif.org](mailto:nodes@gbif.org) and/or members of the **Nodes Steering Group**.