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DataONE Sociocultural and Usability &
Assessment Working Groups

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Internal documents, UAWG, SCWG, DataONE

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Summary

Joint Usability & Assessment and Sociocultural Working Groups Meeting
April 30 – May 2, 2013 Knoxville, TN

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1. Documentation Guide

Meeting folder on plone:

<https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013>

Main meeting Epad - <http://epad.dataone.org/Sp13-SCUAWg-jtmt>

Subgroup folders and Epads:

1. One Drive and Other Tools: Usability Testing & Development Strategy (Mike Frame)
 - Epad - <http://epad.dataone.org/Sp13-SCUAWg-usability>
 - Plone folder - <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-one-drive-and-other-tools-usability-testing-and-development-strategy>
2. Assessments: follow-ups, additional baselines and results usage (Ben Birch)
 - Epad - <http://epad.dataone.org/Sp13-SCUAWg-assessment>
 - Plone folder - <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-assessments>
3. Member Nodes (John Cobb)
 - Epad - <http://epad.dataone.org/Sp13-SCUAWg-membornodes> and <http://epad.dataone.org/Sp13-SCUAWg-membornodes2>
 - Plone folder - <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-member-nodes>
4. FAQs, Other Documentation and Environmental Scan of Institutional Policies (Kimberly Douglass)
 - Epad - <http://epad.dataone.org/Sp13-SCUAWg-faq>
 - Plone folder - <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-faqs-documentation-environmental-scan-of-policies>
5. Assessing Evaluation Program
 - Epad - <http://epad.dataone.org/SP13-SCUAWg-eval-prog>
 - Plone folder - <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-assessing-evaluation-program>
6. User Interface
 - Epad - <http://epad.dataone.org/Sp13-SCUAWg-user-interface>
 - Plone folder - <https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-user-interface>

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7. Working Group Surveys

- Kevin Crowston, Carol Hoover and Alison Specht met during the meeting to continue their analysis of participants attitudes re participation in DataONE WGs.

2. Attendance (32)

SCWG: Suzie Allard, Lynn Baird, Kevin Crowston, Miriam Davis, Kimberly Douglass, Holly Mercer, Rob Olendorf (subbing for Miriam Blake)

UAWG: Ben Birch, Denise Davis, Mike Frame, Bruce Grant, Carol Hoover, Rachel Hu, H. K. Ramapriyan (remote), Ellie Read, Mary Beth West, Lisa Zolly (remote), Alison Specht (some remote participation)

CCIT: Roger Dahl, Giri Palanisamy, Bob Sandusky, Dave Vieglaiss, Robert Waltz, Bruce Wilson

DataONE: Amber Budden

UT Students: Rob Christensen, Rebecca Davis, Tanner Jessell, Priyanki Sinha, Todd Suomela,

Member Node: John Cobb, Laura Moyers, Amber Owens (UT Student), Chelsea Williamson-Barnwell (UT Student)

3. Agenda Overview

Day 1:

- Welcome and introductions.
- Context Setting, Updates and Demonstrations via a “mini” reverse site visit
- Form and work in four subgroups:
 - One Drive and Other Tools: Usability Testing & Development Strategy (Mike Frame)
 - Assessments: follow-ups, additional baselines and results usage (Ben Birch)
 - Member Nodes (John Cobb)
 - FAQs, Other Documentation and Environmental Scan of Institutional Policies (Kimberly Douglass)

Day 2: Subgroups (above) continue and complete their work by day’s end. Report outs during last session of the day.

Day 3:

- Two new Joint Subgroups are explained and formed. Morning is spent working in these two subgroups.
 - Future Interface
 - Assessing Evaluation Program
- Original 4 subgroups reform, continue working and report out at end of day.

4. Meeting Overview

Purpose (**intro slides*):

- To address current questions.
- To explore issues for the next five years.

Introductions:

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- “What does DataONE mean to you?” answered by each participant.
- Responses recorded on main meeting epad and on flip charts, and also incorporated into a graphic representation of “Why we do what we do: a sociocultural view of DataONE” on Slide 5 of the Power Point here: https://docs.dataone.org/member-area/working-groups/usability-and-assessment/meetings-usability-and-assessments-working-group/joint-ua-sc-wg-meeting-2013/subgroup-assessing-evaluation-program/JWG_May13_Future-Eval.pptx

Context Setting, Updates and Demonstrations via a “mini” reverse site visit:

- 1) CCIT (Dave Vieglais, Bruce Wilson)
- 2) Sociocultural (Suzie Allard)
- 3) Usability and Assessment (Mike Frame)
- 4) Community Engagement (Amber Budden)
- 5) Member Nodes (John Cobb)

5. Subgroups: Summary of Work and Deliverables

1. One Drive and Other Tools: Usability Testing & Development Strategy

Summary: Focused primarily on OneDrive. Demonstrated and reviewed early version. Explained functionality to full group. Developed release strategy for v1 including deliverables below. August 2013 anticipated release (testing May – July). Requested testers, suggested MNs may be interested in using OneDrive, and these types of tools may help drive participation in DataONE.

Deliverables:

- Release strategy for v1: functionality, timeline, documentation, resource allocation, mocks ups, anticipated outcomes, operations concept(s),
- Mockups
https://repository.dataone.org/software/cicore/trunk/itk/d1_client_onedrive/doc/build/html/mockup/index.html
- Plans for DataONE AHM 2013.

1. Assessments

Summary: Two tasks for this meeting; 1) Design four (follow up) surveys, 2) place all unfinished survey work on timeline from now till end of time (July 31, 2014). Identified opportunities to do studies of the individual surveys but also comparison studies between the surveys.

Deliverables:

- Academic libraries Follow Up Survey
- Academic librarians FU Survey
- Federal libraries FU Survey
- Federal librarians FU Survey
- Survey development/deployment timeline
<https://docs.google.com/spreadsheet/ccc?key=0Am8rDNhFX-BkdG1ZYkJ5TndsckItZmhDdVNSOFpxNnc#gid=0>

2. Member Nodes (MN)

Summary: Lot of interested in MN work. Sessions well attended.

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- Personas - Presented work to date on MN persona concept and started drafting four more personae. Developed strategy including resource allocation and timeline for development of additional MN personae.
- External web presence – discussed what a MN wants to see, how people find the external documentation and how to structure it emphasizing less text. Lots of discussion generated and captured in two epads noted above.
- Metrics and activity assessment – lots of discussion of what metrics and activity tracking would provide indications of success of DataONE wrt MN coordination activities. Generated full list and voted on those most important. ID'd action item to develop a standardized DataONE acknowledgement to include in methodology of papers or publish a paper that can be cited as such.
- MN Scaling (How many MNs can DataONE support?) – Discussed what limits scalability. Big answer was, inability to convey the message may limit MNs. Additional responses include physical cyberinfrastructure, human resources and org structure, factors related to the target market, complexity of growing organization . . . (full list in report out slides). Discussed how to alleviate these limits and created brainstormed list of ideas.

Deliverables:

- Four draft MN personae (large geospatial data repository, academic institution repository, replication node, cultural heritage repository)
- Development strategy for additional personae.
- List of 21 possible metrics/assessments.
- Most important suggested metrics (by vote): ratio of datasets downloaded to dataset views, number of datasets downloaded, how many orgs want to be MNs, persistent ID citation counts, end user satisfaction measures (quantity, quality, documentation).
- Draft lists of limitations to MN scale and ways to address these.

3. FAQs, Other Documentation and Environmental Scan of Institutional Policies

Summary: Reviewed ask.dataone.org, and identified it as the new platform for FAQs. Discussed and identified a way to provide an “official” or “DataONE approved” FAQ answer by providing privileges for Leadership Team members to host this perspective. Vetted answers to existing FAQs and posted additional FAQs to ask.dataone.org with answers. Identified additional socioculturally related FAQs to be addressed. Documented additional sociocultural issues to be addressed. Mapped stakeholders involved in academic ecosystem of data management.

Deliverables:

- Considerations for Terms and Considerations
- Workflow issues to consider
- Recommendations for ask.dataone.org
- Concept map of stakeholders present in the academic ecosystem related to data management.
- List of sociocultural FAQs to address

4. Assessing Evaluation Program

Summary: We need to think about how we are evaluating ourselves and who is interested in our evaluations because:

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- We are growing a distributed virtual organization that must evolve over time in response to technical changes and the needs of our user community.
- We also exist in an ecosystem of diminishing resources (monetary ones).
- Eventually we will have no funding from the DataNET program and we need to ensure we have the information we need, the business case, to move forward.

Evaluation is needed to report progress to NSF, to improve internal project management and to prepare for the future. We need to identify what kind of data need to be gathered in order to make better strategic decisions.

There are some existing Evaluation standards/guidelines we can look to including American Evaluation Association Program Evaluation Standards and the Evaluation Characteristics from the Joint Committee on Standards for Educational Evaluation.

A group activity was conducted to address DataONE's evaluation needs. Participants were asked to consider: 1) Who are our relevant evaluation stakeholders? (utility), 2) How can this be implemented? How many resources are needed and what are they? (feasibility), 3) IRB, other considerations? (proprietary), 4) design ideas for information gathering (accurate), 5) how do we record the process? (accountable).

Extensive conversation was captured in the meeting epad and extracted into Assessing Evaluation Notes.

Deliverables:

- List of 5 priority tasks for the next five years.
- List of 16 additional ideas for next five years concerning issues DataONE needs to address.
- Figure – Why We Do What We Do: A Sociocultural View of DataONE"

5. User Interface

Summary: Built on the session from AHM 2012, but stepped back further and asked, "How should data be made available, what do we envision in the future?" and "What are other portals doing, how do they make their data and tools available?"

Deliverables:

- Basic Principles for future (DataONE as suite of products)
- Potential list of required features assessment (prioritized)

6. Working Group Surveys

Summary: Kevin Crowston, Alison Specht and Carol Hoover worked together to analyze results of previous working group surveys and develop strategy and methodology for IRB approved additional surveys distributed at the next AHM that could be published.

Deliverables: PowerPoint presentation of preliminary results (in plone folder).