8/19/14

**Notes from Follow up Interview with Carl Koch (EPA), Gabi Fitz & Lisa Brooks (IssueLab)**

**Agenda:** To follow up on topics from original conversation and to discuss how IssueLab may potentially be a resource for ArchEE.

IssueLab can potentially be house for ArchEE through:

*1. Public Issuelab*

*2. Knowledge Center*

**Public Domain**

**1. What are the requirements for pulling information into public IssueLab?**

The public section is free for anybody to use. Anyone can go on and create an account and can add documents. However, documents do have to meet basic criteria (see 2 below). Gabi advised EEN to pick a small sample of documents to get a feel whether IssueLab’s public site is appropriate for the ArchEE documents.

**2. Are there qualitative criteria that make it publicly available?**

Issuelab deals with copyright preliminarily. Accepted documents must be data driven (quantitatively or qualitatively). The document must have proper citations. They do not accept opinion pieces or white papers. The documents can be produced by for-profit consultant (doing work for social sector clients), only if it improves the practice in the field. Along these lines, one issue that may come up for the purposes of this project is that IssueLab does not take government work for the public site. Knowledge Centers, however, allow government documents.

**3. Who is allowed to submit to public IssueLab?**

It is completely open to anyone to submit documents. However, if you add a publication but are not affiliated with the organization that produced it, you do not have administrative rights over the document and you would not have editing rights over the metadata. In this case, IssueLab would contact the person with the rights to the document by sending an email saying that a document has been added on their behalf, along with a link, and give an option for it to be taken down. People can respond to emails and change requests about the document’s availability whenever they please. This is done in order to respect copyright and fair use, not really for metadata purposes.

**4. How does Issuelab deal with large numbers of documents uploaded to the public site?**

In general, Issuelab can handle large volumes. They suggest adding documents in waves (e.g. 100 a month) to avoid potential delays, which can occur if the metadata is messy or incomplete.

**Additional comments on the public Issuelab.org site:**

Documents added to the public site would be categorized as “evaluation” and “environment.” The user-base would not be able to tell what the group has individually added; there is no way on the public site to tag our specific documents as “ArchEE.” Issuelab cannot add ArchEE as a keyword to metadata, because the public site does not have flexibility with respect to categories and tags. On the one hand, the public domain broadens your exposure to work similar to yours, but there might be some confusion among EEN members as to which documents were added as part of the ArchEE effort.

**Knowledge Centers (KCs):**

Overall, the KC concept allows the client to identify what is going to go into the collection and provides some flexibility and customized features (mostly related to search) which can be wrapped within a website (in this case, EEN’s website).

**1. What’s the process to get started creating a Knowledge Center?**

A Knowledge Center can be opened with one with one document. Issuelab starts by having conversations like these about what the search preferences are. For example, they consider what metadata points EEN would want searchable (i.e. author, the funder).

*Get a sense of the content/scope of work-* Issuelab and EEN would go over how many documents would be added to the KC and identify what format the content will be coming to them. They then do some quality assurance on the metadata, and give an initial training on how to index the documents being added. IssueLab can do the indexing as part the contract or it can be done by the client. In September, IssueLab is rolling out a process to auto-generate keywords to help with indexing the document. All of these topics are included in initial scope of work conversation.

*Look & feel-* Issuelab works with the client to identify the overall user experience. IssueLab can flag potentially related items that come in either through the public website or through other KCs that have documents they allow to be public. This is done through a query that’s developed to flag anything that’s been mapped to specific keywords (i.e., auto-curating).

**2. What are the things that IssueLab typically customizes beyond the basics? How do they vary in your experience?**

Heavy customization is not generally available. As the system improves over time, less customization has been necessary. Typically, the greatest difference between KCs is how they approach search. For example, sometimes clients want the labels to reflect the community of practice or featured documents to look a certain way.

**3. Can we ask for additional metadata fields?**

There is not a lot of flexibility. Since IssueLab is a shared system, there is not a lot of room around the core metadata pieces because they are built on larger standards. For example, IssueLab would not be able to show whether things are well-received.

**Going Forward:**

**1. KCs vs Custom System**

If EEN is looking for custom functionality (i.e., ratings, critiques), IssueLab will not change its structure to accommodate needs. If these are critical functions for ArchEE, EEN would need to develop its own system or use something other than IssueLab.

KCs are more of a half-way point, as they are not a custom system, but do provide custom tagging and consolidates the documents into a unified collection. EEN should consider the tradeoffs/limitations around features, configurability, and the sustainability of the collection, i.e. who’s maintaining it. Custom systems have ongoing costs and likely require more attention and maintenance.

**2. Timeline?**

If IssueLab is the right home for ArchEE, together, EEN/Issuelab would establish timeline for development. The timeline, depending on indexing piece/ roll out, is usually around 2-3 months (can be longer). People will sometimes chunk it out into sub-topics, and will start with a certain one and continue with others. KC allows you to tag things associated with one sub-category.

**2. We may want to refine things over time, is IssueLab flexible enough to allow for modification?**

Yes, but within the constraints of the system. For example, EEN could add new categories to its knowledge center, or change the look and feel.

**3. In IssueLab’s experience, why have some knowledge sharing practices been unsuccessful?**

Need to have people accountable. IssueLab has seen projects fade out when key folks retire or interns (who leave and are often sloppy) are placed in charge maintaining the site. It depends on the group culture how things will function.

**4. Do you have a set of key questions you ask of people when getting started with a new client?**

No, projects are more conversation based no checklists.

**5. We want to make sure we consider all possible questions, any suggestions for topics to review?**

Clients need to consider how much they want a customized service. If this is a high priority, IssueLab is not likely appropriate. If they want full range of exposure to materials in a simple interface, IssueLab works well.

**6. Are there Knowledge Centers in the public domain to look at?**

Yes, IssueLab will provide links for review.

**Costs:**

For a base implementation, setting up costs typically run about $7500, with an additional $400/year for maintenance. In general, there are no additional costs associated with document volume. However, if clients do bring in a large amount of documents or decide they want to approach things differently, there could be potential changes in cost (as this might change the scope of the effort).

With most clients who want sub-categories, customization, & auto-curation, costs typically range between $12,000 and $25,000.

Indexing needs play a large role in costs and scope of work. If EEN were to handle the metadata and indexing, costs would be lower than if IssueLab needs to handle this work. Another piece that can add costs is when work comes in other languages.