MONTANA WILDLIFE AND TRANSPORTATION
DATA AND INFORMATION WORKGROUP
1:00pm – 5:00pm, Monday, March 14th, 2022
Meeting Notes

Purpose: Finalize beta testing preparation, the beta testing instructions, survey questions and form, and beta tester list; review the PIT Crew edits to the Tool Description for the website landing page and the Story Map Write-Ups for the NAC Maps, determine progress and next steps for methodology write-up, review AJ's revised datasets and limitations document.

Objectives:
- Finalize the beta testing instructions, survey questions and form, beta tester list, webinar/roll out, other related items and set date(s) for beta testing
- Review and finalize the Tool Description, review the Story Map Write-Ups, and determine next steps and timeframe for finalization.
- Determine progress and next steps for methodology write-up
- Review AJ's revised datasets and limitations and data needs/data gaps documents and determine next steps for revision or finalization
- Coordinate work for February – April milestone tasks

Attendees:
- D&I Work Group: Andrew Jakes (MSWP), Liz Fairbank (MSWP), Gabe Priebe (MDT), Paul Sturm (MDT), Brian Andersen (MDT), Adam Messer (FWP), Justin Gude (FWP)
- Planning and Implementation Team (PIT Crew): Deb Wambach (MDT), Brooke Shifrin (MSWP), Linnaea Schroeer (FWP)

Agenda:

1. Introduction

2. PIT Crew provided a debrief on latest SC meetings and work progress
   a. Discussed SC review of the DI Phases and Intended Uses document
      i. This document was very helpful for the SC in understanding how the tool could intersect with their project selection process.
   b. Discussed how the SC envisions the tool informing project identification and project selection
      i. The SC agrees with the DI group's recommendations around displaying relative heat + chunking by percentile and using that information to inform project selection
   c. Discussed any SC input received for the beta testers list and questions for the beta testing from each entity

Outcome: Group understands how the SC is incorporating the DI Phases and Intended Uses into their current work, how they envision the tool fits into the project identification and selection process, and the SC recommendations for roll out of the tool into beta testing

3. Finalize beta testing preparations and determine next steps

a. Reviewed and discussed draft survey questions and form provided via email link by BA
   https://forms.office.com/g/KyKUGnPx80
      i. Group discussed the need to synthesize questions (given redundancies) into a shorter/simpler list of 6 key questions (in addition to the introductory questions regarding affiliation, position etc.)
      ii. Group agreed that question 6 in draft survey is good, question 7 needs revisions to better encompass all text descriptions in the tool, question 8 should be deleted, and questions 13 and 14 should be deleted.
      iii. Group discussed the pros and cons of open-ended questions and determined open ended questions would be most useful but that a shorter list would make processing the feedback more viable.
      iv. Liz offered to create a second draft of questions based on the discussion and will put that document in the 'final drafts' folder on the Teams site for the group to review in advance of 4/28 meeting.
b. Reviewed and discussed proposed beta tester lists to determine final list of testers
      i. Group discussed the variation in list length across the 3 entities and identified two different goals that were driving the proposed lists: 1) creating an opportunity for exposure to the tool/building buy in across staff, and 2) soliciting feedback on the tool
      ii. The group agreed that implementing a webinar or some similar tactic after beta testing could be a more appropriate method of creating exposure/building buy in and for the purposes of beta testing for feedback, perhaps it makes sense to try and narrow the list down to 10 individuals per entity (not including SC and PIT crew testers)
c. Discussed instructions for beta testing and determined method to roll-out beta testing within each organization (webinar, email, meeting, other?). Ensure common messaging among each entity and testers
      i. BA needs to develop tool use guidance and instructions to accompany testing
      ii. Group agreed that the beta test could be rolled out via email with a standardized message used for each entity
      iii. The need for a webinar or something similar should be re-visited following beta testing.
      iv. The PIT crew offered to do a first draft of the beta testing roll out email and will put that document in the 'final drafts' folder on Teams for group review prior to 4/28 meeting.
d. Reviewed and identified remaining clean-up and production tasks for the tool (AM and BA)
      i. Data clean-up and organization
      ii. Metadata analysis and user-friendly display
      iii. Base layers
      iv. Product display options
      v. Instructions vs. guidance for use
         o Brian will create a draft 'help guide' (i.e., instructions for use) for group review prior to the 4/28 meeting
      vi. Access permissions or sign-on terms of use
      vii. Other related items

Outcome: Made progress on finalizing the beta testing preparation and determined leads and next steps for remaining and related items. Agreed on the instructions and method for introduction and roll-out. Set a planned timeframe of May for beta testing roll-out and completion.

4. Reviewed and discussed the PIT Crew edits to the Tool Description for the website landing page
    a. PIT Crew walked DI Group through the proposed revisions
    b. Agree on proposed changes in style and content or make additional revisions- did not complete
    c. Worked to finalize this document and determined next steps and date for completion
        i. Deb will put PIT crew version of the Tool Description in the 'final drafts' folder and Teams and group will review/comment in advance of 4/28 meeting
    d. BA to upload to web page when final

Outcome: Still need to agree on style and content of tool description for the landing page. Worked to finalize the document and determined next steps for upload to website. This needs to be completed prior to beta testing.

5. Reviewed and discussed the PIT Crew edits to the Story-Map Write-Ups and NAC details document
    a. PIT Crew walked DI Group through the proposed revisions
    b. Agree on proposed changes in style and content or make additional revisions- did not complete
    c. Identified leads and next steps for document revisions and set a date for completion
        i. Story map write-ups
        ii. NAC details
            • Deb added the PIT crew version of the document containing both items to the 'final drafts' folder on Teams. Brian will add the most recent process related content he and Adam drafted to the PIT crew version and the group will review the updated documented prior to the 4/28 meeting.
            • Ultimately, key information from this document will be integrated into AJ's datasets and limitations document to make AJ's document an overarching methodology report.
    d. BA to upload story map write-ups to web page when final

Outcome: Still need to agree on style and content of story map write-ups for the tool. Worked to finalize the story map write-ups and determined next steps for upload to the tool. This needs to be completed prior to beta testing. Determined leads and next steps for remaining document revisions.

6. Reviewed BA and AM progress on methodology write-ups
    a. Discuss how SC feedback on Phases and Intended Uses informs additions or revisions to the methodology write-up
        i. No discussion
    b. Determined next steps and timeline for finalization of methodology write-up. Group agreed that this needs to be done prior to beta testing.
        i. AJ's datasets and limitations/data gaps document will become the final methodology report. Information from the needs assessment criteria document

will need to be integrated into AJ's document. The group will discuss this at 4/28 meeting.

      ii. Information from the data sources spreadsheet also needs to be added to AJ's datasets and limitations/data gaps document to make that piece a comprehensive methodology write up. Justin will add relevant information to Andrew's document prior to 4/28 meeting.

Outcome: Reviewed and determined next steps and timeframe for finalization of methodology write-up.

7. Reviewed AJ's revised datasets and limitations and data needs/data gaps documents
   a. Reviewed and discussed the revised documents
   b. Determined any needed revisions and best layout for this information
      i. Based on decision to make this document the comprehensive methodology report, information from both the needs assessment criteria document and data sources spreadsheet will need to be incorporated into the document.
   c. Identify leads for any remaining items associated with these tasks
      i. Andrew will reconcile all group comments/edits on this document and add a final draft into the 'final drafts' folder on Teams for group review prior to 4/28 meeting.
   d. Determined how these documents are to be incorporated into product documentation and guidance
   e. Determined leads and timeline for finalization of datasets and limitations documentation. Group agreed this needs to be completed prior to beta testing and
      i. Group will finalize at 4/28 meeting.

Outcome: Group identified next steps, leads, and timeframe for finalization of data limitations and data needs/data gaps documentation.

8. Reviewed and updated the latest (February 2022) tasks and timeline document, coordinated the work for the January/February/March milestone tasks
   a. *Clean up naming and metadata (back) and create story map documentation (front) (BA, AM TBD) –March*
   b. *Develop guide on intended uses and instructions on how to use product (LF, AM, BA) – March*
   c. Methodology write-up (JG, AM, BA) – March-April
   d. Beta-test product within organizations MDT, FWP, and MSWP staff (AM, BA, ALL) – February-May
   e. Present product via webinar to staff- May
   f. **Other outstanding related items not specifically identified in tasks and timeline that need to be completed prior to beta testing?**
      a. **Draft email for beta testing roll out**
   g. **Other outstanding related items not specifically identified in tasks and timeline that need to be added to the document or otherwise identified?**

Outcome: Tasks and Timeline documented was updated and posted to Teams. Group determined if any items remain unfinished from January/February and make a plan to finish them. Group coordinated and made progress on February/March milestone tasks and planned for April/May tasks.

9. Next Meeting
    a. Does group need to meet sooner than next scheduled meeting **April 28**?
        a. No
    b. What does the group want to accomplish at the **next** meeting?
        a. Review and reconcile all group edits and comments on documents in the 'final drafts' folder on Teams:
            i. Datasets and limitations/methodology document
            ii. Needs assessment criteria and story map write ups document
            iii. Tool description document for website landing page
            iv. Beta testing survey questions
            v. Beta testing roll out- draft email
            vi. Tool help guide/instructions document
        b. Work to integrate relevant information from needs assessment criteria and story map write ups document with datasets and limitations/methodology document
        c. Finalize or identify next steps to finalize all items needed for roll out of beta testing.
    c. What is the group's homework between now and **next** meeting? Will that be accomplished individually, in small groups, or some other way?
        a. PIT crew
            i. Ensure most recent tool description and needs assessment criteria/story map write ups documents are in 'final drafts' folder on Teams
            ii. Draft email for beta testing roll out and add to 'final drafts' folder on Teams
            iii. Send 4/21 email reminder to group to review all documents in Teams 'final drafts' folder
        b. Brian
            i. Draft help guide/instructions and add to 'final drafts' folder on Teams
            ii. Add most recent additions to needs assessment criteria/story map write ups document to PIT crew version in 'final drafts' folder
            iii. Continue progress on "clean-up" and final revisions to tool.
        c. Liz
            i. Develop second draft of beta testing questions and add to 'final drafts' folder on Teams
            ii. Assist BA with draft of help guide/instructions
        d. Andrew
            i. Reconcile all comments and edits on various versions of datasets/limitations document and add final draft to 'final drafts' folder on Teams
        e. Justin
            i. Add relevant information from data sources spreadsheet to AJ's document with an eye toward ensuring that document can stand alone as comprehensive methodology write up
        f. Adam
            i. Assist BA with draft of help guide/instructions
            ii. Continue progress on "clean-up" and final revisions to tool
            iii. Assist in methodology write-up
        g. Group:

      i.   Work to narrow down/finalize list of beta testers for each entity

     ii.   Review and comment on all documents in 'final drafts' folder on Teams/come prepared to finalize documents at 4/28 meeting

<u>Outcome</u>: Agreed on next steps and agenda for next meeting.

10. Closed at 4:40 pm