

How We Work for Setting up Openscapes Champions Cohorts

Quicklinks:

- Zoom: link here
- NASA-Openscapes
 - [CohortPlanning GitHub Project](#) | [2024-nasa-champions](#) Cohort website
- Openscapes
 - [CohortPlanning GitHub Project](#) (all non-NASA Champions Cohorts) | [2024-epa](#) Cohort website

Participants:

- Science Gateway [SGCI Focus Week](#) participant (knowledge exchange)
- [Pathways to Open Science](#) organizers
- NASA Openscapes Mentors for [NASA Earthdata Cloud](#) workshops
- Stef & Julie - lead, prep for April-May NASA & EPA Cohorts

Purpose: Onboarding to how we work, while getting specific tasks done to prepare for a Champions Cohort. We're hoping the group will have complementing motivations to learn/reuse.

Process: 4 Calls: Call 1 to be a kickoff conversation to share our overall approach, context, and get to know everyone's needs/motivations. Calls 2-4 will be what we call "coworking" - Stef will screenshare and Stef and Julie will talk through the tech and tasks we get done live that day, and we can learn together. We can schedule a check-in call after the cohort.

Outcomes: People learn how we work and have a sense of how this applies to their work, and everything is set for our spring Champions Cohorts for NASA Earthdata and EPA researchers.

Pre-session optional homework

- Before Conversation #1
 - **Optional:** To get the "feeling" of a Champions Cohort in action, watch teams from NOAA Alaska Fisheries Science Center (AFSC) present their Pathways in their final Cohort Call. Watch the [recording](#) while following along with the collaborative notes Google doc (private to that cohort).
- Before Coworking #1

- **Optional:** Get a taste of how we use GitHub Projects by browsing summary and recording of [Openscapes Community Call: GitHub for NASA Openscapes community calendaring & project management](#)
- **Optional:** If you want to more actively follow along, create a GitHub account and review our [GitHub Clinic](#).

Conversation 1. March 19, 2024

Quick introduction:

- Welcome, thank you for being here!
 - We'll be using Zoom for video calls & Google docs for notes
 - Everything you share in this doc is available to everyone else on the call
 - Comments / emojis / gifs / +1s to say "me too" are welcome! 🥳👍
 - Please add your name to Roll Call each time you join
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- **Roll Call - go around the room** (15 min)

Name / affiliation / pronouns / how are you involved with Openscapes / what brings you to this session (any program or learning session you're planning to apply this to ... real or imagined?)

- Julie Lowndes / Openscapes / she,her / core team member and founding director / share about how we work, see what is useful for other projects, learn together
- Stefanie (Stef) Butland / Openscapes / she,her / core team member / excited to share this really rich dynamic constantly evolving system we have for doing good things together and learning what you all are imagining & needing
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- **How We Work** - Julie & Stef (25 min)

- **Openscapes Intro - Julie** screenshare from [website](#)
 - Intro, values, philosophy
 - [The Flywheel](#) grounds us
 - [Initiatives](#) - different learning events; peer-teach; try to reduce separations between us as mentors and learners (interchanging)
 - [Designed alliance](#)
 - Use the [Flywheel for workshops](#)/trainings/learning events

- Design for the audience, repeat & improve, stabilize & document; automate
 - Roles and responsibilities of a Cohort Mentor (distinguished from general community Mentor)
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- **We document as we go - Stef**
 - [Openscapes Approach Guide](#)
 - [Tooling](#) notes for everyday work
 - Video editing, screen recording (shoutouts to people we learn tips from!), Slack, Zoom
 - [Champions Program](#) for workflows before, during, after Cohorts, with example emails, checklists
 - Approach Guide is complementary to the GitHub Projects we use to set up Champions Cohorts, especially the section on [Timing and order of tasks](#)
 - [Openscapes Champions Lesson Series](#) Open educational resources with links to current slides used for each lesson, narratives, source citations
- **Our Values - Julie**
 - Open-first, modular (reusing and lightly updating “timeless” lesson materials), future us - thinking about how to onboard someone else to it, keep as lightweight as possible/reduce amount of tech
 - Everything evolved over the past 20 cohorts! Did this “by hand” with modular design and eye towards automation - kyber and GitHub Issue Templates came later
 - We use kyber now to create draft agendas for Champions, create Cohort websites, add people to GitHub Teams for Cohorts and
- **Discussion - share stories and questions** (15 min) (start ~~~10:40~~ 10:45 11:00 am PT)
 - What is the largest group of people you have done this ‘google doc-ing’ with? Have you done it in a group in which you don’t know everyone?
 - Google limits # of ppl who can simultaneously edit (100 person limit but practically it’s lower). For big group we use “published version” of agenda doc but participants are not able to edit it.
 - Pathways program and some Community Calls have been big and we didn’t know everyone; have not had negative issues

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- **Team Communications** - Stef with Julie (10 min silent?) 👍

- Weekly 1:1 in zoom
 - Ongoing Google doc with agendas, checkins, silent updates, non-urgent questions, discussions as needed, coworking - get stuff done during meeting
- Daily asynchronous checkins in Slack
- How and who and when to ask a technical question that stalls me?
 - Ok to DM with questions any time? (set notifications)
- Calendaring - Google Calendar; Google Group for NASA Openscapes Mentors; GitHub calendaring for NASA Openscapes
- Project management via GitHub Openscapes MainPlanning, CohortPlanning and NASA-Openscapes MainPlanning (for wider audience), CohortPlanning
 - Show example issue, like a [community call](#) with checklist, notes; saves me every time by reminding me to update the intro slide deck.

- **Pathways Sheet/Flywheel - how are you thinking of applying this?** (5-20 min)

- [Openscapes Pathways Sheet](#)
- [Flywheel adapted](#) for teaching design
- <https://openscapes.github.io/documenting-things/#/places-for-3-audiences-designed-for-onboarding>
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Coworking #1: March 21

Recording from Coworking #1, March 21:

HowWeWork_ChampionsSetup_Coworking-01_2024.mp4

Roll Call - please sign in as you join (3 min)

Name / affiliation / pronouns / what's one thing you do, or a system or software you use to track tasks

- Stef Butland / Openscapes / she, her / GitHub Projects, Issue Templates, Google Calendar Tasks
- Andy Teucher / Openscapes / he, him / GitHub Issues, Trello, Toggl Track for time tracking
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What's on your mind since last time? (7 min) - Stef

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Goals: Get a glimpse of Google docs/ sheets/ GitHub processes we use to set up, manage, and lead Champions Cohorts. Tee up to create and review NASA Champions Cohort Call 1 Agenda next week, in Coworking 2. Final activity - copy our GitHub repo for Issue Templates using your own account.

Approach Guide documentation:

- [Approach Guide: Champions Program](#) chapters cover program design, cohort planning, pre-cohort engagement, etc
- Approach Guide: Champions Program > [Cohort tech setup](#)
- [Approach Guide Timing and order of tasks](#) outlines what we're accomplishing here with GitHub Projects

Screenshare how we work (40 mins) - Stef

Everyone is welcome to add notes and / or screenshots (or ask us to add a screenshot) so this text has more context.

- **Activity 1:** Google Workspace - sheets, Calendar
 - View [OpenscapesChampionsCohortRegistry](#) sheet - all Cohorts

- not just for record-keeping; this is the source used by the [Kyber R package](#) to create each Cohort GitHub repo, README, agendas
- View **Cohort Calendaring** sheet - all sessions for a single Cohort ([OpenscapesCalendering \[2024-nasa-champions \]](#))
- View Cohort dates in Google Calendar with Zoom links and link to relevant docs e.g. Agenda
 - Put things where people expect to find them; avoid searching for things, “where is the agenda?”
- **Notes**
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- **Activity 2:** Tracking tasks with GitHub Projects.
 - View [Openscapes CohortPlanning Project Roadmap](#) (a calendar view) to see what’s possible.
 - Screenshare: Orientation to the NASA-Openscapes CohortPlanning project
 - Go to [NASA-Openscapes GitHub org](#) > Projects > CohortPlanning
 - Browse issues and checklists - done, in progress
- **Notes**
 - Every cohort has a repo in Openscapes or NASA-Openscapes org, which also deploys a website on GH-Pages
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- **Activity 3:** Use GitHub Issue Templates to open an Issue to prepare Call1 for NASA Spring Champs
 - From NASA-Openscapes CohortPlanning Project we can get to the [cohort-planning repo](#) > Issues > New Issue
 - choose from templates > open 05 Prepare standard Cohort Call
 - Edit issue as needed: title, text, labels, assign, add Issue to CohortPlanning project > Submit new issue
 - Edit issue status > To Do

- Set date March 28. We review a Call Agenda in the week before a Cohort Call
 - Open Issue for Call 1 Debrief & Digest
- **Notes**
 - Edit templates in `.github/ISSUE_TEMPLATE`
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- **Activity 4:** Anyone can copy our setup to reuse and adapt our issue templates
 - Screenshare our [issue template files](#). We edit these as processes evolve, or to suit a cohort's unique needs
 - Demo using Openscapes cohort-planning repo as template to create new repo. This copies issue templates but not labels (I think)
 - Who wants to try it? E.g. create the repo and project under your own GitHub account
 - Demo opening new issue to see templates
 - Create a new Project and link the new repo to that Project
- **Notes**
 - Labels don't come along with a template repo, but can create a default set of labels for all new repos in an organization.
 - Question about our labels: Do we have our labels documented, in terms of what they mean, what they're used for?
 - Which labels are most useful for people and projects? 'Beginner' or 'good first issue' are welcoming labels to contribute to a sense of community (but these must come with guidelines on how you want people to contribute)

Openscapes / Projects / CohortPlanning Q Type ↵ to search > + + + + + + +						
CohortPlanning Add status update Status table Roadmap Status board New view						
Filter by keyword or by field Discard Save						
Title	Status	Labels	Date	Assignees	Repository	
In Progress 2						
1 04 Intro Calls (aka 1:1's) [2024-epa] #192	In Progress	ahead-of	Mar 22, 2024	stefaniebutland	Openscapes	
2 03 Participants Setup & welcome [2024-e...] #193	In Progress	01-call ahead-of	Mar 25, 2024	jules32 and stefan...	Openscapes	
Add item						
Todo 14						
3 Prepare Cohort Call 1 [2024-epa] #195	Todo	01-call ahead-of	Mar 27, 2024	stefaniebutland	Openscapes	
4 Call 1 Digest & additional setup [2024-epa] #196	Todo	01-call following	Apr 10, 2024	stefaniebutland	Openscapes	
5 After Cohort Call 1 [2024-epa] #197	Todo	01-call following	Apr 10, 2024	stefaniebutland	Openscapes	
6 Prepare Cohort Call 2 [2024-epa] #198	Todo	02-call ahead-of	Apr 17, 2024	stefaniebutland	Openscapes	
7 GitHub Clinic [2024-epa] #200	Todo	02-call ahead-of	Apr 17, 2024	stefaniebutland	Openscapes	
8 After Cohort Call 2 [2024-epa] #199	Todo	02-call following	Apr 24, 2024	stefaniebutland	Openscapes	
9 Prepare Cohort Call 3 [2024-epa] #201	Todo	03-call ahead-of		stefaniebutland	Openscapes	
10 After Cohort Call 3 [2024-epa] #202	Todo	03-call following		stefaniebutland	Openscapes	

NASA-Openscapes / Projects / MainPlanning Q Type ↵ to search						
MainPlanning Status Table Roadmap Schedule Board view View 6 New view						
lp daac						
Title	Star...	Labels				
This Week In Progress 1 Actively being worked on						
1 Year of Open Science Culminating Conference - Mar 2... #22	Mar 21, 2024	LP DAAC meeting open science				
Add item						
This Quarter Upcoming 7 Defined as Jan, Feb, March 2024						
2 SDSU Researcher AppEEARS TagUp #96	Mar 27, 2024	AppEEARS LP DAAC				
3 AEOIP (meeting), April 23-25, 2024 #8	Apr 23, 2024	LP DAAC meeting ORNL workshop				
4 LP DAAC Earthdata Webinar #25	Apr 24, 2024	LP DAAC				
5 AGU 2024 session and workshop deadline #32	Apr 24, 2024	deadline LP DAAC workshop				
6 EROS User Experience Webinar #24	Apr 30, 2024	AppEEARS LP DAAC webinar				
7 NOAA Enterprise Data Mgmt (EDMW) - May 13-17 #61	May 13, 2024	LP DAAC				
8 NASA SEES AppEEARS Student Talk #97		AppEEARS LP DAAC webinar				

Discussion (20 mins)

- ~~Adapting this for NASA Workshop Registry - Julie~~
- question - documentation about labels? And why did you choose them? But also what would the “community workshop planning” version of “bug” and other common labels be?
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Coworking #2: March 28

Recording from Coworking #1, March 21:

HowWeWork_ChampionsSetup_Coworking-01_2024.mp4

Recording from Coworking #2, March 28:

HowWeWork_ChampionsSetup_Coworking-02_2024.mp4

Roll Call

Please sign in as you join (3 min)

Name / affiliation / There are good things about your workflows. What feels good to you?

In [Openscapes Reflections](#), “We broadly define workflows as the tools, habits, and practices that we use to complete, collaborate on, and share our work. It can include how and when we like to send emails or the structure of documents we share with

our coworkers. Our workflows will evolve with different projects, software, and collaborators, and defining it can be a process. The most important thing about your workflow is that it works for all involved!"

- Stef Butland / Openscapes / team communications using daily async Slack checkins and weekly synchronous team meetings with Google doc agendas & notes; allows us to be clear on priorities as they change
- Julie Lowndes / Openscapes / teamwork + openness + overlapping skillsets means workflows have resilience when team members travel/have other things come up!
- Andy Teucher / Openscapes / It feels good when different pieces flow together seamlessly; it takes effort to make those links work (like zoom links in the meeting notes, Slackbot reminders, links to meeting notes in invitations)
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What's on your mind since last time? (7 min) - Stef

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We are recording now

Agenda: Cohort Call 1 for 2024-epa

Goal: Review Agenda for Cohort Call 1 for 2024-epa: approach, roles, content, artifacts

Activity:

- What's the prep status of 2024-epa cohort? Visit issues in [Openscapes CohortPlanning Project](#) - Stef (<5 min)
 - See issue: Prepare Cohort Call 01
- Review Cohort Call 1 Agenda for Apr 10: [01_CallAgenda \[2024-epa \]](#) - Julie
 - Roles: Julie leads; Gayle Hagler (EPA) manages breakout rooms; Stef away
 - **Our approach (10 mins):** alternating facilitators, welcome, limit focus on process, live timing edits, not screensharing slides during presentations

- Structure / Content: short lessons alternate with discussions in breakout rooms or silent journaling on prompts
- Artifacts: Google Drive folder (1 place) for Cohort agendas, recordings; Slides for all Core Lessons in a central open location
 - Show [Lesson Series](#) with links to slides
 - We update slide decks by keeping the same file and moving unused slides down in the deck; avoids having multiple decks and allows easy find and reuse of some slides for different audiences. e.g. Open Communities lesson for NOAA Fisheries vs NASA Earthdata
- **Notes**
 - This agenda doc format and the content of Welcome are the same across many of our programs including Pathways to Open Science
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- **Discussion: Philosophy and design**
 - Agenda headings have timings prominent to help facilitator keep on track
 - Roll call gets people in the doc and engaging over common themes
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- **Review Call 1 Agenda details (15 min)**
 - Opened issue: [update Mindset slide deck link in Call 1 #86](#)
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- **Discussion: roles and facilitation**
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CohortRegistry and automation • 1:4556 pm PT

Goal (Julie): we built a system to automate for timesaving, fewer manual errors - and also so other groups can fork/extend this (CA Waterboards, NASA Workshops)

- **Activity:** Julie (screenshare)
 - Where did this Agenda come from?
 - Show [CohortRegistry](#) Call sheet Metadata tab > points to Rmd files
 - source of Rmd files on GitHub in Kyber repository:
<https://github.com/Openscapes/kyber/tree/main/inst/agendas>
 - CA Waterboards custom agenda content (a [pull request](#) to GitHub Kyber dev branch)
 - [NASA WorkshopsRegistry](#) - early days of starting this spreadsheet and thinking how this automation could help (and extend this workflow - reporting!)
- **Discussion**
 - Naming folders and files (default to open?)
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- **Live demo!** In RStudio, use Kyber to build the agendas; see the magic in action - Stef 2:15 pm PT (5 mins)
 - Here's a preview of the GitHub Clinic we do in Champions Cohorts (except NASA cohorts): <https://openscapes.github.io/series/core-lessons/github/>
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Co-design next call Thursday April 4 • 2:20 pm PT

What would be most useful for this group for next time?

- Review post-Call 1 activities for NASA Cohort (10 min)
 - Intentional design: debrief and digest
 - Wrapping up our how we work approach
- Open mic: Would someone like to bring something to workshop? Bring your workflow and screenshare; what feels good, what feels clunky?
- Review/repeat something we already saw for How We Work - What's an element you might like to adopt and screenshare to test?
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Coworking #3: April 4

Recording from Coworking #3, April 4::

HowWeWork_ChampionsSetup_Coworking-03_2024.mp4

Roll Call

Please sign in as you join (3 min)

Name / affiliation / What's one thing about your workflow that feels clunky?

In [Openscapes Reflections](#), "We broadly define workflows as the tools, habits, and practices that we use to complete, collaborate on, and share our work. It can include how and when we like to send emails or the structure of documents we share with our coworkers. Our workflows will evolve with different projects, software, and collaborators, and defining it can be a process. The most important thing about your workflow is that it works for all involved!"

- Stef Butland / Openscapes / straying from daily checking GitHub MainPlanning Project and referring more to our team google doc
- Andy Teucher / Openscapes / slightly different keyboard shortcuts in different contexts
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What's on your mind since last time? (7 min)

- Stef: wondering how the stuff we've shared is landing with people. I think it would feel complex to someone who hasn't been privy to the evolution. Andy +1'd that
- Andy - Posit's annual spring cleaning - for a week, with checklist <https://www.tidyverse.org/blog/2023/06/spring-cleaning-2023/>
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We are recording now

Debrief & Digest Cohort Call 1 for 2024-nasa-champions

Goal: Wrap up CohortPlanning cycle

Activity (10 mins)

- 2024 NASA Champions Cohort Call 1 took place April 3! Reactions/debrief from Andy?
 - Similar structure in champs call vs these how we work (and Pathways ...)
 - People liked the Roll Call and connected around it
 - Julie introduced norms and tips for viewing multiple windows - tangible advice about our practices was good
 - Excellent Cloud use case talk - group had debrief discussion about where this talk belongs in the Cohort Call running order - motivation at start? Or later for technical
- Briefly look at NASA Champions post-Call 1 issues ([CohortPlanning GitHub Project](#)) including Debrief, Digest email & GH Discussion post; [template doc for DebriefsDigests](#)

Who else uses debriefs?

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Using GitHub

Goal: Someone creates their first GitHub account and folks know how to get started or upskill

Activity (10 mins)

- [Register a GitHub account](#) (has great advice for choosing a username), from “Happy Git and GitHub for the useR” by our hero, Jenny Bryan

Resources

- [Openscapes GitHub Clinic](#) introduces GitHub with the motivation of collaboration and open science. It is designed for both new and seasoned learners, focused on how to develop workflows with diverse teams. Links to slides and recordings of Julie teaching the content

Notes

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Open Mic

Goal: Solidify something you have learned through screenshare and tell or ask questions of the group.

Activity

- Is there an element we've covered that you'd like to adapt, or something about your workflows that feel great... or clunky? Anyone is welcome to screenshare to work through it with everyone's input! You can also ask us to revisit something from a previous session.

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Discussion (2:20 pm PT)

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Closing

Thank you! We hope you've found elements of How We Work to be helpful. It's felt great to us to design this series, codify how we've developed our approach and share it for the first time.

I (Stef) am a huge fan of 1:1 coworking. Open to cowork with any of you, where we do our own work for ~2hrs with checkins every 20 - 40 mins to think out loud, ask for input, or say "let's get back to it!". Book here: <https://calendly.com/stefaniebutland/>

Announcements

Add yours here

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Feedback

We welcome feedback at any time! What's one thing that worked for you? What's one thing we could have done better?

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Planning/Communication

Date ?:

Good morning All! Excited for our Mentors Call today. We'll spend the most focus on preparing for the Champions Cohort and will have time for your topics too. For folks interested in streamlining workshop planning for NASA Openscapes, Stef and I are leading a 4-part "How we work" series with a small group March 19-April 4 and you're invited! Details are in this [Issue](#).

Let us know what you think and we will add you to the calendar invites.

Cheers,
Julie

Schedule: a kickoff call Tuesday March 19 (10-11:30am PT) and then 3 recurring Thursdays March 21, 28, April 4 (1-2:30pm PT).

- **Purpose:** Onboarding to how we work, while getting specific tasks done to prepare for a Champions Cohort. We're hoping the group will be all of us with complementing motivations to learn/reuse:
 - Listed names, affiliations, individuals purpose for participation
- **Process:** 4 Calls: Call 1 to be a kickoff conversation to share our overall approach, context, and get to know everyone's needs/motivations. Calls 2-4 will be what we call "coworking" - Stefanie will screenshare and she and I will talk through the tech and tasks she gets done live that day, and we can learn with her. We can schedule a check-in call after the cohort.
- **Outcomes:** People learn how we work and have a sense of how this applies to their work, and everything is set for the spring Champions Cohort.

Date: March 15

Hi All!

Julie and I are honestly so excited to see you on Tuesday to share How We Work for Champions Setup.

Reminding ourselves of the POP:

- **Purpose:** Onboarding to how we work, while getting specific tasks done to prepare for a Champions Cohort. We're hoping the group will have complementing motivations to learn/reuse.
- **Process:** 4 Calls: Call 1 to be a kickoff conversation to share our overall approach, context, and get to know everyone's needs/motivations. Calls 2-4 will be what we call "coworking" - I will screenshare and Julie and I will talk through the tech and tasks I

get done live that day, and we can learn together. We can schedule a check-in call after the cohort.

- **Outcomes:** People learn how we work and have a sense of how this applies to their work, and everything is set for our spring Champions Cohorts for NASA Earthdata and EPA researchers.

Here's our agenda doc [HowWeWork_ChampionsSetup_2024](#) (link). We'll start Tuesday going around the room to meet each other and for each of us to share a program or learning session (real or imagined) you have in mind where you might apply some of what we learn together.

Optional: To get the “feeling” of a Champions Cohort in action before we meet, watch teams from NOAA Alaska Fisheries Science Center (AFSC) present their Pathways in their final Cohort Call. Watch the [recording](#) while following along with the collaborative notes Google doc (link).

You should have calendar invites for Tuesday, March 19, (10-11:30am PT) and 3 recurring Thursdays March 21, 28, April 4 (1-2:30pm PT). Missing something? Questions? Let us know. Cheers!

Stef and Julie