

XSEDE Campus Champions Outreach Best Practices Guide

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In the context of “Outreach”, many of these “Best Practice” points might better be considered “ideas for doing XSEDE outreach”. If you have your own suggestions for being a successful at XSEDE Outreach, please send them to the Campus Champion mailing list.

A. Getting started with XSEDE outreach

1. **Get connected:** If you haven’t already, create a portal account, get on the Campus Champion mailing list, and attend the next “New Champion” conference call. Make sure you get the weekly usage reports, and are given a Campus Champion allocation.
2. **Campus XSEDE home page:** identify a location for a web page describing XSEDE for your institution and populate it with some basic content: what XSEDE is, who it is for, how to contact you, how to get access (including the CC allocation), how to get an allocation, how much it costs (trick question!). Get a memorable short URL for the page (j.mp!) and QRcode it everywhere.
3. **Promo material:** avail yourself of the promotional material available to Campus Champions describing XSEDE. Slides decks, brochures, loaner booths.
4. **Elevator pitch:** get a 30 second description of XSEDE.
5. **Define boundaries:** consider what you will and won’t do as a Campus Champion. Refer to your MoU. How to respond when you reach your boundaries? Who can you hand off to? Other people involved with HPC or XSEDE support on your campus? To XSEDE Training Education, and Outreach Services (TEOS) or help@xsede.org? Extended Collaborative Support Services (ECSS)?
6. **Recruit a team:** identify people who will help with new user accounts, allocation management, user support, XSEDE promotion.

7. **On the circuit:** induction events for new grad students, new postdocs, new faculty at your institution. Ask for 5 minutes. Take business cards. Use a pre-existing slide deck, or customize it for your audience.
8. **Connect locally:** Identify the major HPC resources and computing services groups at your campus. Reach out to them and tell them about XSEDE and what your role is as Campus Champion. Understand how XSEDE is complimentary to existing systems. Ask if they have users who could benefit from shifting to XSEDE (or dual use XSEDE + local resources). Be aware of the political tensions that can exist around different computing services providers.
9. **Share the love:** Talk to the CTO and departmental/faculty computing committee about XSEDE and how it can fit into the institutions computing ecosystem for research, teaching, collaboration, and cyberinfrastructure. Give them Deputy Campus Champion badges to help recruit XSEDE users. Talk about campus bridging (how to link campus compute systems to XSEDE).
10. **Course catalog:** Points you to instructors that may want to use XSEDE in their courses (educational allocations), and faculty who have an interest in HPC or scientific computing who may be interested in XSEDE for research.
11. **Early adopters:** Campus magazines, newspapers, and departmental annual reports often highlight interesting science which could benefit from HPC (and may be already). Get access to existing systems at your institution and see who has jobs in the queues, or look at past usage records. XSEDE weekly usage reports list anyone at your institution already using XSEDE.
12. **Start slow, manage expectations:** Target a few initial people who have previous HPC experience. Walk them through the XSEDE process until they are successfully running their own jobs and using the systems. Learn timelines, gotchas, procedures, support avenues. Don't over promise.
13. **Keep your institutional sponsor on-board:** Someone senior at your institution signed the Campus Champion MoU. Meet with them early on, then try to schedule a few brief meetings a year to keep them up to date as to how the campus community is benefiting from XSEDE. Ask them for suggestions about how to promote XSEDE, advance its adoption, and build campus bridging links.

B. XSEDE awareness

1. Introduce yourself as the XSEDE Campus Champion at every opportunity.
2. Posters around campus, and on computing bulletin boards. Include a business card and URL for campus-specific information for XSEDE access.
3. Get some XSEDE promotional slides loaded onto digital sign-boards around campus. Including "research highlights" from local faculty, staff, or students help make it more personal and engaging.

4. Request printed brochures from XSEDE TEOS. Some are “self-print” and others can be shipped to you.
5. Speak to the communications office to arrange a press release. Involve senior figures from your institution and key users of XSEDE (or future users).
6. Drop off XSEDE brochure with faculty and in grad student or postdoc offices or mail boxes. Be sure to include campus-specific contact information (email and URL). Staple your business card to it.
7. Address stickers are an easy and inexpensive way to put your campus XSEDE information onto your business card. Provide one or two URLs and an email address.

C. Community building

1. Keep track of the XSEDE community on your campus. A mailing list, spreadsheet, or CRM may help with this. Checkout HighriseHQ CRM. If they register for an XSEDE account, keep track of their XSEDE username and what they’re interested in (to help with adding them to Champion allocations, or sending out targeted announcements).
2. CRM (Customer Relationship Management) techniques can help you manage campus contacts. Consider each person you meet or speak with as a prospective XSEDE user, moving through a “deal” pipeline of awareness, interest, registered user, trial use, training, experience gathering, personal allocation. CRM software can help you know where your “customers” are in the “deal pipeline”, “close the deal”, and “maintain relationships” so they’ll come back for more.
3. Join discussion and announcement mailing lists where “scientific computing” types are likely to be found. Mention XSEDE when appropriate, or make occasional (quarterly) announcements about its availability or related training events.
4. Consider the best way to communicate to your campus XSEDE users – new mailing list? piggy-back on an existing one? MailChimp may be helpful.
5. Catch announcements and news about HPC issues. Make sure you’re on XSEDE Campus Champions mailing list, and subscribe to International Science Grid This Week (iSGTW). A few others that are relevant: HPCWire, Datanami.
6. Be aware of the “success stories” of XSEDE users, and look for opportunities to share these with your local community. This can help inspire them to see how XSEDE could be useful for their research or teaching.
7. Circulate announcements about HPC webinars, training events, or cyberinfrastructure grants.
8. A Twitter account or Facebook page provides opportunities to generate interest. Use your own or create a new one for your Campus Champion role, post to it at least once a month, and promote it (followers, and “likes”). For many, these channels to get “news” are preferred over mailing lists or blog entries.

9. Provide feedback to XSEDE. If you hear from your community about an issue, or observe something that is working especially well, or that presents significant obstacles, let someone within XSEDE know. feedback@xsede.org, monthly Campus Champion conference call, or the XSEDE annual meeting are great ways to do this. If it is a bigger issue, organize a specific conference call with relevant parties (solicit other CCs from the CC mailing list) and XSEDE staff.
10. At least once a month look at the weekly usage reports to see who on your campus is using XSEDE. Touch base with regular users a few times each year to hear about what they are doing. Ask if they'd give a short talk or provide a few slides describing how they've used XSEDE.

D. On-ramping to XSEDE user

1. **Process:** Have a clear mental picture of the steps required for someone to go from raising their hand to say "I want to use XSEDE" until they have successfully run their first jobs.
2. **Fair share:** Communicate clearly what the Campus Allocation can be used for, and that it is shared with all other users from the campus.
3. **Know what's out there:** What resources are available within XSEDE. Get to know the rough details of sites and systems.
4. **"Go to" system:** have a "default" system you can talk about in detail and guide new users to, if they don't have a particular preference or requirement.
5. **Data, storage, and backup:** have a clear message about how to move data in and out of XSEDE, where to put it, quota, and backup procedures/policies. This probably links in with what facilities are available on your campus for these same issues.
6. **Move along:** Outreach includes seeing which users are actively using the Champion allocation, and eventually (probably somewhere south of 20k SUs) moved to their own startup allocation, or to an XRAC. Get in touch with users around the 5k to 10k SU mark to discuss this. Let them know when you've removed them from the Champion allocation.
7. **Allocations:** Explain Champion, Startup, Education, and Research allocations to prospective users. If you have the capacity, offer to be a Co-PI on new allocations.

E. Seminars, Workshops and Cyberinfrastructure days

1. **Partner:** Look for opportunities to partner with campus-wide events or other groups who would be interested in doing a half-day, full-day, or multi-day workshop. Depending on the scope and audience, XSEDE may be able to send a representative.
2. **Fill a slot:** Are there existing lunch series, pizza nights, group meetings, or SIGs who might be interested in XSEDE? Contact the organizer: more often than not they will welcome someone coming to them with a request to give a talk on HPC and CI.

3. **Virtual Webinar:** If getting people in the same room at the same time is hard, consider running a virtual webinar (e.g. WebEx, AnyConnect). Staff from XSEDE may be able to help organize this and deliver content.
4. **Vendor Sponsored Event:** Many software or system vendors are happy to be invited on campus to run a seminar or training event. They will often look after catering and all the registration/administration logistics. Piggy back on this and include an XSEDE session as part of it.
5. **Attendance:** Make sure you get the name, email, and position of all participants.
6. **Evaluate and Follow-up:** do an evaluation of all outreach or HPC training events, even if it is just self-reflection (W6: what when well, what went wrong). Follow up with participants a week or two later to ask if there is anything more they'd like to talk about or know about.

F. Tips for promoting events

(credit to VSCSE)

1. **Basics:** fix the event details early. Event title, brief description, presenter, target audience, time, location, cost, who to contact with questions/to register.
2. **PR team:** get introduced to your institutions: department and institutional communications office, campus publications, photographers, people responsible for widely distributed newsletters, website maintainers (beyond your reach)
3. **Graphics:** find a few to promote the event. If you don't have anything obvious, use Google image search to look for "XSEDE".
4. **Event Page:** create a single "landing page" for the event. Try to have a short and memorable URL (j.mp lets you customize the "tag"), and link everything else off the one page.
5. **Websites:** create a promo blurb and circulate it. Get this onto as many websites as you can, and have it include a graphic and point to the Event Page.
6. **Calendar:** add the event to your calendar. And also any other widely circulate "events" calendar at your institution.
7. **Word of mouth:** tell everyone in your immediate group and mention it at events. Have a 30 second description memorized.
8. **Past participants:** ask them to send to their contacts. Email short announcement to past participants; ask that they pass the opportunity along to fellow students
9. **Cold call:** consider which groups may be interested in the event and send them the short blurb. An HTML email with a graphic Ask them to share the opportunity with their graduate students and faculty: physics, biology, chemistry, engineering, et al.

10. **Mailing lists:** keep a list of popular mailing lists, who their audiences are, and how to post to them. Many institutions have variations on the following: hpc-announce, cs-talks, postdoc-discuss, scicomp.
11. **Outside the box:** Meetups, Facebook, LinkedIn. If the event is open to the public, there are probably good ways to contact the broader community.
12. **Social:** Twitter (use #HPC hashtag) and Facebook. Consider creating a Facebook page and Twitter account for your group then promoting these events there.

G. Experienced Champion Outreach Suggestions

You feel like a seasoned Champion, and are looking for some ideas to take your computing to the next level. Consider some of these ideas.

1. **Borrow, don't buy:** arrange a meeting with the Office of Research and/or Provost's office to describe XSEDE and how it can be an alternative for researchers who are considering purchasing equipment or hiring IT staff for scientific computing research. Be well prepared for this meeting, know what your campus already provides, what the pain points are, and how XSEDE fits into this mix.
2. **Cyberinfrastructure day(s):** Organize a full day (or multi-day) event of seminars, workshops, lectures, and tutorials highlighting CI for education and research. Invite researchers, IT staff, industry reps. XSEDE staff may be able to present. Ask for the XSEDE booth to be shipped to you.
3. **Succession planning:** You're not going to be the Campus Champion forever. Find someone who would be happy to be your deputy for six months to a year and induct them into the XSEDE community and your local XSEDE users. When you're ready, hand over the baton.
4. **Write about it:** Find a venue to communicate how XSEDE has had an impact on your campus. Put yourself in it, talking about your experience as Campus Champion and your successes and challenges at Outreach. A written piece could be for a journal, magazine, blog, campus newsletter.
5. **Advertise success stories:** Prepare a slide show with videos and visualizations showing off the use of XSEDE by some of your top campus users. Get your communications office involved. Run the multi-media story on common area large screen LCDs around your campus or at conferences.

H. Document History

Relevant Sections	Version	Date	Changes	Author
XSEDE12 First public release	1.00	15/7/2012	Baseline	Outreach WG, Ian Stokes-Rees