

State Technology Summit

DATE

Facilitator's Script

FOCUS QUESTION: _____

Rational aims

"By the end of State Summit we will have accomplished the following:"

1)

Experiential aims

"By the end of the Summit, participants will feel . . . "

1)

Follow-Up

"After the Summit, we will..."

1)

Pre-Work

- 1) Focus question, outcome goals, survey design based on focus and goals
- 2) Preliminary results of technology survey
 - a. How will this be applied into the Summit?
- 3) Determine how to break out agencies

Pre-Summit	<p>Roles</p> <p>Main facilitator: Support facilitator(s): Note taker:</p> <p>Supplies</p> <p>Sticker notes/virtual sticker note board: Flip Chart: Fidget toys (incl. if virtual!) Virtual- and in-person-specific items Booklets Card Decks Bring Buy Build Cards Other worksheets Survey printout (in-person)</p>
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	<p>Misc. Prep</p> <p>Blue highlighted text is important “choreography” for facilitator</p> <p>Green highlighted text indicates references to accompanying booklets</p>
8:30 am	<p>Day 1 Welcome and framework (Presentation)</p> <p>Welcome</p> <ul style="list-style-type: none"> - Welcome and layout for the Summit - Introduction of facilitators, presenters, stakeholders - Reference materials: where to find them (e.g. Google Drive if virtual, printed if in-person) - Present focus question, outcome goals, and the format for the next-steps doc so people see what they’re working towards - What should be on a sticky note: <ul style="list-style-type: none"> o Concise o Understandable without any context (someone should be able to walk in the room, pick up the sticky, and understand the idea) - Ground rules for a successful summit <ul style="list-style-type: none"> o If you need to take a call, leave the room (or mute yourself) o Fully participate as a team member! Success depends on everyone’s input - Questions?
8:45 am	<p>Participant Introductions – DO NOT SKIP THIS</p>
9:15 am	<p>What do we want from transit technology?</p> <p>Explain what attendees should do during this discussion:</p> <ul style="list-style-type: none"> • Write ideas on stickies (or Miro if virtual) <ul style="list-style-type: none"> o Provide 3 quiet minutes o Then 3 more: dive deeper than your original ideas o Have each person share their top stickie after each question o Post all other stickies on the wall – you’ll use those for the breakout activities <p>We will facilitate a discussion on questions below. Make sure, as facilitator, to save all stickies, which we’ll use through the Summit. The following questions are examples – you can find others in your topic booklets.</p> <ol style="list-style-type: none"> 1) First, ask yourself “what can make me/my staff more effective at my job?” 2) Second, ask “what can make my service more useful to our passengers?” 3) What can be accomplished in house with existing staff? Where is outside assistance needed? 4) How can regional partners support each other? 5) How can the state support regions/agencies?

	<p>6) Where do we need additional consultants/vendors?</p> <p>7) Where do you need help – how should we structure that help?</p> <p>8) What do you want to know more about?</p>
<p>10:15 am</p>	<p>Topic-Based Presentation</p> <p>Discuss results from technology survey. If there are other relevant materials to present, this is the place (e.g. Technology Plan this will inform, briefing on the topic/focus area, demo on certain product you’re considering).</p> <p>As you discuss, attendees should keep adding thoughts to stickies/Miro. Provide opportunities for questions and feedback.</p> <ul style="list-style-type: none"> • Ask respondents for elaboration on items you need extra info on • This could be a good opportunity to hold live polls to gauge reactions to certain ideas • Have a Q&A box or Chat Box open for questions <p>Again, save all stickies/questions/ideas!</p>
<p>10:45 am</p>	<p>Break</p> <p>Make sure stickies are posted on walls/on Miro so people can view other ideas</p>
<p>11:00 am</p>	<p>Whole Group: Insights and Themes</p> <p>1. Begin to cluster key observations</p> <ol style="list-style-type: none"> a. Identify what is holding a cluster together and then ask “So what” How does this relate to our focus question b. Review different types of patterns in insights— c. Model—identify possible insights d. Do: 1) In small groups, begin to cluster key observations, 2) Name the groupings, 3) Try to identify the insight that is embedded in that cluster and between clusters. <p>Questions to ask:</p> <ol style="list-style-type: none"> i. Are there overlaps (think Venn diagram) among clusters or within information within a cluster? ii. Are there steps that seem to suggest a sequence or process? iii. Is there one central person, event, consequence around which many other things revolve? iv. Group key information in different ways: e.g., obstacles, work arounds, attitudes, needs,

	<p>e. Name your clusters on large sticky notes</p> <ol style="list-style-type: none"> 2. Name the groupings 3. Try to identify the insight that is embedded in that cluster and between clusters. 4. Name your clusters on large sticky notes <p>To Consider:</p> <ol style="list-style-type: none"> a. Are there overlaps (think Venn diagram) among clusters or within information within a cluster? b. Are there steps that seem to suggest a sequence or process? c. Is there one central person, event, consequence around which many other things revolve? d. Group key information in different ways: e.g., obstacles, work arounds, attitudes, needs
12:30 pm	Lunch
1:00 pm	<p>Breakout Group: Design Criteria</p> <p>For virtual breakout rooms, make sure to have staff available to be in the rooms to troubleshoot, keep the conversation on track, and share example slides for the group to have a reference point</p> <p>For in-person breakouts, have staff rove and check in to make address issues and keep the conversation on track. Have example slides up for reference</p> <p>Look at insights and translate them into design criteria: what is necessary for this technology to be successful?</p> <p>Example: Provide this example on a slide for groups</p>
1:45 pm	<p>Whole Group: Prioritizing Criteria</p> <p>Have each individual select what they view as the three most important criteria to address.</p> <p>For the Design Criteria that receive the fewest (or zero) votes, have the group determine if they are make or break – will not addressing this cause the whole mission to collapse?</p> <p>Reach consensus – only remove criteria that everyone can support removing (they don't have to love it, but can live with it)</p> <p>What is too big of a question mark to make a decision on? Corral those for later</p> <p>At this point, if the group finishes early, feel free to offer the option of a break or to power through</p>
2:30 pm	Whole Group: Bring, Buy, Build re: Design Criteria

	<p>Use Bring, Buy, Build cards</p> <p>Have individuals fill out as many Bring, Buy, or Build cards as they feel they can based on the prioritized design criteria. As everyone finishes, or after 15 minutes, they should post their cards under the relevant design criteria.</p> <p>Record everything; Wrap up when everyone is finished.</p>
3:00 pm	<p>End of Day 1</p> <p>Ensure everyone has next day's logistics. If virtual, ensure everyone has next day's login information</p> <p>Facilitator follow-ups: Post all materials and feedback so attendees can review</p>
8:30 am	<p>Day 2</p> <p>Recap yesterday – Where were we, where are we now, where are we going?</p>
8:45 am	<p>Loosen everyone up – again don't skip it!</p>
9:15 am	<p>Breakout Groups: How Might We Accomplish Design Criteria as a group?</p> <p>Before breakout: present how you mapped the BBB inputs. Ask for feedback, additional BBBs</p> <p>Assign Design Criteria to groups, enter breakouts</p> <p>Groups should come up with headline strategies for how the group can accomplish the design criteria (details to be fleshed out after Summit by each organization as their agreed-upon role)</p> <p>Example headline strategy: Post as example slide</p> <p>End up with preliminary responsibilities: maybe a road map of who does what when, or a chart of who can best accomplish tasks</p>
10:15 am	<p>Whole Group: Discuss results of breakout groups Do people agree, see other potentials?</p>
10:45 am	<p>Break</p>
11:00 am	<p>Whole Group: Prioritizing Outcomes</p>

	<p>You likely ended up with a number of activities relative to the design criteria. Now, what has to be done first? There is likely some order of operations for some items. Try to map out a general timeline to identify what outcomes depend on previous ones. This can be refined later, but participants should have an idea of how everything would come together.</p> <p>Take note of uncertainties, to be discussed after lunch.</p> <p>Screenshare Gantt Chart or similar timeline tool so participants can visualize order of operations</p>
12:00 pm	Lunch
12:45 pm	<p>Whole group: Research still to be done</p> <p>Identify uncertainties, questions about order of operations, gaps in expertise, research to be done. Identify responsibilities for the answers, create a new timeline for that</p>
1:30 pm	<p>Quick Break</p> <p>Organize thoughts if needed</p>
1:35 pm	<p>Re-state next steps, who has ownership over each one, fit into final document you showed at beginning. Any last thoughts?</p>
2:15 pm	Summarize Summit Outcomes, Looking forward, answer questions
2:30 pm	Survey: gauge how close you were to your rational and experiential aims
2:45 pm	Close