

OFWIM Project Discovery Guide

Project discovery for project planning and tool selection

Why did we create this document?

Fish and Wildlife Information Managers are frequently asked to assist with tool selection and custom tool development. Conversations typically begin with a client/colleague articulating a need for a tool to solve a specific problem. Requests are often accompanied by very little background information, making it challenging for the Information Manager to attempt to make an appropriate recommendation without further insight into the scope of the project. Regardless of subject matter, the project discovery process is relatively consistent across projects. Patterns appear over time in the types of questions that should be asked during the project discovery phase. Our intention is to provide a set of interview questions to be asked of clients that will lend consistency to the project discovery process.

Who can use this document?

Any who find themselves in the role of assisting scientists with project planning, tool selection, and/or tool development for a project.

Scientists are welcome to bring this document to technical staff as well to help facilitate the conversation from the start.

Intended Use:

To guide initial conversations with clients/colleagues and aid in project discovery to facilitate tool selection.

This document is not intended to replace other more robust project planning tools. Information collected via this document can be used to inform other project planning tools should they be selected. *See the Additional Project Planning resources list at the end of this document.*

Known Pitfalls:

Good working relationships are critical to the success of any project. Take the time to speak with your client/colleague before introducing them to this document. Remember people are seeking a partner to help them find a solution to their issues. Emailing this document to a client/colleague before having an initial conversation will set the wrong tone for the relationship right from the start.

Additionally, much of the information in this document can be quickly gleaned from an initial conversation. This document also serves as a great template to guide your first conversation. Consider it a tool to help you do your job more effectively. If you choose to edit the document to track details about the project, consider making it a collaborative process with your client/colleague.

Implementation Steps

Step 1: Following the initial contact from the client/colleague, set up your first meeting to learn more about the project and the anticipated project needs. This meeting should be held in-person or over the phone.

Step 2: Work through the project discovery document with the client. Decide how you will navigate the process based on the client/colleague with which you are working. For new clients, it may be best to start filling the document out yourself with information you are able to glean from the first meeting, then collaborate to complete the document and to fill in the gaps. Repeat clients who are familiar with the process may be comfortable working through the document together starting at the first meeting.

Step 3: Review the materials provided by the client and hold a follow-up meeting (phone or in person) to work through their prioritized outcome list with respect to their budget and timeline. Share your initial thoughts and schedule a follow-up meeting if necessary to work on re-prioritizing and/or phasing the outcomes.

Step 4: Research software/hardware tool options that are most appropriate given the project parameters. Provide the client/colleague with a list of options and discuss the pros/cons of each. The OFWIM Tools inventory may be a useful guide at this stage of the process.

Interview Questions

The intention of this document is to clarify the project scope to facilitate tool selection and project planning. The coordinator will work with you to answer these questions. If you are completing this form on your own, please do so to the best of your ability and do not hesitate to ask your coordinator questions.

Purpose: What is the purpose of this project?

Outcomes: What outcomes would you like to see from this project? Be specific.

Prioritize: Please itemize and rank your outcomes as follows

1. Must do, vital to the project success
2. Must do, but could be delayed at least one phase in favor of #1 items
3. Would really like to have this, but we could live without it if we had to
4. Useful to have, not critical to the project, and shouldn't delay or drop anything to create this
5. Not critical, we can drop this item (you probably won't use this category at first)

Why use all 5 categories? Items in category 3-5 can sometimes be quick and easy to implement, but if technical staff are not aware that you are interested in a certain feature they won't know to look for it as an option in a tool or to add it to a custom tool. It's best to brainstorm a large list, then rank the items. The list will likely go through several iterations as you learn about the cost and development time associated with each feature.

Existing Resources: Describe current data storage/applications. Provide copies of (access to) relevant resources

- Project proposals (e.g. grant applications)
- Survey protocols
- Datasheets, w/ sample data
- Existing tools or data entry worksheets/databases (in Excel, Access, etc.)
- Historic datasets
- Data storage location (personal computer, server, paper copies, etc.)
- Metadata documentation
- Websites
- Maps
- Other relevant project documents

Subject matter crash course: What are your project related data collection challenges?

Field conditions and species attributes can play a big role in tool selection, database design, quality assurance, quality control, and data analysis. For example, if you collect data underwater or very rapidly you may need customized hardware or software to support your project. Or if technical staff are told that females of the species you are working with are substantially larger than males, they can build gender specific quality assurance measures into an application. Or maybe you anticipate a range expansion for a species in the coming years for a long-term project that includes custom maps. If technical staff know this it may be just as easy to create map products for the anticipated range rather than the current range, which will take care of a future workload up front. When possible, it's always best to try to get technical staff out in the field to experience what you do first hand. It's a great way for them to learn more about the specific project needs, the subject matter, and the field conditions. It also tend to foster a better working relationship.

- Biology:
 - Fast, Slippery, Dangerous, Cryptic, Numerous, Nocturnal
- Field Conditions:
 - Muddy, Sandy, Salty, Wet, Dark, Bright, Tides, Wind, Waves, Extreme Temperature
- Life History:
 - Range, Seasonality, Longevity, Life Stages, Sexual Dimorphism, Hermaphroditic

Who will be using the tool? List everyone who will use the data or the tool at any stage of the project and their role (Data entry, QA/QC, printing reports, etc.)

- Internal Staff, External Staff, Both?
- Do all the users have a science background?
- How many users to expect in each category? What permission levels do they need? For example, Administrator, View and Edit, View only, etc.
 - Tool Development
 - Data managers
 - Data entry
 - Data quality
 - Data access

What is your timeline?

- When do you plan to start using the tool?
- Is there an end date?
- What deadlines do you have to comply with, grant reporting, etc.?

What is your budget?

- How much can you spend, ballpark (\$500, \$5,000, \$10,000, \$100,000?)
- When is the funding for this project available?
- What existing resources do you have to put toward the project?
 - Staff Time
 - Hardware
 - Software licensing
- Who is responsible for making the final decisions about funding, resources, etc. for this project?
- Are you seeking additional funds?

Sensitive data?

- Please list any data that your agency classifies as “Sensitive”
- Are there any known access restrictions?

Additional Project Planning Resources

- Data Management / Life Cycle
 - DataONE, [Data Life Cycle](#)
 - [USGS Data Management](#)
- Project Planning & Tracking Tools
 - [USGS Data Management Checklist](#)
 - Data Management Planning Tool, [DMPTool](#)
- Software/Hardware Tools
 - OFWIM Tools Inventory
 - DataONE, [Software Inventory](#)