General Programmatic Terms and Conditions (PTC) for the National Resource for Digitization of Biological Collections: Integrated Digitized Biocollections (NSF 10-603) Cooperative Agreement(s)

1.   **Key Personnel:** Except for the Principal Investigator(s) (PIs) or Co-PIs identified in this award, requests to make any changes to senior personnel, organizations, and/or partnerships specifically named in the proposal, that have been approved as part of this award, shall be submitted in writing to the cognizant NSF Program Official for approval prior to any changes taking effect. Requests for prior approval of changes to the PI(s) or Co-PIs must be submitted through FastLane for review by the cognizant NSF Program Official and approval by an NSF Grants Officer.

2.   **Program/Project Description:** The primary goal of this project is to create a national biological collections resource based on the existing biodiversity collections housed in U.S. institutions that will integrate critical information for scientific research to aid in understanding the biodiversity dimensions and societal consequences of species invasions, natural and human disasters, climate change, spread of disease vectors and agricultural pests and pollinators, and other environmental and biodiversity issues. Collections of biological specimens gathered over two centuries of field exploration document the world's biodiversity through this time period and represent a monumental investment for research and applied environmental science, but those collections are not easily available for online searching and much of the associated information is not linked to the specimens that are digitized. This central resource (known as the National Resource for Digitization of Biological Collections: Integrated Digitized Biocollections or iDigBio, for short) will serve as the administrative home for the digitization effort, foster partnerships and innovations, facilitate best practice standards and workflows, and establish integration and interconnectivity among the collection digitization projects. The accessibility of these long term data resources will provide opportunities for fostering new and innovative research on biodiversity issues.

3.   **Project Governance:** The Awardee will ensure that an efficient and effective project governing structure is in place throughout the award period to support all critical or significant project activities. The specific governing components are listed in the Award Specific Terms and Conditions.

4.   **Governing Responsibilities:** The Awardee will ensure efficient and effective performance of all project responsibilities by the governing components throughout the award period. The Principal Investigator (PI) will cooperate and coordinate with the

cognizant NSF Program Official through activities listed under the Award Specific Conditions.

5.   Reporting Requirements: The Awardee will provide annual reports as designated by the NSF cognizant Program Official with content, format, and submission time line established by the NSF cognizant Program Official. The Awardee will submit all required reports via FastLane using the appropriate reporting category; for any type of report not specifically mentioned in FastLane, the Awardee will use the "Interim Reporting" function to submit reports. Additional specific reports are noted in the Award Specific Terms and Conditions.

6.   Ongoing Project Management and Oversight: The Awardee will ensure full commitment and cooperation among the governing structure components, and all project staff during all ongoing NSF project management and oversight activities. The Awardee will ensure availability of key personnel during any desk or on-site review as well as timely access to all project documentation. The Awardee will flow down this condition to all subawardees.

NSF will conduct at least two site reviews to determine the effectiveness of the national resource and its value to the scientific community. The site reviews will consider the quality of the digitization activities that the national resource has enabled and the community standards developed; the quality of the digitization activities addressing collection needs; progress towards digitizing the existing biodiversity collections of the U.S., the effectiveness and accessibility of the data management systems; and the effectiveness of the education and outreach activities. Other aspects of national resource activities considered will include: administration and management, cooperation with partner organizations, and participation by minorities and members of under-represented groups.

During each year of the project, the NSF will evaluate the project to determine whether the Foundation will continue to support full operations or will provide decreased funding to phase out NSF support of the national resource. If a decision is made to phase-out NSF support of the national resource, the Awardee will negotiate a six-month phase-out plan with NSF.

Subject to a favorable recommendation following the fourth-year site review and in accordance with NSF policies and procedures, the Awardee may submit a request no later than 1 November 2015 for a renewal of the award for a period not to exceed five years. NSF will conduct a merit review and site visit. Funding beyond the initial 5-year period will require negotiation of a new Cooperative Agreement. If NSF determines that funding shall not be continued, the national resource will not receive any further support from NSF.