Henry don’t forget to hit record

Intake Interviews: First Contact
with Demos

Facilitators: Wendy Shan and Dirk Colbry

2023 Virtual Residency, June 27th

CyberAmbassador Project

- National Science Foundation Grant (#1730137)
- Professional Skills for Interdisciplinary Work
  - CyberInfrastructure (CI) Professionals
  - STEM (science, technology, engineering, math)
- Volunteer Facilitators
  - Training is provided
  - Open Source Curriculum

CAMPUS CHAMPIONS

Tau Beta Pi
The Engineering Honor Society

NRMN
National Research Mentoring Network

software carpentry

ACI-REF
Advanced CyberInfrastructure Research & Education Facilitators

CIMER

CATME
SMARTER Teamwork

ResearchSOC

NSF

NIH

PEEQ @ PEARC:
Practice & Experience of Emotional Intelligence

XSEDE
Extreme Science and Engineering Discovery Environment

The CyberAmbassador Curriculum

COMMUNICATION

FIRST CONTACT: Communicating with a Purpose
LET'S TALK: Communicating about Problems
IT'S COMPLICATED: Communicating About Complexity

TEAMWORK

TEAMING UP: Effective Groups and Meetings
SPEAKING UP: Effective Presentation Skills
LEVELING UP: Problem Solving and Decision Making

LEADERSHIP

LEADING THE TEAM: Understanding Style and Personality
LEADING THE CHANGE: Equity and Inclusion
LEADING WITH PRINCIPLES: Ethics

Best Practices in STEM Education

Constructivism and Socioculturism

- Learning is an active process of creating meaning from information and experiences
- Learning is most effective when it happens in the context and culture of the learners

Ongoing Research Shows...

- Effective professional skills can be taught!
- There are common tools (algorithms) that apply across many scenarios
- Role playing / rehearsal activities are effective learning tools for developing professional skills
- Practice is most effective in context

Project Impact (as of June 8, 2023)

10,000+ Participants Trained

380+ Participant Certificates Earned

120+ Facilitators Trained

340+ Sessions Completed

Agenda

Introduction: What is a good intake interview?

Canned Example Interviews

Wrap Up

Intake Interviews

First meeting you have when you are talking with a new researcher.

- You don’t know them (or their problems)
- They don’t know you (or your resources)

Opening an Intake Interview

Hi, my name is Loren. I would like to use the HPC for my academic work. How do I get started?

What questions do you ask?

Chatter

1. Type your response into the chat window, but **WAIT** to hit enter
2. Listen for the countdown (three, two, one, CHAT!)
3. Hit enter and watch the responses scroll through the chat window!

Chatter

Why are intake interviews important?

Effective intake interviews

- Identify the problem(s) and start to plan to find solutions

- Build a relationship

Good Intake Interviews (Research Facilitators)

- Ask about their research
- Avoid Rushing
  - ***(Except tomorrow where we're going quickly on purpose)***
- Identify the fundamental problem(s) being solved
- Work to describe the problem in terms of computing
- Ask how they think the problem should be solved
- Assess their ability
- Identify Assumptions (yours and theirs)

Chatter

What is a question you might ask in an intake interview?

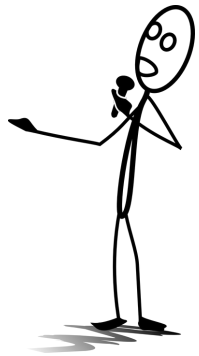
Explain it to me like I am 12.

Useful for both the facilitator and the researcher

Tool: Active Listening

- Listen with the goal of truly understanding the speaker
  - Pay attention to both words and body language
  - Watch for strong emotions (anger, frustration, worry)
- Reflect back to the speaker what you heard, using “I” statements
  - Correct: “What I understood was…”
  - Incorrect: “You said…”
- If strong emotions are expressed, acknowledge without judgement
  - Correct: “That sounds really frustrating…”
    Incorrect: “Calm down! You’re blowing this completely out of proportion…”

Tool: Reducing Jargon



- Before you speak, think about what might be considered jargon?
  - What is the disciplinary background of the Listener?
  - What is the cultural/language background of the Listener?
  - What is the level of expertise of the Listener?

- Choose whether to explain or eliminate the jargon
  - **Explain** when understanding the jargon is essential to solving the problem
  - **Eliminate** when the jargon is not essential

Chatter

What are some examples of jargon we use as research facilitators?

Tool: Paraphrasing

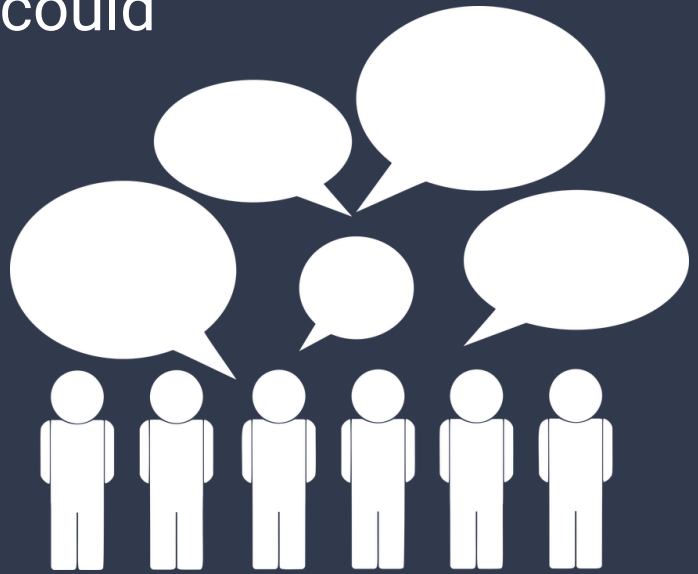
- Use paraphrasing when you are trying to understand a complex problem
  1. Listen to the speaker carefully
  2. In your own words, state the parts of the situation you understand (avoid adding jargon!)
  3. Allow the speaker to confirm, or to clarify, your understanding
- Paraphrasing is NOT the same as parroting
  - To use an analogy: paraphrasing is a lens, while parroting is a mirror

Tool: Ask Clarifying Questions

- As the listener, your goal is to understand in order to help solve problems
- Use clarifying questions to obtain additional information you need to help
  - “What programming language does your software use?”
  - “Do you already have an account on our system”
  - “Have you ever used this approach before?”

Chatter

What is another clarifying question you could ask during the interview?



You can say No without saying No.

Don't say "No, because"; instead say "Yes, if".

- Quote from Henry Neeman
    - Who got it from Dan Boatright
        - Who got it from ??

But what if the request “is not my job”

- To be effective for future problems you want to maintain the relationship.
- Try to offer a “Soft handoff”
  - Find someone who can help.
  - Help them use Google or ChatGPT

Closing an Intake Interview

- Action items
- Follow up times

“Fake” Examples

- Open up your chat window.
- While the videos are playing, “live chat” your thoughts.
  - What do you like?
  - What don’t you like?
  - What listening tools were used?
  - Questions you would have asked?
  - Questions you have for us?
  - Etc.

The story, names, characters, and incidents portrayed in this production are fictitious. Any relationship to real world people or events is entirety coincidence.

Sanborn Strata Method

Questions

- Was this scenario realistic?
- Did Jessie (research facilitator) sufficiently understand the problem?
- Did Jessie sufficiently understand the research?
- Did Jessie solve the problem?
- Did Jessie maintain the relationship?
- Other thoughts about this scenario?

The story, names, characters, and incidents portrayed in this production are fictitious. Any relationship to real world people or events is entirety coincidence.

GIS Data - Take 1

5:49

Questions

- Was this scenario realistic?
- Did Jasper (research Facilitator) sufficiently understand the problem?
- Did Jasper sufficiently understand the research?
- Did Jasper solve the problem?
- Did Jasper maintain the relationship?
- Other thoughts about this scenario?

The story, names, characters, and incidents portrayed in this production are fictitious. Any relationship to real world people or events is entirety coincidence.

GIS Data - Take 2

4:43

Questions

- Was this scenario realistic?
- Did Jasper (research Facilitator) sufficiently understand the problem?
- Did Jasper sufficiently understand the research?
- Did Jasper solve the problem?
- Did Jasper maintain the relationship?
- Other thoughts about this scenario?

Security Risk

3:55

Questions

- Was this scenario realistic?
- Did Justin (research Facilitator) sufficiently understand the problem?
- Did Justin sufficiently understand the research?
- Did Justin solve the problem?
- Did Justin per maintain the relationship?
- Other thoughts about this scenario?

Okay, this one is real but we only kept the good stuff….

“Real” Intake Interview

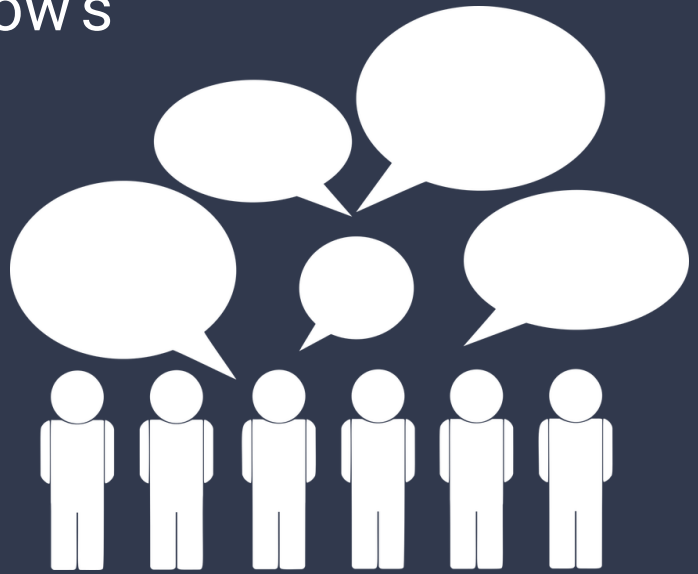
8:34

Questions

- Was this scenario realistic?
- Did Dirk (research Facilitator) sufficiently understand the problem?
- Did Dirk sufficiently understand the research?
- Did Dirk solve the problem?
- Did Dirk maintain the relationship?
- Other thoughts about this scenario?

Chatter

What strategies do you have for tomorrow's intake interview event?



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Questions?