

## Community Engagement and Outreach Working Group Charter

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### 1. Background

DataONE was conceived as a 10-year project to enable new science and knowledge creation through universal access to data about life on Earth and the environment that sustains it. In Phase I (2009-2014), more than 300 DataONE participants designed, developed and deployed a robust cyberinfrastructure (CI) with innovative services, and directly engaged and educated a broad stakeholder community. DataONE provides a resilient, scalable infrastructure using Member Nodes (data repositories), Coordinating Nodes, and an Investigator Toolkit to support the data access and data management needs of biological, Earth, and environmental science researchers in the U.S. and across the globe. DataONE also supports research by developing an engaged community of users and repositories via the DataONE Users Group and the Member Node Forum; encouraging working groups (small groups of community experts) to support CI and community engagement activities; educating the workforce by providing online best practices, curricula, and other resources; and collaborating with other CI and community efforts nationally and internationally.

Building on Phase I, DataONE will target goals that enable scientific innovation and discovery while massively increasing the scope, interoperability, and accessibility of data. Community education and outreach efforts will remain central to the DataONE mission. Four working groups will refine and extend the DataONE CI; perform usability testing and assess community needs; engage and educate the community; and develop a responsive governance structure and long-term sustainability model.

### 2. Working Groups

Working Groups are central to DataONE in conducting research, specifying cyberinfrastructure, and engaging the community. The Working Group Model allows DataONE to conduct targeted research and education activities with a broad group of scientists and users. Working Groups are designed to enable research and education activities to evolve over time. Each Working Group will have two co-leaders who actively work with members to propose and implement solutions to particular research, education, cyberinfrastructure, governance, and sustainability challenges.

### 3. Purpose, Scope, Mission

The Working Group will be chartered to determine effective means for engaging with DataONE's stakeholders to improve DataONE technical tools and build community capacity for sharing and using data. This activity will require deep analysis of existing literature in order to make evidence-based recommendations, and thus should lead to peer-reviewed publications that have impact beyond DataONE activity, in addition to guiding DataONE efforts. The Group will include stakeholders in large-scale environmental data sharing efforts, including scientists and non-scientists, and identify the widely varying means for engaging them, e.g., through targeted media efforts, and training. A training program will be developed for targeted groups of stakeholders, scaling with the Cyberinfrastructure (CI) efforts within DataONE, i.e. initially focusing on capacity building education that can be achieved using existing resources, and including increasing level of specificity for DataONE tools as they develop. This Group will coordinate efforts with the Usability and Assessment Working Group, e.g., integrating Assessment into training activity, and providing testing grounds for Usability. This Group will provide regular feedback to the CI team, and respond to questions from the technical team and requests to "test drive" CI products, an activity that requires initial specification of the explicit channels of communication with DataONE's CI team, largely the responsibility of the Working Group co-leads and DataONE leadership.

#### 4. Duration of Working Group

This Working Group will exist throughout the life of the DataONE Project. Working Group members will conduct yearly updates to the Working Group Charter.

#### 5. Major Objectives

The Phase II Community Engagement and Outreach (CEO) Working Group will focus on two sets of key activities: (A) engaging and growing the DataONE community; and (B) educating the community. Three interrelated sets of activities support the continuing education of users and the training of the next generation of scientists:

- (a) Providing effective online learning materials via a Webinar Series and online tutorials that will show researchers and students how to use DataONE tools and other resources to facilitate data discovery, access, management, and analysis and visualization;
- (b) Enhancing the Best Practices database by developing a user-friendly interface, supporting more dynamic search, and adding features that allow for a workflow type transition through the best practices and exploration of social media add-ins / ranking for increased engagement and utility; and
- (c) Supporting the DataONE Summer Internship Program in which four interns each year will participate in research projects aligned with DataONE CI development and CEO activities (e.g., creation of tutorials).

#### 6. Expected Deliverables, Outcomes & Schedule

The following deliverables will be outputs from the CEO Working Group:

##### Create set of education modules

- Review current modules Y6 Q2, Y9 Q1
- Determine changes needed to current slides Y6 Q2 Q3, Y9 Q1 Q2
- Update current modules Y6 Q3 Q4, Y9 Q2 Q3
- Add new modules (as needed) Y6 Q3 Q4, Y7 Q1, Y9 Q2 Q3 Q4
- Get feedback on modules from community Y7 Q2, Y10 Q1
- Incorporate feedback into modules Y7 Q2 Q3, Y10 Q1 Q2
- Create online education curriculum around modules Y8 Q1 Q2
- Collect end-use metrics (downloads, page views) Y6-10

##### Establish webinar series

- Determine webinars needed (community input required) Y6 Q1 Q2, Y7 Q1, Y8 Q1, Y9 Q1, Y10 Q1
- Investigate / acquire webinar software Y6 Q1 Q2
- Establish a schedule and assign webinar responsibility Y6 Q3, Y7 Q1 Q3, Y8 Q1 Q3, Y9 Q1 Q3, Y10 Q1 Q3
- Determine webinar presenters Y6 Q3, Y7 Q1 Q3, Y8 Q1 Q3, Y9 Q1 Q3, Y10 Q1 Q3
- Conduct webinars Y6 Q3 - Y10, Q4

##### Generate screencast tool-based tutorials

- Determine screencasts needed (community input required) Y6 Q1 Q2, Y7 Q1, Y8 Q1, Y9 Q1, Y10 Q1
- Investigate / acquire screencast software Y6 Q1 Q2
- Develop scripts for screencasts Y6 Q2, Y7 Q2, Y8 Q2, Y9 Q2, Y10 Q2
- Determine presenters Y6 Q2, Y7 Q2, Y8 Q2, Y9 Q2, Y10 Q2
- Get feedback on scripts and incorporate changes Y6 Q2, Q3, Y7 Q2, Q3, Y8 Q2, Q3, Y9 Q2, Q3, Y10 Q2, Q3

- Record screencasts Y6 Q3, Y7 Q3, Y8 Q3, Y9 Q3, Y10 Q3
- Publish on web (Vimeo, website, blog etc) Y6 Q3, Y7 Q3, Y8 Q3, Y9 Q3, Y10 Q3
- Collect usage statistics Y6 Q3 - Y10, Q4

**Update and add to web-based resources (including primer, best practices database, toolkits, tools database)**

- Generate list of changes, updates, and development needed for website Y6 Q2, Y7 Q2, Y7 Q2, Y8 Q2, Y9 Q2, Y10 Q2
- Determine developer resources needed for website goals Y6 Q2, Y7 Q2, Y7 Q2, Y8 Q2, Y9 Q2, Y10 Q2
- Oversee changes to materials Y6 Q3 Q4, Y7 Q3 Q4, Y8 Q3 Q4, Y9 Q3 Q4, Y10 Q3 Q4
- Get user feedback on changes/updates Y7 Q1, Y8 Q1, Y9 Q1, Y10 Q1
- Evaluate usage (e.g., google analytics) Y6 Q1 - Y10 Q4

**7. Potential Risks**

Potential risks for the CEO Working Group include:

- Attrition of group members, including co-chairs, due to loss of interest, motivation, or schedule conflicts.
- Mitigation: Ensure all opinions are valued during meetings; check-in about about workload and interest levels.
- Developing materials that aren't relevant to the community
- Mitigation: use surveys and outreach to determine community needs
- Multiple demands on the time for volunteers involved in the Working Group may dilute participation.
- Mitigation: maintain flexibility to allow group members' to pursue interests creatively, schedule meetings well in advance, actively manage responsibilities for work and deliverables between meetings
- Delayed delivery of materials from other Working Groups.
- Mitigation: WG leaders use weekly leadership team calls to gather information and coordinate.

**8. Membership**

- Co-Chair: Carly Strasser (CDL)
- Co-Chair: Viv Hutchison (USGS)
- Amber Budden (DataONE, UNM)
- Bob Cook (ORNL)
- Matt Mayernik (UCAR)
- Stephanie Wright (University of Washington)
- David Bloom (VertNet)
- Amy Hodge (Stanford University)
- Gail Steinhart (Cornell University)
- Yiwei Wang (DataONE, UNM)

New members will be nominated by the working group co-chairs and vetted by the DataONE Leadership Team. Members will serve at the pleasure of the co-chairs and the leadership team.

**9. Roles and Responsibilities**

The Working Group will consist of two co-leaders who are responsible for organizing meetings, communicating with the Leadership Team and other WGs, and tracking progress of projects.

Members of this Working Group should be prepared to provide expertise and resources that can be used for capacity building for the use, re-use and sharing of data in the broad community of potential DataONE users. Members will take on leadership of particular projects that are of greatest interest and benefit to them as they develop within the Working Group.

Members will be asked to commit to 2 face-to-face meetings per year and periodic conference calls.

Decisions within the Working Group will be by collective agreement, giving serious treatment of every group member's considered opinion. When necessary, the WG will make decisions on at least a majority vote and ideally consensus.

Members will commit for roughly 2 years, allowing the composition of the group to shift as needs change. New members will be nominated to the WG chairs and vetted by the Leadership Team.

### **10. Resources Available to Working Groups**

The Community Education and Outreach Working Group will use the following resources:

- All Working Group documents will be managed through the DataONE content management system.
- An annual or biannual face-to-face Working Group meeting will be held in support of Working Group activities.
- Quarterly Conference calls/Video Conferences will be held to support Working Group activities. Agendas, documents in development, and other materials will be available in advance of these monthly meetings.
- Financial support including a modest honorarium and travel support will be provided to members that are allowed to and desire to receive such support.

### **11. Relationship to other Working Groups**

CEO will solicit contribution from CI in development and presentation of screencasts of DataONE tools. Additionally, CI will be involved in CEO coordinated webinars related to tools and services provided by DataONE. CEO will seek feedback from UA in the development of video and scencast products.

### **12. Communication Plan and Reporting Requirements**

The Community Education and Outreach Working Group will provide monthly and quarterly status reports identifying major activities completed, anticipated deliverables, and any other issues identified to the Principal Investigators and Executive Director. The Working Group will provide periodic feedback on activities and issues as appropriate to other working groups, and the Leadership Team.

### **13. Modifications to the Charter**

Final approval for this Working Group Charter will be provided by the DataONE Principal Investigator and the Executive Director.