MEMORANDUM | 7.22.2014

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| TO | Carl Koch and Matt Keene, EPA |
| from | Nick Pittman and Neal Etre, IEc |
| subject | Draft Preliminary ArchEE Workshop Plan  |
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Introduction

The Environmental Evaluators Network (EEN) aims to advance the practice, policy, and theory of evaluating environmental programs, policies, and other interventions through systematic and collective learning. With support from the U.S. Environmental Protection Agency’s (EPA’s) Office of Policy’s Office of Strategic Environmental Management (OSEM) and Evaluation Support Division (ESD), EEN is proposing to develop an Architecture of Environmental Evaluation (ArchEE) to meet the demand for evidence related to environmental management. ArchEE aims to provide EPA and the environmental sector with open access to environmental evaluations, evaluators, and evaluation-related literature, including formal evaluations and other approaches to systematic improvement, evidence-based management, and policy.

Building off of an initial review conducted in 2013, EPA contracted Industrial Economics, Inc. (IEc) to prepare for, organize, and implement an EEN workshop that brings together key stakeholders to formulate a design plan for ArchEE. As part of this effort, EPA tasked IEc to draft a preliminary plan to identify the key steps and milestones leading up to the workshop. Building off this plan, EPA and IEc will develop the workshop agenda, materials, and event follow-up. The purpose of this memorandum is to provide a preliminary workshop plan under Task 2-3 of Call Order 1-27.

Preliminary Plan

EEN is currently targeting January or February 2015 for the date of the workshop. To meet this target date, EPA and IEc will need to complete a series of key steps in preparation for the workshop. Exhibit 1 below lists these steps, along with a preliminary target date, and identifies who is responsible for their completion. As discussed with the COR, IEc expects to treat this exhibit as a living document that will adapt and improve as we work toward the final workshop plan. In some cases, particularly with respect to the workshop format and agenda, we have left placeholders as we need to gather more information before determining how EPA would like to proceed.[[1]](#footnote-1)

exhibit 1. Preliminary ArchEE WorkSHOP Plan

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| Key STEPS  | Target Date | Responsibility |
| Information Gathering |
|  Identify additional interview candidates | 7/25/14 | EPA |
|  Conduct additional interviews | 8/1 – 9/15/14 | IEc |
|  Complete funding research | 8/29/14 | IEc |
| IssueLab |
|  Schedule preliminary interview with IssueLab | Complete | IEc |
|  Conduct preliminary interview with IssueLab | Complete | EPA/IEc |
|  Schedule follow up discussion with IssueLab | 8/1/14 | IEc |
|  Conduct follow up discussion/demo with IssueLab | 8/8/14 | EPA/IEc |
|  If appropriate, create “pilot” project with Issuelab | 12/15/14 | IEc |
| Workshop Participants |
|  Determine size/composition of the advisory group | 9/5/14 | EPA |
|  Identify potential advisors to participate in the workshop | 10/15/14 | EPA/IEc |
|  Develop formal invite letter with logistics | 10/15/14 | IEc |
|  Invite workshop participants | 10/31/14 | EPA/IEc |
|  Participant RSVP | 12/1/14 | EPA |
| Workshop Logistics |  |  |
|  Establish date/time | 1/1 – 2/28/14 | EPA |
|  Book venue (Washington, DC) | 10/31/14 | EPA |
|  Save hotel room block near the venue | 10/31/14 | EPA |
|  Food/refreshments (if appropriate) | 12/15/14 | EPA |
|  Identify final workshop format | 12/1/14 | EPA/IEc |
|  Develop final workshop agenda | 12/15/14 | IEc |
| Workshop Materials (deadlines depend on workshop date) |
|  Agenda | TBD | IEc |
|  Hand outs  | TBD | IEc |
|  Slides/mock-ups (potentially an IssueLab demo) | TBD | IEc |
|  Survey /follow up materials | TBD | IEc |

Workshop Format/AGENDA Options

While we are still gathering information and conducting interviews, EPA may wish to consider potential workshop format options, as we talk with potential participants and advisors. EPA envisions a two-day workshop, which will require careful planning to ensure that the workshop meets expectations. A key consideration for the format of the workshop will be the number of participants. A large number of participants would likely allow for a greater diversity of views and interests, and support the use of break-out sessions. A small group would likely provide for more lively discussion and allow more interactive, hands-on work.

While it is too early to organize the agenda formally, below we list several potential topics that could be incorporated into the workshop agenda.

* Introductory overview of the ArchEE concept
* Goals and expectations of the workshop
* Roles of the participants and advisors
* Justifying ArchEE – cultivating the use case
* Maintaining stakeholder interest and engagement
* Access and user administration
* Document capture
* Keywords and tags
* Document review process and standards
* Demonstration of potential functions (e.g., IssueLab, mock-ups)
* Design – features and functions
* Synthesis and analysis
* Rating and critical evaluation
* Potential funding options
* Action items, timeline, and to-do list

Next Steps

Under Task 3, we will continue to refine the background research on funding approaches and IssueLab. As appropriate, we will also coordinate with IssueLab to determine whether it is good fit to host and manage ArchEE. Our early discussions point to IssueLab’s Knowledge Centers as potentially workable solution. We need to continue our conversation with IssueLab to better understand the costs, functions, and timing associated using the IssueLab repository. If warranted, we will explore the potential to employ IssueLab as a live demonstration/example during the workshop.

Moreover, assuming EPA identifies potential experts that can provide insight on ArchEE, IEc will work with EPA to schedule interviews. We will need to evaluate the number of interviews that can accommodated by our current project resources. We will use the information collected during the interviews (and ongoing research) to inform the development of the workshop materials, format, and agenda. Within the next two weeks, we propose to schedule a check-in call with EPA to ensure a smooth course forward as we work towards the workshop in early 2015.

1. IEc proposes to convert this preliminary plan into a collaborative Smartsheet project plan (see [www.smartsheet.com](http://www.smartsheet.com)), which would allow IEc and EPA to access and edit the plan going forward. IEc has successfully employed Smartsheets to effectively manage project deadlines and dependencies on other similar projects. At no cost to EPA, we believe that the tool can assist internal communications as we close in on the workshop date. During the Task 3 kickoff call, we propose to demonstrate the tool and discuss how we believe it can improve our efficiency and communication. [↑](#footnote-ref-1)