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***Reports of Governing and Major Subsidiary Bodies***



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# **Steering Group for the IOC Ocean Best Practices System, Fourth Annual Meeting (SG-OBPS-IV)**

**Hybrid**

Paris, France

31 November - 02 December 2022



**UNESCO 2022**

Paris, 31 December 2022  
English



In-Person Participants from L to R:

George Petihakis; Rene Garello; Rachel Przeslawski; Taco De Bruin; Arno Lambert; Francoise Pearlman; Ana Lara-Lopez; Mark Bushnell; Peter Pissierssens; Jay Pearlman; Pauline Simpson; Cristian Munoz Mas; Johannes Karstensen; Juliet Hermes; Emma Heslop; Sergey Belov. (missing : image of Frank Muller-Karger)

## [ANNEX II: PARTICIPANTS](#)

### [Steering Group Membership 2023](#)

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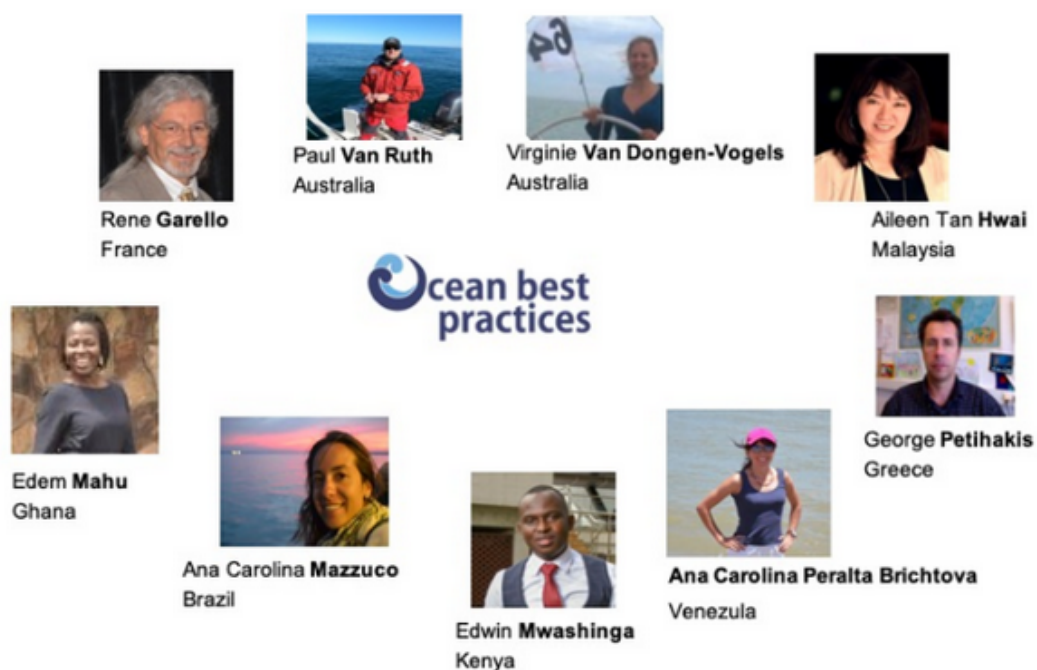
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## 1. OPENING OF THE MEETING

The Fourth Session of the Steering Group for the IOC Ocean Best Practices System (SG-OBPS-IV) was held on 30 November - 02 December 2022. A hybrid format was chosen to facilitate maximum participation of Steering Group members and candidate co-Chairs and new SG members. OBPS Co-Chairs, Johannes Karstensen (JK) and Jay Pearlman (JP) welcomed participants to the first in-person meeting in a long time. It was noted that there was a full agenda but with flexibility to allow for full discussion. Jay Pearlman started with introducing the Co-Chair candidates, George Petihakis and Rene Garello and the Co-Chair-Elects candidates, Cristian Munoz Mas and Rebecca Zitoun who was presently on a research cruise and would only be able to join the meeting sometimes. He introduced the nine new members of the SG, some of whom would join online when they could, time zones permitting.

### New 2023 SG Members



The Steering Group welcomed the new members and looked forward to discussions on their contribution to OBPS.

Jay Pearlman then moved to a presentation on [The future is ours - an OBPS Perspective 2022](#). He briefly went through activities for the year, but reminded the meeting attendees that there would be agenda sessions covering much more detail and the priorities for 2023 would be discussed. He showed that the OBPS supported the entire ocean value chain and outlined the structure of OBPS, repository, journal, user support and training with metrics showing the upward trend in repository

deposits, and the (almost) global coverage of users. For the gaps in parts of South America and Africa he noted that the new SG members from those areas would support new engagement activities there. In addition, regional support was now available from the five new Ocean Decade Ambassadors - a Programme implemented by Cora Horstmann and Rebecca Zitoun, in which the Ambassadors were receiving training on communication to better approach their work of representing OBPS in their regions.

Financial support from IODE and GOOS was gratefully acknowledged and he recognized the importance of additional funding from projects and he listed those that OBPS are involved with, highlighting that Blue Cloud 2026 and ILIAD were new projects for 2022/2023. In this respect, the investigation of AISBL status (a non profit international organization in Belgium) to permit acceptance of grants could be important. Emma Heslop was interested in seeing a spreadsheet of the external Project Deliverables and how they mapped into the OBPS work plan.

Steering Group meeting structure had been changed to a quarterly rotation: decision; panel; open discussion but this was still experimental. Much had been discussed on governance and would be in this meeting and of course steering group rotation and the co-chairs succession would also be addressed during this meeting.

Technology, which is supported through external project funding, had resulted in enhancements to the user interface; the endorsement process had matured in 2022 and steps toward defining the concept of a federated network of methodology management systems had begun. Capacity Development and training has moved forward with the completion of the OBPS Training Course and the Caribbean Capacity Development proposal submitted to NORAD is awaiting an outcome. Communication and Outreach are vital components of the OBPS activated by the bi-monthly *Newsflash* and also the very successful OBPS Workshop VI. Work on the Ocean Practices for the Decade Programme needs to be focussed, but is already working with other programmes like CoastPredict and Ocean Observing Co-Design.

## **ACTION**

**1.1. Project deliverables to be mapped in the OBPS work plan (PS)**

**1.2. The SG-OBPS to urge the IOC Secretariat to mobilize NORAD funding (GP/RG/PS)**

## **2. ADMINISTRATIVE ARRANGEMENTS**

Pauline Simpson, Project Manager for the Ocean Best Practices System thanked Emma Heslop for hosting the meeting in UNESCO, Paris, and Forest Collins the Local Host support and Yaeji Baek a new UNESCO intern who provided technology navigation. She thanked those who had travelled from far to be physically present at the meeting, as well as to those who were joining

remotely at inconvenient times.

Since the meeting was hybrid it was necessary for all to follow the same Zoom settings to enable all to have the same meeting experience. She shared some logistical and administrative information:

- Recordings
- Zoom camera and microphone
- In person zoom connections and microphone

She also reminded all of the Participants Pack which had been circulated, which included the agenda and all links to supporting documents of the meeting. Cristian Munoz Mas had kindly agreed to monitor the chat and 'raised hand' indicator.

## 2.1 Adoption of the agenda/timetable

Pauline Simpson presented the draft agenda. One change was requested, to move the Workshop VI session from Wednesday to Thursday 01 December morning. That change was agreed and the agenda was accepted. The agenda is presented in Annex III.

## 3. REVIEW OF STRATEGIC PLAN 2021-25

[https://drive.google.com/file/d/1M1RTpB\\_I5sTjQF5qdxHatAFt4kqIDx7/view?usp=share](https://drive.google.com/file/d/1M1RTpB_I5sTjQF5qdxHatAFt4kqIDx7/view?usp=share)

Jay Pearlman explained that the OBPS Strategic Plan was developed two years ago, covering a 5 year period in which adaptation was expected. Strategic areas (objectives) are laid out with goals but a detailed plan is not included within the strategy document itself. The Implementation Plan is the complementary document which maps the delivery of the strategy and covers two years and is based on available funds and priority decisions of the SG.

JP moved through the OBPS Strategic Plan emphasizing the main thrusts of each of the four objectives. The following actions were agreed after a comprehensive discussion:

### **ACTION:**

**3.1.** An update to the OBPS Strategic Plan titled **OBPS Strategy** should be produced. A small group volunteered (SB, FMK, EH) to wordsmith the introductory paragraph but time did not allow for this. The work to update the strategy would be done through collaborative working online. **(GP/RG)**

The following changes were recommended:

- 3.1.1.** Leave the vision and mission the same, but later it was decided to update the mission
- 3.1.2.** Rewrite the introduction to include context and relevance of the OBPS within the structure of IOC and IODE AND GOOS Strategies.
- 3.1.3.** Recommendation that 'information content' should be addressed at the OBPS level initially and then separately for the repository.
- 3.1.4.** As OBPS steps through the endorsement process and moves towards addressing standards, a delineation/definition between best practices and standards needs to be included. Standards in the OBPS context is probably more about standardization and does not imply that OBPS is moving towards being a standards body. This should be made clear.
- 3.1.5.** More explanatory text on critical keywords used in the Mission etc, needs to be included as well as a GLOSSARY
- 3.1.6.** In particular the 'ocean value chain' - should be expanded to use *ocean and related sciences value chain*, since OBPS is addressing a broader community, this broader phrase is very necessary to indicate not just the oceans but other environments that impact the ocean eg. river inputs. The concern about a broader inclusion is a dilution of the core requirement of the mission; it will affect convergence and searches and it was thought that there would be no difference between OBPS and Google.
- 3.1.7.** Strategic Objective 1 (SO1) included a definition but more prominence is needed to what is understood by 'methodological document' and ensure principles are set down when co-designing the Federated Network of Methodological Management Systems. Under SO4 the form of the name used is 'Federated network of interoperating 'practices system'', and it was recommended to use 'Federated network of interoperating ocean and related sciences best practices systems'
- 3.1.8.** Include a value proposition to the community in the strategy
- 3.1.9.** The strategy document could be used as an outreach tool if made succinct and more presentable - funding would be needed for designing the outreach document

OBPS under IOC is co-sponsored by the International Oceanographic Data and Information Exchange (IODI) and the Global Ocean Observing System (GOOS). The representatives from each of the Programmes provided a perspective on OBPS:

## **Global Ocean Observing System (GOOS) Perspective**

Emma Heslop , Acting Director GOOS, explained that she had been associated with OBPS for six years starting with a first meeting at SOCIB, Majorca where some early implementations were decided. She acknowledged that a great body of work has been achieved - OBPS and the term best practices is well known and included in such as research proposals, but warned that OBPS has not capitalized on the investment. She urged caution on what is agreed to take on and to ensure that OBPS can deliver its' core mission. At present there is no new money in IOC to fund strategy or staff positions; the Ocean Decade has helped in raising the ocean science profile but has not brought new resources.

She commented that all documents in the OBPS repository cannot be categorized as 'best practices' (only those certified as Endorsed Practices can be) and suggested this needs to be addressed perhaps by including another generic category. OBPS was asked to set up an endorsement process and this has been done and it can be seen as a step towards standards. GOOS and OBPS piloted this process and at the moment there are 7 GOOS endorsed practices. Another area of work is convergence and perhaps we do not know how to do it yet - but we need to settle down to getting a collection of the best of the best practices so that people use the same best practices. She suggested a proactive exercise of making separate approaches to the networks and communities.

She has heard the need for standards particularly in the Dialogue with Industry series so there should be a call to support the private sector to contribute to OBPS. The community needs to consider how we deal with standards and she linked convergence as the stepping stone to standards in OBPS. She suggested expanding OBPS abilities and to look at structural innovation, but again emphasized the balance between expansion and maintaining the core which still has some work to be done. She asked if OBPS offers a value statement of what is offered in the core.

She noted that there appeared to be too many documents produced on OBPS Governance and advised that particularly around decision making they should be condensed. Consensus is the IOC preferred methodology for decision making so it is better to take more time to make good decisions which in the end will help with cohesion of the group.



## **International Oceanographic and Data Information Exchange (IODE) Perspective**

Peter Pissierssens Head of the IODE Programme, said IODE has a long tradition of setting up manuals and guides, but their reach is somewhat limited. That is why it supports OBPS to get its documentation exposed but also to see the global uptake of its recommendations. He has difficulty finding documents in the repository and had some suggested improvements, some of which were already present, but others which will be added to the functionality additions in the next contract. His recommendation of criteria for what is deposited into OBPS is partially covered on the interface, but will also be covered by the definition of a 'methodological document' requested for the strategy update which will also be added to the search interface. OBPS is already a target source to OIH which he endorsed.

Sergey Belov, IODE Co-Chair, offered that because the project has two sponsors and they both have strategic visioning, the project in its new strategy, must be in line with the sponsors vision. It will be a challenge for the new co-chairs but will give a better OBPS profiling. He left a presentation on [IODE Perspectives](#).

Taco De Bruin, IODE Co-Chair, commented that the OBPS was one of the IODE flagship projects, highlighting that OBPS is known not only in the ocean community but that the Polar Community was working on best practices with guidance from OBPS. As already mentioned he recommended not focussing on governance but addressing the technical repository issues.

## **4. REVIEW OF IMPLEMENTATION (WORK/ACTION) PLAN 2022**

[https://docs.google.com/spreadsheets/d/1oVbsh1D8bNLwEL-RfKHC7bgwMVdU1-qiTWlwTLZismc/edit?usp=share\\_link](https://docs.google.com/spreadsheets/d/1oVbsh1D8bNLwEL-RfKHC7bgwMVdU1-qiTWlwTLZismc/edit?usp=share_link)

The OBPS Implementation plan was screen shared and Johannes Karstensen outlined that the work plan activity was mapped to OBPS strategic objectives (SO) and work packages (WP) responsibilities. A detailed review of each action both completed or in progress for 2022 was covered and text updated in real time, on the google spreadsheet above, and planned actions for 2023 were discussed and agreed with SG. (see Annex I).

*To avoid repetition, the Work Plan discussion text and actions are recorded under each WP agenda item.*

## **ACTION**

### **4.1. Implementation Plan to be updated (GP/RG/PS)**

With the updating of the Strategy Plan the Implementation Plan will also be updated. Timescale will depend on when the updated OBPS Strategy is available.

**4.1.1.** It was recommended that the Work Plan should not be included in the Implementation Plan (make a separate internal document)

**4.1.2.** It was recommended that the Budget should not be included in the Implementation Plan (make a separate internal document)

**4.1.3.** It was agreed that actions for WP8 would be added after the Ocean Decade session.

**4.1.4.** Approval of the 2023 Action (work) plan was rescheduled to Friday, following Agenda item 19.

**4.1.5.** Project deliverables to be mapped in the OBPS work plan

## **5a. GOVERNANCE**

Johannes Karstensen (JK) introduced this item. The need to revisit the governance document Version 1 of 07 Jan 2022 was required because the succession of co-chairs had not been documented. This work had resulted in a recommendation to have a co-chair-elect position to eliminate the situation of not having succession candidates in place. The Version 2 document presented, brings together a number of foundational documents to reflect the new co-chair succession exercise.

The document Version 2  
<https://docs.google.com/document/d/14qxRWG8qYYcl7E5qQRAakIKJk8BNCIs0/edit#heading=h.30jOzll> was screen shared and JK worked through the document highlighting the changes and updates to Version 1. Changes in terminology and phrases were discussed and agreed edits made in real time to the draft. It was confirmed that this Governance exercise resulted from not being able to select a co-chair from SG Members and to address this eventuality with a future succession procedure. Only processes affected by the new co-chair recommendations were revised in Version 2 - specifically, revision of the current Terms of Reference (ToR) addressed the selection criteria of the co-chair-elects including the Term limit of co-chairs which has been changed to 2 years with no renewal.

The co-chair-elects title was suggested to be changed by two members and it was decided to hold a quick in-meeting Google form vote - the result of which was to retain the co-chair-elects title.

Peter Pissierssens highlighted that IOC already has Rules of Procedures (for 60 years) and he informed that a new document on the *Rules of Procedure for IODE Projects*, will be presented at the IODE Committee in March 2023. Members were reminded that the new OBPS governance structure will need to be presented for approval at both IODE and GOOS Committees. A draft can be agreed at this meeting but it does have to go to the sponsors for approval and it may well be that the OBPS and co-chair/co-chair-elect revised terms of reference need to go to the IOC Assembly for final approval. A transitory arrangement would need to be in place in the meantime.

It was agreed to continue this discussion at an additional session slot on Friday morning. The following motions were presented for approval:

## **ACTION**

**5a.1. Motion:** The SG approves the election of nine new SG members : René GARELLO; Edem MAHU; Ana Carolina MAZZUCO; Edwin MWASHINGA; Carolina PERALTA; George PETIHAKIS; Aileen TAN SHAU HWAI; Paul VAN RUTH; Virginie VAN DONGEN VOGELS.

DECISION: the motion was agreed by consensus.

**5a.2. Motion:** The SG (approves) endorses the implementation of a Co-Chair-Elect governance element as a succession mechanism for SG-OBPS Co-Chair

DECISION: the motion was agreed by consensus.

## **5b. GOVERNANCE**

Version 2 discussion continued on Friday 02 December 2022, after agenda item 18. This session was the opportunity to revisit the draft Version 2 of the Governance Document

<https://docs.google.com/document/d/14qxRWG8qYYcl7E5qQRAakIKJk8BNCIs0/edit#heading=h.30jOzll>.

Jay Pearlman (JP) clarified that the new co-chairs would take office on 01 Jan 2023. Following a comprehensive discussion it was agreed that the proposed revisions to Version 2 recommended at this meeting, including revision of OBPS Terms of Reference, would be presented for approval to the members at the SG regular meeting 14 December 2022.

## ACTION

**5b.1.** It was agreed that the edits to Version 2 made at this meeting would be validated and a final draft copy would be made available to all SG for review (in suggesting mode) before the next SG-OBPS. Following a final convergence of all comments and suggested edits a final version of the Governance Document Version 2, would be presented for approval at the regular SG meeting to be held on 14 December 2022. (JP/PS)

Once approved it will be prepared as a working document for approval submission to IODE-XXVII and GOOS SG and possibly the IOC Assembly June 2023. (PS/GP/RG)

## 6. AISBL

### Establishing a non-profit organization for OBPS (presentation)

Johannes Karstensen (JK) explained that funding is key to ensure long term, stable operations and further development for OBPS. At present, core operations have been funded by IODE and GOOS with additional technology enhancements funded through EU and US external projects. However, UNESCO/IOC have a minimum threshold for accepting EU Grants of \$100k per annum which in most proposals eliminates what EU grants OBPS can bid for.

Alternate routes may not be attractive to donors : 3<sup>rd</sup> party funding “in the name of OBPS” by SG members who may retire, or, potential donations “filtered” through OBPS members. The funding vision is to add to OBPS a legal entity that can be a full partner in EU grants by establishing a non-profit international organization in Belgium (AISBL). JK stressed that OBPS would remain a project of IOC-IODE/GOOS with the following possible options for discussion: AISBL has a seat on the SG-OBPS (e.g. observer or ex-officio); IODE & GOOS have a seat on the Board of the AISBL (e.g. observer or ex-officio); SG-OBPS member institutions can also be AISBL members (e.g. none/low member fee)

The AISBL would provide a stable platform for funding and be able to receive smaller grants. JK outlined costs and confirmed a sponsor for setup and initial operating expenses (IEEE) has been identified; overheads from research grants would cover AISBL overhead and coordination costs. He went on to show a SWOT analysis.

George Petihakis shared his experience of working in the EuroGOOS AISBL which was hosted at the Royal Belgian Institute of Natural Sciences (RBINS) but

noted that SeaDataNet, for example, does not have an office so, depending on business, an office and Secretariat might be needed. He also cautioned that it was necessary for the AISBL, to select only projects which were in line with OBPS/OceanPractices Strategy/Implementation, despite that many proposals will invite bids from the AISBL. Particularly not to bid for projects in competition with AISBL members.

Peter Pissierssens commented that the relationship between OBPS and the AISBL will have to be documented in an MOU identifying what are the obligations from each organization - for 'OBPS' AISBL the prime activity is to mobilize funding; he also advised not to use the same name as the IOC entity to avoid any confusion. He queried the requirement of 'due process' but this may not be mandatory.

In summary:

- OBPS would remain a part of IOC-IODE/GOOS
- The repository remains the property of IOC
- The name of the AISBL should not be the same as OBPS
- A physical office would not be set up, but a PO Box would be needed - depending on the amount of 'business', a secretariat might be required, therefore cost becomes an important factor, but at the moment a 'light' approach would be pursued.
- IEEE will sponsor the AISBL setup and initial operating expenses.
- If global funding is pursued, there is a need to declare conflict of interest, where it arises.
- Do not bid for projects in competition with individual AISBL members.
- No host has been identified for the AISBL
- Director's insurance is required because they are fiscally responsible for any deficit

## **ACTION**

**6.1. Motion:** The SG approves that further steps are taken to create an AISBL with final approval of the AISBL to be requested of the SG once the structure and other details are identified by a subgroup of SG members with interest in moving this forward. The subgroup will report quarterly at the SG Regular Meeting focussing on a feasibility study. Initial AISBL subgroup: **JK/EH/PP/GP/RG/JP/PS**

**DECISION:** the motion was agreed by consensus.

## 7. FUNDING AND BUDGET 2023-2024

### [OBPS Draft Budget 2023-2024](#)

Johannes Karstensen (JK) identified different elements of the draft Budget - the core that is linked to the sponsors, and other items that are required for technology development and these have to be covered by external project funding. The budget lines were individually discussed and changes made in real time. Line items were prioritized and others moved to a new sheet for 2024. It was accepted that more changes are likely as discussion progresses with the sponsors, but it was cautioned that both IODE and GOOS have much reduced allocations from IOC so nothing can be assumed until the budget is submitted and the IODE and GOOS Committees have made an allocation to OBPS. The budget items would then need to be again prioritized according to the amount/s allocated. Similarly, the items annotated as EXB (i.e. funded by external projects) would also need to be re-confirmed.

From a query on funding opportunities from such as Government of Flanders and projects such as OIH/ODIS, Peter Pissierssens suggested that IOC Programmes for example, Ocean Carbon and Tsunamis Programmes might be worth approaching to 'sell' OBPS as their methodology archive.

### **ACTION**

**7.1.** Final Draft budget was to be presented for approval on Friday 02 December 2022, in agenda item 19, but there was no time, Following a final draft of all comments and suggested edits a final version of the Draft Budget Version 2, would be presented for approval at the regular SG meeting to be held on 14 December 2022. (JP/JK/PS)

## 8. OBPS WORKSHOP VI, 2022

### [OBPS Workshop VI](#) (presentation)

### [Recommendations from the OBPS Workshop VI](#) (presentation)

Frank Muller-Karger (FMK) who Chaired the Workshop VI Organizing Committee outlined his thoughts on the virtual OBPS Workshop VI and presented the recommendations from Paul Van Ruth's synthesis at the Workshop VI Plenary II. He felt the workshop was successful; there were some 668 active participants. He felt there was not enough cross linking/fertilization. Whilst the best practices recommendations were interesting, he felt they were at a high level (Mother Earth) without sufficient

detail. For OBPS, he highlighted the recommendations for an emphasis on capacity sharing and outreach, particularly the need for multi-language practices and possible translation requirements. He also called for different communication styles.

- ❖ Because it is virtual he did not think it should be compressed into 2 weeks with the Theme Sessions/topical workshops perhaps spread over the year. It might be time for a new format.
- ❖ EH suggested the workshop should have one theme each workshop rather than a mix; perhaps structure around the ocean value chain; focus on the observing community getting together to provide a set of converged standards including bio networks; perhaps link to OCG workshops, convene joint workshops; perhaps focus over one quarter of the year. The annual workshop is a useful convening event and we could facilitate pre and post workshops.
- ❖ JP suggested including a couple of plenary sessions summarizing all previous workshops outcomes. FMK thought this would overload the workshop organizers
- ❖ FMK - We should plan for big things that are in the pipeline as opposed to new things and bring best practices to those events (this is an alternative to the co-chairs simply creating a lot of arbitrary events).
- ❖ JH updated information on the next OceanObs in 2024 (or 2025) in Africa which would be a perfect event for best practices exposure.

The discussion moved to planning for the next annual Workshop VII:

- If external project funding is obtained it could be hybrid or with no funding it will be virtual
- The workshop title was not discussed
- Depending on clashes with other major events - the date should be September-October 2023. FMK noted 21 Sep Eurosea Conference IOC HQ, Paris; 7-13 Oct, GEO BON All Hands, Montreal (that involves MBON); 7 Nov ,Elections in USA, 10-11 Nov, Veterans Day; 23-24 Nov Thanksgiving. A Save the Date should be sent out asap as soon as a date is decided See Action Plan WP5..
- PP asked what are the objectives of the workshop is it CD/formal training?  
FMK - OTGA can play an important role but we need to agree on a strategy on how to engage researchers in universities and work with associations, societies and bring this into the classroom. PP suggested that we circulate OBPS materials in universities. We could try this with a few universities. (see Section 12. Capacity Development)

- With workshop global participation, it became obvious this year (from Cafe conversation and survey) that participants are looking for some level of translation provision and possible language groupings. Simultaneous human translation is costly so we should investigate any translation technology (Zoom has some partial features - provided you have the Pro subscription). IOC has four official languages (English, French, Russian and Spanish) so maybe focus on those (UNESCO has 9 working languages: Arabic, Chinese, English, French, Hindi, Italian, Portuguese, Russian and Spanish). It was also suggested to conduct a trial on providing translated versions of endorsed practices and this was added to the work plan 2023 and the draft Budget 2023.

Paul Van Ruth's Plenary I presentation on IMOS was highlighted by Emma Heslop as an exemplar of a nation's response and support to OBPS, and also a possible source of AISBL members subscription.

## **ACTION**

- 8.1.** Investigate translation technology to use in OBPS workshops (AL)
- 8.2.** Define a process and conduct a trial to translate two endorsed practices (Budget item) (JK/JH/PS )

## **9a. ADVANCED TECHNOLOGY AND INTEROPERABILITY (WP3)**

Pier Luigi Buttigieg (WP3 co-lead) was unable to attend this meeting.

Federated network of interoperating ocean practices systems (SO-04) technology co-design with OIH/ODIS - It is understood that OIH/ODIS would support the initial setup of a federated network of methodological management systems, searched through an OIH interface node clearly identified as OceanPractices and also searched through individual methods systems interfaces (eg. OBPS, FAO)

From the Work Plan: Decision trees action D1.3.1 was agreed to be expanded through the Task Team and members were reminded that within the JERICO Project Cristian Munoz Mas was also involved with SOCIB on decision trees to identify BP being used within the JERICO Community.

It was agreed that assessing a requirement for a mobile app should be deleted until it becomes an SG priority.

## **ACTION**

- 9a.1.** PLB be requested to provide an update on the progress of the proposed Federated Network of Methodological Management Systems (PS )



## **9b. TECHNOLOGY - Repository Operations (WP2)**

Pauline Simpson Work Package 2 co-lead explained the two interfaces that comprise the Repository which is hosted at the IODE Project Office in Oostende - the DSpace submission interface and the Search interface called Enhanced Discovery Service (EDS) designed by E84 contractor to provide a more sophisticated search functionality than DSpace but noting that the structure, metadata and content in the DSpace repository underpins all the functions made available through the EDS search interface. E84 had received several contracts because with bespoke software it is difficult to find other contractors willing to take the time to understand other contractors' programming. The last EDS enhancement contract was beset with problems due to contractor personnel resourcing and then paternity leave for the programmer responsible for the EDS; and little support from WP3. The EDS is hosted on Amazon Web Services (AWS) using Elasticsearch. The present search logic reflects a google type search logic which produces search results in decreasing relevance as a default. Issues have become apparent with the search logic and search results and this session was to focus on the issues.

E84 has recommended:

### **UI/UX design review**

Element 84 believes that EDS would benefit from a UI/UX design review, given the increase in UI elements implemented in this phase. Currently, when a search returns results, each result has a large amount of information that is returned as well. A UI/UX review could determine a cleaner way to represent all of this information and avoid a potentially cluttered appearance and end user confusion.

### **Ongoing Maintenance**

The system ought to be updated and patched on a more regular basis, as is done for most operational software, to prevent security or stability issues.

Comments received from the SG:

1. Boolean search has a bug
2. Queries about quality of search engine and the search logic configuration
3. Search logic (and intuitiveness, user friendliness, usability); (user help)
4. PP would like to be able to have a search parameter for categories such as (manual, standard, practice) and also a geographic search.
5. Need criteria for inclusion. Comments from two members on non-methodology papers included. A suggestion about implementing a Review Group for a submitted deposit, but it has to be understood that

6. there would be a tight timescale for the review because depositors are chasing to see their deposit within hours of submission.
7. Provide disclaimer/clarification on interface about what the system gives as results (if zero then it will give something else)
8. An internal WG to be set up to test the search interface against benchmark tests. The new SG and Ambassadors who have not used the search interface to provide an external testing base.
9. It was obvious from discussion that members had different views of the repository in the sense that some expected it to store only **best** practices whilst others expected it to include emerging practices, novel methods introduced and practices in use by the community.

#### **ACTION:**

**9b.1.** Pieter Provost and Arno be requested to try to fix the boolean logic bug (PP)

**9b.2.** Establish an SG Working Group on Repository Search to define and implement a formal benchmark test and reporting process (PS)

**9b.3. Motion:** The SG approves the creation of a Working Group on the Repository Search Function, to investigate and document in detail any issues with the Search function <https://search.oceanbestpractices.org/>.

DECISION: the motion was agreed by consensus. All SG will be requested to contribute.

### **10a. COMMUNICATION AND OUTREACH (WP5)**

Rachel Przeslawski (RP), WP5 co-lead, outlined her plans and explained that her focus was a new communication plan and a redesign of the OBPS website <https://www.oceanbestpractices.org/>. At present for the website, there is too much content and some issues with the design. She confirmed that WordPress software would continue to support the website but a different theme would be chosen. She would be creating a design outline to share with the SG including theme options. She will start this only after funding for a website developer had been confirmed and a developer engaged.

The following was discussed:

- RP plans to develop fliers and glossy (compliant) pdf that will be linked out from the website. Arno cautioned about pdf on websites. Rene advised about pdf Express.
- RP recommended that all WP5 deliverables would be addressed by a new Communication Plan (either created in-house or out-sourced). She agreed to create a rudimentary communication plan released as an SG

internal document, with scoping for a full communication plan, (with the help of Laura (GOOS Communications Officer - need to ask EH).

- AL recommended that events displayed on the website should be fed from the OceanExpert Calendar
- There is likely to be an SG members only section on the website where content not intended for OBPS users would be stored.
- A request was made that the site be multilingual and a suggestion that Deep-L be investigated <https://www.deepl.com/en/translator>. This could also be useful for the trial to translate two endorsed practices into other languages.
- The funding for this website exercise is being sought from repurposed funds in EuroSea - the RFP was ready and RP called for names of web design companies to use to call for quotations.
- Social media: RP reported that the last entry in Facebook was 2020 and it was decided to no longer use Facebook. PP commented that if we do not tweet regularly then we should not promote Twitter on the website.
- Other channels were discussed and it was agreed that an OBPS LinkedIn group would be set up . The new Ambassadors will begin working with their communities in 2023 to support communication and outreach.

## **ACTION**

**10.1** OBPS account on Facebook to be cancelled (RP)

**10.2.** RP to setup an OBPS LinkedIn Group (RP/AL)

**10.3.** RP request EH for assistance from Laura Stukonyte,(GOOS Communications) (RP)

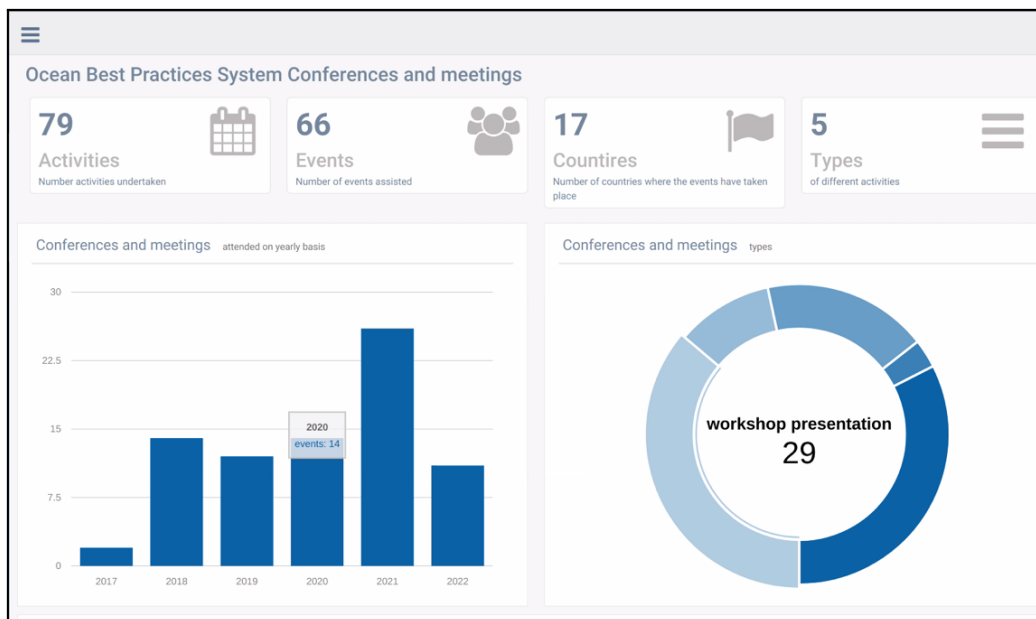
**10.4** Events on the new website to be populated from OceanExpert (RP/AL)

Cristian Munoz Mas who is working to build a suite of OBPS metrics to support OBPS KPI targets made a call for SG members to regularly update/contribute to the outputs folder

[https://drive.google.com/drive/folders/194d4lytB7Kw6aiWJ2PdwcUJTUvbe\\_cn?fusp=share\\_link](https://drive.google.com/drive/folders/194d4lytB7Kw6aiWJ2PdwcUJTUvbe_cn?fusp=share_link), and particularly to the spreadsheet

[https://docs.google.com/spreadsheets/d/16H\\_uGr6fK5Ku\\_aDH7a0tx0kbbRjtkT xmZHDaLl88-Zg/edit?usp=share\\_link](https://docs.google.com/spreadsheets/d/16H_uGr6fK5Ku_aDH7a0tx0kbbRjtkT xmZHDaLl88-Zg/edit?usp=share_link). He showed the Google Analytics visual

below that he had generated from the manually maintained output log of contributions to conferences and meetings, but explained that he would like to automate the process to feed a website page that would be automatically updated.



## ACTION

**10.5.** CMM requested a reminder about completing the log be made on each SG agenda. (PS)

**10.6.** CMM to consider a Google Form collection mechanism (CMM)

## 10b. USER STORIES (WP5)

This section was moderated by Rachel Przslawski (RP) and Mark Bushell (MB) and was about encouraging SG to record their good news stories about the OBPS activities. Not just about for example the excellent metrics for a repository deposit, but also events, online workshops etc. It was suggested that User Stories should be included on the new website and RP pointed out that the *NewsFlash* publishes these 'stories' so these could be a separate webpage option. RP made a call for more user stories for the *Newsflash*. Juliet Hermes (JH) mentioned that the XBT endorsed practices gave feedback that the BP document template and the 'BP4BP' report were really useful in their practices creation. EH suggested we reuse some of the success stories for example metrics for a deposit, or working with indigenous communities. JP has a new story related to the OceanPrediction DCC and MB thought the wonderful slate of new SG candidates attracted by OBPS should be included. CMM reported that IMR had a mentorship with Mauritania doctorate candidate and at the end of his mentorship he produced a couple of database methodologies now in OBPS. This also relates to comments about OBPS not being just the 'best of the best' but these sort of methodologies might contribute to any convergence exercises. AL-L suggested including a regular

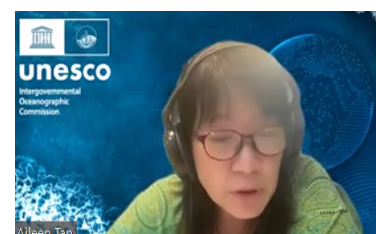
series in the News Flash about learnings from mistakes and misadventures. The user stories are an opportunity space to expose OBPS' many facets.

At this point in the meeting, Vladimir Ryabinin, Executive Secretary IOC, 'dropped' into the meeting for a short time. He talked about the UN Lisbon conference statement that specifically mentioned the **IOC** Ocean Decade initiative. He acknowledged that OBPS best practices activity is a crucial element in supporting the Ocean Decade in creating a moral climate for innovation in the ocean and helping marine science grow, based on best information and practices. He acknowledged OBPS work that contributes to the global ocean decade vision.

## 11. CONNECTING TO USERS/STAKEHOLDERS (WP4 & WP 6)

Mark Bushnell (MB) introduced this session by asking the questions - who are the stakeholders we wish to address and in what respect - what are their needs. He followed by saying that even though OBPS has expanded its collaborations there is still a need for more. He was impressed with the 19 workshop themes which reflected the growing potential of the user community and also provided the mechanism to gather stakeholders; and felt the regional diversity of the new steering group members would expand that stakeholder reach. MB and FMK confirmed that almost on a daily basis they talk to diverse stakeholders and will also introduce the engagement log to the new members. He offered to enter members' activity into the log if they let him know the details. The GOOS Regional Alliances (GRA) were recommended as groups and gatherings with which to make connections; there are 13 GRAs and an OBPS representative should attend their meetings and make presentations. This would reach down to levels lower than just the lead of the GRA. As a benefit to the GRAs, OBPS could offer to deposit for each of the relevant communities and expose the metrics. There are a number of big meetings like the EuroSea Project final meeting in September, but also some in the beginning of the New Year, so perhaps offer a presentation on best practices to each of the big meetings in the regions - possibly the Ambassadors should take this on. GRAs could make it possible to share national and regional practices particularly with a call for affordable practices with low cost equipment.

The meeting was attended remotely by a number of regional steering group members and Aileen Tan (AT)



was asked for her regional (Malaysia) perspective. She explained that in her region the debate was still about whether to use good practices rather than 'best practices' because 'best' constrains what tools and what is adoptable in the region - how do they apply what is called best practices. She queried how many in the regions after the workshop are able to adopt best practices that often require funding and skills which are gaps in the region, but felt it would be good to start looking at the needs of the region. She confirmed there was little effort in Malaysia for the Ocean Decade.

FMK asked if OBPS could be represented with a slot in the World Conference on Marine Biodiversity July 2023 to be held in the region. AT felt it was a great idea and asked FMK to email her with the request to incorporate an OBPS session.

PP urged promotion of community building and suggested the region identify and deposit into OBPS, methodologies used by projects in those regions particularly deposit practices that use low cost options. PP suggested that perhaps the discussion could be raised in IOCWESTPAC at their next annual meeting.

CMM wondered if for OBPS deposits, metadata could be collected on the cost of implementing a practice in a particular region. Particularly metadata for tools used or low cost methods used for developing countries. What do you need to deploy, cost, serviceability, temperature region etc. VvD-V cautioned using low tech for a purpose for which high tech has been used - this needs comparative studies and research to allow for acknowledging its use... assessment needs to be done.

PP asked that there should be a search mechanism in OBPS that can retrieve 'low cost' methodologies.

MB reminded the meeting about the Task Team 22-01: Coastal Observations in Under-Resourced Countries which was investigating low cost options.

It was agreed the GOOS Endorsement Pilot in OBPS has been successful, (now 7 endorsements) but more organizations than GOOS need to become OBPS endorsing entities. EH recommended that the GRAs should be introduced to the endorsement process/pilot as part of a recruitment drive for more endorsement agencies; JH reminded that she only deals with GOOS endorsement, so other OBPS endorsement managers need to be identified for other agencies. She took the opportunity to make a call for practices to be nominated for endorsement, particularly in Australia which so far had only worked on national practices. JK also called for more endorsing agencies, he suggested ICES and other candidates, and suggested the Glider Community should endorse glider practices in Europe. He recommended that any

organization wanting to become an OBPS endorsing agency should present a proposal which contains their own definition of endorsement and their own conditions. There was agreement that an SG Working Group on Endorsement should be organized to address all these discussions including agreed generic criteria for all endorsing agencies.

EH reminded the meeting that convergence was part of OBPS vision but asked what that meant -what would be OBPS approach - is it convergence on EOVS? Is it convergence only on post processing - what do we think is possible - put some strawman ideas out there for the networks to consider. JK added that a requirement of an OBPS endorsing agency would be to include 'how they do convergence'.

JK spoke of a call for rotation of editors for the *Frontiers in Marine Science, Best Practices RT* but wondered how to do that. JH offered to step down. A call for volunteers was made to the SG; RP volunteered as an Associate Editor but it was also identified that an editor for ocean literacy (which Rachel thought she might be able to cover) was needed which raised the question about what was the criteria and experience required for a *Frontiers Best Practices RT* associate editor.

## **ACTION**

- 11.1.** A list of GRA and IOC SubRegion contacts to be compiled (AT?)
- 11.2.** One practice from Australia to be submitted to JH for GOOS endorsement (RP)
- 11.3.** SG Working Group on Endorsement to be setup with invitations to JK/FMK/MB/CMM /PS (JH)
- 11.4.** Invite RP to be associate editor for *Frontiers ... best Practices RT* (JK)
- 11.5.** Create a document defining the criteria for a *Frontiers .. best Practices RT* associate editor. (JK and Associate Editors)
- 11.6.** Presentation slot in the World Conference on Marine Diversity July 2023 to be requested via AT (FMK)
- 11.7a.** Investigate what mechanism can be implemented in OBPS to identify low-cost methodologies (PS)
- 11.7b.** What is the criteria for a 'low-cost' methodology. Include decision tree application. (JH and TT22-02)
- 11.8.** Make the Endorsed (External) metadata field a dropdown that only includes the names of OBPS approved endorsing agencies (at the moment only GOOS) (AL/PS)

## 12. CAPACITY DEVELOPMENT (WP7)

[WP7 Capacity Development](#) (presentation)

Ana Lara-Lopez, co-lead of WP7, reported that all four OBPS Training Course videos had now been completed and were available on the OTGA website. OTGA courses will continue to be added to OBPS, but the OBPS generated courses would also be on YouTube. It has been decided to store all training tutorials on the OBPS Youtube Channel <https://www.youtube.com/@oceanbestpractices/> and Nick Roden had reconfigured the channel to include Playlists which now included the workshops but also training videos. Sergey Belov reminded the meeting that YouTube was restricted in some countries.

In addition, WP7 had worked with Dominique Pelletier and Florent Cade (via EuroSea funding) to develop the first video protocol with the intention to encourage the community to create more.

JH brainstormed whether WP7 can produce guidelines for training videos and suggested including a session for lecturers in the next annual OBPS workshop - neither was included in the action plan but will be considered by WP7.

A proposal to [Norwegian Agency for Development Cooperation - Norad](#) had been submitted on *Ocean Practices for the Decade - Capacity Development in Ocean Best Practices Pilot in the Caribbean* in collaboration with Instituto de Investigaciones Marinas y Costeras, Colombia ([INVEMAR](#)) and St George's University ([SGU](#)), Grenada, West Indies. It would be a pilot programme to adopt and adapt best practices in the Caribbean which would be a blueprint to be used in other regions. Peter Pissierssens reported that IOC were discussing a renewed funding arrangement with Norad and there was hope that the proposal would be among those successful.

WP7 would also be working with WP5 on plans to redesign the CD webpage <https://www.oceanbestpractices.org/training/training-videos/>, within an overall revamp of the OBPS website. Al-L regretted to report that Claudia Delgado, IOC Capacity Development Coordinator and OTGA Project Manager had stepped down from WP7 co-lead (and in fact is leaving her IOC/IODE position) and she welcomed Rebecca Zitoun as her replacement in WP7.

Webinars had been identified for WP7 action in collaboration with WP5 and members recommended to plan to use the GOOS Webinar option. An initial idea was to host a webinar on "the *bad, the worse and the plain ugly*" covering bloopers. George Petihakis cautioned that he had done something similar and came up against problems with the manufacturers.



From the work plan - embedding best practices in university curriculum was originally suggested in the Majorca SG-OBPS meeting by linking to some universities and to include best practices tutorials into for example a training course on data management. JH recommended WP7 talk to Steve Diggs to take this forward. Other approaches - survey among universities if they are using OBPS ; survey POGO Training and request to embed a slidedeck into their many training offers and SCOR linking to the Ambassadors and including BP in their solicitations. AL-L agreed to develop members' suggestions concerning a trial to provide a few slides on best practices to university lecturers who could embed it into their own tutorials (Geomar (JK) or approach such as Rutgers and provide a best practices slidedeck for a discrete session. CMM recommended AL-L approach Prof Antonio Hogueane, CePTMar/UEM. (Mozambique) [hogueane@yahoo.com.br](mailto:hogueane@yahoo.com.br), for a pilot to embed OBPS in university curriculum.

## **ACTION**

**12.1.** Survey to academics in institutions about embedding OBPS in curricula (Geomar)

**12.2.** Prepare a Capacity Development pack on best practices for university curricula trials (Rutgers and POGO)

**12.3.** Follow up on collaboration with Capacity Sharing Hub for Arctic

**12.4.** Look for other sources of funding for the Caribbean pilot - depending on the NORAD outcome

**12.5.** The SG-OBPS to urge the IOC Secretariat to mobilize NORAD funding

## **13. OBP-SYSTEM Review**

Jay Pearlman (JP) used this open discussion agenda item to outline work package responsibilities and to seek new work package co-leads where vacancies had occurred or are expected.. He acknowledged the contributions of members who had left during 2022: Adam Leadbetter, Kirsten Isensee, Francoise Pearlman, and Jordan Van Stavel. New SG members bringing fresh ideas and new perspectives had the opportunity to identify where they wished to contribute to OBPS. During this session as a joint effort of the SG, the following recommendations were made for Work Package co-leads:

### **Work Package Leads/co-leads:**

WP1: Project Management - **Pauline Simpson**, Rene Garello, George Petihakis, Emma Heslop, Peter Pissierssens

WP2: Repository Operations - **Pauline Simpson**, Arno Lambert,

WP3: Advanced Technology and Interoperability - **Pier Luigi Buttigieg**, Cristian Munoz Mas

WP4: Publications and Endorsement - **Juliet Hermes**, Cora Hoerstmann

WP5: Communications and Outreach - **Rachel Przeslawski**, Carolina Peralta

WP6: User Communities - **Mark Bushnell**, Frank Muller-Karger

WP7 : Capacity Development and Training - **Ana Lara-Lopez**, Carolina Mazzuco

WP8 : OceanPractices – **Rebecca Zitoun**, Aileen Tan

## ACTION

**13.1.** Co-chairs will confirm with each of the recommended names for Work Package co-leads. Co-chairs would discuss with all new SG members how they wish to contribute to OBPS and it was expected that many would be members of one or more work package. **(RG/GP)**

## 14. TASK TEAMS Status/Reviews (WP6)

In the work plan discussion, it was queried whether there would be an action to assess the work of the Task Teams (TT) but it was agreed that the action would be for a summary to be produced by WP6 of the TT progress at each annual SG. The encouragement of new Task Team proposals was added to the WP6 action items.

## ACTION

**14.1.1.** TT progress reports to be presented at each annual SG **(MB)**

**14.1.2.** Add to the Work Plan 2023 an action to encourage new Task Team proposals **(PS)**

RP took the opportunity to confirm that all TT webpages would not be replicated in the new website design, but the information would be reproduced in a linked pdf.

Task Teams are implemented under the WP6 umbrella and have a finite duration. Mark Bushnell WP6 co-Lead, introduced TT co-leads for a brief overview when one was present:

- **OBPS Task Team 21-01: Diversity, Equity, and Inclusivity in Ocean Best Practices Development** [01-01-2021 to 31-12-2022] Cora Hoerstmann. <https://www.oceanbestpractices.org/about/task-teams/diversity-equity-and-inclusivity-in-ocean-best-practices-development/>  
The TT, organized by Cora Hoerstmann and Jordan Van Stavel (who stepped down in 2022), has now finished but the work is continuing with

Cora Hoerstmann co-leading a merge of the TT21-01 work into a newly formed ECOPS Ocean Decade Programme Task Team on Diversity, Equity and Inclusivity,

<https://www.ecopdecade.org/diversity-equity-and-inclusivity/> with a subgroup focussing on Best Practices (some 15-20 members which includes social science and industry). They are developing a document which extracts all the issues on diversity and will identify more practices which will be cross linked in OBPS. Non-methodology papers will not be included in OBPS because they are background papers only and do not have methodologies. FMK suggested papers that approach the issue from the social perspective particularly in marine science - should be included in OBPS but noting the more than once criticism from two members of non-methods papers being in OBPS, the agreement was that only published outcome from the OBPS TT should be included in OBPS but not the background or general literature.

## ACTION

**14.2.** Methodology outcomes from Task Teams will be included in OBPS, but not all the background papers. (PS)

- **OBPS Task Team 21-02: Value Chain Analysis and KPI Development**

<https://www.oceanbestpractices.org/about/task-teams/tt21-02-value-chain-analysis-and-kpi-development/> [2022 - ] Cristian Munoz Mas CMM reported that the Value Chain analysis of the internal system had been completed and there is now a first approach on costs, but that value and impacts were not defined yet.

The second part is designing a KPI strategy which has now been identified and a draft made of the mapping against the KPIs in the Strategy document. Every KPI has a target. He identified three types of stakeholders as targets for KPIs and metrics: Funders - to attract funding; Users - show how good the system is; and importantly, how to track our own performance internally. For these we need to identify a **core set** of KPI and metrics to support the target, that can be attached to outcomes but which can be collected easily and sustainably. Fortunately, a repository statistics collection had been set up since the beginning of OBPS. He expects the final version to be implemented by July 2023 with a first draft by Feb 2023 for review.

He suggested more focussed meetings to finalise KPI and targets, in preference to a very short session at an SG monthly meeting.

- **OBPS Task Team 21-03: Omics/eDNA Protocol Management**

<https://www.oceanbestpractices.org/about/task-teams/obps-task-team-21-03-omics-edna-protocol-management/>

Pier Luigi Buttigieg is the SG-OBPS link but was not at this meeting.

It was noted that this is a successful task team and actively embedding their work in networks such as Omics Biomolecular Observing Network (OBON)

Part of this agenda item today was to officially present to the regular SG for approval, proposals for two new task teams. Delay in official presentation for approval of these proposals was explained by JP.

- **OBPS Task Team 22-01: Coastal Observations in Under-resourced Countries**

<https://www.oceanbestpractices.org/about/task-teams/task-team-22-01-coastal-observing-in-under-resourced-countries/>

This TT has been working since the beginning of 2022.

MB reported that the TT produced excellent quarterly reports; hosted a successful session at the OBPS Workshop VI; is active in connecting with others; and has set up its own GDrive folder for all its documentation.

It was considered an exemplary TT.

## **ACTION**

**14.3. Motion:** The SG approves the proposal Version 2, 2022-01-05 as presented to the meeting for the OBPS Task Team on Coastal observations in Under-resourced Countries,

DECISION: the motion was agreed by consensus. **(TT to be informed by JP)**

- **OBPS Task Team 22-02: Decision Trees** - [01-03-2022 to 31-12- 2023]

This TT proposal had been on the table since 14 March 2022 but SG comments regarding non-identification of members of the task team had delayed its official approval. The proposal had now been updated with team members identified from diverse sections of the community.

Despite the delay the TT has been active including a theme session in the OBPS Workshop VI.

## **ACTION**

**14.4. Motion:** The SG approves the proposal dated 14th March 2022, updated 23rd November 2022 as presented to the meeting to form an OBPS Task Team on Decision Trees

DECISION: the motion was agreed by consensus. **(TT to be informed by JP)**

Two other proposals may be expected during 2023: **Task team on Best Practices and Standards** and **Task Team on Deep Ocean Observing**

## 15. OCEANPREDICTION DECADE COLLABORATIVE CENTRE

(Enrique Alvarez ) ([remote presentation](#))

Enrique Alvarez, Technical Coordinator of OceanPrediction DCC at Mercator Ocean, explained that he would summarise what they intend to do in OceanPredictions and to link the best practices they hope to establish. He explained that their motto was ‘*connecting the world around ocean prediction*’ and in order to get to that vision, to work within the framework of the UN Ocean Decade to inspire the Decade Programmes and Actions. He outlined two areas (pillars) :

**1)** a forum for a global and transversal community - building regional teams (including those from GOOS and UNEP etc, and also developing countries) promoting the implementation and use of ocean forecasting systems worldwide:

- Identifying and attracting a wide community : Scientist, users, private sector, NGO ...
- Supporting Ocean Decade actions related to ocean forecasting
- Identifying gaps (systems technically disconnected) and ways forward
- Capacity building
- Advocating for implementation and development of Best Practices, Standards and Tools

He introduced the ‘ETOofs Guide’: a comprehensive description of ocean monitoring systems and their maturity, calling it a capacity building tool for those with the relevant background, that want to work in this area:

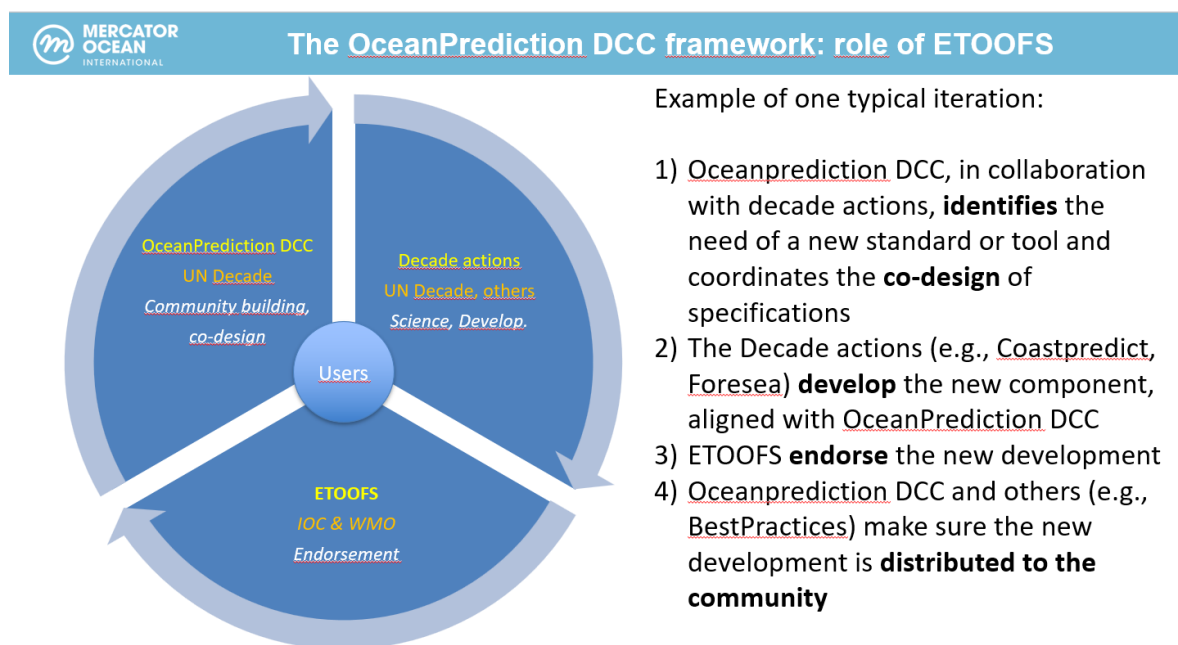
Alvarez Fanjul, E., Ciliberti, S. and Baharel, P. (eds) (2022) *Implementing Operational Ocean Monitoring and Forecasting Systems*. Paris, France, IOC-UNESCO, 376pp. & Annexes, (GOOS-275). DOI: <https://doi.org/10.48670/ETOofs>,

and **2)** A technical joint global framework - about improving the technical activities that will allow more integrated ocean forecasting services for the future. At the moment the systems are technically disconnected and not interoperable. The common tools are not available and ‘reinvention of the wheel’ often happens. DCC will provide a new framework for ocean forecasting made possible by harnessing UN Decade and Digital Twins opportunities. An “Ocean Forecasting Co-design Team”: will design a new

architecture (standards, tools, best practices, etc.) in cooperation with related Decade Programmes and will inspire other programmes and actions. The solution will identify the need for new standards (which DCC/ETOOFS will endorse) and coordinate and co-design specifications.

ETOOFS will be part of the endorsement process and support the DCC role - to validate if a system is mature enough to join. To enable this, as part of the architecture, ORL - Operational Readiness Levels have been identified as a 4 digit code. The process will encourage the development of standards and best practices.

Once developed this is what one option could look like and he confirmed collaboration with the OBPS would be an important element



He acknowledged that the vision was a significant challenge that could only be achieved by collaboration with Ocean Decade Programmes and other relevant actors. Partial success will still stimulate and guide development and still provide the benefits of a robust community and new forecasting services based on new technology frameworks.

## ACTION

**15.1.** Discuss with DCU and OceanPrediction DCC on OBPS becoming a primary attachment **See Action 16.3**

**15.2.** Discuss with DCU whether OceanPractices can be a primary attachment to more than one DCC/DCO **See Action 16.3**

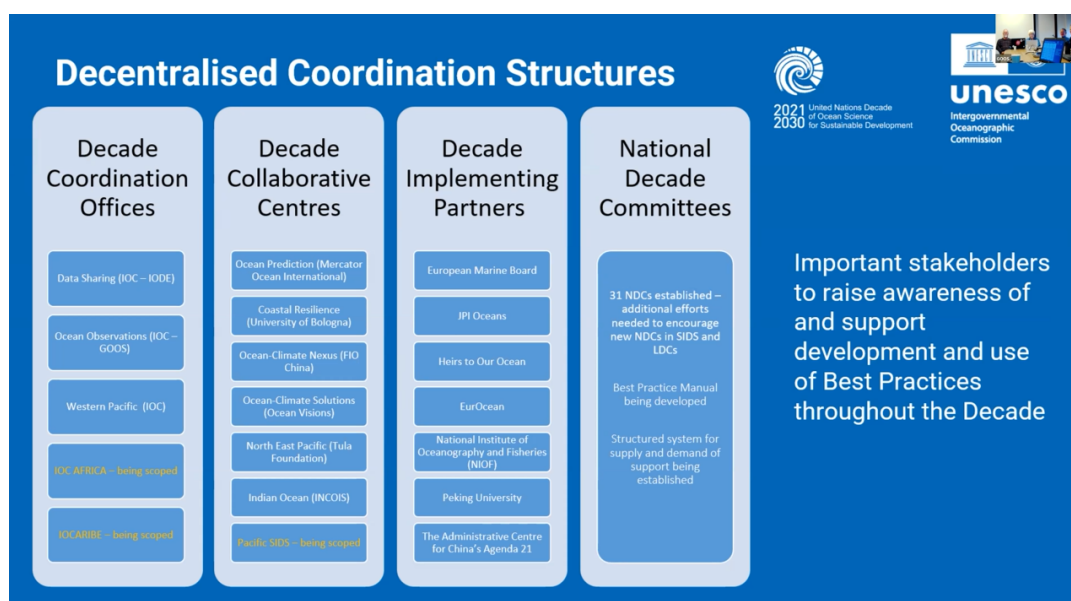
## 16. OCEAN PRACTICES FOR THE DECADE (WP8)

*Implementation of the Ocean Decade (presentation). Alison Clausen*

Alison Clausen (AC), Decade Coordination Unit, shared an update on recent Ocean Decade activity. She started with the slide showing the foundational framework of the Ocean Decade structured around the 10 Ocean Decade Challenges. There have been three calls for Decade actions and she confirmed the current status of 45 Programme and 203 Projects (15 added after the last call). 67 contributions, which are in-kind or financial resources and include all the Collaborative Centres and contributions from Member States. Two new additions are INCOIS (India - regional Collaborative Centre), the Royal Society (ECOP Programme) and the new IOC Tsunami Programme).

This solid foundation will continue to grow with the bottom up approach but with some top-down encouragement for which she saw a role for the OceanPractices Programme. She mentioned from the third call in August 2022, programme endorsements to be announced early 2023, with a focus on blue food and nutrition aspects, and a couple of regional programmes – Arctic and Southern Ocean. A call for Decade Actions will close Jan 2023 and has a focus on coastal resilience and digital representation of the ocean including ocean data strategy, applications and services and the endorsements will be announced in June on World Ocean Day. She noted 26 Programmes including OceanPractices are calling for projects.

AC explained the Decade Decentralisation Coordination Structure

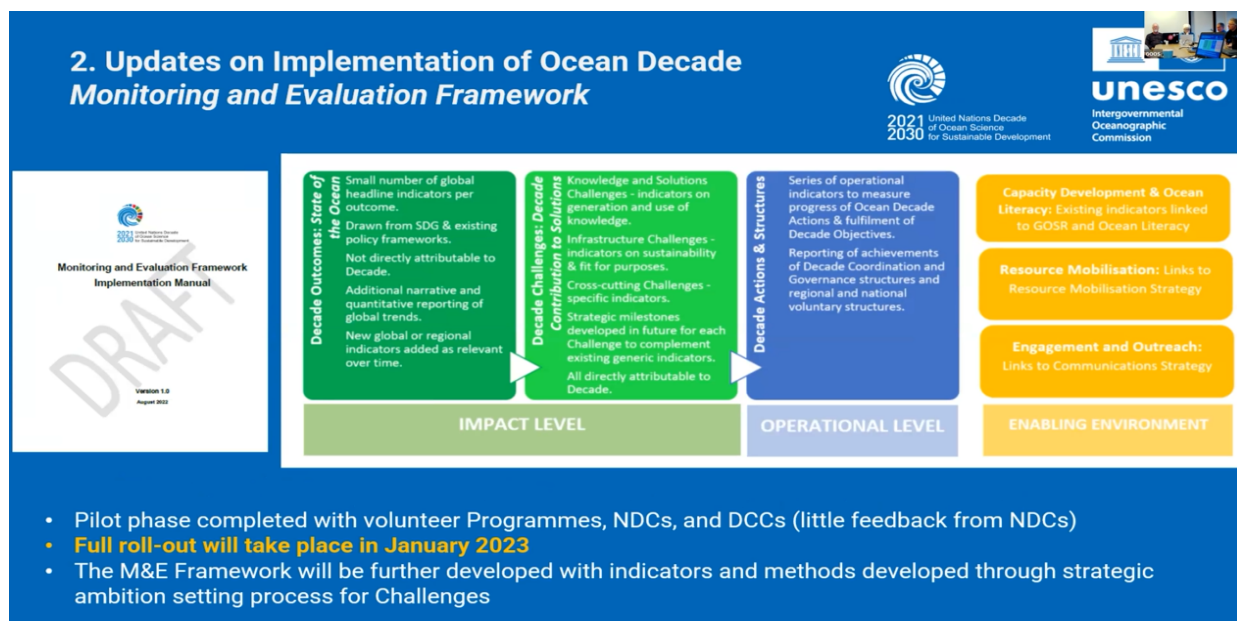




The Decade Coordination Offices (DCO) based in UN Agencies have a regional or thematic focus ; Decade Collaborative Centres (DCC) – are non UN Agencies, but they are both the same in terms of functions.

For DCCs, it is a significant commitment for 5 years to cover funding for facilities, staff (4-5 people), etc. Decade Implementing Partners are the smaller contributors tailored to specific Decade implementation and 31 National Decade Committees (voluntary multiplatform stakeholders catalyzing national activities). All of these structures acknowledge the need for best practices and she expects will be working with OceanPractices to build awareness and integrate best practices into their workflows. From the Informal Working Groups she highlighted that the Data Coordination Group is preparing a draft Ocean Data Strategy for first round review in January 2023.

The Monitoring and Evaluation Framework draft expects to be rolled out in January 2023, to start the-once-a-year collection of feedback and metrics on activities, but indicators and methods will be further developed. They expect to report the results to the IOC Assembly in June 2023.



She went on to highlight the vision of an Ocean Decade for Capacity Development Facility, and the work with the Government of Flanders for initial 2 year funding of a multi Partner facility. A small team at the DCU will focus on obtaining survey feedback from all Ocean Decade stakeholders, on what CD training options are needed by all Ocean Decade stakeholders

Returning to the introduction of a top-down process she questioned - how does the Ocean Decade start to bring all the Programmes and Projects to move in the same direction, harnessing the energy and reporting on it.



Included will be a review of how the Ocean Decade is approaching the challenges and what adaptation is needed. They are looking for partners to take responsibility and drive the exercise for specific Challenges, but they will also be recruiting experts to set out the methodologies and manage the exercise which will be a Strategic Ambition Setting Process to reach the Ocean Decade targets.

The DCU vision on how they see the OceanPractices contribution is set out in the slide below.

## Best Practices contributing to the success of the Ocean Decade




- Ensuring that Decade Actions adopt and build on existing knowledge, methods and practices
- Providing a centralized framework to consolidate new Best Practices and measure impact / progress of Decade
- Facilitating expansion of Best Practices across the ocean value chain ranging from research to operations to applications and across additional Ocean Decade Challenges
- Making existing and new Best Practices accessible to a diverse group of Decade stakeholders – policy makers, industry etc.
- Engaging in diverse Communities of Practice around the Ocean Decade Challenges and promoting exchanges between diverse actors to enable transfer of technology, knowledge and methods from other fields
- Feeding and creating synergies with Decade capacity development and data management initiatives

## ACTION

**16.1.** Obtain guidance from DCU on how to prioritise which programmes with which to work **(RZ)**

**16.2.** Check that OceanPractices is now listed on the Decade website as a hosting Programme. **(PS)**

**16.3.** Progress with DCU, OceanPractices being designated a primary partner for OceanPrediction DCC **and** DCO-Data Sharing **(RZ)**

**16.4.** Submit an existing Australian project as a Decade Project proposal to be hosted by OceanPractices. **(RP)**

**In addition** there is interest in expanding the work of TT 22-01: Coastal Observations in Under-Resourced Countries, from Vinnie in the Pacific and Caroline Peralta for South America, and the NORAD Caribbean pilot. Should these regions concatenate and present a Decade Project proposal? **FMK**

suggested making contact with the Gulf and Caribbean Fisheries Institute for work with the NORAD pilot.

## **17. ELECTION OF CO-CHAIRS and CO-CHAIR-ELECTS 2023-2024**

The following motions were presented for approval:

### **ACTION**

**17.1. Motion:** The SG approves for 2023-2024, the election of Co-Chairs George Petihakis and Rene Garelo

DECISION: the motion was agreed by consensus.

### **ACTION**

**17.2. Motion:** The SG approves for 2023-2024, the election of Co-Chair-Elects Cristian Munoz Mas and Rebecca Zitoun

DECISION: the motion was agreed by consensus.

## **18. DATE AND PLACE OF THE SG-OBPS-V MEETING 2023**

To start this discussion, Peter Pissierssens reminded that only at the formal regular Steering Group meetings can decisions be made (which for OBPS occur quarterly - Mar-Jun-Sep-Dec). One of those can be designated an Annual Meeting. He reminded that normally co-chairs term of office, reflect from one regular meeting to the next, so the 2 year term of office for OBPS co-chairs defined in the new ToR is necessary.

Whilst external funding had not been identified yet, it was proposed that the December 2023 regular meeting should be designated as the annual meeting to be scheduled November/December 2023 and organized as a hybrid meeting. JH and RP recommended a southern hemisphere (summer) location for the meeting.

We are grateful to Juliet Hermes (SAEON) who confirmed her offer to host the next annual meeting November/December 2023 in Cape Town, South Africa.

### **ACTION**

**18.1.** The SG-OBPS management team will plan for the November/December 2023 annual meeting in Cape Town and will work with JH on arrangements (PS/RG/GP)

## 19. SUMMARY and WORK PLAN 2023

There was little time to review the revisions made to the draft Work Plan 2023 and Budget 2023-2024, and the meeting decided to finalise the documents after this meeting, and present them for approval at the next regular SG meeting, 14 December 2022.

### ACTION

**19.1. Motion:** The SG is requested to agree that the 2023 Work Plan and draft Budget 2023-2024 would be presented for approval at the SG-OBPS regular meeting, 14 December 2022.

DECISION: the motion was agreed by consensus.

## 20. CLOSE OF MEETING

Jay Pearlman and Johannes Karstensen, the outgoing Co-chairs, recognized the hard work done by the OBPS Steering Group members during their Co-Chair's term of office. Johannes praised SG willingness and commitment to OBPS, including the intense participation for this particular meeting which was the first in-person since the long hiatus due to COVID. Their thanks went also for the support from: GOOS (Forest and Yaeji) for the meeting arrangements and the numerous contributions; to IEEE for travel support of a number of SG members participating in this meeting; to OceanObs RCN for their travel support, and to IOC for their sustained involvement.

Pauline Simpson added her thanks to the co-chairs with the belief that OBPS would not have achieved its present position, without the energy and leadership of Jay and Johannes. Rachel Przeslawski agreed that their complementary personalities had been a success factor.

Peter Pissierssens thanked the two outgoing co-chairs for their work in building OBPS over the 6 years, highlighting the many lively, interesting and diverse exchanges and discussions on the OBPS journey. He welcomed the new co-chairs and looked forward to working with them.

Juliet Hermes acknowledged how good it had been to work with Jay and Johannes and to benefit from their mentorship and hoped that would continue even though they were stepping down.

Finally, René Garelo speaking on behalf of himself and George Petihakis, congratulated the outgoing co-chairs on their OBPS successes and thanked them for agreeing to continue to support 'the rookies' over the transition.

Jay thanked the remote participants for their patience:

Aileen Tan commented that she was very new and OBPS will be a good learning experience for her - she thanked the group and co-chairs.

Virginie Van Dongen-Vogels has been involved with OBPS for the past two years and expressed how happy she was with the cohesion in the group.

The meeting closed at 12.30 CET

## **POST MEETING NOTE**

During the Friday morning session one of the participants, Taco De Bruin, reported that he had tested positive for Covid-19 that morning. In the following week, two other participants (Rene Garelo and Juliet Hermes) also tested positive. All three recovered.

## ANNEX I: ACTION PLAN

### SUMMARY OF ACTIONS Work Plan 2023 and OBPS-IV Meeting Actions

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
WP1		4.1	<b>IMPLEMENTATION PLAN</b> <b>4.1. Implementation Plan to be updated</b> With the updating of the Strategy Plan the Implementation Plan will also be updated. <b>Timescale will depend on when the updated OBPS Strategy is available.</b>	2023-09-13 SG Decision meeting	GP/RG/PS	
			<b>4.1.1.</b> It was recommended that the Work Plan should not be included in the Implementation Plan (make a separate internal document) <b>4.1.2.</b> It was recommended that the Budget should not be not included in the Implementation Plan ( make a separate internal document) <b>4.1.5.</b> Project deliverables to be mapped in the OBPS work plan	2023-03-08	PS	

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
WP1		6.1	<b>AISBL</b> <b>6.1. Motion:</b> The SG approves that further steps are taken to create an AISBL with final approval of the AISBL to be requested of the SG once the structure and other details are identified by a subgroup of SG members with interest in moving this forward. The subgroup will report quarterly at the SG Regular Meeting focussing on a feasibility study. Initial AISBL subgroup: DECISION: the motion was agreed by consensus.	2023-03-08 2023-06-14 etc. Report to SG Decision Meetings	JK/EH/PP/GP/ RG/JP/PS	
WP1		13.1	<b>OBP-SYSTEM Review</b> <b>13.1.</b> Co-chairs will confirm with each of the recommended names for Work Package co-leads. Co-chairs would discuss with all new SG members how they wish to contribute to OBPS and it was expected that many would be members of one or more work package. <b>Work Package Leads:</b> WP1: Project Management - <b>PS</b> , RG, GP , EH, PP WP2: Repository Operations - <b>PS</b> , AL, WP3: Advanced Technology and Interoperability - <b>PLB</b> , CMM WP4: Publications and Endorsement - <b>JH</b> , CH WP5: Communications and Outreach - <b>RP</b> , CP WP6: User Communities - <b>MB</b> , FMK WP7 : Capacity Development and Training - <b>AL-L</b> , CM WP8 : OceanPractices – <b>RZ</b> , Aileen Tan	2023-01-31	RG/GP	
WP1		18.1	<b>DATE AND PLACE OF THE SG-OBPS-V MEETING 2023</b> <b>18.1.</b> The SG-OBPS management team will plan for the November/December 2023 annual meeting in Cape Town	2023-05-01	(PS/RG/GP/JH)	

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
			and will work with JH on arrangements			
WP2	A1.1		A1.1. Secure a CORE Trust Seal Repository Certification FUNDING REQUIRED	2023-12-01	PS	
WP2	A1.1		A1.1. Secure an ISO Repository Certification	2024	PS	
WP2		9b	TECHNOLOGY - Repository Operations 9b.1. Pieter Provost and Arno be requested to try to fix the boolean logic bug 9b.2. Establish an SG Working Group on Repository Search to define and implement a formal benchmark test and reporting process <a href="https://search.oceanbestpractices.org/">https://search.oceanbestpractices.org/</a> . All SG will be requested to contribute.	2022-12-01 2023-01-31	PP PS	COMPLETED
WP2		11	11.8. Make the Endorsed (External) metadata field a dropdown that only includes the names of OBPS approved endorsing agencies (at the moment only GOOS)	2023-06-14	AL/PS	
WP3	D1.3.1.		D1.3.1. Implement a decision tree for improved browsing and BP selection: A. Assess the value of the Decision Tree to community B. Implementation of decision tree after assessment	2023-09-13	CMM/TTeam	
WP3	D1.4.1		D1.4.1. Implement a user-tested automated submission system for document templates A. Organize funding for autoingest	2023-12-01	PLB	

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
WP2	D1.5.1a		D1.5.1a. Update existing BP document templates and generate new topics with community advice A. Create a Template Collection and populate with OBPS and external template examples.(PS)	2023-06-14	PS	
WP3	D1.5.1b		<b>D1.5.1b. Design and implement machine readability of templates</b> Progress with machine readable templates or machine readable metadata sheet (with SOCIB). <b>FUNDING REQUIRED (see also D1.4.1)</b>	2023-12-01	PLB	
WP3	D2.3.1		<b>D2.3.1.</b> Semantic capabilities to accommodate broader range of disciplines including E84 changes and additional vocabularies A. Upload AGROVOC and WoRMS <b>FUNDING REQUIRED</b>	2023-12-01	PLB	
WP3	D4.1.1		<b>D4.1.1.</b> Federated System Design A. Define the Network Federation and then include it in the Ocean Practices Programme webpage work beng carried out under OIH contractors(PLB/ PS)	2023-12-01	PLB (OIH contractors)	
WP3	D4.2.1		<b>D4.2.1.</b> A pilot demonstration of a federated system of Methodology Management Systems	2023-12-01	PLB (OIH contractors)	
WP3	D2.1.3		<b>D2.1.3</b> Develop guidance document for endorsement process (first draft) and OBPS endorsement process recorded	2023-04-01	PS	



Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
			A. OBPS document endorsement process followed in the repository admin once an endorsement certificate issues			
WP3		9a	<b>FEDERATED NETWORK</b> 9a.1. PLB be requested to provide an update on the progress of the proposed Federated Network of Methodological Management Systems	2023-01-31	PS/CMM	
WP4	D2.6.1.		D2.6.1. Recruit specialist editors for Frontiers Best Practices RT eg. Modelling, Ocean Literacy	2023-12-01	JK	
WP4		11	11.4. Invite RP to be associate editor for <i>Frontiers ... best Practices RT (JK)</i>	2023-01-31	JK	
WP4		11	11.3. SG Working Group on Endorsement to be setup with invitations to JK/FMK/MB/CMM /PS		JH	
WP4		11	11.4. Create a document defining the criteria for a <i>Frontiers .. best Practices RT</i> Associate Editor.	2023-03-08	JK and Associate Editors)	
WP4		11	11.2 One practice from Australia to be submitted to JH for GOOS endorsement	2023-06-14	RP	
WP4/WP5		8	<b>OBPS WORKSHOP VI, 2022</b> 8.1. Investigate auto translation technology to use in OBPS workshops 8.2. Define a process and conduct a trial to translate two endorsed practices (Budget item)	2023-03-31 2023-09-31	AL JK/JH/PS	

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
WP5	D2.4.1.		<b>D2.4.1.</b> Advocacy products for community outreach A. Rudimentary communication plan released with scoping for full communication plan (internal document) B. Redesign of website <b>FUNDING REQUIRED</b>	2023-06-14  2023-03-08	RP  RP	
WP5	D2.5.1.		<b>D2.5.1.</b> Organize annual workshop and Proceedings of OBPS Workshops, with recommendations to feed into future iterations of the work plan A. Organize 2023 Annual Workshop	2023-10 Start to discuss now and send out Save the Date	RG/GP +++	
WP5		10	<b>COMMUNICATION AND OUTREACH (WP5)</b> <b>10.1</b> OBPS account on Facebook to be cancelled <b>10.2.</b> RP to setup an OBPS LinkedIn Group with a new responder email to be monitored by RP and CMM <a href="mailto:linkedin@oceanbestpractices.org">linkedin@oceanbestpractices.org</a> <b>10.3.</b> RP request EH for assistance from Laura Stukonyte,(GOOS Communications) <b>10.4</b> Events on the new website to be populated from OceanExpert <b>10.5.</b> CMM requested a reminder about completing the log be made on each SG agenda. <b>10.6.</b> CMM to consider a Google Form collection mechanism (CMM)	2023-01-31 2023-01-31      Ongoing monthly  2023-03-08	RP RP/AL   RP RP/AL	<b>COMPLETED</b> <b>2023-12-31</b>    <b>COMPLETED</b>
WP6	WP6		OBPS Ambassadors (Focal Points); start outreach/engagement	ongoing	CH/RP	
WP6	WP6		Engagement Log maintenance - monthly reminders	ongoing	MB/CMM	

[illegible]

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
WP7	D3.2.1	12	<b>CAPACITY DEVELOPMENT (WP7)</b> 12.1. Survey to academics in institutions about embedding OBPS in curricula (Geomar) 12.2. Prepare a Capacity Development pack on best practices for university curricula trials (Rutgers and POGO) 12.3. Follow up on collaboration with Capacity Sharing Hub for Arctic 12.4. Look for other sources of funding for the Caribbean pilot - depending on the NORAD outcome 12.5. The SG-OBPS to urge the IOC Secretariat to mobilize NORAD funding	2023-04-01  2023-09-30  2023-06-14  ongoing  2023-01-31	AL-L/CM	
WP8		15	<b>OCEANPREDICTION DECADE COLLABORATIVE CENTRE</b> 15.1. Discuss with DCU and OceanPrediction DCC on OBPS becoming a primary attachment 15.2. Discuss with DCU whether OceanPractices can be a primary attachment to more than one DCC/DCO See Action 16.3		RZ/AT  RZ/AT	
WP8		16	<b>OCEAN PRACTICES FOR THE DECADE (WP8)</b> 16.1. Obtain guidance from DCU on how to prioritise which programmes with which to work 16.2. Check that OceanPractices is now listed on the Decade website as a hosting Programme. 16.3. Progress with DCU, OceanPractices being a primary attachment for OceanPrediction DCC and DCO-Data Sharing 16.4. RP to Submit an existing Australian project as a Decade Project proposal to be hosted by OceanPractices. In addition there is interest in expanding the work of TT	2023-06-14  2023-01-11  2023-01-31	RZ/AT  PS  RZ/AT  RP	COMPLETED 2023-01-11    COMPLETED 2023-01-11

Work Package	Number OBPS Work Plan 2023	Number OBPS-IV Action	Action item	Deadline yyy-mm-dd	Implemented by	Status
			22-01: Coastal Observations in Under-Resourced Countries, from Vinnie in the Pacific and Caroline Peralta for South America, and the NORAD Caribbean pilot. Should these regions concatenate and present a Decade Project proposal? FMK suggested making contact with the Gulf and Caribbean Fisheries Institute for work with the NORAD pilot.	2023-01-31		

## ANNEX II: PARTICIPANTS

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## ANNEX III. AGENDA

	TIME UTC	TIME CET	WEDNESDAY 30 NOVEMBER 2022
1	08.00	09.00	OPENING OF THE MEETING (JP JK)
2	08.20	09.20	ADMINISTRATIVE ARRANGEMENTS (PS)
3	08.25	09.25	REVIEW OF STRATEGIC PLAN 2021-25.
	09.15	10.15	Break (group photo)
4	09.45	10.45	REVIEW OF IMPLEMENTATION (WORK) PLAN 2022 (JK JP PS) Implementation Plan
	11.15	12.15	Lunch
5a	12.15	13.15	GOVERNANCE (JK JP)
5b			GOVERNANCE (cont) (JK JP)
		15.40	BREAK
6		16.00	AISBL (JK JP)
7		16.45	FUNDING AND BUDGET 2023-2024 (JP JK PS)
	16.30	17.30	ADJOURN
	TIME UTC	TIME CET	THURSDAY 01 DECEMBER 2022
8	08.00	09.00	OBPS WORKSHOP VI, 2022 (FMK RZ PvR)
		10.00	Break
9a	08:45	10.20	TECHNOLOGY (WP3) (PLB NOT AVAILABLE)
9b		10.20	TECHNOLOGY - REPOSITORY OPERATIONS (WP2)(PS, AL)
10a	10.00	1115	COMMUNICATION AND OUTREACH (RP)
10b	11.00	12-15	USER STORIES (RP MB)
	12.15	13.15	Lunch



11	13.30	14.00	CONNECTING TO USERS/STAKEHOLDERS (MB; WP 4 and 6)
12	14.00	14.45	CAPACITY DEVELOPMENT (AL-L)
	14.45	15.15	Break
13	15.15	15.45	OBP-SYSTEM Review (JP; WP leads)
14	15.45	16.30	TASK TEAMS Status/Reviews (MB)
	16:30	17:30	ADJOURN
			FRIDAY 02 DECEMBER 2022
15	09.00	09.45	OCEANPREDICTION DECADE COLLABORATIVE CENTRE <i>Enrique Alvarez (remote)</i>
16	09.45	10.30	OCEAN PRACTICES FOR THE DECADE (WP8) <i>Implementation of the Ocean Decade</i> (presentation). Alison Clausen
	10.30	11.00	Break
17	11.00	11.15	ELECTION OF CO-CHAIRS and CO-CHAIR-ELECTS 2023-2024 (JP)
18	11.15	11:30	DATE AND PLACE OF THE SG-OBPS-V MEETING 2023 (PS)
	11.30	12.00	GOVERNANCE - Version 2 document discussion from Agenda Item 5) (JP)
19	12.00	12.15	SUMMARY and WORK PLAN 2023 (JK)
20	12.15	12.30	CLOSE OF THE MEETING (JP/JK/PP)