Content Planning Worksheet

The first phase of dashboard development should be to define clearly the parameters of the product. Knowing the aim, scope, limitations and target users is essential. The following questions can guide you in that process.

We recommend to budget at least an hour to answer these questions as precisely and extensively as possible. Any thoughts or information will be useful in future strategy or planning work.

Text in italic is an example, aiming to suggest how one could start to answer these questions.

I) Content and Users

- What is the aim of the project? What problem will this solve?

    - *ex: We need an interactive dashboard for Campylobacter surveillance, with a forecast of outbreak risk in humans.*

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- Who are the target users? Will it be open to the public? What is the degree of knowledge of the users? (a rough idea is enough for now, because in-depth user profiling should be its own detailed step later on)

    - *ex: Closed website for researchers in public health, animal health, and food safety authorities – high level of knowledge in their sector, but possible need for basic information in the other sectors.*

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- What data is available to us? How frequently is the data updated? Is it an automatic or manual process? What data would be great to have?

  - *ex:*

    - *available: syndromic surveillance in humans + Campylobacter tests in poultry farms + weather data – weekly data at the municipality level, updated automatically*

    - *ideal additional data: sampling results from waterwork authorities*

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- How large and complex is the project going to be?

    o *ex: a single panel dashboard with a few graphs VS. surveillance of multiple diseases over several tabs*

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II) Actors and Resources

- Will this be the project of a unified group, or a collaboration between several sectors and institutes? Who is doing what?

    o *ex: Collaboration between 3 institutes*

        ▪ *institute A provides data + data analysis + hosting + development*

        ▪ *institute B provides data + data visualisation + content writing*

        ▪ *institute C provides data*

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- Who will be involved in the development? What is their role? What skills and expertise can they provide? How available are they for this project?

  - *ex:*

    - *person A (40% on this project) – project leader – time management, coordination, communication with stakeholders*

    - *person B – researcher + developer – basic coding, data visualisation, content writing, expertise in Campylobacter in humans*

    - *person C (consultant for the next 6 months) – designer – UX, UI, accessibility*

    - *person D – researcher – expertise in Campylobacter in the food industry, review and help writing content*

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- Do we need more people/skills? How to get it?

    o *ex: We need a backend developer for database support– ask the IT department?*

    o *ex: We need more reviewers for text content – contact X and Y? hire someone new?*

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III) Technical Implementation

- What is the timeframe for development and for use?

    o *ex:*

        ▪ *First pilot dashboard for selected users should be usable in March 2023.*

        ▪ *Planned launch of final product to extended user base should be in September 2023.*

        ▪ *Possible iterations and scaling up after launch.*

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- What is the planned lifespan of the project?

  - ○ *ex: until the end of the ongoing outbreak / as long as needed / until the end of the pilot project / …*

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- What development solutions are considered or will be chosen? (R Shiny, HTML/CSS from scratch, ArcGIS…) What are their perceived pros and cons?

  - ○ *ex: R Shiny, Tableau, HTML/CSS from scratch, ArcGIS, …*

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- How does your organization get websites out to the internet? What regulations are there? Who will handle patching/updating/security? (Contact your IT and/or Communications Department to get accurate information on this topic)

    - *ex: The IT department deploys websites themselves, they take charge of all technical questions. All content changes on public facing websites must be validated by the Communications department. Person A in our team is in charge of communicating with them and making changes go through. Person A will have login information on servers and databases.*

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- Where will the website be hosted? (R servers, external servers, internal servers...) Who is responsible/contact information? Does it need regular renewal?

    - *ex: Hosted on external servers, needs a renewal every two years. Domain name must be renewed in five years. We need to order through the IT department + have authorisation and project codes from the Accounting department. Person A is responsible for this.*

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- How is the data retrieved and stored? Where does it live? (API, R package, internal database, .csv files on Sharepoint, …) Is there a backup protocol? If the process is automatic, who is in charge of checking that it runs fine? What is the procedure if something goes wrong?

  - *ex:*

    - *Dataset 1 is retrieved manually on Mondays from an email sent by person A at institute A. It must be copied to folder xxx.*

    - *Dataset 2 is retrieved automatically from the API of institute B. Each institute is responsible for its own backup protocol (ask for more details?).*

    - *Person B is responsible for checking that data collection and analysis went through. If they are unavailable, person C will check. In case of a problem, contact person D, and possibly the relevant registry/institute.*

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- Data security - How is the data protected? Is there a login system? What are protocols in place to keep things secure? Who is responsible? Who has access to what? Who to contact in case of problem?

    o *ex:*

        ▪ *The website is closed, and accessible via a login system. The IT department is responsible for this, with person A as main contact person for this case.*

        ▪ *In the team, person A and B have access to all data. Person C, D and E have access to anonymised data.*

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IV) Legal and Financial Concerns

- What are the planned financial costs? How is the project funded? What is the timeframe of that funding? (server hosting, software license, hired consultant, ...)

    o *ex:*

        ▪ *project funded 20% internally by institute A – 50% externally through EU funding – 30% externally through national research grant X*

- - *Server hosting at company A ($/year) – R Studio licence ($/year/user) – Yearly risk and data security assessment by company B ($/assessment) – UI/UX consultant for initial design ($/month * y months)*

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- Legal considerations – is the data public? is there directly identifiable data? is there an agreement from the data owner(s)? When does it run out? Who is in charge of renewing it? Who to contact?

  ○ *ex:*

    - *Dataset A is originally directly identifiable data – Anonymised through process Y – We have a data agreement that must be renewed every 3 years - Person A at institute A and person B at institute B are responsible for this.*

    - *Dataset C is publicly available data*

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