

## October 22, 2019 Partners & Knowledge Transfer Working Group Call

**Attendees:** Mike Dietze, Cliff Duke, Jody Peters, Kathy Gerst, Kira Sullivan-Wiley

### Recap of Call for the Newsletter

The Partners Working Group is continuing to develop the Terms of Reference or Scope of Work of the group including tasks that the group will be working on moving forward. One task that was discussed extensively during the call is the creation of a survey to reach out to potential EFI partners to let them know what EFI is and what we are doing and to learn how organizations are currently using data, models, and forecasts and where there is the potential for synergies with EFI. The group also discussed how the survey may provide input for the RCN in finding partners interested in forecasts using NEON data. The survey creation and dissemination will be an ongoing effort that the group welcomes anyone interested in joining for our next call on November 19 at 1pm US eastern time.

### Action Items From 9-24-19 Call

- Refining the Scope of Work section of the Terms of Reference document (Jake, Chris)
  - Chris is not available to join the call today but said: Jake and I started putting together a spreadsheet to better define the tasks ahead of the Partners Team.
  
- Design the survey. Determine if it is a focus group, phone survey, etc. (Kira, Kathy)
  - Kira has a survey mocked up and sent to Kathy
  - Point of the survey - reach out to folks who could potentially be partners in EFI and see what would be useful for them. Precursor to the matchmaking between EFI and what partners need.
  - It could be a survey or could be a focus group. There are pros and cons to both methods
  - Sections:
    - People to reach out to (Mike has a list that was brainstormed previously)
    - Introduction to EFI - need input from Mike and Melissa (what EFI is, what the goals are, who we are and what we are doing)
    - Basic Info
      - Initial questions - name, organization, what they hope to get out of or learn from participating in survey/focus group
      - Does your Organization( and how does it currently) do a number of items. The goal is to get each person to think about the way the organization interacts with ecological or ecologically-relevant (EER) data, forecasts, and others in the forecast cycle
    - Feedback from this group: Middle section that says "Use EER data to". Want to include models and forecasts in the questions. We are most interested in how the groups would use models and forecasts to make decisions not necessarily EER data. The current questions would answer how the organizations are using data. But we want to see if they are using

models/forecasts or how might they envision using models/forecasts to make decisions. Asking how they are using them right now is also a good place to start.

- KG: Can we use this as an opportunity to assess where people's knowledge is? Many of the organizations we are thinking of reaching out to may not be using models/forecasts. So maybe start more simply to assess their state of understanding about what an ecological model/forecast is. Then follow up with the deeper questions.
- Want to identify folks who would benefit to connect with scientists if they aren't scientists
- How are we defining Partners? Any member of EFI or any non-science member of EFI? If the Partner stores/manages EER data, but don't do forecasting/modeling.
  - Part of this would be to identify who is collecting data but their mission is not necessarily to do forecasts.
  - Our interactions may change depending on how they answer certain questions.
  - If this was a survey there would be contingencies - if you answer "No" to some set of questions, you would not be asked follow up questions
  - But there could be a slightly different variant. For groups that collect data but don't forecast, ask something like, "Do you currently know if your data is being used in decision making?"
- Ask questions to assess their initial forecasting knowledge - do this before asking about what their organization does or would like to do related to forecasts.
  - Kira will think about this.
    - Could present definitions and have them choose.
    - Or if we want to get folks on the same page, define forecasts upfront
- Kathy - one option is a 2 pronged approach
  - Do broad survey to see where people are at, their understanding, and interest (e.g., 5 question survey)
  - For those who self-identify as being interested in EFI, then do a follow-up survey for that group
  - If we can get people's feedback to get sense of field where the gaps are and where the needs are. If this can be embed it in an email or they click and takes 5 minutes or less to get a broad response. Then follow-up with a more targeted survey.
  - We would need to think about what information we want to get upfront.

- There is a risk of not getting a large response to the survey. But we also don't want to start out with 100 partners.
- Partners - definition. Are these groups/organizations or individuals? Mike initially thought of it more as groups/organizations, but we don't need to limit it to organizations.
  - Do we have any examples of an individual that is not representing/part of an organization?
  - Thinking simplistically from Data Provider to Forecaster to Forecast User - the two end members on this are typically going to be organizations
  - NPN has also been grappling with who is a stakeholder over the past 10 years.
  - Cliff's example - he is part of the National Academies, but doesn't speak for them. Jake has also brought this up. He can be an EFI member as an individual, but can't speak for the USGS
- For survey - take a broad view of Partners - individuals who are part of EFI, but aren't officially representing their organization at this time. Maybe in the future, that individual can be the conduit for their organization.
- Other information for subsequent survey:
  - Areas of Challenge or Areas where groups have Identified Areas of Improvement
  - Ask what tools people currently use for decision making.
    - Goal is to incorporate current tools rather than creating new ones.
    - So get an understanding of existing tools and where there are areas of need - \*\*add this to the Does your organization use forecasts and follow up with How
  - What are the other primary challenges? Do we need this question
    - Perhaps re-state to be something like: How do these challenges rank relative to the other things that your organization is worried about. How are these challenges prioritized within your organization
  - Opportunities
    - What help or assistance from the EFI community would organizations be looking for?
      - If there are things that partners are looking for then follow up with the question about How they would like help
- One worry is the length.
  - There would be display logic to prevent everyone seeing all the question.

- If we can see it in survey form, it may be fine
  - Incentive? Be put into a drawing for a mug?
    - The leftover fund from EFI19 are all Sloan, maybe some BU. Mike doesn't think they are encumbered by federal rules. So could probably make this work.
  - Is this an opportunity to identify potential participants for the RCN.
    - Yes. In the last RCN meeting the discussion about identifying partners got started. For the RCN, need to identify partners that will benefit from forecasts that can be done with NEON data
    - Add a question to survey about what system the organization works in
    - Venn diagram of EFI and NEON stakeholders that want forecasts
    - Would be good to have NEON member join this group as they might know stakeholders that want to use their data
      - Mike will reach out to NEON outreach team to ask
      - Next STEAC meeting is later this week that Mike is on for so he will ask at that
  - Getting back to 2-prong approach
    - In initial survey say that there will be a follow-up and ask for that follow-up who is the most appropriate person(people) at the organization to contact who knows about how data, models, and forecasts are used in the organization
  - **Action Item: Kira will draft up survey and send out to the group for initial thoughts**
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- Chris - to send the NOAA best practices to improve user engagement to Kira.
    - Kira will follow up with Chris about this
  - Chris work on second NOAA Blog post
    - Chris is not available to join the call today but said: I wasn't able to complete my blog before leaving on my trip, but it is coming along.