

CDI Playbook: How

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How: Programming

CDI programming is designed to support its purpose to

- Advance understanding of Earth systems through enhanced use of data and information
- Provide a forum for sharing ideas and learning new skills
- Increase the visibility of work with data and information

The major components of CDI Programming are:

- [Monthly Virtual Meetings](#)
- [Annual Request for Proposals](#)
- [Collaboration Area Meetings](#)
- [Biennial in-person workshop](#)
- [Special Trainings and Events, including Group Learning](#)

Monthly Virtual Meetings

[Workshops and Meetings](#)

Annual Request for Proposals

[Proposals](#) page

Previous year schedules

Task list

Collaboration Area Meetings

[Collaboration Areas](#)

[CDI Collaboration Areas - more detailed information](#)

Biennial in-person workshop

[Workshops and Meetings](#)

Special Trainings and Events, including Group Learning

[Special Workshops and Training Events](#)

Content Strategy

How to reinforce community values?

How often to share, where?

How to find what you need?

How to make it engaging?

Whose role to create it?

Content goals

Content calendar

Onboarding

Communications Plan

<https://my.usgs.gov/confluence/display/cdi/CDI+Communication+Plan>

Need to move the plan some place with greater view permissions.

How: Community Guidelines

The CDI currently does not have community guidelines or a code of conduct. Other communities have developed guidelines that outline expected behavior, behavior that will not be tolerated, consequences of unacceptable behavior, and reporting. In the future, the CDI may develop guidelines if they decide that they are necessary.

A good example of guidelines is at:

[Mozilla Community Participation Guidelines](#)

How: Best practices for community management

For Coordinators

Collaboration Area Best Practices

[CDI Collaboration Areas 101](#)

[CDI Collaboration Area Checklist](#)

[CDI Collaboration Areas - more detailed information](#)

[Resources for Collaboration Area Leads](#)

Running virtual meetings

Most CDI meetings are conducted virtually and come with the challenges of meetings on the web/phone. Some tips on running virtual meetings are here.

- Update a calendar event with Topic and speaker that people can sync with their own calendars.
 - Distribute an agenda before the meeting.
 - Remind your contact list about the meeting 1-2 days in advance.
 - Record the call to allow others to access the information later.
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- As moderator, give a short introduction to the agenda and speaker.
 - As a speaker, use of the camera on zoom will help people stay engaged.
 - Attendees are usually not willing to speak up on a call if they are not familiar with the other attendees, make sure to check the chat to see if questions have been submitted that way.
 - Don't be afraid to pause for a long time for people to speak up.
 - If you want a lot of interaction on the call, methods such as [sli.do](#) or mentimeter may allow people who are more shy to provide their input without speaking up on a phone call. Zoom also allows polls.

- Update your wiki meeting page within a day or two after the call.
- Post slides and/or notes from the call for people to review if they can't make the call.

See the CALM Events manual for additional tips for building community during webinars. ([link](#))

Engaging members

Tips for increasing engagement within a collaboration area are documented on the wiki [here](#).

- Create methods for collecting input and feedback that are easy, can be done asynchronously, and that provide information that will help you steer your path. Example: a form survey sent to your email list asking members to select topics of interest.
- Let members learn about each other by sharing their reasons for being in the group and their expertise. This can be done on a wiki forum or during meetings.
- The Data Management group ran a "Speed Data-ing" activity during the 2019 workshop that matched people's challenges and expertise. See more [here](#) ([link](#)).
- Keep adding more to this list.

For Facilitators

New member management

The [new member workflow](#) and links to more information is available on the wiki to signed-in CDI coordinators.

Workflow for Monthly Meetings

The [workflow for monthly meetings](#) includes timing of actions, email templates, and post meeting tasks. *To do: Documentation of Monthly Meetings*

Award solicitation and selection

Information about the CDI Award, which was formalized as a USGS award in 2019, is available on the wiki. *To-do: More detail about the award selection process and an archive of past award citations.*

Management of CDI Facilitator tasks

CDI Tasks are managed on the Microsoft Planner app, and are available to CDI facilitators. *To-do: move workflow details of how Planner is used to the CDI Facilitators wiki space and link here.*

Request for Proposals Procedures

CDI [Request for Proposals Planning and Workflow](#) on the CDI wiki, including [list of tasks and timeline](#).

Workshop Planning (timeline)

A list of tasks and timeline for workshop planning.

To-do: convert FY19 .xlsx to a wiki page whose table can be copied.

The CALM events manual provides guidance for building community at events. ([link](#))

How: Best practices for community participation

For members: How to participate in the community

- **Ask a question.** There are many ways you can ask a question in the CDI community, and with the breadth of CDI member expertise, you are likely to find an answer! You can post on the community forum or on a more focused topical forum, USGS employees can ask in the MS Teams CDI Questions and Answers channel, you can present a 5 minute Scientist's Challenge at the beginning of our monthly virtual meeting, you can ask in the chat box during a monthly webinar meeting, you can ask a question during the community comment period of our request for proposals, or you can email cdi@usgs.gov to reach the CDI facilitators directly. Common types of questions are those that ask about tools and methods for meeting data release and management, software development, or
- **Answer a question.** Asking questions is more fun when you get an answer. All CDI members, both USGS and external partners, are able to log in to our wiki system and contribute to discussions on our forums. Answers can be discussed in the MS Team site, in the chat box during our monthly meetings, or even live on the phone during a monthly meeting.

- **Attend a monthly meeting.** The CDI holds monthly forums every 2nd Wednesday of the month from 11-12:30 Eastern Time, where we share information and tools to help us work with our data. Segments of the meeting include Scientist's Challenges (to spur discussion on shared data challenges), announcements from our executive leadership, report outs from our collaboration areas, and "featured presentations." Further interaction is available via live polling during the meetings.
- **Attend a collaboration area meeting.** The CDI has over a dozen active collaboration area groups that have formed around common interests, help address challenges, and work to identify solutions for working with scientific data. These subgroups provide a setting within a smaller group to dive deep into a topic.
- **Submit a statement of interest.** Each year, the CDI hosts a request for proposals process where any team with a USGS Lead Principal Investigator can submit a statement of interest for an idea that focuses on data integration for interdisciplinary research, innovative data management, and use of new technology.
- **Comment and vote in the RFP.** Community discussion is critical for improving upon initial statements of interest and selecting ideas for full proposals. All CDI members are invited to comment, question, and vote on 2-page statements of interest.
- **Attend (and help plan) the in-person workshop.** Every two years, the CDI hosts an in-person workshop that brings together people, funding, and Bureau-wide efforts. The workshop program is a mix of keynote talks, topical breakout sessions, lightning presentations, and a poster and demo session that we call the DataBlast. CDI members can propose sessions, talks, posters, and demos. See the most recent 2019 workshop site [here](#).
- **Become a CDI coordinator.** If you are interested in contributing ideas to steer the path of the CDI, join the biweekly CDI coordinator calls and let us know your ideas.

Join us on social media. The CDI tweets from @USGS_CDI. If you are active on twitter, @mention us to share information relevant to the CDI.