Kick-off Webinar & Discussion THE NEED FOR A SPECIMEN MANAGEMENT PLAN REQUIREMENT

February 7, 2023







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PROGRAM OVERVIEW

- Background & current policy landscape
 - Jyotsna Pandey
- Introduction to BCoN and USCCN
 - Jyotsna Pandey, Dusti Gallagher
- What is a Specimen Management Plan & what are its elements?
 - Breda Zimkus
- Need & benefits to stakeholder communities
 - Andy Bentley

- Case Studies and Examples:
 - Living microbial collections
 - Kyria Boundy-Mills
 - NEON Biorepository Service Example
 - Nico Franz
 - Antarctic Biorepository
 - Kristin O'Brien
- Panel Discussion and Audience Q&A
 - Dori Contreras (Moderator), Kyria Boundy Mills, Barbara Thiers, Kristin O'Brien, Nico Franz, Andy Bentley, Breda Zimkus
- Wrap up: What's next?







Background & Current Policy Landscape

(Jyotsna Pandey, AIBS & Natural Science Collections Alliance)



National Academies' Report on Biological Collections (2020) recommended that NSF should:

"...require a specimen management plan for all research proposals that include collecting or generating specimens that describes how the specimens and associated data will be accessioned into and permanently maintained in an established biological collection."







CHIPS and Science Act

(Passed August 2022; formerly US Innovation and Competition Act / America COMPETES Act)



"In consultation with other relevant Federal research agencies, and as the Director determines is appropriate, the Director shall require that proposals submitted to the Foundation for funding for research that involves collecting or generating specimens include, as part of the data management plan under section 10344, a description of how the specimens and associated data will be accessioned into and maintained in an established biological collection."







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Not mentioned in earlier iterations of the bill







A Draft Proposal

- Joint effort of the Biodiversity Collections Network (BCoN) & the U.S. Culture Collection Network (USCCN)
- Outlines the elements of a Specimen Management Plan (SMP), the need for it, valueadded benefits for various stakeholder communities, and a recommendation for moving forward.
- We need your input!

SPECIMEN MANAGEMENT PLAN DRAFT PROPOSAL

Prepared by: Biodiversity Collections Network (BCoN) U.S. Culture Collections Network (USCCN)

A Specimen Management Plan

The recently published National Academies of Sciences, Engineering, and Medicine (NASEM) Report on Biological Collections recommends that funding agencies"...require a specimen management plan for all research proposals that include collecting or generating specimens that describes how the specimens and associated data will be accessioned into and permanently maintained in an established biological collection" (NASEM, 2020). This recommendation is also called out as a fundamental research priority in the now enacted CHIPS and Science Act (PL__ 117-167) that includes a robust reauthorization for the National Science Foundation (NSF). Others in the research community have promoted the idea of a specimen management plan (Colella, et al. 2020; Schilthuizen, et al. 2015) as well as the yet unpublished, NSF funded, Antarctic Biorepository Workshop

(https://sites.google.com/alaska.edu/antarcticbiorepository/home) report. We endorse these recommendations and suggest that a specimen management plan become a part of all research projects that generate biological collections of any type. In the specific case of the National Science Foundation, we suggest that a Specimen Management Plan (SMP) complement, not duplicate, the currently required Data Management Plan (DMP) by providing detailed information regarding the collection, digitization, curation, and funding for accessioned specimens associated with NSF-sponsored research.

At present, there is only a cursory mention of specimen curation in the required Data Management Plan (DMP) associated with NSF Biological Sciences (BIO) directorate proposals (https://www.nsf.gov/bio/pubs/BIODMP Guidance.pdf). Although specimens are closely linked with their associated data, as physical objects that differ widely in size, shape and method of preservation, they have very different, more diverse requirements and prerequisites, especially with respect to infrastructure needs. Therefore, the methods and infrastructure for physical specimen preservation should be the subject of a separate plan. The Division of Ocean Sciences in the Geological Sciences Directorate does provide more detailed sample archiving requirements for physical qeological samples

(https://www.nsf.gov/gubs/2017/nsf17037/nsf17037.jsp). Because biological collections are composed of a varied array of living and formerly living organisms, their long term maintenance requires curatorial experise and knowledge regarding preservation techniques that are specific to the type of organism. Furthermore, because some biological collections are also defined as genetic resources, their stewardship and use is governed by international conventions such as the Nagoya Protocol (<u>https://www.cbd.int/abs/</u>). As currently written, an NSF DMP does not require enough information from a proposed project to ensure specimen deposition, digitization, care, and curation. In addition, it does not establish that biological collections will be adequately safeguarded and ethically managed, to make specimens available for future research endeavors.

We advocate that the NSF specimen management plan should also be conceptualized and implemented as an instrument to promote and reinforce the development, maintenance, and











The Biodiversity Collections Network (BCoN)





- BCoN emerged from a five-year RCN grant from NSF (DBI 1441785)
- Published the Extended Specimen Report (Lendemer et al., 2019).
- Brings together representatives from the wide range of U.S. biological collections to promote the use and expand the accessibility of biodiversity collections and data and extend their impact as critical infrastructure for research and education for the benefit of life on earth.
- Promotes the development of an **Extended Specimen Network** as a unifying goal for biological collections over the next decade.
 - bcon.aibs.org







BCoN Steering Committee



John Bates Field Museum

Anna Monfils

Central Michigan University



Andrew Bentley University of Kansas **Biodiversity Institute**



William Moser National Museum of Natural History



Dori Contreras Perot Museum of Nature and Science



Gil Nelson iDigBio



Elizabeth Ellwood iDigBio



David Nobles UTEX Culture Collection of Algae



Breda Zimkus Harvard Museum of Comparative Zoology









NATURAL Science Collections Alliance







Jyotsna Pandey AIBS & NSCA



Sinlan Poo Memphis Zoo

Barbara Thiers New York Botanical Garden (Emerita)

Mike Webster

Macaulay Library, Cornell Lab

of Ornithology

U.S. Culture Collection Network (USCCN)

(Dusti Gallagher, USCCN Project Manager)

- A NSF-funded Research Coordination Network currently in 2nd phase (2022-2026)
- Brings together scientists working with living microbe collections
- **Vision:** USCCN seeks to optimize the quality and availability of microbial resources and become a central resource for U.S. microbe culture collections and their users.
- **Mission**: Facilitate the safe and responsible utilization of microbial resources for research, education, industry, medicine, and agriculture for the betterment of humankind by providing opportunities for U.S. culture collection workers to engage with each other and with the broader culture collection community.

• <u>usccn.org</u>







USCCN Goal: Expand the current network to increase awareness & enhance collaborations among collections/users

Collections Registry

A searchable database of plant associated, microbial culture collections from universities and government agencies

Submit your collection:

usccn.org/culture-collections









USCCN Structure and Involvement









(Breda Zimkus, Harvard Museum of Comparative Zoology)

- A SMP would comprehensively address specimen deposition, digitization, care, and curation to ensure that collections are safeguarded and ethically managed.
- Researchers embarking on projects generating biological collections would reach out to a biorepository at the writing stage of a grant proposal to determine if the specimens meet their criteria for accessioning.
- If the specimens meet the criteria, researchers would work collaboratively with the biorepository to produce a SMP that would be included in their NSF proposal.
 - A SMP would complement and not duplicate the currently required Data Management Plan (DMP).







- Criteria for specimen acceptance will vary
 - Is the acquisition consistent with the institution's mission, programmatic goals, and collecting scope?
 - Does the collection fit within the existing storage space of the biorepository?
 - Will there be legal limitations on specimen use?

Adapted from IWGSC Report 2009:

- Rare species
- From endangered sources
- Fill gaps (species, habitat, geography, genotype, phenotype)
- Address urgent problems
- Costly or difficult to acquire
- Have associated data (genome sequence, phenotype, genotype)
- Have research value







- Only part of the collection may be accepted by the biorepository.
- Researchers should consider the fate of any specimens/samples not deposited and include this information in the SMP.

Example:

• Tissues that are not selected for deposit by the biorepository will be cryopreserved in the PI's research lab for at least [time period] after the end of this project.







Major Elements

- 1. Anticipated number of specimens and details regarding specific preparation types, referencing relevant best practices
 - Number of specimens, samples, and/or strains
 - Species, including how they are identified (e.g., morphology, sequencing)
 - Where and when collected; single collection or over span of time
 - Protocols for preservation and storage requirements (e.g., specific methods, types of vials, temperature in field)
 - Specific information about labelling (e.g., number series, labels)
 - Shipment from field or PI's institution







Major Elements

- 2. Associated data, referencing data standards that complement emerging recommendations for the Digital Extended Specimen
 - Minimum data requirements and required formatting for the selected biorepository
 - Links to online submission forms or standardized spreadsheets may be available

Column heading	Explanation			
COLLECTION_OBJECT_ID	DLLECTION OBJECT ID Number sequentially, starting with 1			
ACCN	Enter accession number if known			
CAT_NUM	LEAVE BLANK			
COLLECTOR_AGENT_1	Collector's name [Note: list name as completely as possible.]			
COLLECTOR_ROLE_1	Enter "c" for collector			
OTHER_ID_NUM1	Enter the field number or collector number			
OTHER_ID_NUM_TYPE_1 Include one of the following: "collector number" or "field number" [Note: this is an inst				
	departmental number series]			
TAXON_NAME	Taxonomic determination of a specimen/lot identified to lowest possible classification level. Enter			
	the genus, species (ex. Anolis sagrei) and subspecies			
ID_MADE_BY_AGENT Enter the name of whoever identified the specimen [Note: list name as completely as pos				







Major Elements

3. Funding estimates for the repository to curate, digitize, and care for the material

The budget for this proposal includes funds to be paid to [institution/collection] to cover the costs to accession, catalog, digitize, and store approximately # specimens collected in 2023 and # specimens collected in 2024.







Major Elements

4. Plans for how to disseminate the specimens and associated data to the research community, as well as address any required data embargoes

Specimens will be made available for loan by request for the purposes of research, education, and exhibition. The [institution/collection] will make all specimen data publicly available in their online collection management system. Metadata is routinely shared with a variety of data aggregators (e.g., iDigBio, GBIF) through IPT, thereby increasing discoverability by researchers worldwide.

 Both researchers depositing specimens and the biorepository need to collaboratively ensure that all national and international permits and agreements that govern specimen maintenance and use are understood and tracked.







Need for a Specimen Management Plan (SMP)

(Andy Bentley, University of Kansas Biodiversity Institute)

- Specimen Management Plan (SMP) vs Data Management Plan (DMP)
- Deposition of research materials in collections and minimizing "dark" collections.
- Increase the value of these collections and contribute to Open, FAIR science and the Digital Extended Specimen ideal.







An SMP will have benefits to all communities involved:

- Researchers
- Collections and institutions/research organizations
- Funding agencies
- Publishers







Researchers

- Dialog between researchers and repository during grant-writing stage
- Collections can advise/assist in national and international laws and regulations, IACUC, IRB, biosafety, and biosecurity, as well as ethical guidelines.
- Collections can inform about existing collections and research projects.
- Sound collection plan would ensure efficient use of funds and maximize impact of specimen and data collected far beyond current project.







Collections and institutions/research organizations

- High quality specimens and metadata, legally collected and preserved in a format compatible with storage
- Data that adheres to standards and best practices and is compatible with their CMS
- Funding to catalog, digitize, maintain, and curate specimens.
- Funds directed to collections that are in active use and growing.
- Potential early access to information about cutting-edge research









Funding agencies

- Receive a larger and earlier return on their investments in collections.
- Clearer view of which repositories preserve specimens generated through research funding.
- Highlight areas of need in collections infrastructure.
- All collections that receive accessions from NSF-funded research would receive some NSF funding.
- Would be seen to be supporting reproducible, ethical science in relation to sample management.





Publishers

- Better equipped to fulfill their mandate of exposing reproducible science.
- Benefit from the guidance included in an SMP to increase uniformity of citation and attribution to support the Extended Specimen.
- Empowered to make the links between research, funding dollars, and collection information more transparent.
- Better equipped to facilitate compliance with national and international permitting agreements.
- The SMP could reduce publishing delays and bottlenecks.









Case Studies and Examples:

- Living microbial collections
 - Kyria Boundy-Mills
- NEON Biorepository Service Example
 - Nico Franz
- Antarctic Biorepository
 - Kristin O'Brien







Case study: SMP draft template

Kyria Boundy-Mills, Curator

Phaff Yeast Culture Collection University of California Davis



DRAFT TEMPLATE for discussion purposes Version 3, 4 Dec 2022

DRAFT SPECIMEN MANAGEMENT PLAN TEMPLATE

by Kyria Boundy-M

This Specimen Management Plan was jointly prepared by (proceed Planame(a), institution(a) and (percentel name, position title) of the Phot Travel Culture Collectors, University of Collect Davis, for inclusion in the proposal to (<u>Pency</u>, program (Bed. (<u>Thi</u>Fe).

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- "Strains whose genome sequence will be made public will be deposited
- Novel species will be deposited in the Phatf collection."

"Yeasts from rain forests threatened with deforestation will be prioritized for deposit. "Species that we known human, plant or animal pathogens will be analysed."

Check to confirm that these criteria will be met:

 No known human, plant or onlimal pathogens are included.
 All required parmits will be obtained, and assess will be sent to the Phatil collection (for example: collection permits, NTA, NAT, PIC, income permits).

 How accession costs (US\$ 150 per specimen) will be covered The bodget for this proposal inductes \$ phot collection is costs for accession of (number) strates.

 Format of specimens: preservation method, assignment of UCDFST strain ID numbers, format of specimen labels

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by Kyria Boan

5. Format of specimen data and metadata

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8. Confirmation

Phatf Yeast Culture Collection personnel approved this Specimen Management Plan.

Date

Or, Kyria Boundy-Mills, Curator Phaff Yeast Culture Collection

If requested, the Phaft collection can provide a Document of Compliance to [Pi name] an (Funding Agency] isting the yeast strains that have been deposited as cutlined in this Sg Management Piers and confirming which almins have been posted in the Phaff collection catalog, https://phaffcollection.ucdavis.edu.







Issues for Phaff collection

- Financial (who pays costs?)
- Number of specimens (storage limits)
- Types of specimens (future use)
- Specimen format
- Data format
- Material Transfer Agreement
- Transfer ownership to UC?
- Distribution terms
- Compliance: biosafety, biosecurity, Nagoya Protocol









Data: source, characteristics

- Link to collection's online deposit forms
- Link to collection's online specimen data forms
 - Required and optional fields
 - Country, date isolated required for Nagoya compliance

Agreement for the	Transfer of Material(s) to the UC Day	a Phaff Yeast Calture Collection		
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NATURAL SCIENCE COLLECTIONS ALLIANCE

Collected by



Costs; timeline

- Number and kinds of specimens
- How collection's accession costs will be covered

• "The budget for this proposal includes \$4,500 to be paid to the Phaff collection to cover the Phaff collection's costs for accession of 30 specimens, plus we will cover shipping costs for delivery to UC Davis. Costs for any additional strains will be covered by institutional funds. We expect to deposit up to 15 strains in 2024, and another 15 strains in 2025."







Distribution terms

- Strains will be listed in catalogs
 - Timing of release to be negotiated?
- Link to collection's Terms of Use

• "The Phaff collection will post the strains in their online catalog for distribution to the research community under terms of the Phaff collection Research License Agreement [URL]."

UC BARSPRAFY YEAST OIL TURE COLLECTION Han-Competition Research College Agreement These TANKS STRAND, we for proper of the imports of the University of Settime in approaches by the Constraint of the Settime in a settime in a settime in the Settime in th RICHEN'S an expenden to ensure that all element in DATE HEATER TONS BY ACCEPTING OR USING THESE YORKE SERVING, YOU AGREE TO BE BOUND BY THE CONCILING OF THIS NOTICE a may refuse to assess the conditions of this solice by returning the sources 'VLASI' &/RABR to 'Del'ABQUE'S. rel MODIN's newsy parts a newspaper to reliaPENTE to use the VEAST STRAINS for treating or newspapersoid and purposes only. POGPEN'S all out ad or use the 'EAU' Silfeshill be commercial purposes PROVID and and address to 4500-111/2000 the start total particular to a provider. Bio/PROVID and reduce an assessible for the ICT PROVIDE and Colours from France Assessible (BEAPERST from Streed HEAD COLOURS) and and the the exostation to exote the exote total and the PROVIDENT to the presentation and chall before total and the total is in proposed only if the strends total total PROVIDENT to the presentation and chall before totals and exote the interpretation of the strends total and the PROVIDENT to the presentation and chall before total and the provide total and the proposed only if the strends total and the presentation and chall before totals and regimes total and the proposed only if the strends total and the presentation and and the total and the presentation of the presentation and the presentation an IN VESSES AND AND ADDRESS OF A DAMAGE STREET, SANSA SANSASSAN PENTS all ple-the space-of the VEAC STRAINS is also policylaterial assumption investig allow the SEAS STRAINS allowers, MCCPERE approx to allo the source of the VEAS STRAINS an York Takes Salese Saleses, strained of the SeaS. Strains and a strain derivative models. POSTLETAND, evening answer is the Present Learner Ageneration or protected is to an evening a value per lange of the second and second seco MORN'S WAL NOT ME LARLE FOR ANY DIRECT DIMAGES, LOST PROVIDE COUTS OF PROV Social di statuta in presidenti di secoli di statuta di internazione internazione internazione in accordina di accordin Other probability hys. INCREMENT accurse of bittly for class for damaget agend it to find probe which may arise test the incurrently in all sample or inspace of the test of the test of the same test incurrently in a set of prot opposition, to the instant provide ity is an interface of the ICDENENT set of the same test incurrently the IASENICS agent are protein, some or site buttless which are prime as a world of the ICDENENT set, many or proposition of the IADENENT segment are prime as a set of the ICDENENT set. In some or protect of the IADENENT set. The ICDENENT set of the ICDENENT set of the ICDENENT set of the ICDENENT set.







Compliance

- Validation that repository approved the SMP before proposal was submitted
- Validation that researcher deposited specimens

• Signed and dated by curator before researcher submits to NSF; or "The Phaff collection curator approved this plan on [date]."

 "If requested, the Phaff collection can provide documents to [PI name] and [Funding Agency] listing the yeast strains that have been deposited as outlined in this Specimen Management Plan and confirming which strains have been posted in the Phaff collection public catalog, https://phaffcollection.ucdavis.edu."







NEON Biorepository Service Example

(Nico Franz, Arizona State University)

Example specimen management plan and budget:

- **1. Storage:** \$xx per cubic foot and month: 2,500 cryo samples stored in 96-well plates correspond to roughly 1 cubic foot. One year storage = \$xxx; 30 years storage total. **\$x,xxxx**.
- Labor and services: 5 hours of cryo collection staff time per year for the 30-year duration [based on an annual salary + ERE of \$xx,xxx]. Services include sample receipt, inventory, data management, loans, shipping, monitoring and safeguarding of the 2,500 cryo samples.
 \$x,xxxx.

Total \$xx,xxx.

Additionally, we request that the client (1) label, house, and ship samples as per our specifications for long term storage, and (2) assist us in publishing all sample-associated data in our [NEON Biorepository] portal at the time of publication, or within 2 years of sample archival, whichever comes first.







Antarctic Biorepository

(Kristin O'Brien, University of Alaska, Fairbanks)

- Feb 2-4, 2022 NSF-funded workshop to evaluate the value and scope of an Antarctic biorepository of specimens
 - Outcomes from pre-workshop survey
 - Pls have extensive undiscoverable collections
 - Publicly available collections are underutilized
 - High interest in accessing and depositing specimens
 - Barriers to deposition: cost, time & effort
 - Barriers to accession: difficulty finding specimens, cost, concerns about sample integrity







Antarctic Biorepository

- Recommendations to NSF:
 - Establish a central virtual hub that manages standardization of collections and data across multiple existing physical repositories
 - Require a specimen management plan
 - Invest in education on best practices
 - Facilitate opportunistic sampling
 - Prioritize and incentivize the deposition of legacy samples
- Outcomes:
 - Data management plan that includes a SMP is now required for OPP proposals
 - Specimens must be deposited in a publicly accessible archive within 2 years of collecting or by the end of the award- whichever comes first
 - DMP must include information on how specimens and associated data will be accessioned into an established long-lived collection
 - Encourages collaboration between PIs and repository







Panel Discussion and Audience Q&A







What's Next

- Call for input on draft proposal
 - Please respond to our survey: <u>https://aibs.wufoo.com/forms/qxkgeya1f0nip3/</u>
- BCoN & USCCN are available to participate in community-focused discussions if there is interest please reach out to us!
 - BCoN: <u>bcon.aibs.org/contact-us/</u>
 - USCCN: usccn.org/contact/





