

# Exchange Network Forum

Thursday, November 14, 2024

1:00 – 2:00 PM ET

## Welcome

*Alexander O’Neill, EPA Office of Information Management (OIM), Office of Mission Support (OMS)*

- Alex O’Neill welcomed participants to the meeting and noted that this Exchange Network (EN) Forum meeting will include two presentations.
  - The first presentation will be given by Dwane Young, with the US EPA Office of Information Management. Dwane’s presentation called “From Ideas to Applications” will touch on key considerations programs can make when getting an idea off the ground and into a project.
  - The second presentation will be given by Lydia Scheer of the Institute for Tribal Environmental Professionals. Lydia will provide an update on the recent Tribal Exchange Network Conference in Spokane, Washington.
  - The meeting will also include an opportunity for an Open Forum discussion.

## From Ideas to Applications

*Dwane Young, EPA Office of Information Management*

- Dwane Young introduced himself to participants and noted that the presentation is part of a training that was given to EPA but may be of interest to the Exchange Network Community.
- He noted that the intent is to share this information to prompt discussion about how organizations go from an idea to building an application. He noted that there are many ways to go about the application development process and the presentation is just one example experience.
- A variety of events can trigger the need to develop an application. For example, a new rule or statute, a problem that needs to be resolved, etc.
- Getting started is sometimes the hardest and most exciting part.
  - Good discussions are needed to define what outcomes the effort is trying to accomplish. This will help to ensure everyone is on the same page about the vision and what getting “there” means.
  - It is also important to have a good understanding of the current state and what the proposed change involves.
- It is not necessary to have a perfect understanding of “what” is needed before beginning. It is important to know what is currently known and remains unknown and to begin to iterate through the questions and document outcomes.

- Engaging partners early is critical even if all the answers are not yet known.
- Development Process:
  - Discovery
    - During the discovery phase, the first question to address is whether anyone else has pursued a similar project before.
    - Cross-program exchanges are beneficial to learn how other organizations have solved similar problems.
    - Coming to a common understanding of the problem is critical.
    - It is also important to start thinking about budgets and aligning budget requests. This can be difficult because all the costs will not yet be known. This is the place to get a rough order of magnitude (ROM) estimate.
  - Building Momentum
    - Communications and listening are important as this step involves determining who stakeholders are, establishing a vision/plan for obtaining buy-in, documenting requirements and building a community with stakeholders that are interested in the project's success.
    - It is also important to set expectations including when to expect change, what type of change is expected, etc.
  - Translating from “What” to “How”
    - This step involves turning business requirements into technical requirements.
    - It is important to understand and document your data model before you start.
    - Evaluation of technical options also happens at this phase. Alternatives Analysis are helpful to ensure that the project does not get locked into one approach too early.
    - Refinement of the budget also happens at this step.
  - Getting “There”
    - During this step, the project team continues to use an Agile development approach of building, testing, and adapting.
    - It is important to have iterative releases.
    - Customer engagement should continue throughout the process. It may be necessary to continue to build community throughout the process. Project teams need to have a plan to bring in new users/community members.
    - Training must also be planned into the process. This includes training users on new solutions and planning for user support.
- Overall Thoughts/Recommendations
  - Be aware of risks. They can sometimes be opportunities and are not always threats.
  - Governance is valuable to engage people throughout the decision-making process.

- Communication is key to success. Apply resources to this.
- Maximize the use of other investments (rent/build/buy).
- Ensure project managers have skills to oversee contract support – monitoring schedules, delivery of work products, etc.
- Recognize that developing a new application is not just building the application. You are creating a change and that may be uncomfortable, scary, etc. for stakeholders. This change process needs to be navigated as well as the development activities.
- Questions/Comments:
  - Question: How would you handle a situation where one stakeholder does not understand development and chooses not to participate in the process?
    - Answer: The key is to be kind and involve them when they are ready to engage; however, it is important to be clear that adding a lot of new requirements immediately is not going to be possible. Communication about the change management process is critical.
  - Question: Can you explain the phrase “develop governance that includes your stakeholders”?
    - Answer: For the Water Quality Exchange Data Model, we realized that EPA had a lot of expertise in house; however, there were additional perspectives from states, Tribes and other stakeholders across the country who were also interested in engaging in this space. Communication about the focus on the data elements that are required to understand water quality monitoring was important so that the stakeholder community understood the direction of the project. Monthly calls were held to discuss requirements and reach agreement on the model. It was also important to be transparent about the decision-making process and how changes would be evaluated.
  - Comment: Moving forward without knowing all the answers is good advice. If you wait for all the answers, stakeholders will not feel heard, and you may lose engagement and expertise that is useful to the Agency.

## Tribal Exchange Network Conference

*Lydia Scheer, Institute for Tribal Environmental Professionals*

- The Tribal Exchange Network Conference (TENC24) was held in October at the Northern Quest Resort in Spokakne, Washington.
- There was a good turnout at both the hybrid/live stream and in-person events. About 150 people registered for the event.
  - 50% were tribal agencies.
  - 20% were federal agencies.
  - 30% were other (private, academic, non-governmental organizations, etc.)
- Session recordings are available on the website ([www.bit.ly/tenc24](http://www.bit.ly/tenc24)).

- Topics included Coding and Data Science, Exchange Network (EN) Reinvigoration, EN Grants Program and Grant-funded Projects, Emerging Technologies and many more.
- Panels, interactive discussions, and opportunities for workshops and networking were included.
- Next Steps
  - Input is being sought from Tribal and EPA partners on future TENCs.
  - Opportunities will be available to attend Tribal EN Roundtable sessions (dates and locations are to be determined).
  - Other events, such as the Alaska Tribal Conference on Environmental Management and Tribal Lands and Environment Forum, are also planned.
  - Tribal Data Workshops are also planned. Dates and locations will be forthcoming.
  - Monthly Tribal Drop-In Sessions will be hosted throughout 2025.
  - For more information visit the website ([www.tribalexchangenetwork.org](http://www.tribalexchangenetwork.org)) or email [txg@tribalexchangenetwork.org](mailto:txg@tribalexchangenetwork.org).
- Questions:
  - Question: Were there any topics that came up during the TENC that may be a blind spot for the Exchange Network generally or could offer enhancements?
    - Answer: Participants noted the following:
      - TENC had more opportunities for training on tools (Geo, etc.). Including these opportunities in E2i moving forward may be beneficial.
      - TENC included a good discussion around Quality Assurance Project Plan (QAPP) requirements for EN Grants.
      - TENC discussions also highlighted the power of an individual and how much one person can impact other people's experience. They also did a nice speed dating exercise to rotate through tables and discuss a specific topic. This helped to meet new people and network.
      - Small group discussions were valuable to check in and discuss questions one-on-one. EPA heard about needs for grant applicants that are unique to tribes. The Artificial Intelligence (AI) Tribal perspective discussion was also interesting.
      - Opportunities to connect to vendors (Esri) at the TENC conference was helpful. It was beneficial to be able to ask questions and workshop on the tools that stakeholders are using.

## Open Forum & Announcements

- There will be no Exchange Network Forum for the month of December. The group will reconvene in January.
- The January meeting will include a presentation from the Drinking Water Safety Team on updates to the Water Quality Exchange.