

# Spec workshop exercises

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## Meeting facilitation tips

- Be prepared for the meetings to unfold differently than planned. Know which sessions (and parts of sessions) you can leave out if you need to due to time.
- Be prepared for formal welcomes at the beginning which may take some time.
- Begin with an hour (no more than that) of plenary time so that they can settle in and follow with a short break for coffee.
- There may be some resistance to what you're proposing at some point in either meeting. Be ready to give this time and discussion, and to gently move the group back to productive outcomes. Here are some potential scenarios as an example:
  - If they are challenging the premise of the new system, ensure this is documented by getting them to map their current situation and then try to re-map the situation with the new thing - showing how this would not work (you may be able to fix the issues they are raising or they may be right - this may not be appropriate for some reason). Stress your role as taking this feedback to the people running the project.
  - If they are concerned about other things, like surveillance by their bosses, the state or other actors, give this space and discussion time, record on flip charts, and ensure you have explained how you handle security and privacy considerations in your platform.
  - If they criticise specific features, treat this as UX feedback and record meticulously and visibly.
- Be prepared for a few voices to dominate. Wherever possible keep discussion group sizes small, no more than 6, draft other facilitators if you need to facilitate more than one group.
- Bear in mind that participants may not accurately self-describe ICT use

## Preparation ahead of time

- Pre-write some flip charts or develop prompt slides to move through the agenda and provide instructions to group per the outline below (look out for **red text**)
- Find out whether you will have a projector
- Ensure you have flipchart paper, marker pens, post-its in the room
- Find out how the room will be laid out, whether you can move tables and chairs, and whether there is break-out space
- Understand how and when refreshments and lunch will be provided
- Check with relevant people whether they will need to do an official welcome. Try to informally feel out how these things tend to go - anyone who has attended these types of sessions in the region might be able to tell you how long the welcome might run.

## Draft agenda and exercises instructions

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## Official welcome (15 - 60 mins)

- Host

- Government official
- Donor
- Partner

## Opening the meeting and introductions (15 mins)

- Welcome to the meeting and give an overview of the day:
  - Example overview: we will be leaning on your expertise and experience, showing you what we are working on and seeking feedback. We will work through some participatory exercises to ensure we get insights from everyone and work together to produce the outputs we will take back.
- Facilitator introduces herself
- Invite everyone to stand, introduce their name and job title and the geographic region they cover (or other brief important detail)

## Expectation and norm-setting (10 mins)

Set up a flipchart to be visible to everyone. Invite contributions from the group as to their expectations from the workshop. Tack the finished flip chart to the wall.

**Tip:** *expectation setting can be a risk, as participants may request sessions you haven't planned for. However, you can visibly make note of this and promise to take this back; use suggestions that do map to planned sessions to augment how you present them, increasing how relevant they feel; get a window on participants' perspectives; and set up a responsive dynamic from the beginning.*

Set up a second flipchart to be visible to everyone. Invite more contributions from the group, this time to set group norms. Explain this by stressing that for today, 'we are a team' producing products, and it's important to trust one another and behave in certain ways. Give an example which seems relevant, e.g. raise a hand to indicate that you wish to speak, rather than interrupt one another; it's ok to take calls for work as long as you go outside; or be on time back from breaks.

Tack the finished flipchart to the wall so that you can refer to it through the day at key points, like right before a break or if someone becomes disruptive.

**Tip:** *this exercise can feel awkward - we are all adults, why do we have to do this? But this is your chance to get out in front of personalities in the group who might be disruptive. If this group has met together before and have experienced disruption, they will seize the opportunity to regulate the behaviour in advance.*

## Plenary presentation: (45 mins maximum)

This is an excellent opportunity to give the participants a chance to get used to your accent, the room and their presence there, following the small amount of participation you've required of them so far.

Below are summarized some of the suggested topics, based on input from you and from the via email.

- Framing: they are experts, this is part of our user-designed build process for the dashboard
- Basics of whatever technology you're working with

Allow time here to ask questions and discuss

## BREAK

## Exercise: User personas (30 mins)

### About user personas

User personas can be generated informally by any knowledgeable group and can be important vocabulary to use for the rest of the day. They can help to highlight inconsistent assumptions about technology capacity and problems with the theory of change, and can also very much speed up the mapping exercises later. You can find some excellent resources about user personas on the [Usability.gov website](http://usability.gov).

### Prepare ahead of time:

- Provide prompts (write this up on flip chart or slides to show the audience):
  - 1) User personas describe individuals, how they use technology in their work, and what they need from the tool we are looking at
  - 2) Who are the users we should talk about? [generate a list on a flip chart prompted by this slide]
  - 3) Sample user persona [*develop a user persona which might be relevant. This should ideally be a real role, but not someone who is key to the system, e.g. onsite maintenance workers or senior management. E.g. 'Santiago is a 34 year old maintenance worker. He left school at 15 and has a 6th grade reading level. He has a wife and two children at home, where he has a TV but no internet access. He sometimes uses internet cafés to check his personal email but is not*

*required to use a computer for work. In his office he sometimes reads official notices on the wall in the cafeteria and papers given to him with his paycheck or in meetings with his supervisor. He receives some training every year or so when new equipment is brought in or as part of his certifications from the government. He would find it very useful to have an overview of changes to the flood risks in the areas he covers, as soon as possible after a flood event.']*

- 4) Now write your own for the user assigned to your group. Think about:
  - What their home life is like
  - What technology they use at home and at work
  - How they get important updates about their job
  - What they need in their work that is relevant to this platform
  - Give them a name!

### The session:

Run through the prompts described above and explain user personas to the group. Explain that you will be generating your own. (prompt 1)

Put up a piece of flipchart paper that is visible to everyone and encourage the group to suggest types of roles that will be important here. Look for people who would directly use the system but also people who would consume outputs from the system even if they don't directly generate them. (prompt 2 and 3)

In small groups, get participants to choose (or assign directly) a role and spent 5-10 minutes generating their own and writing them up on flip chart paper. (prompt 4)

Come back together and spend 10-20 minutes talking through what they generated in plenary. Encourage groups to comment on each-other's work. It's important not to end up just providing feedback from the front but to make this a conversation, and add to or amend the user personas as you go, so that the whole group feels ownership of them. Be prepared to spend more time on the most important ones.

Put the final user personas up on the wall for the rest of the day, to refer to.

Alternative idea: if people are resistant to participation or the groups don't work, you could do this in plenary (might be more painful) or you could even have pre-developed user personas up your sleeve and validate those in plenary.

*Tip: validation exercises can include:*

- Putting bulletpoints or quotes up on flipcharts or on slides and having people walk round and silently put stickers of different colours against the things they agree and disagree with. Discuss the ones that got the most votes
- Asking people in the group to read aloud from a prepared user story and discuss as a group

## Exercise: System map showing how things are now (30 minutes)

This exercise is one we have run many times for groups wanting to think through how a technology works in an organization and it has always been extremely useful. This is less



technical than a system map often is - this isn't about how the technical components fit together. It's about how the users interact with each other, the platform and the environment and the results of those interactions in the real world.

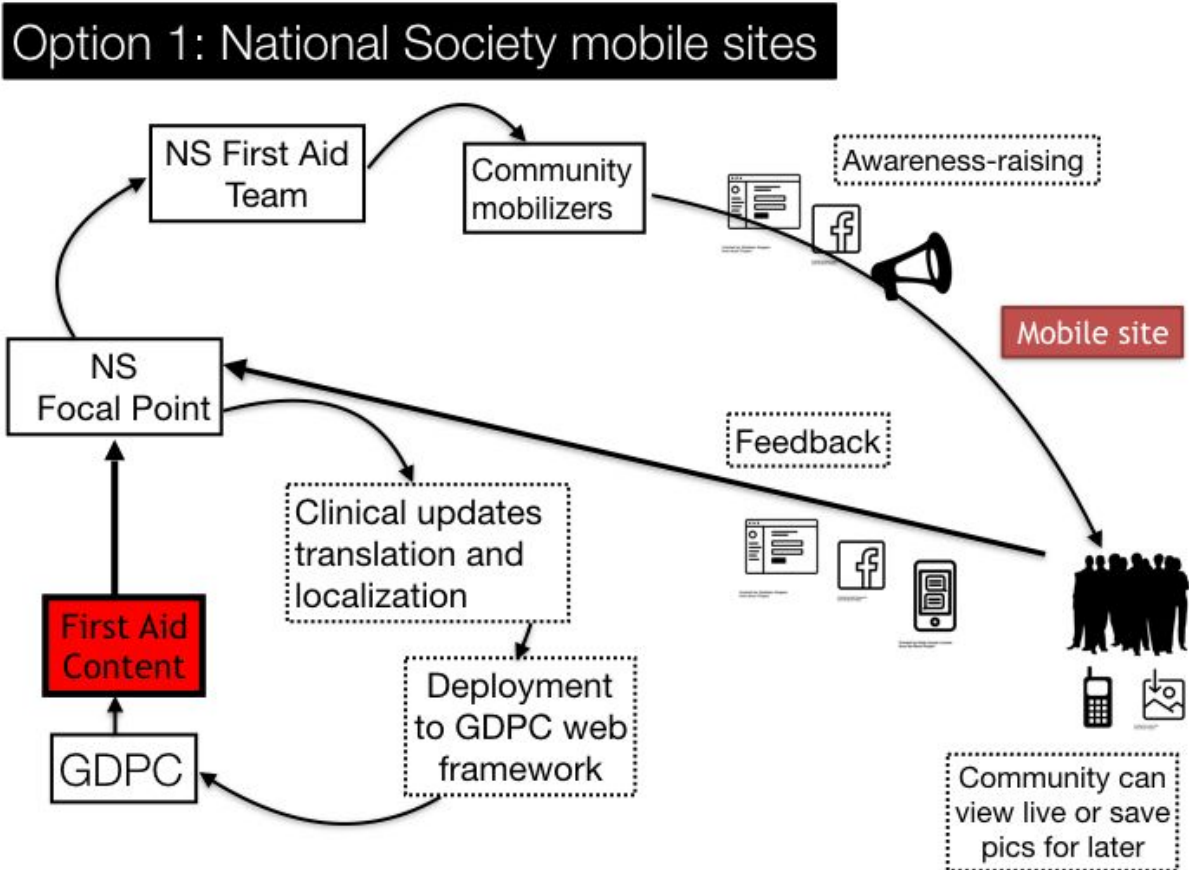
Maps should show how information moves from one actor

to another, via what channel, and what happens when it arrives. For example, from ADA hydrologists looking at flood data and providing analysis, advice and guidance might flow to engineering departments. Questions and feedback might flow from those engineers back to the people who task the hydrologists and acquire the data.

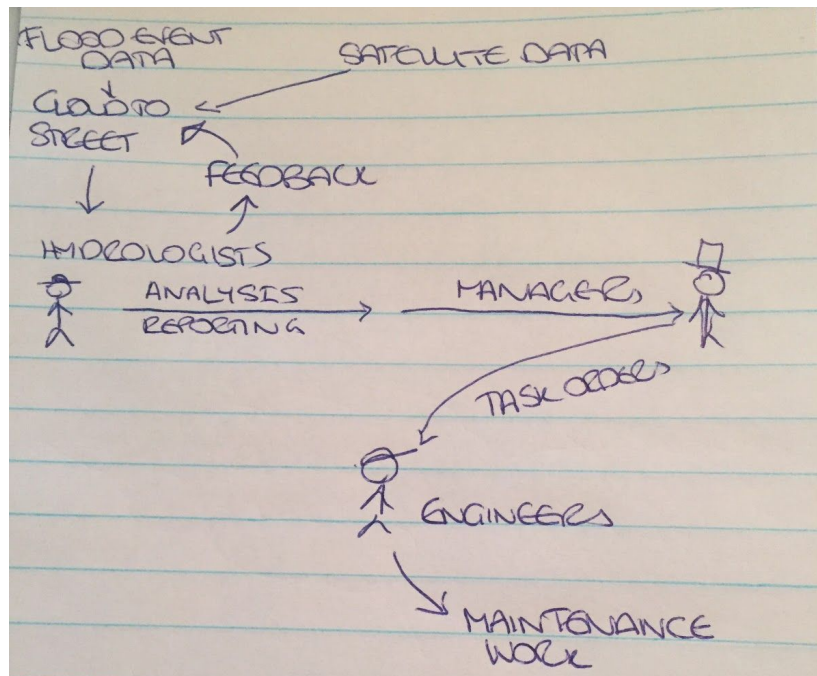
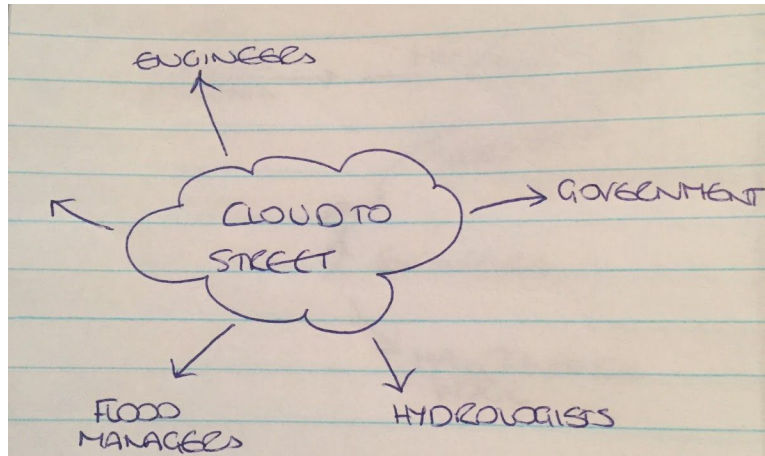
Start by asking participants to help you to draw what happens now. What is the info collected, who does it, where does it go? What are challenges? Use the exercise to draw out an informal/facilitated discussion of current issues, how decisions are made, and goals and plans for the future.

You can run this in groups and validate and discuss in plenary, or develop in plenary. If the latter, it's good to encourage others to take the pen and add to the map as it emerges but you should start it yourself to ensure it develops correctly.

Below is a sample system map from another project redrawn later for clarity.



Try to avoid simplistic maps that focus on dissemination of information without showing what happens in the real world. See the difference between the first and second sample maps below. The second is far more helpful.



## BREAK

*This is a good time for a lunch break or alternatively, this is where the agenda could be split in two for a two-day meeting.*

## Exercise: The new system map (15 mins)

Redraw the system map based on what will be possible with the new system. (this is about them buying into your theory of change, getting them to believe it will work.)

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## Exercise: User-specific features (30 mins)

Based on the new system map and the user personas you developed earlier, identify key functionality that each role would need and compile a list.

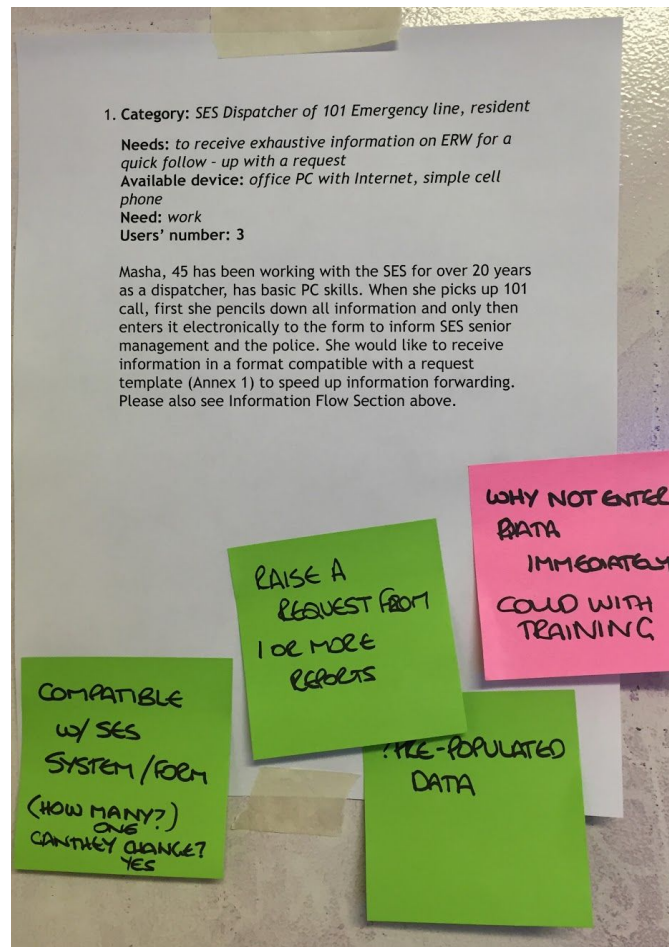
An example is shown on the right. Here, features are attached to each user persona on green post-its.

Provide each person with a bunch of post-its in one colour and invite them to generate their own proposed features, drawing them from the user stories and their own ideas. For example, for a hydrologist, one might be 'see flood data from previous historic events'. Share with the group and discuss.

## Exercise: prioritization of user stories (15 mins)

Take the post-its generated earlier, ideally with a note on each to show which user persona they were attached to. Two options:

- Validate the features by giving each participant a sheet with a fixed number of stickers on it (no more than 10 but whatever is easiest to cut the paper into bits, honestly). They should go round and without discussing with others, use the stickers to 'vote' on individual features by sticking them to post-its they think are important. They must use all their stickers and are allowed use more than one on the same feature. (if you don't have stickers people can draw stars in marker pens.)
- OR, take each post-it and ask the group to place it higher or lower on a piece of flip chart paper, where the higher the post-it is placed, the more important it is. They can do this together, with discussion; or individually and silently (this is good for encouraging participation by everyone). If you do this exercise silently, participants are allowed to move post-its placed by others, and facilitators should step in if a post-it keeps moving up and down - just put a mark on it and discuss in plenary later.



In plenary, discuss: which got prioritized, which got deprioritized, any surprises? Anyone willing to talk about why they voted the way they did, e.g. if one story got many votes from one person?

End with a prioritised display of post-it features which you can capture and take back to developers, or use to shape your own feedback to them.

## BREAK

## Plenary discussion: Feedback, risks, challenges and concerns (45 mins)

Return to the system map you drew of the new reality, and the demo version of the platform. What additional feedback do they have on the platform which is not covered by the feature list?

What are the operational and political challenges? Try and tease out concerns around surveillance in their jobs, security and human protection issues, trust in state and others. Be open to any concerns and criticisms. There is a slight risk here to end on a negative note so be prepared to counter objections and hear criticism. This may all have emerged earlier in the day, in which case you can end on the voting which will be solid feedback for the platform.

## CLOSE