April 30, 2020 Partners Working Group Call

Attendees: Mike Dietze, Kira Sullivan-Wiley, Jake Weltzin, Clifford Duke, Kathy Gerst, Chris Brown, Güray Hatipoglu, Mike SanClements

Agenda

- RCN Presentation giving updates from what the WG has done and plans moving forward. Kira and Chris have these slides [LINK REMOVED] drafted to get feedback from the group.
  - Core functions of the group and what we want to accomplish
  - Work Plan
    - Advertisement for Kira’s survey. People who collect data, store, manage, use it to make forecasts, make decisions, etc. How are people connected in this space and where are there opportunities for making connections
    - How do we advertise the group to get others interested in joining. This is the group where the rubber meets the road. We want to bridge between different audiences. There is room for academics who create forecasts that other organizations like NGO, Gov’t, Industry will want to use.
    - How can we best create useful applications
    - Need to have good models but also need good delivery models
    - Key messages for Day 2

- Terms of Reference
  - Ratification vote results.
  - Vote here [LINK REMOVED]
  - See results here [LINK REMOVED]
  - Best practices for transitioning from research to operations. How to engage with people throughout the trajectory of forecasting rather than the standards for the forecasts. Working towards building the best practices. How are they evolving what are the lessons learned?
  - “Partnership and market development” is wording that Melissa added for the Work Plan
    - What does market development mean?
      - Cross reference to the workplan. Rename record keeping and outreach to partnerships and market
    - How is it distinct from fostering the collaborative community from above?
    - If the Work Plan is a private document and the ToR is public-facing and there isn’t a URL link between them, we don’t need to match the short name now. We can work on the language in the Work Plan later.
  - We made adjustments to the ToR and
  - Jody send out the poll one more time after the meeting

- Work Plan
  - Continue to review to make sure it is where we want it.
There were a number of edits on April 2 when Kira and Chris were not available, so want to make sure to keep them in the loop

- **Kira’s Survey Update**
  - Short-term goal - getting the survey ready to send out
  - Long-term goal - Determine how to create a database to allow EFI members to network, but balance that with not sharing an individual’s contact information broadly. Or be sure people are willing to share their contact information.
  - Kira has updated and changed the survey and would like one more round of feedback

- **Knowledge Transfer & Partners Webpage** - Update on status

- Update from Chris about this User Experience Image (see the image on the next page) shared by his colleague at NOAA. What is being conveyed and how they use it? Is this something we want to consider including in some way or is it just a best practice that is good for the group to know about.
  - Chris has not used this before.
  - We could use it as an example of best practices for user experiences.
  - Check with Melissa. Chris thinks it came from her. We’ll follow up with her to get the reference.
    - **UPDATE:** this was a figure shared by Renata Lana from NESDIS
    - A full description of it can be found here: [https://www.nngroup.com/articles/ux-research-cheat-sheet/](https://www.nngroup.com/articles/ux-research-cheat-sheet/)
  - NOAA will also be developing a User Experience as well, Chris will share what they develop
  - Too specific for the Partners Working Group ToR. But could include this image in a library as an example of how to engage with stakeholders or engage with forecast users. How to continue a dialogue
  - Jody will create a Google folder to create a library of useful images and documents. Keep it internal and then if we compile more resources then we can have an external library.
UX ACTIVITIES IN THE PRODUCT & SERVICE DESIGN CYCLE

**DISCOVER**

**METHODS**
- Field studies/user interviews
- Diary studies
- Stakeholder interviews
- Requirements & constraints
- Sales & support interviews
- Support call monitoring
- Competitive testing

**ACTIVITIES**
- Find allies
- Talk with experts
- Follow ethical guidelines
- Involve stakeholders
- Hunt for data sources
- Determine UX metrics

**EXPLORE**

**METHODS**
- Competitive analysis
- Design review
- Persona building
- Task analysis
- Journey mapping
- Human-centered design
- Design diversity exploration
- Pluralistic walkthrough
- Prototype feedback & testing
- Write user stories
- Card sorting

**ACTIVITIES**
- Follow Tog's principles of IxD
- Use evidence-based guidelines
- Design for universal access
- Give users control
- Prevent errors
- Improve error messages
- Provide helpful defaults
- Check for inconsistencies
- Map features to needs
- Make software updating easy
- Plan for repair and recycling
- Avoid waste
- Consider diverse contexts
- Look for perverse incentives
- Consider social implications

**TEST**

**METHODS**
- Qualitative usability testing
- Training research
- User group outreach
- Social media monitoring
- Forum post analysis
- Benchmark testing
- Accessibility evaluation
- Test instructions & help

**ACTIVITIES**
- Protect personal information
- Keep data safe
- Deliver both good and bad news
- Track usability over time
- Include diverse users
- Track usability bugs
- Make training information

**LISTEN**

**METHODS**
- Surveys
- Analytics review
- Search log analysis
- Usability bug review
- Feedback review
- FAQ review
- Conference outreach
- Q&A at talks and demos

**ACTIVITIES**
- Pay attention to user sentiment
- Reduce the need for training
- Communicate future directions
- Recruit people for future research

*Bold methods are some of the most commonly used.*