September 24, 2019 Partners & Knowledge Transfer Working Group Call

Action Items From This Call
- **Refining the Scope of Work section of the Terms of Reference [document](#) (Jake, Chris)**
- **Design the survey. Determine if it is a focus group, phone survey, etc. (Kira, Kathy)**
- **Chris - to send the NOAA best practices to improve user engagement to Kira.**
- **Chris work on second NOAA Blog post**

Attendees: Chris Brown, Harry Watkins, Mike Dietze, Cliff Duke, Kira Wiley-Sullivan, Jody Peters, Kathy Gerst, Jake Weltzin

Agenda and Notes:

- Action items from August 27
    - Second blog from Chris expanding on first - more specific on NOAA/NESDIS satellite R2O process
    - Revise & update Terms of Reference
    - Default text for invites
    - Spreadsheet of people / orgs
    - Matchmaking ideas (Kira)

- Introductions
    - Chris - Co-chair of WG. NOAA, transitioned from research to operations.
    - Mike - BU, EFI Director,
    - Jody - ND
    - Jake - NPN Director (transitioning out of role), USGS ecologist. Hosted a USGS-led multi-agency workshop on ecological forecasting earlier this year.
    - Kira - Co-chair of WG. Decision making and behavioral science and the link to forecasting
    - Kathy - research scientist at NPN. Phenological forecasting
    - Cliff Duke - director of NAS board on Environmental Studies and Toxicology. Attended EFI conference this May. Worked with Jake/Mike through ESA

- Meeting Notes
    - Chris' 2nd blog. Will be more specific. Has 1st draft. Will update
    - Terms of Reference Discussion
        - Use this to define the scope of what we want to do. Set priorities for near term and further out
        - We have a mix of tasks and outcomes. This is okay. But may help to differentiate. Could be helpful to clarify.
        - One Goal - get the word out to potential partners what EFI is with the intent of having them be a participant for EFI and to educate them about

the intent of forecasting. Whatever actions we do will help serve this. (e.g., give presentations, create listserv, create newsletter, etc). Do we want to set more aspirational goals and then come up with the tasks/action items for them.

- Communication planning - will that be part of this group? Or is that going too deep? Jake: be cautious about how much work the WG will undertake. Instead of us developing a communication plan. Rather keep it narrow for what we do. The group knows what EFI does and then be able to describe the higher level EFI goals to partners.
- Kira: Tasks she sees
  - Have work that is under communication/outreach
  - Have work on record keeping (identify document users), data management
  - Best practices. Define best practices within EFI
  - Want to delineate who is in charge of each outcome. Define the tasks so they can be delegated
- Kathy:
  - Feels overwhelming for who is going to do all this work
  - Can we identify our top goals for the group and identify one task that we can start with for the next 12 months
  - Kathy has been brainstorming with Kira on matchmaking. This is a survey/query for potential data from stakeholders who need forecasting information, but don't have a way to get that information

- Update on Matchmaking from Kira
  - Identify stakeholders/forecasting users. If we can know what stakeholders want in terms of forecasting. What does that matchmaking look like/include. These are the questions that could be answered first before getting into the Terms of Reference
  - Want to avoid going to stakeholder and saying "you need forecasting in your life". Instead ask them what they want.
  - Point 1 of Terms of Reference - we can do that better after doing the outreach.
  - The Matchmaking is 2 fold (it isn't designed yet, so there is still room for change/updates)
    - From list of potential partners
      - Are you connected with a research body/scientists
      - What are your format needs
      - What format will be useful
  - Need to define what we mean by Partners. This discussion could overlap with the Decision Science. T
  - Chris's definition of Partners - Not a one way street. Supporting each other for a common goal. There will be reiteration between data user and data creator. It is a dialogue.

- Mike - agrees with Chris's definition. Views partners as organizations more than individuals.
- Jake - partners can be dangerous term in some sense. Having too many partners can be overwhelming. Defining partners that we work with on daily basis whereas stakeholder, Audience, users are different from Partners
- Cliff - what are the views of the other EFI WG's on what Partners are? How can people in NGO/Gov Agency be useful to the other EFI WGs?
- On the last call - started listing groups/users. Had a big list. Had some individuals on this WG who would reach out to people on that list. Mike to write intro that could be used to send out for first contact for these user groups? Yes that was on Mike's To Do list. Hasn't gotten to it yet.
- Last call - tabled this idea a bit for what Kathy and Kira's ideas of Matchmaking. But having some common language for what the group is using would be useful. Want to avoid talking over each other.
- Difference between end users and partners - how do we approach partners rather than end users. The list of end users is very large and it is too early to approach end users right now. For the Partners in the Matchmaking database - could be folks to join this working group and folks that EFI would work closely with - these may not overlap.
- The other part of the puzzle is the Data Suppliers - upstream data. Would be nice to have the data colocated in a database so people can find that info if they want it. The model outputs, not just the met or the graphics (e.g., seasonal precip over east coast for 3 months).
  - These are great Partners to have on our radar. This could be synergistic with what the MEthods and Tools teams is doing to compile the common tools used to make forecasts. What are common resources that span across forecasting (e.g., lots of forecasts need met data, remote sensing, but not all forecasts need things like small mammal data)
  - There are forecasts for 16 day forecasts and at 100 year time scales, because those are the type of met data that can be downloaded, but these are not necessarily the forecast scales that most forecasts are interested in.
  - Add something like this to the Terms of Reference
  - Timeline to be aware of Kick off of RCN. Week of May 11. Exact dates still to be determined. If there are things we want presented to broader EFI community/want feedback on. At that meeting will be discussing NEON Forecasting Challenge. Important in spirit of this WG want to know what Partners need to be at the meeting to know who will be at that first RCN meeting.
    - The whole NEON catalog is available for this Challenge. Expect that there will at least be on set of forecasts that will be based off instrumental data, but there are lots of other great non-instumental data streams that are also available from NEON (e.g., aquatics, ticks, small mammals, etc)

- Back to Terms of Reference
  - Connect an individual(s) to the bullets/tasks at this time?
  - Action item: Look at each bulleted task on the TOR before the next call. Then connect an individual to that task.
  - Think about expected outcomes. Break out as a table. Build a matrix - here is what we are trying to do, here are the tasks, and here is who will take lead on this task
  - Carefully define what the group will do and define who wants to do that
  - **ACTION ITEM - Refining the Scope of Work section of the Terms of Reference**
  - ==All==: By September 27, please add any thoughts or suggestions to this section using Suggestion mode
  - ==Jake, Chris, Kira==: will use your contribution while they revise this section (perhaps by separating Outcomes/Goals from specific Objectives or even Tasks, maybe by creating a matrix).

- Back to Matchmaking (Kira's upate)
  - Try to figure out what kind of outreach and how best to make connections with potential partners (using broadest definition fo Partners used today)
  - There has been a couple of ideas of how to do this
    - Searchable database
    - Robust list that folks can scroll through
  - Before getting this data (which will probably be a lot of work), reach out to stakeholders to see what they need. Do this before the matchmaking
  - **Action Item - need to design the survey. Determine if it is a focus group, phone survey, etc.**
  - Kira has names/contact from Mike about different agency members. Could use a subset of those folks for 15-20 to get feedback on how is the most useful way to build a matchmaking service/database.
  - Want to respect people's time. Asking for 10-15 minutes to get feedback to get input on this database
  - Ask what kind of problems they face in their work where future forecasting will be useful, what barriers are they facing to get the information they need to make the decisions they need to make.
  - **Action Item - Kira can mock something up and send around to the group for feedback.**
  - NOAA is working on best practices to improve user engagement. **Action Item - Chris can send this along to Kira.** This may not be directly applicable, but could be helpful.