



NEON Strategic Engagement Plan 2018-2022



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National Ecological Observatory Network (NEON) is a project sponsored by the National Science Foundation and proudly operated by Battelle.

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Introduction

NEON aims to achieve an optimized observatory with a robust, active, and inclusive NEON user community that advances science. To accelerate and achieve these impacts, the NEON program must continuously engage with its existing and potential user community. Laying a foundation for engagement early in the operational lifetime of the observatory is critical to the program's success. Therefore, this five-year (2018–2022) strategic engagement plan highlights activities that center around three primary goals with the following measurable objectives:

1. Optimize NEON: Continuously improve and adapt NEON data, resources, and infrastructure through community engagement.

Objective 1: Leverage NEON advisory groups
Objective 2: Request and respond to community feedback to promote transparency
Objective 3: Improve discoverability, accessibility, and usability of NEON data
2. Build a robust, active, and inclusive NEON user community: Build and leverage community relationships across scales (local, regional and continental) to facilitate community-driven research using NEON data, resources, and infrastructure.

Objective 1: Create educational resources and provide data skills training to facilitate the use of NEON data
Objective 2: Broaden awareness of NEON to key communities
Objective 3: Cultivate and establish partnerships with scientific, data, and education networks
3. Advance science: Facilitate the use of NEON data and infrastructure to advance science.

Objective 1: Offer professional development opportunities for scientists
Objective 2: Host and participate in working groups and workshops that advance NEON science
Objective 3: Facilitate NEON-related research through science engagement

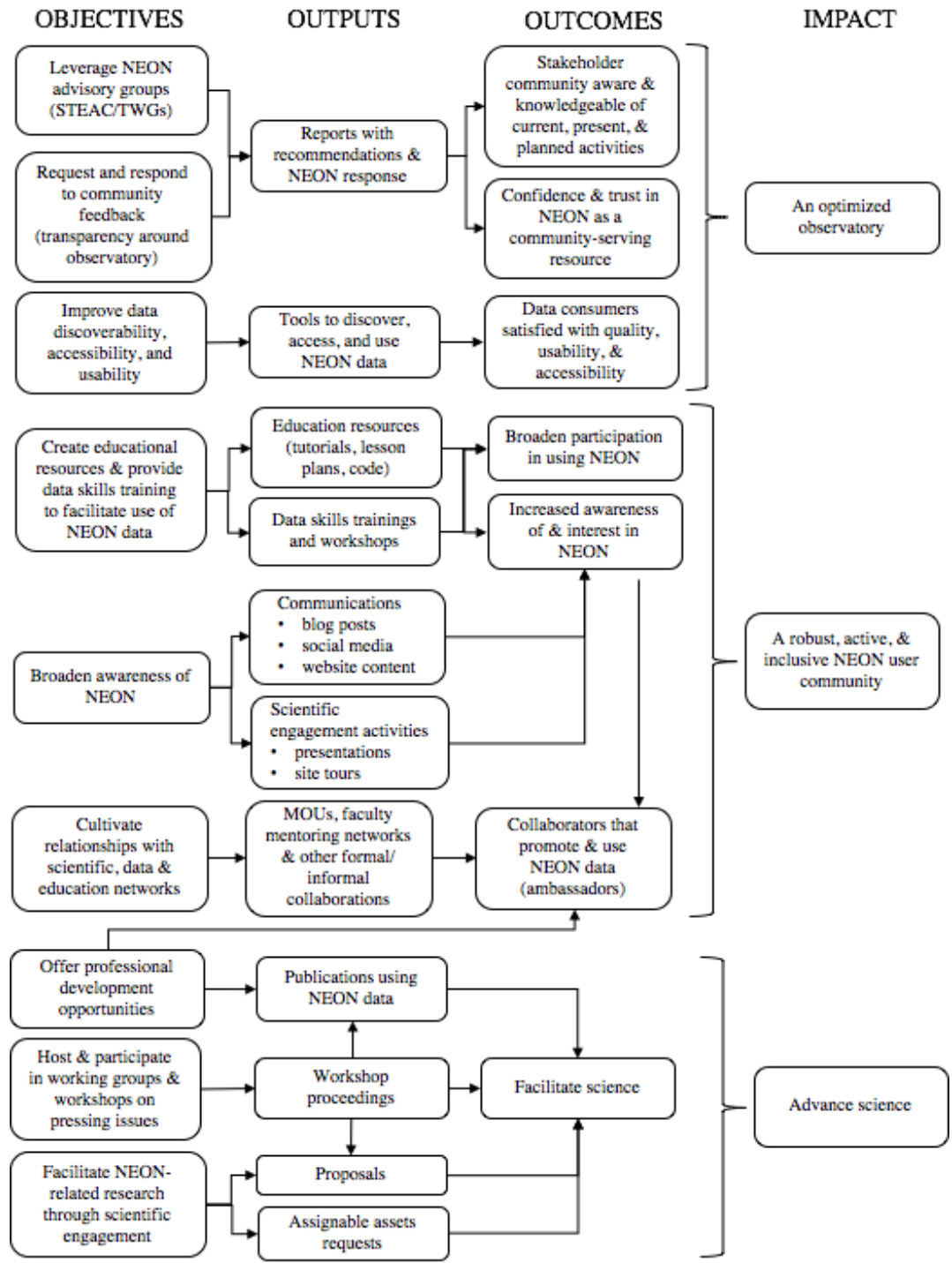
By focusing on these goals and related objectives, we will increase interest in leveraging the NEON program for diverse user needs and accelerate the scientific community's ability to conduct science in new ways. Progress towards each goal will be demonstrated by tracking engagement activities and their contribution to a set of related outcomes. We expect to see progress towards the following outcomes as outlined in our theory of change (Figure 1):

- Increased stakeholder community awareness of current, present, and planned NEON activities
- Confidence and trust in NEON as a community-owned resource
- Data users satisfied with the quality, usability, and accessibility of NEON data products
- Broaden participation in using NEON data
- Increased awareness of and interest in NEON
- Collaborators that promote and use NEON data (i.e., NEON ambassadors)
- Advance science

In many cases, activities will contribute to many, if not all, of the outcomes listed but we only highlight those outcomes primarily targeted by each objective. All the activities listed are within two funding categories:

- Activities funded through operations: A list of engagement activities that are funded to address each objective in the annual NEON operations budget. Although some activities will be maintained throughout operations, others are likely to only occur in some years.
- Externally funded activities: Engagement activities that are funded for each objective but are not budgeted as part of NEON operations. These will likely change year to year based on external funding availability.

Figure 1. This simplified theory of change diagram maps NEON engagement activities to measurable outcomes. Long-term impacts are directly tied to the three NEON engagement goals.



Goal 1: Optimize NEON

NEON data, infrastructure, and other program resources need to be optimized for the community to most effectively use the observatory. To achieve this goal, we will engage with our stakeholders to ensure everyone has an active role in advising observatory science and that the observatory remains a resource that serves the community. Of equal importance, feedback received from the community, NEON response to that feedback, and transparency of the responses are critical to ensure a positive user experience when engaging with the program. An observatory working towards optimization for a diverse user community will ensure that the NEON program remains relevant and essential to those working at the forefront of ecological research while being responsive to other stakeholder needs.

Objective 1: Leverage NEON Advisory Groups

The science, education and engineering communities provide essential input to NEON through various advisory group structures. The Science, Technology and Education Advisory Committee (STEAC) provides high-level advice to the NEON Chief Scientist/Observatory Director on: (i) the direction and vision of the Observatory; (ii) how best to position Observatory capabilities to address frontier science and science strategy; (iii) how best to align observatory efforts with other Federal investments, (iv) how Operations and logistics can address the science requirements, and (v) educational objectives and programs.

In addition, NEON staff rely on external Technical Working Groups (TWGs) to review and provide feedback on data products, documentation, data delivery, resources, and infrastructure. Serving as representatives for their respective science domains, TWG members provide essential feedback to ensure the observatory best meets the needs in their fields. STEAC and TWG members also serve as NEON ambassadors by bringing awareness and credibility of NEON to their communities and identifying opportunities for NEON to further engage within these communities.

Activities Funded through Operations:

- Engage regularly with advisory groups to collect and respond to feedback on specific topics related to observatory data (i.e., accessibility, usability, and quality of NEON data products), protocols, instruments, documentation, and other technical areas
- Share STEAC and TWG recommendations and discussion summaries with the science community and other NEON stakeholders as appropriate
- Collect feedback from advisory group members on their experience as a member to continuously improve processes for feedback and response; get data on diversity of perspectives represented in TWGs
- Recruit individuals with diverse perspectives to sit on TWGs

Externally Funded Activities:

- None currently planned

Expected Outcomes: Stakeholder community aware of, knowledgeable of and contributing to current, present, and planned activities; Confidence and trust in NEON as a community-serving resource

Objective 2: Request and respond to community feedback

We will identify opportunities to gather feedback from our user community on the usefulness of data products, documentation, data delivery, resources (including code tools) and infrastructure as needed and create mechanisms to incorporate the feedback received. Our responses to that feedback will be shared broadly to increase transparency of NEON operations.

Activities Funded through Operations:

- Solicit feedback (via surveys, focus groups, interviews, discussion groups) from partner organizations and other stakeholders annually or as needed to understand user needs
- Summarize community feedback and NEON response to feedback in reports that will be disseminated broadly
- Respond to user comments received via the neonscience.org and data.neonscience.org websites in a timely manner
- Refine online user feedback system(s) and processes for review, response/actions, and reports of actions

Externally Funded Activities:

- An Optimizing NEON Science workshop (NSF Award #1649997) was hosted at NEON in 2017 to advance NEON's capability to respond to community needs while building an engaged community dialog. Findings from the event were integrated into a [community engagement assessment report](#) released in 2018.
- NEON staff will collect community feedback through the workshop evaluation of the NEON Science Summit (NSF Award #1906144; Jennifer Balch, Principal Investigator; Rachel Nagy, Co-Principal Investigator) which will be hosted at the University of Colorado-Boulder in October 2019. The Summit will convene current and prospective users of NEON data to explore major questions in environmental science that can be addressed at continental scales.

Expected Outcomes: Stakeholder community aware and knowledgeable of current, present, and planned activities; Confidence and trust in NEON as a community-serving resource

Objective 3: Improve discoverability, accessibility, and usability of NEON data

NEON data products are spatially and temporally complex. Users must be able to easily discover and access (query, and download/receive) data products across many field sites and time ranges. The NEON Data Portal and API will be the primary tools that enable users to discover and access data. NEON will also engage with the data science community to write and maintain open source software to facilitate the use of NEON data.

Activities Funded through Operations:

- Continually leverage community feedback to assess user satisfaction with the user interface and API, and develop action plans to address feature requests
- Work on modifying API and Data Portal to support versioned data products which is estimated to launch by January 2021

- Assign Digital Object Identifiers (DOIs) to publicly share NEON documents and, when available, versioned data files to support FAIR Data Principles and enable the generation of data use metrics. Goal is to get DOIs on documents by the end of FY2020.
- Continue development and improvement of data quality and availability metrics reporting for all subsystems of the Observatory.
- Public Code Working Group developed and will iteratively adjust guidelines for review of both internally- and externally-generated code. Once approved, code and code packages will be shared and advertised on neonscience.org.
- Develop and launch new integrated web portal

Externally Funded Activities:

- Develop data portal applications to communicate current and expected data availability through time
- Complete development of time series viewer to improve exploration of instrumented data products
- Replace older data portal applications with modern solutions
- Rebuild data product landing pages in React, add more informational fields, use schema.org to structure machine readable information about data products that can be harvested by search engines
- Complete development of new data browse page and replace the old data browse page and other redundant portlets
- Build beta AOP data exploration tool (map-based) with NSF CI Center of Excellence

Expected Outcomes: Data consumers are satisfied with the quality, usability, and accessibility of NEON data

Goal 2: Build a robust, active, and inclusive NEON user community

For current and potential data users to fully use NEON data, resources, and infrastructure, we will provide or facilitate a variety of opportunities to encourage the use of NEON in their research and teaching activities. Team science and reproducible research approaches are tenets of multidisciplinary, big-data based investigations, so researchers need a variety of data skills to work with complex, diverse data like those available through NEON. To help new users find opportunities to gain these skills, we will build links to existing resources, collaborate with faculty and organizations practicing these approaches, and provide NEON-specific training resources to help scientists effectively use NEON data.

NEON will also support efforts to promote inclusion within the ecological and data science fields through collaborative activities that recruit users from groups underrepresented in STEM and provide training opportunities across the diverse communities the project serves. This will broaden participation in STEM and ensure both excellence and applicability of NEON resources for diverse user communities.

Objective 1: Create educational resources and provide data skills training to facilitate the use of NEON data

NEON will facilitate opportunities for existing and potential users to gain the data management and analysis skills needed to work effectively with NEON data as well as experience working with team science and reproducible research approaches. There are many additional opportunities to utilize NEON's data and infrastructure beyond scientific research, so we will work with faculty (university, community college, K12) to expose a wide range of future users to NEON in relevant ways.

Activities Funded through Operations:

- Run collaborative Explore NEON workshops that support NEON scientists providing an on-site, 2-day data skills training workshop at a host's location.
- Access and Work With NEON Data workshops hosted at national and regional conferences (ESA, AGU, and others)
- Lead a NEON-ESA Early Career Scholars program that provides travel support to the annual ESA conference and inclusion in NEON-related activities
- Create online tutorials for using NEON data
- Develop and provide teaching modules that use NEON data
- Maintain a NEON profile on QUBESHub for sharing of open educational resources using NEON data or protocols
- Facilitate use of NEON data in workshops/short courses lead by external faculty.
- Host Access NEON webinars with Ecological Society of America (ESA) and other partnering organizations to train users in navigating and accessing NEON data

Externally Funded Activities:

- With funding from NSF INCLUDES (Award #1812997), NEON partnered with QUBES to launch the EDSIN-QUBES Open Education Fellows. Fellows will develop an online space for conversation and resource curation around one of EDSIN's core visions to integrate undergraduate life and environmental science education, data science education, and inclusive design.
- The NEON Science Summit (NSF Award #1906144; Jennifer Balch, Principal Investigator; Rachel Nagy, Co-Principal Investigator) was designed to bring together current and future NEON data users for collaboration and shared learning. NEON staff will be participating in the summit.
- Participate in specialized topic workshops at national and regional conferences (including ESA and AGU). Workshops may be led by external or NEON scientists.

Expected Outcomes: Broaden participation in using NEON; Increased awareness of and interest in NEON

Objective 2: Broaden awareness of NEON

The success of NEON depends on its ability to broaden its user community over time. We will prioritize, expose and facilitate NEON-related research opportunities with scientists by promoting the data, resources and infrastructure available to them. We will also identify users that can make use of NEON's data and infrastructure for purposes beyond scientific research.

Activities Funded through Operations:

- Identify opportunities and participate in a diversity of conferences, working groups, and meetings relevant to NEON
- Spread a unified message to promote the use of NEON resources, including its capabilities, its relevance, its value to society, and how it can be used by the science community
- Develop and implement inbound content marketing strategies for NEON's four key personas to the neonscience.org website to attract NEON users, educate them on the ways to use NEON, and incentivize them to use NEON
- Identify and implement outreach to key audiences local to NEON field sites

Externally Funded Activities:

- NEON received funding from NSF's INCLUDES program (Award #1812997) to host a conference in April 2019. The conference, *Bringing Conversations on Diversity, Equity, and Inclusion in Data Science to the Environmental Sciences*, examined diversity, equity, and inclusion (DEI) in the environmental data sciences. The following minority serving institutions were represented at the conference: Sinte Gleska University, Jackson State University, Spelman College, Florida A&M University, Little Big Horn College, Jarvis Christian College, City Colleges of Chicago, Riverside City College, and North Carolina A&T State University. Although not official minority serving institutions, the conference included representatives from the following institutions that serve minority populations: Maricopa Community Colleges, University

of Texas-Rio Grande Valley, Humboldt State University, University of California-Fullerton, Tacoma Community College, and Georgia Gwinnett College.

Expected Outcomes: Increased awareness of and interest in NEON; Collaborators that promote and use NEON data

Objective 3: Cultivate and establish partnerships with scientific, data, and education networks

NEON data can be leveraged by active users of other existing networks (e.g., LTER, LTAR, CZO, Phenocam, QUBES, EREN, Project EDDIE, FluxNet). Creating strategic relationships with key networks will bring awareness and relevance of NEON data to those researchers and educators. By participating in these relationships, NEON will also contribute to advancing the field of ecology by discovering opportunities for data synergy and interoperability.

Activities Funded through Operations:

- NEON will continue to work with other networks to deliver complementary datasets.
- Ongoing collaboration with other networks to expand NEON operations.
- Identify and nurture partnerships with priority networks, including partnerships that will expand NEON accessibility to groups underrepresented in STEM
- Implement activities to expand NEON data use in the classroom

Externally Funded Activities:

- In partnership with NCAR and with funding from NSF (Award # [info needed]), a workshop was hosted in April 2019 to provide an opportunity to bring together members of the atmospheric science and ecological communities to advance the capability of Earth system prediction. A follow-up workshop will occur in April 2020.
- The conference, Bringing Conversations on Diversity, Equity, and Inclusion in Data Science to the Environmental Sciences, funded by NSF's INCLUDES program (Award #1812997) with NEON Scientist Alycia Crall as PI, included 12 partnering organizations and brought together 104 researchers, practitioners, educators, and evaluators. A new networked improvement community, the Environmental Data Science Inclusion Network (EDSIN), was formed to continue the work that began during the conference and to support a community of practice that can share resources and best practices. NEON plans to take a leadership role in EDSIN moving forward.

Expected Outcomes: Collaborators that promote and use NEON data

Goal 3: Advance science

From the beginning, a primary goal of the observatory has been to advance the field of ecology by advancing the ways in which ecologists can conduct their research. There are multiple ways NEON can engage with its user community to advance science, including providing opportunities for early career scientists to use NEON as a platform to launch their careers, participating in scientific conferences and workshops, and working with collaborators to develop proposals that utilize NEON's data and infrastructure.

Objective 1: Offer professional development opportunities for scientists (internally and externally)

One of the best approaches for ensuring the use of NEON data across the lifetime of the 30-year project is to engage early career scientists that can use NEON as a stepping stone for their careers. Opportunities include research experiences for undergraduate students, postdoctoral programs, and faculty professional development activities that provide experiences using NEON data to address a variety of research questions. Throughout these experiences, scientists practice team science and reproducible research approaches to improve and document their research. In addition, offering professional development opportunities to NEON scientists will allow them to engage in

NEON has also developed an extensive field protocol training curriculum. NEON Field Ecologists learn and implement these protocols as a part of their work with NEON, providing an excellent field training program for early career scientists. Sharing these training curricula with the science community will enable other organizations to leverage NEON's approach to training field ecologists to consistently collect data across different ecosystems, potentially facilitating more standardized data collection methods across multiple data collection initiatives.

Activities Funded through Operations:

- Explore possibility of existing REU programs using NEON data as a part of their REU projects
- Explore collaborative faculty professional development opportunities to ensure faculty have skills to effectively engage students in using NEON data in their classes/research experiences
- Provide career development opportunities for NEON Field Ecologists
- Provide early career experience
- Establish NEON postdoc program (Kate)
- Invite external scientists to visit NEON Headquarters and/or virtually present at NEON's monthly Science Seminars
- Lead a NEON Early Career Scholars program at ESA and SFS/ASLO to enable scientists without funding to attend conferences and to create new opportunities for collaboration
- NEON staff support the development of non-NEON grant proposals with external members of the community and execution, if awarded, as well as related analyses and manuscripts

Externally Funded Activities:

- NEON staff serve as PIs, co-PIs or Senior Personnel on various externally funded NEON-related projects

- Work with colleges/universities and other projects to host interns to work on NEON data, engineering, and science education projects.

Expected Outcomes: Collaborators that promote and use NEON data.

Objective 2: Host and participate in working groups and workshops

NEON has a role to play in collaborative efforts to solve pressing issues. NEON should model team science and reproducible research approaches, and work closely with other organizations to facilitate meaningful workshops around relevant topics. These working groups and workshops advance methodology, analyses, and other aspects of the scientific process.

Activities Funded through Operations:

- Identify hackathon ideas and partners to support hackathons with the intention to host a hackathon in 2021
- NEON scientists participate in workshops and working groups to develop innovative and novel science topics relevant to NEON that will inspire new research proposals and/or advance ecology education
- Seek funding, partners, and other opportunities for workshops
- NEON scientists host/lead workshops and working groups to develop innovative and novel science topics relevant to NEON that will inspire new research proposals and/or advance ecology education

Externally Funded Activities:

- NEON-NCAR workshop working groups and April 2020 meeting (participant support costs are externally funded).
- EDSIN group is also externally funded with some staff time funded by NEON

Expected Outcomes: Advance science

Objective 3: Facilitate NEON-related research through scientific engagement

NEON staff at headquarters and the domains will build relationships with local researchers and site owners (by field site) to expand relevance of NEON to the research communities already primed to use NEON data. This will extend their own research through the use of NEON infrastructure (i.e., Assignable Assets) and data, both locally and across the broader network of sites. These collaborations will result in the co-development of new ideas and research proposals that further advance the science produced through the observatory.

Activities Funded through Operations:

- Provide information on, evaluate, and facilitate the NEON Assignable Assets program to allow researchers access to NEON infrastructure to collect PI-driven data. Example activities include:
 - Increased promotion of the NEON Assignable Assets Program to key communities
 - Increased transparency of existing use of Assignable Assets to increase awareness and share usage ideas

- Periodic evaluations to improve the user experience of the NEON Assignable Assets Program
- Identify and engage with local stakeholders at each field site, including organizations that support underrepresented groups in STEM to:
 - Offer opportunities for local stakeholders to provide feedback and supporting local information to NEON
 - Provide opportunities for external partners to encourage the use of NEON within their own research communities
- Identify opportunities to develop proposals with collaborators to support NEON research and engagement activities

Externally Funded Activities:

- Two interns with the STARTNOW program are working at Domain 4. STARTNOW or Student Training in Agricultural Research Techniques by Novel Occupational Workshop, is a United States Department of Agriculture National Institutes of Food and Agriculture (USDA-NIFA) competitive funded program to the Hispanic Serving Institutions (HSI) Texas A&M University Kingsville (TAMUK) as lead and University of Puerto Rico Mayagüez (UPRM), Florida International University (FIU), and the University of Texas at El Paso (UTEP) as collaborative institutions. This grant specifically targets the education of undergraduate and graduate students of Hispanic background at 4-year Universities to equip them with the knowledge base and expertise needed to lead and succeed in the continuously evolving agricultural field.

Expected Outcomes: Advance science