

Usability & Assessment Working Group Charter

Revised October 2011

1. Background

The Observation Network for Earth (DataONE) is poised to be the foundation of new innovative environmental science through a distributed framework and sustainable cyberinfrastructure that meets the needs of science and society for open, persistent, robust, and secure access to well-described and easily discovered Earth observational data. Supported by the U.S. National Science Foundation, DataONE will ensure the preservation and access to multi-scale, multi-discipline, and multi-national science data. DataONE will transcend domain boundaries and make biological data available from the genome to the ecosystem; make environmental data available from atmospheric, ecological, hydrological, and oceanographic sources; provide secure and long-term preservation and access; and engage scientists, land-managers, policy makers, students, educators, and the public through logical access and intuitive visualizations. Most importantly, DataONE is not an end but a means to serve a broader range of science domains both directly and through the interoperability with the DataONE distributed network.

2. Working Groups

Working Groups are central to DataONE in conducting research, specifying cyberinfrastructure, and engaging the community. The Working Group Model will allow DataONE to conduct targeted research and education activities with a broad group of scientists and users. Working Groups are also designed to enable research and education activities to evolve over time. Each Working Group will have two co-leaders who organize the activity and propose solutions to particular research, education, and cyberinfrastructure problems.

3. Purpose, Scope and Mission

This working group will focus on the research, development, and implementation of the necessary processes, systems, and methods to ensure DataONE products and services meet network goals, include appropriate community involvement, and demonstrate progress and achievements of DataONE.

The scope of the Usability & Assessment Working Group is defined as activities necessary to establish program performance indicators, measure usage and impact, and adopt usability analysis principles and methods to ensure that high quality, community-driven products and services result from DataONE activities. This includes periodic testing of versions of the system and tools as they are being developed. The Working Group also establishes and implements appropriate methods, tools, and instruments for usability and assessment of all DataONE stakeholders.

4. Duration of the 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

Major objectives for the Usability & Assessment Working Group are described below:

- Develop a comprehensive assessment approach, instruments, and methodology for DataONE products, services, and deliverables.

- Provide guidance and leadership to DataONE community for the development and application of assessments, performance indicators, and usability analysis techniques and principles.
- Conduct usability testing of selected DataONE capabilities, including the Investigator Toolkit.
- Actively engage the DataONE community in performing usability and assessments.

6. Expected Deliverables, Outcomes & Schedule

- A plan to identify, prioritize, and schedule all assessment activities tied to PMP metrics. (Initial by Q4; detailed By Year 2)
- Identification of priority DataONE stakeholders and audiences (Year 1)
- Development of Baseline Assessments of DataONE stakeholders (Year 1-3)
- Develop a usability analysis strategy for DataONE (Year 3)
- Report to the C.I. and Leadership Team on requirements based on assessments for the Investigator toolkit (Years 2-5)
- Report on usability analyses as appropriate (Years 2-5)
- Report on baseline assessment of scientists (Year 1-2)
- Peer reviewed publications from assessment activities. (Years 2-5)
- Report on ongoing assessment of scientists (Years 3 and 5)
- Report on baseline assessment of other stakeholders (Year 3)
- Report on ongoing assessment of other stakeholders (Years 4-5)
- In conjunction with SocioCultural Working Group, develop personas and scenarios and map to actual use of DataONE (Years 2-5)
- Integrate assessments of stakeholders and personas (Years 3-5)

7. Potential Risks

Potential risks are identified for the Working Group and other DataONE members are aware of their potential occurrence and develop appropriate methods to mitigate their impact on overall Working Group outcomes. These risks are briefly described below:

- RISK: Loss of Co-Chair; MITIGATION: Members will suggest a new co-chair to the Leadership Team if needed
- RISK: Stakeholder response inadequate for Baseline and ongoing assessments; MITIGATION: Send reminders, distribute surveys widely, enlist assistance of all DataONE partners, expand distribution base
- RISK: Insufficient involvement of Working Group members in the WG tasks; MITIGATION: Schedule meetings well in advance, communicate in multiple ways, distribute notes from all meetings and assign actions, review membership every year and replace members as necessary
- RISK: Lack of capacity of CI to respond to usability recommendations; MITIGATION: Report regularly to CCIT and to CCIT working groups about assessment and usability plans and findings; develop usability recommendations in collaboration with CCIT members
- RISK: Delay in CI deliverables; MITIGATION: Refocus activities on more long-term research

8. Membership

Membership is composed of two co-leads and 10-12 members. Members are asked to commit to a two-year term, with possibility of renewal

9. Roles and Responsibilities

Members of this Working Group should be prepared to provide expertise in assessment and/or usability and assist with assessment and usability testing of DataONE stakeholders, services, and products.

Members of this Working Group will bring expertise in:

- Assessment techniques, including surveys, interviews, and focus groups; testing of software tools; and evaluation of information products and services;
- Usability testing;
- Survey data analysis;
- Scientific data analysis and/or
- Working with an interdisciplinary research team.

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

New members will be nominated by the WG chairs and vetted by the Leadership Team.

10. Resources

The Usability & Assessment Working Group will use the following resources:

- All Working Group documents will be managed through the DataONE Collaboration Forum.
- An annual or biannual face-to-face Working Group meeting will be held in support of Working Group activities.
- Conference calls/Video Conferences/emails as needed to support Working Group activities. Agendas, documents in development, and other materials will be available in advance of meetings.
- Financial support will be provided for Working Group members' travel to Working Group and DataONE meetings.

11. Relationship to other Working Groups and the DataOne management team

The Usability & Assessment Working Group is a cross-network Working Group, which aims to ensure that proper assessment tools and methodologies exist for the entire network. The Working Group also provides advice to inform all DataONE working groups and network operations in the area of usability analysis and assessment. Consequently, this Working Group supports and works with a number of the DataONE working groups and Leadership Team members.

12. Communication Plan and Reporting Requirements

The Usability & Assessment Working Group will provide 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 assessment and usability as appropriate to other working groups, the Leadership Team, and the CCIT.

13. Modifications to the Charter

Final approval for this Working Group Charter will be provided by the Executive Director and Associate Director for Education and Outreach.