



**Healthcare Transportation Design Thinking Project
for
Tri-County Council for Southern Maryland**

SCOPE OF WORK

The following Scope of Work includes a description of tasks, a schedule, our staffing plan, and cost detail.

Task 1: Planning the Research - Expected timeframe: January 2017

- 1) Information exchange: The Tri-County Council staff will brief CTAA on the members of the stakeholder group as well as their organization's mission and activity in St. Mary's County. Staff will also provide CTAA with a summary of unmet transportation needs in the county along with key healthcare destinations for residents of St. Mary's County. Staff will provide CTAA with other background information that will be needed.
- 2) Stakeholder meeting #1: Reframing the question, planning the project (5 hours): CTAA will lead this meeting to accomplish the following:
 - a. CTAA will facilitate a discussion of the group's challenge question, beginning with this initial draft: "How can we create a regionally responsive healthcare transportation system for the rural citizens of St. Mary's County?" CTAA will lead the group in a question-reframing exercise to examine the question from the perspectives of all stakeholders, both represented in the room and those who could potentially impact the project.
 - b. CTAA will facilitate the team in creating a draft design brief, which is a tool to help focus, manage, and communicate the project. This brief frames the exploration areas and constraints, scopes the target users, captures the curiosity of the team during research, and defines expected outcomes and success metrics.
 - c. CTAA will facilitate the team in drafting an initial research plan for the project. This plan will address who to interview in Task 2 (below) and what other research is needed to learn more about ideas for the project.

Deliverables: 1) facilitated stakeholder group meeting; 2) Design Brief and Research Plan (using draft developed by stakeholder group and refined as needed)

Task 2: Understanding Stakeholders and Context - Expected timeframe: February-March 2017

Two types of research will be conducted: primary and secondary. Also in this phase, existing secondary data will be identified and additional data to be gathered will be discussed with Tri-County Council staff

- 1) Primary research. The primary, qualitative research will explore the motivations and goals of related customer groups, including but not limited to, the member agencies of the stakeholder group, transportation and healthcare customers and their caregivers, and other stakeholders identified by the group in the draft Research Plan. This research will consist of up to 30 one-on-one, in-person interviews and observations. Members of the stakeholder group are invited to join in the interviews as they are able. CTAA will prepare the interview guides, join members of the stakeholder group in setting up the interviews, be on-site for the interviews, and document the interviews.
- 2) Process material from interviews: Each 1-hour interview takes about 3 hours of work to: conduct the interviews, form usable notes from the interviews, and begin to synthesize the aggregate data into themes and formats that can be used for analysis with the SPC (i.e., 30 interviews = 90 hours of work).
- 3) Create and share visible representations of the results of the primary research (customer journey maps, personas, other formats) as well as other data (e.g., area maps, key technology and transportation trends).
- 4) Stakeholder meeting #2: Sensemaking (7 hours). CTAA will facilitate a stakeholder group session, on-site, to present the results of the research and to assist the group in making sense of the data, determining important insights and opportunities related to the chosen challenge question. CTAA will also lead the group in identifying design criteria drawn from the primary and secondary research; these criteria will be used to determine if proposed solution concepts will indeed respond to stakeholders' needs.

Deliverables: 1) CTAA will prepare customer journey maps, personas (archetypes from interviews), and other visible representations of the results of the research; 2) facilitated stakeholder group meeting.

Task 3: Idea Generation - Expected timeframe: March–April 2017

In **Work Session 4**, which will be a 1.5-day session, the members of the stakeholder group will use guided brainstorming activities, led by CTAA staff, to create solution concepts to take into Task 5 (assumption testing), and identify key assumptions embedded in those concepts.

- 1) Stakeholder meeting #3: Idea generation (1.5 days). CTAA will prepare and lead brainstorm activities for the stakeholder group to generate ideas for potential solutions. On day 1, CTAA will facilitate the stakeholder group through the brainstorming and concept formation activities. On day 2 (.5 day), CTAA will guide the stakeholder group members in making any revisions to the solution concepts created the previous day, and facilitate the group in identifying make-or-break assumptions that will need to be tested for each solution concept and how they will be tested.

Deliverable: CTAA will summarize the resulting 2-3 concepts that emerged from stakeholder meeting #3 and the thinking that led to those concepts. CTAA will also summarize the key assumptions and the strategy for testing those assumptions.

Task 4: Assumption Testing - Expected timeframe: May 2016

CTAA staff, with help from members of the stakeholder group, will begin to test the key assumptions through research and in-person testing.

- 1) CTAA will conduct necessary research to test the key assumptions.
- 2) CTAA will prepare prototypes to be used for in-person testing of key assumptions.
- 3) CTAA and members of the stakeholder group will engage individuals with the prototypes to test key assumptions and to “co-create” the solution; this means that the prototypes will be rough visualizations that retain an “unfinished” look so that individuals will see an opportunity to provide their own thoughts and ideas. These individuals will include interviewees from Task 2 as well as other interviewees identified through the SPC.

Deliverable: CTAA will summarize the results of the assumption testing and develop a business model canvas for each solution concept.

Task 5: Preparing for Learning Launch – Expected timeframe: June 2016

In **Work Session 5**, CTAA staff will facilitate a meeting of the stakeholder group to discuss the results of the assumption testing and narrow down from three solution concepts to one solution concept.

- 1) CTAA will share ahead of time with the stakeholder group the results of the assumption tests and the business model canvas.
- 2) Stakeholder meeting #4: Preparing for the Learning Launch (4 hours). CTAA will facilitate a discussion of the results of the assumption testing. As a group, CTAA and the stakeholder group will choose the one solution concept that shows the most potential for success in responding to the group’s challenge question. The concept will meet the design criteria developed in Task 2 as well as tests in these three areas: customer desirability, operational feasibility, and financial viability. CTAA will also lead a discussion of how the members of the stakeholder group can do a limited launch of the solution (limited by geography and/or time and/or scope) to learn more about how the solution could work.

Deliverable: CTAA will deliver a plan for a learning launch for members of the stakeholder group to conduct.

PROPOSED SCHEDULE

PHASE	MONTH					
	Jan	Feb	Mar	Apr	May	Jun
Task 1: Planning the Research Phase						
Task 2: Understanding Stakeholders and Context						
Task 3: Idea Generation						
Task 4: Assumption Testing						
Task 5: Preparing for Learning Launch						
Total						

* Note: Costs for all materials and any subcontractors will be paid by CTAA from the total contract funds.

STAFFING

The following CTAA team members will work on this project with Meadowlink:

- ⇒ Scott Bogren, Executive Director
- ⇒ Amy Conrick, Assistant Director
- ⇒ Rich Sampson, Editor, Community Transportation Magazine

Scott and Amy will facilitate and contribute to discussions and planning during core team meetings, the larger group work sessions. Both Amy and Scott have much experience facilitating groups, particularly around design thinking and testing prototypes, based on their work with mobility design teams across the country. Rich Sampson will assist in conducting and debriefing Task 2 interviews and preparing research data for the stakeholder group. CTAA will also use the services of a consultant graphic artist to assist in preparing all visualization tools used in the project.