NRM HCD retro and planning | summary

January 19, 2018

Overview

This is a summary of a retro and planning activity I conducted with members of the NRM HCD cadre on January 5, 2018.

Of the 13 cadre members, 9 participated in the activity: Callie McConnell, Eugene O'Donnell, Gina Seroy, Kathy Sleavin, Emilie Lang, Anna Fargo, Carly Bier, Lena Ahad, Portia Jelinek. (Not present: Steve Lammey, Sue Emery, and Bill Belton, and Roy Mita.)

Retrospective

A retrospective is an opportunity for the group to reflect on what has gone well, what could be better, and what we might change going forward.

- **What we did:** On stickies, participants independently wrote down their answers to 3 prompts: successes, less than successes, and "Ah ha's!". I specifically asked participants to react to the prompts in relation to the training they've been receiving as part of the HCD consulting engagement. Participants then voted on stickies they would most like to talk about, and then we discussed top voted items. During this discussion, we talked about what we might do differently going forward to improve our practice.
- **What I learned:** I identified common themes under each of the main two prompts.[1]
  - Successes :)
    - Overall, successes were related to the quality of the course material. Participants found the workshop and reading helpful, and feel that they're learning new tools, skills, and ways of looking at problems.
    - An additional success that came up was the flexibility to change the training approach to better meet people's needs.
  - Less than successes :|
    - Most people's concerns were related to the schedule and pacing of the engagement and how it aligned with their project work. Participants

[1] There were only 4 stickies under "Ah ha's!", and no significant themes emerged.

specifically talked about: struggling to make time for the reading, activities, and the 1:1 coaching sessions. Several participants mentioned feeling as though they'd fallen behind, especially over the holidays.

        - Another theme was tension some participants feel in planning their discovery research around a nascent project. E.g.: *"[It's] hard to create a plan for a phase that we have not started planning yet;" "The project I came to this effort with wasn't sufficiently spelled out."*

- **What might we change going forward?**
    - Participants are very pleased with the shift to more 1:1 coaching and feel that this change will address their main concerns.
    - Having me proactively reach out to individually schedule 1:1s is participants' preferred way to engage.
    - An additional theme was around communication between the cadre and the broader NRM team in both directions. Participants would like for there to be more communication on the cadre's progress and next steps and also to better understand NRM's expectations of them.
    - A final item had to do with how NRM might include time and resources for discovery research as part of their projects.

Planning activity

The goal of the planning activity was for me to better understand participant's project timelines and the types of questions they anticipate over the coming months. The results will inform how we want to structure the rest of the engagement.

- **What we did:** Participants independently wrote down on stickies a question they have associated with each of five stages of design research: (1) planning, (2) data collection, (3) analysis, (4) representing and communicating research, and (5) moving from research to action. Participants then arranged a stickies along a timeline to show when in the next year they expect to be engaged in each phase.
- **What I learned:** The majority of participants foresee completing phases 1-3 (planning, data collection, and analysis) within the next 6 months.
    - Nearly everyone will be focused on the same kinds of activities in FY18-Q2, but their project timelines fall further out of sync as time goes on.

- Most people do not foresee communicating their research or acting on their research until FY18-Q4 or FY19-Q1.
- I think it still makes sense for the second module to be about communicating design research and moving from research to action, but people will not be ready for this material before Q3.
- A few participants would like help getting stakeholder buy-in for their research at the start and throughout their projects.

- **What we might do going forward**
  - **In the next month:**
    - Offer an hour long webinar AMA on getting and maintaining stakeholder buy-in for design research.
    - Work with NRM leadership to deliver answers to leadership related questions.
  - **Over the next few months:**
    - Schedule 1:1s with participants as they prepare to move to a new stage.
    - Send a monthly email to the group answering questions by stage.
    - Plan an intensive workshop on communicating design research in April/May 2018.
    - Schedule regular retros on a quarterly basis.

Appendix: Participants questions

Leadership related questions:

- What are NRM's expectations of the cadre?
    - To be addressed during the NRM leadership meeting, 1/25/18
- Do we need a letter from NRM leadership to introduce ourselves and sanction user interviews?
- How might NRM include time and resources for discovery research as part of their project timelines?
    - To be addressed during the NRM leadership meeting, 1/25/18

Questions about each stage in the research:

Planning:

- Will we have sufficient focus on this effort to get meaningful work done?
- Have we adequately researched our question?
- Do I have all the players and people identified?
- We have 2 directions we can go. Trying to figure out which one makes the most sense for users.
- Do I have all the pieces and parts necessary for this phase?

Data collection:

- Do we have a sufficient sample size of users to interview?
- Do we need a letter from NRM leadership to introduce ourselves and sanction the interview?
- Will I find the people I need to reach out to have the time to do this?
- After my interviews are there tools to help me make an experience map?
- Thinking about bias as I find people to interview
- Do we know all who we should interview?

Analysis:

- Not sure what analysis will be needed and who can do it?
- Best way to organize data for different user groups?
- Combining qualitative results and quantitative results?

Communicating research:

- Who is our target audience? Or do we have multiple reports for different audiences?
- How to communicate with external stakeholders?
- How do we present research in a way that's actionable?
- Will all affected parties understand/consume the results of the analysis?
- What is the best way to keep track of all the information to not have scope creep but also make sure items are not lost?
- Did I miss anything/anyone?

Moving from research to action

- What happens when we have our portion of the project completed, but implementation is in the future?
- Taking this from set/type of data to broader application
- Timing--I don't want to present something that will take years to implement.
- Who all needs buy in on the final JUMP from results to action items?