CDI Collaboration Areas - more detailed information

This content has been adapted **(is in the process of being adapted, 5/11/2010)** from the Carter, Megan (2020): How to Cluster in ESIP. ESIP. Online resource. https://doi.org/10.6084/m9.figshare.12827963.v1.

This content is provided as best-practice, as there are few CDI collaboration area requirements at this time. Contact the CDI facilitators at cdi@usgs.gov if you have any questions about this content.

How To Collaboration Area

There is no one-size-fits-all approach to leading a CDI collaboration area. CDI collaboration areas are not intended to exist in perpetuity. They are proposed when a need or goal arises and are spun down when the goal has been achieved. In general, collaboration areas have at least 3 phases in their life cycle - initiation phase, active phase, and hiatus phase. CDI facilitators tailor their support to groups based on where the group is in the life cycle and they serve as a sounding board for decisions regarding when to propose a group or when to move a group from active to hiatus phase. What follows is a series of recommendations based on past experiences and community input (mainly to CDI) to aid group leads in proposing, leading, and spinning down a collaboration area broken down into sections on the 3 main phases. Contact the CDI coordinator if you have any questions.

Why start a CDI Collaboration Area?

Do you have an data-related challenge or opportunity that you think other CDI community members would be interested in tackling? Would your project benefit from accessing the CDI backbone framework for collaboration? An CDI collaboration area may be just what you need. If you are undecided about whether to start a CDI collaboration area, share your initial idea with the CDI MS Team or the CDI coordinators group to see what other CDI community members think. You are always welcome to contact cdi@usgs.gov to discuss as well.

Who can propose a CDI Collaboration Area?

Anyone who is a member of the CDI.

Collaboration Area Chair Responsibilities

When considering whether to propose a collaboration area or whether to continue in a leadership role for a collaboration area, please consider carefully the responsibilities of a collaboration area chair. For a collaboration area to function successfully, it must have a chair who takes the lead in goal-setting, planning, advertising, facilitating, and documenting group activities. It is not a trivial time commitment. CDI staff can help the chair by providing advice and other support as outlined in this document, for example in disseminating news about group activities and outputs, but staff will not take over the duties of a chair. The recruitment of 1-2 co-chairs is strongly advised, as well as additional delegation of tasks. It is recommended that chairs give careful thought to their ability to continue chairship each year. For some collaboration areas, it has also worked well to elect a new chair at least every 2 years.

CDI Collaboration Area Life Cycle: Proposal Phase

How to propose a CDI Collaboration Area

To propose a CDI collaboration area, send an email to the CDI coordinator (cdi@usgs.gov). Although many details may not yet be determined, your email should include as much as you can describe about the following:

- Name of proposed collaboration area
- Names and email addresses of initial participants
- Name of initial chairperson and co-chairperson (if identified)
- Preliminary description of group and group goals (see section on Setting Group Goals)
    - E.g., What is the motivation for forming the collaboration area? What will success look like for the collaboration area in terms of goals and outputs? What is the anticipated timeline for achieving your goals? If known, how does the collaboration area fit in with or how will it interact with others? How is this proposed work related to your day job? Is your employer supportive of your involvement in this?
- Description of support needed from CDI facilitators

(Modified from the ESIP Life Cycle) CDI Life Cycle: Start-Up Phase

What to expect after you have proposed a CDI collaboration area

Once your requested collaboration area has been approved, a CDI facilitator will contact you to let you know and to ask you about what CDI collaborative tools you need. The basic collaborative support provided to includes a dedicated mailing list, access to MS Teams and associated phone bridge, and a Wiki Page that briefly describes your collaboration area that links to your Wiki page and other communication tools. Add-ons may include a dedicated MS Teams.

Populating Your Wiki Page

One important step before advertising your group to the broader community is to put some content on your group Wiki page. Think about what information a person would need to decide whether to get involved in your collaboration area or even to simply join the mailing list. Be sure to include the nuts and bolts of how to get involved, including how to join the mailing list, who to contact for questions, when your web meetings take place (once known), etc. You should also include a link to preliminary Collaboration Area Plan (see section on Setting Collaboration Area Goals below). You should aim to update your Wiki page periodically and you are welcome to appoint a specific person to do this over time.

Scheduling & Advertising Your First Web Meeting

Once your collaborative tools are in place and you are pleased with your group Wiki page, it is up to you to choose a time for a first web meeting for your group. You may wish to have a brainstorming session with your co-chair(s) or with a few targeted invitees to develop a strategy for the early phase of the group prior to inviting others in or you may wish to wait to see who turns up and is likely to be involved in the group before developing a further strategy. If your initial web meeting is open to all, please share event details with the CDI coordinator at least 10 days in advance so that the call can be advertised more broadly within the CDI Community.

CDI Collaboration Area Life Cycle: Active Phase

Active phase is defined as all activities happening during and after the first meeting of the group. Goal-setting is included in active phase, though it may be something that starts even prior to proposal of the group. The idea is that goals cannot be solidified until you know who will take part in the group and what they hope to get out of participation.

Setting Collaboration Area Goals

There is no one-size-fits-all approach to running a group, nor will CDI facilitators rigidly prescribe how you work. Likely you formed a group around an Earth and Biological science data challenge or opportunity, so you should find the structure and format that best helps you take steps toward addressing the challenge or opportunity. With past collaboration areas, it has been observed that those groups that set **concrete and measurable goals** are most likely to reach their goals, as well as to attract and retain active participants. Break larger goals down into smaller sub-goals, so you have **smaller, but more frequent, milestones** to celebrate. Lay these goals out clearly in a **succinct plan** (copy template for CDI collaboration area plan available at https://doimsp.sharepoint.com/:w:/s/CDIInternal/EVTqEktX-ZdDqpRrB8lOhvwBsZYDxJH9khN-SDhvsdvfrw?e=n3jY2t). The plan should be shared with all collaboration area members and linked on the collaboration area's main Wiki page, as well as reviewed and updated twice a year, with assistance from the CDI coordinators if desired. The most ideal times to review and update your collaboration area plan may be just after an in-person CDI Meetings because it is likely that some of the activities from the meeting may have helped you to refine future directions. When a new collaboration area is first started, the chairs may draft an initial plan that is then refined through subsequent group events. Some examples of concrete goals that have been set by collaboration areas include the development of guidelines or white papers, webinar series, and more.

Scheduling Regular Collaboration Area Web Meetings

For most collaboration areas, monthly hour-long web meetings are the primary event and communication pathway for group progress. Your group may choose to meet more frequently. Often, it works well to set the call on a recurring schedule (e.g., on the first Tuesday of the month at 1 pm ET), so that meetings are predictable. When identifying a regular time slot, please try to avoid times that conflict with other CDI collaboration area calls, as shown on the CDI Calendar. Once an ideal time slot has been identified, notify the CDI coordinator.

Web Meeting Formats

Web meetings facilitate the achievement of collaboration area goals, so web meeting formats may differ widely depending on what the goals of a given group are. Some groups choose to host webinar series, some hold open discussion, while others spend web meeting time on developing a concrete output, such as a publication or a set of guidelines. In preparation for biennial CDI in-person meetings, most groups spend a few web meetings developing content for the meeting, most often a session.

Advertising Your Collaboration Area Web Meetings

In order to encourage greater attendance, please remember to send out a reminder email to your collaboration area mailing list prior to any web meetings. It is ideal if this email is sent out 1 week in advance and includes a link to a running notes document with a draft agenda. A second reminder sent out on the day of the web meeting is often helpful for getting the best web meeting attendance.

Starting and Joining Collaboration Area Web Meetings

Link to information about MS Teams here.

Preserving Collaboration Area Web Meeting Proceedings & Recordings

The best practice is that a single running notes wiki page should be kept for each collaboration area each Fiscal Year. The wiki page should be the place to create an agenda for a web meeting that can then be shared with group members prior to the web meeting. The notes document should capture proceedings of the web meeting, any action items generated, as well as who attended. It has worked well for collaboration area members to work together to take notes using a shared wiki or Microsoft document. Notes need not be an exhaustive transcript of web meeting proceedings. It is reasonable to capture just a list of those who attended and a few key takeaways, along with action items.

Web Meeting Slides

Slides presented during collaboration web meetings should be available for future viewing. They may be placed behind permission-controlled spaces of the wiki if needed.

Web Meeting Recordings

We will need to generate information about using MS Teams, which we have just changed over to recently.

Ask the CDI facilitators to help you spread the word about recordings, considering the following factors:

- Should others outside of my collaboration area know about what took place during the web meeting?
- Does this web meeting showcase a unique or cutting edge tool or resource?
- Would this recording encourage others to join my collaboration area or to get involved in the CDI?

How to Plan for In-Person CDI Meetings

Most collaboration areas participate in CDI's Meetings either formally by leading a breakout session or informally like in a Birds of Feather gathering. The meetings are a great time to share and advance collaboration activities, as well as to interact with and find common ground with other CDI collaboration areas.

Collaboration Area Reporting

Collaboration area , led by their chair, are required to do some reporting each year to summarize their efforts and to renew their status as an active CDI Collaboration Area.

Note: The CDI facilitators do their best to summarize collaboration area activities in a standardize way in an Annual Report (in the form of a USGS Open File Report). This text is passed on for group leads to check over.

The following are ESIP Cluster guidelines and are not required of CDI Collaboration Areas, but are included here as a reference and best practices.

- Update Collaboration Area Plan: This document outlines in brief the goals and activities of a collaboration area that are planned for that year. The plans are first drafted at collaboration area inception using the template here: https://doimspp.sharepoint.com/:w:/s/CDIInternal/EVTqEktX-ZdDqpRrB8lOhvwBsZYDxJH9khN-SDhvsdvfrw?e=n3jY2t. The plans should include the following subheadings:
  - Things we may do to fulfill our objectives (on virtual web meetings, at CDI in-person meetings, and elsewhere)
  - Things our collaboration area needs to deliver our objectives? (e.g. partnerships, in-kind support, staff support)
  - How will we know we are on the right track?
  - How will others know what we are doing in & out of CDI?
  - Existing or Desired Cross-collaboration area connections
- Contribute to the CDI Collaboration Area Showcase: This event takes place at each Summer Meeting. The showcase has had multiple iterations, including both a physical and a virtual poster session. Regardless of format, the contribution should include information on the collaboration area's goals, recent activities and outputs, and how to get involved. The product may be used for several months post-meeting as an advertisement for the group's activities and as a recruitment tool for new participants. Here is a potential template to follow for virtual slides.

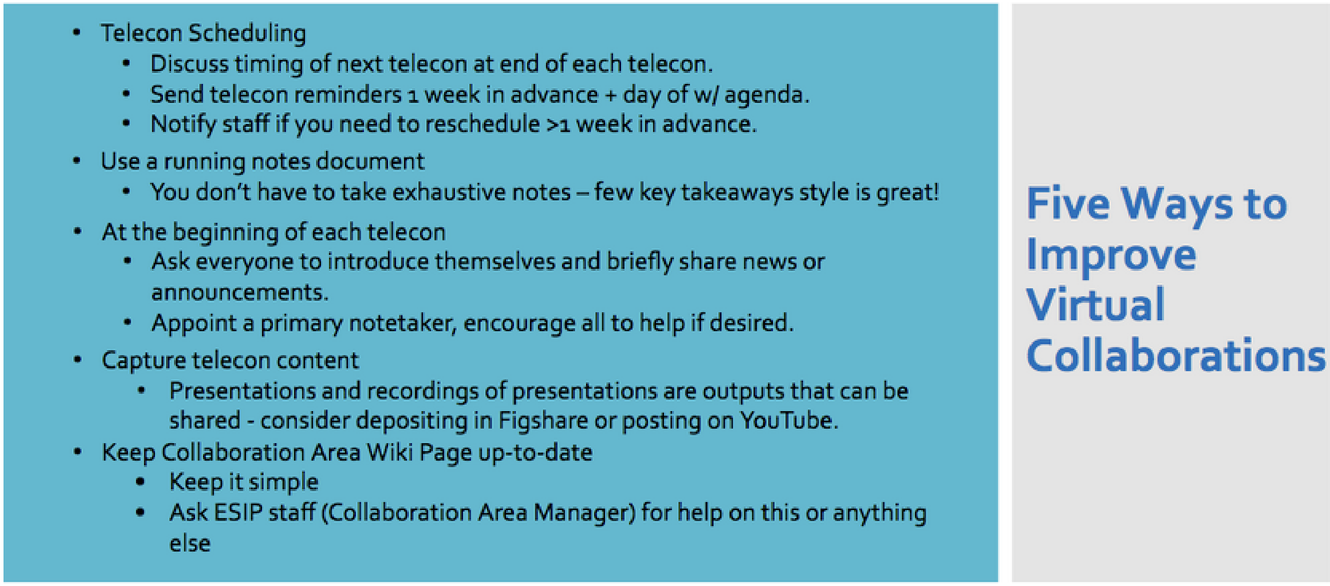
What Can Reporting Do For You?

From ESIP again:

Reporting by producing or updating a Collaboration Area plan yearly, presenting in the Collaboration Area Showcase at ESIP Meetings, and optionally participating in the ESIP Collaboration Area Highlights Webinars, and by producing a yearly Collaboration Area Plan benefits a Collaboration Area in a number of ways. First, it is a means by which groups can track their progress toward previously stated goals and adjust goals or activities as needed. Second, it allows participants to celebrate successes and have something to share with others to show their hard work and find potential areas for collaboration. Third, it provides content that ESIP staff, Board, and other volunteer leaders can use to elevate and amplify your efforts beyond the bounds of your collaboration area. Your efforts can attract others to get involved in your cluster's activities and result in new collaborations formed.

Practical Tips for Improving Virtual Collaborations

Periodically, the Community Director may share tips for improving virtual collaborations, such as those shown in the figure below. Often, these tips may seem like nuts and bolts suggestions, but they can really lead to more productive web meetings and help newcomers jump in and get involved. If your collaboration area would welcome a brief check-in to assess and discuss topics like these, you can request one by contacting the Community Director.



CDI Collaboration Area Life Cycle: Hiatus Phase

CDI collaboration areas that have achieved their goals or are in a period of low activity (possibly defined as 4 consecutive months with no virtual meetings or other activities) should consider entering hiatus phase. Hiatus phase is not a sign of failure - it can, in fact, be a sign of success. CDI collaboration areas are not meant to exist indefinitely, but to exist for a time to work on a discrete activity and then to either take on another discrete activity or enter hiatus phase. If a follow-on goal or activity is identified, the collaboration area can be reactivated again in the future. An important step prior to hiatus phase is to ensure that the history of the collaboration area, including its activities and any outputs produced, is preserved. This should include, at a minimum, a succinct one-pager or webpage listing:

1. Year Initiated
2. Collaboration area goals
3. Current group leaders, including who to contact with questions
4. Key milestones, including presentations and activities within and outside of CDI
5. List of outputs, including where to access

If you have any questions, contact the CDI facilitators at cdi@usgs.gov.