Manual for
Community Forums

Consortium for Science,
Policy & Outcomes
at Arizona State University

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1   Overview

1.1 Project Overview

The [Expert and Citizen Assessment of Science and Technology](#) (ECAST) network—led by [Arizona State University](#)'s [Consortium for Science, Policy and Outcomes](#) (CSPO), the [Museum of Science, Boston](#), and [SciStarter](#)— and the [Association of Science and Technology Centers](#) (ASTC), with support from New America's [Public Interest Technology University Network](#) (PIT-UN), created a **Public Interest Technology Community Innovation Fellowship** (PITCIF) program for staff at eligible ASTC Science Center and Museum Members and their community partners.

This pilot fellowship will train the next generation of science-engagement professionals to collaborate with local civic, government, and university partners to engage the public on science and technology issues that matter to their local communities.

1.2 About the Manual

The Consortium for Science, Policy & Outcomes (CSPO) created this manual as a training resource for the fellows. It is work in progress and will be periodically updated. The manual will serve as a guide for fellows hosting forums in their cities. The purpose of the manual is to provide information about what needs to be done before, during, and after the forum.

For questions regarding this manual and the forum process, please contact:

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Dissemination Strategy

Registration platform
Facilitator Guide   Kimberly Quach, Kimberly.Quach@asu.edu
Forum Materials

2   Forum Preparation

2.1 What is a forum?

The community forums are designed as informed public deliberations. Participants receive briefing materials prior to the forum to help them better understand a socio-scientific topic; societal questions, issues and tradeoff; plausible societal responses; and expert and stakeholder opinions.

Each forum brings together approximately 50 members of the general public. These individuals are **non-experts** with varying levels of familiarity with the topic at hand, and different perspectives on how responses might affect their lives and communities. Forum participants are seated at tables (or divided into groups for on-line) with approximately 5-6 other participants and a trained facilitator.

The facilitator guides the participants through different sessions, or rounds, of discussion. Each session focuses on a different sub topic or issues. The sessions build on one another throughout the day. Facilitators are trained ahead of time and follow the detailed facilitator guide (more information in Staff section).

2.2 Forum Agenda

The following agenda outlines the structure of the forum day from a project on autonomous vehicles and notes the main focus of each session.

9:30am – 10:00am	Participant Check-In
10:00am – 10:20am	Welcome *Head facilitator welcomes participants. Optional opening remarks from a local government or industry official.*
10:20am – 10:30am	Session 0 – Introduction *Main objective: Participants get to know their neighbors and facilitator by answering some questions.*
10:30am – 11:10am	Session 1 – My Transportation Routine Today *Main question to answer: What is your present mobility situation and what effect might driverless mobility have on it?*
11:10am – 12:25pm	Session 2 – Automated Systems, Trust and Confidence *Main question to answer: Would you be willing to give up control of a vehicle to an automated computer system and under what conditions?*
12:25pm – 1:10pm	Lunch & Group Photo

1:10pm – 2:25pm	Session 3 – Future Automated Transportation Scenarios *Main question to answer: What development model do citizens prefer and how do various tradeoffs affect this preference?*
2:25pm – 3:10pm	Session 4 – Who Decides? *Main question: Who do you trust to govern this technology? What role should they play?*
3:10pm – 3:20pm	Break
3:20pm – 4:20pm	Session 5 – Local Session *Main objective: Answer questions of relevance to local stakeholders.*
4:20pm – 4:30pm	Session 6 – Evaluation *Main objective: Conduct post survey. Collect final thoughts.*
4:30pm	Wrap Up

2.3 Project Timeline

As a local convener, your role is to host a forum in your city. Your key responsibilities include **1) session design, 2) participant recruitment, 3) forum logistics, and 4) results dissemination.** The timeline and chart below offer an overview of when each of these tasks occurs. CSPO will host training webinars. The first set of webinars will focus on concepts and overview. The second set of webinars will discuss topic selection, session design, participant recruitment, facilitator training and event logistics. Finally, the third and final webinar set will focus analyzing, reporting and disseminating the results.

Two months prior to the forum	Session Design
	      Host design workshop/meeting
	      Convene expert-stakeholder advisory board/committee
	      Design session and agenda
	      Develop questions and contents
	      Develop forum facilitation guide
	      Develop audio/visual materials
	Participant Recruitment
	      Develop forum participant recruitment strategy
	      Develop screening application
	      Develop recruitment materials
	      Launch forum recruitment (6 weeks prior to the forum)
	Forum Logistics
	      Reserve room and a/v, arrange catering (for in-person)
	      Secure technology platform (for on-line)
	      Arrange preliminary logistics Forum Logistics

One month prior to the forum	Participant Recruitment
	      Conduct targeted recruitment to reach missing demographics
	Forum Logistics
	      Recruit event day staff and facilitators

1-2 weeks prior to the forum	Forum Logistics
	      Facilitator training
	      Event management
	      Assemble materials
	Participant Recruitment
	      Select participants
	      Send participants background materials and logistics
	      Send reminders

After the forum	Results dissemination
	      Tabulate and analyze data
	      Compile and share results

3 Forum Design

3.1 Design Workshop

The design workshop is a pre-deliberation design event that convenes diverse experts and stakeholders from the public, private, not-for-profit, and academic sectors to:

- Educate and inform about the need, objectives, and design principles for citizen deliberations forums;
- Collect advice on salient issues, questions, and relevant content for use in citizen deliberations to align outputs with decision-support needs;
- Assist in framing broader challenges and mapping of stakeholder values and perspectives;
- Develop a representative panel of experts and stakeholders for content review and citizen interaction.

The design workshop should bring together approximately 15-20 stakeholders from local government, specifically those involved with planning and policy related to the topic, and relevant experts and community organizations.

- Welcome and introductions
- Background on the issue
- Project objectives and plan
- (optional) Overview of ISE and Partner work
- (optional) Sample forum deliberation exercise
- Designing deliberation material to be useable for decisions
- Theme explorations (up to three), and project framing conversation: lightning talks (by expert or stakeholder); introduction of issues; small-group conversations; refining of issues; recommendations for background material
- Workshop summary, next steps, looking forward

After the design workshop, fellows will synthesize the input from the stakeholders and decide on the key elements.

- Agenda for an engagement event with participatory activities for your topic?
- Educational tools, visuals, or other information to help participants work through important issues for this topic
- Involving experts or stakeholders before, during and after the forum
- Collecting data from participants to help inform decision-making

3.2 Alternatives

In an event an in-person workshop is not possible, fellows are encouraged to use alternative means of expert and stakeholder engagements such as online workshop, surveys, interviews, and meetings. Regardless of methods chosen, the final outcome should satisfy all of the objectives of the in-person workshop.

4 Participant Recruitment

The forum aims to bring together approximately 50 demographically diverse individuals representing the rough make-up of the local community. Fellows must dedicate time and resources to actively recruit participants. We encourage fellows to begin recruitment at least 6 weeks in advance. This section includes a guide for creating a recruitment plan.

4.1 Demographic Diversity

Forum participants should reflect the demographic diversity of the local community. Note, we aim for **diverse** representation, not **statistical** representation. Namely, fellows should aim to have a critical mass of each demographic category in order to foster diversity and ensure that the voices of all members of the community are adequately represented.

Selection criteria:
- Age (18 and older)
- Gender
- Ethnicity
- Geographic location (urban, suburban, rural)
- Education level
- Level of knowledge about the topic (limit number of participants with significant knowledge)
- Other considerations (e.g. individuals with disabilities, youth groups)

> ***Lessons learned***
> Populations that are especially difficult to reach include:
> - Below age 25
> - Greater than 65 age range
> - Below high school education

For the "other considerations" category, fellows can target or highlight populations that are of particular interest to the stakeholders.

4.2 Stipend

Participants may receive an $25 stipend for participating in the forum. Stipends can either be gift cards or checks. CSPO recommends providing $25 American Express gift cards to participants at the end of the forum.

Forum advertisements should reflect the type of stipend that participants will receive and any time delays between participating in the forum and receiving the stipend.

4.3 Recruitment Plan

In order to achieve a diverse group of participants with respect to the criteria listed above, fellows will need to select approximately 100 participants. This means that fellows will need to conduct sufficient recruitment efforts to garner about 150-200 applications.

After selecting participants, fellows should send periodic emails to remind them about the upcoming forum and request that they let the organizers know if they can no longer attend.

Fellows should aim to have **75 confirmations** on the day before the forum to account for participants who will not show up on the day of the event.

CSPO asks that all Fellows complete a **Recruitment Strategy Plan** (Appx 1) to structure their recruitment process.

Recruitment timeline

6 weeks prior	2 weeks prior	1-2 weeks prior	1 week prior	Day before	Forum Day
Start Recruitment Aim for 150-200 applicants	**Select Participants** 1st round - 60 people 2nd round - depending on # of confirmations	**Confirm 115 Participants** Keep track of email confirmations	**Logistics Email** Send email containing event logistics, presurvey, and background materials	**Final Reminder** Facilitators send final reminder email	**Thank participants** Send a thank you email with photos and preliminary results 1 week after the forum

To allow sufficient time to recruit 75 demographically diverse participants, CSPO recommends that fellows begin their recruitment efforts 6 weeks in advance of the forum. A tradeoff of early recruitment, however, is that individuals who apply closer to the date of the forum are often more likely to actually attend. Nevertheless, fellows should begin recruitment early and then remain in contact with selected participants up until the forum.

Members of the public apply to participate in the forum via an online application. Google Form, Survey Monkey, etc. can be used to collect information. Fellows should review the applications and select participants at regularly scheduled intervals and send them an email to confirm their participation and note any dietary restrictions if food is being served.

One week prior to the forum, fellows will send confirmed participants a logistics email containing event logistics and background materials to review (Appx 3).

Two days before the forum, fellows should assign participants to tables. Once table assignments are complete, table facilitators should reach out to participants to introduce themselves and remind participants about the next day's forum (Appx 3).

Finally, fellows should send participants a thank you email containing photos and preliminary results one week after the forum.

4.4 Recruitment Methods

Many methods exist for recruiting forum participants. The chart below outlines some commonly used strategies. We recommend that fellows combine multiple recruitment

methods. Fellows will describe which recruitment methods they intend to use in their Recruitment Strategy Plan**.**

| Method	Pros	Cons	Time cost	Financial cost
Posting on social networks	Easy to implement and can reach many people *It is best to share multiple posts over time*	Misses demographics that are not social media users	Low	Low
Craigslist	Easily reaches many people. Often leads to significant boosts in number of applications.	Gives a false sense of security. Individuals from Craigslist who apply and confirm often do not show up.	Low	Low
Advertising in traditional media (newspapers, radio, etc.)	Effective Helps reach diverse demographics	Costs associated with buying advertisement space Time spent creating ad	Medium	Medium
Invitation letters (sample in Dropbox)	Can be effective, especially if they are official letters (with the city's logo and the major's signature).	Need to send many letters to get 300 applicants	Medium	Medium *Depending on the cost of postage.*
Email listservs	Easy to implement and can reach many people *Most effective if your local stakeholders share information on their networks too*	Excludes those who are not Internet users May not reach individuals outside of your typical network	Low	Low
Organize an event with 15 heads of associations/networks	Very effective Helps to target specific groups. This can be achieved as part of the local design meeting.	Requires planning	Medium	Medium *Higher cost if providing a meal*
Phoning	Very effective method for securing final confirmations. Phoning is recommended for the two last weeks	Time-consuming	High	Medium to high *Depending on if you conduct work internally or externally*

Face-to-face recruitment at local events	Helps reach diverse demographics	Must identify and attend events Not always effective at reaching participants who will actually attend	Medium	Low
Snowball-sampling (invite one person and tell him/her to invite 3 other people or a family member/colleague)	Effective during the last two weeks before the event Can be suggested to the confirmed participants	May not help with diversity of participants	Low	Low
Outsourcing (use a recruitment company)	Time saver Diversity of participants guaranteed	Highest cost	Low	High

Sample Craigslist Advertisement

The following is a sample posting on Craigslist. Posts to the Craigslist jobs page cost approximately $45 per post.

$100 FOCUS GROUP on driverless mobility - no prior knowledge necessary (University of Maryland, College Park)

image 1 of 4
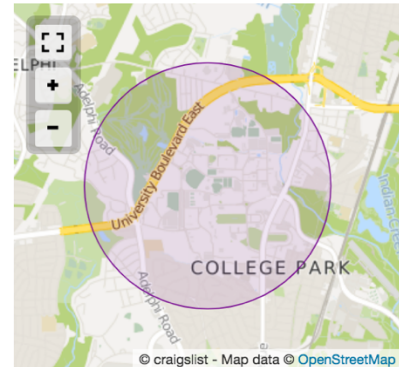
University of Maryland, College Park
(google map)

compensation: **$100 stipend and free lunch**

employment type: **part-time**

non-profit organization

OUR DRIVERLESS FUTURES: Community Forum on the Future of Driverless Mobility

WE NEED YOUR IDEAS! NO EXPERIENCE NECESSARY!

SATURDAY MAY 11, 2019, 9:00 am to 5:00 pm

Driverless mobility systems could have profound social and economic impacts on our society and could dramatically change how we get from place to place. What role, if any, do you want these systems to play in your life?

Add your voice to the conversation! You will meet fellow citizens and engage in thoughtful dialogue. We are looking for individuals with a variety of backgrounds and viewpoints representing the diversity of our community.

Those selected will receive a $100 stipend for participating and lunch will be provided. You must be at least 18 years old to apply. No prior knowledge is required!

APPLY HERE (by May 5): themobilitydebate.net/find-a-debate

(If you have problems completing the online application respond to this post via email or call 202-601-4323)
Selected applicants will be notified by email by early May.

- Principals only. Recruiters, please don't contact this job poster.
- do NOT contact us with unsolicited services or offers
- OK to highlight this job opening for persons with disabilities

5 Event Logistics

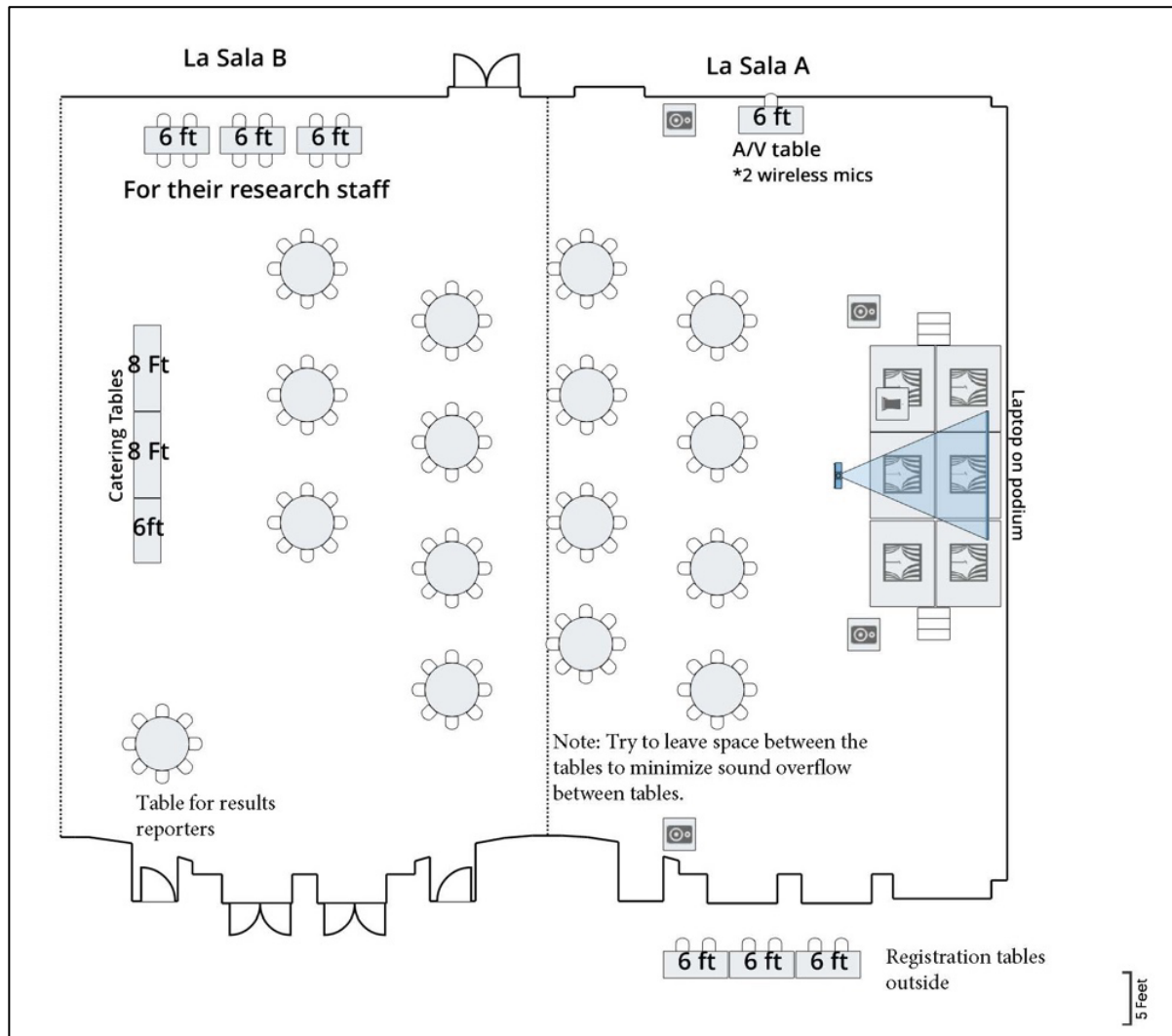## 5.1 Venue (in-person)

Facilities

The venue should include the following:
- Large ballroom with sufficient space to hold participants, forum staff, and guests (~60 people)
- 10 - 60" round tables with 8 chairs per table
    - 7 tables for participants
    - 1 table for results reporters
    - 1 table for guests and the press
- Tables for the catered lunch, snacks, and beverages
- Extra tables for logistics staff (later used to hand out participant stipends)
- Table for check-in
- Podium from which the head facilitator can speak (should be visible to everybody, consider using a stage).
- Comfortable chairs (hard plastic chairs might become painful after several hours to some participants)
- Restrooms available nearby
- Make sure that the venue is accessible to individuals with disabilities.

Technical equipment
- Computer loaded with timing PowerPoint and video clips – must be able to connect to visual display system
- Computers with Internet access to report results – could be the personal computers of results reporters (if desired)
- Microphone and podium
- Additional handheld microphone
- Projector and screen or television screens visible to all participants
- Speakers for microphones and for playing video clips

Sample Room Layout for 100 people

Equipment List
[26 Total Tables, 147 Total Chairs]

8	6' X 2.5' Rectangle		1	3' X 3' Podium	4	3' X 3' Speaker
2	8' X 2.5' Rectangle		6	6' X 8' Stage	2	1' X 3' Stairs
16	60" Round		1	14' X 12' Screen + Projector		

Transportation:
- Ensure that the venue provides free parking for forum participants
- If you would like to specifically target individuals from rural communities, consider offering these individuals a travel subsidy in addition to the participant stipend.

Seating plan:

Participants will have assigned seats to help ensure that each table is sufficiently diverse. Fellows may make small adjustments on the day of the forum to account for tables with too many or two few individuals, depending on the participant drop-off numbers.

Participants will remain at the same table throughout the entire day. This helps foster a sense of teamwork and connection between individuals at the table.

5.2 Venue (on-line)

Platform

The on-line platform should have the following capabilities:
- Sufficient to accommodate participants, forum staff, and guests (~80 people)
- Synchronous Video/Audio/Text with on/off capabilities
- Controlled and managed access
- Manually assigned breakout groups
- Ability to reassign and move people between groups
- Screen share capabilities
- Interactive capabilities (if desired)
- Polling option (if desired)
- Recording capabilities (if desired)

Breakout plan:

Participants will have assigned groups to help ensure that each virtual breakout room is sufficiently diverse. Fellows will make small adjustments on the day of the forum to account for groups with too many or two few individuals, depending on the participant drop-off numbers.

Participants will remain at the same group throughout the entire day. This helps foster a sense of teamwork and connection between individuals within a group.

5.2 Catering (in-person)

To make the forum an enjoyable experience and ensure that participants have energy throughout the day host should provide sufficient food and beverages.
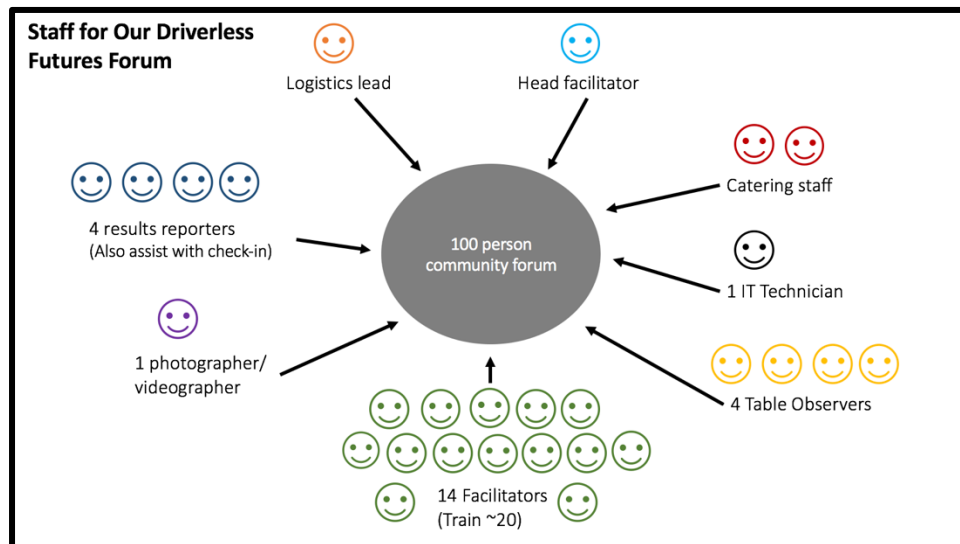
Meals provided:
- Continental breakfast
- Lunch
- Snacks for afternoon break
- Water and Coffee - ALL DAY!
- Other beverages such as tea or soft drinks

Participants will note any dietary restrictions on their on their confirmation email.

5.3 Staff

To ensure that the forum runs smoothly, fellows will need to recruit staff members to assist in a variety of roles.

Logistics Lead

The logistics lead acts as an "on-deck" troubleshooter throughout the forum. The lead assists with setting up the materials for the forum and with check-in. If any problems arise throughout the day, this individual addresses them while the lead facilitator runs the forum. The logistics lead also helps pass out the stipend at the end of the forum.

Head Facilitator

The head facilitator is the emcee for the event. As such, the head facilitator sets the tone for the forum and should remain high-energy, friendly, and engaging throughout the day. The head facilitator serves as time-keeper, ensuring that the facilitators generally follow the timing outlined in the facilitator guide and timing slides. The head facilitator should walk amongst the tables throughout the forum to check in on the discussions and answer any questions that arise.

Facilitators

Facilitators guide the discussions at tables (or groups in case of on-line) of around 6-7 participants. Facilitators ensure that all participants have the opportunity to speak and that no one dominates the conversation. The role of the facilitator should be detailed in the facilitator guide. Facilitators will also receive training prior to the forum. Fellows should train approximately **10 facilitators** in order to have back-ups in case some facilitators cannot attend at the last minute.

Table/Group Observers (optional)

Table observers sit at a table throughout the day and take detailed notes on the conversation. The notes highlight main areas of agreement and disagreement, who dominated the conversation, and other observations about the structure and flow of the discussions. These notes offer an additional method of data collection. For consistency, observers should follow a standardized observation Protocol.

Results Reporters

Results reporters enter the worksheet data into the platform used for collecting forum results. At the end of the forum, results reporters are then able to show preliminary results, giving participants a sense of accomplishment and a chance to see what other participants thought. CSPO suggests having at least 2 results reporters. These individuals can also help with check-in for in-person forums. Results reporters will need to receive training on how to enter data into the collection platform.

Photographer/Videographer (in person)

The photographer/videographer captures footage from the forum throughout the day. Ideally, the photographer/videographer will have a nice camera rather than simply taking photos and videos using a phone. The photographer should capture a mix of wide angle shots of the room, candid photos of participant discussions, and action shots of participants using the stakeholder cards or filling out worksheets.

Catering Staff (in person)

CSPO recommends reserving two catering staff members to assist during the forum. Catering staff are responsible for setting up and later clearing away the food and beverages for the forum.

IT Technician

The forum may require audiovisual equipment to screen videos before each session and to run the PowerPoint throughout the entire forum. To avoid any technical difficulties, CSPO recommends having an IT Technician from the venue available to assist with any issues that arise. This is mandatory for online forum.

5.4 Detailed Preparation and Logistics

To help ensure that your forum runs as smoothly as possible, this section includes a detailed agenda and checklist for the day of the event. Information in this section assumes that other staff at the host facility will manage facilities set up and catering. If this is not the case, fellows may need to adjust the plan as needed.

Detailed Run of Show

In addition to the detailed agenda below, CSPO recommends using a PowerPoint of timing slides to help the head facilitator keep track of time. The facilitator guide should include

detailed timing information for each step within the session. The timing of those steps may be altered slightly at the discretion of the table facilitator, depending on the flow of conversation at the table. Following is an example from the driverless car public forum.

RUN OF SHOW		
8:00		*Tables, linens, chairs set up. AV set up tech (screen(s), mics, speakers, etc.)*
8:30		Core project team arrives to carry supplies and set out materials on all the tables.
9:00		Rest of staff arrives - some staff members direct participants to the forum location and other help set up check-in. *Breakfast catering and coffee/water delivered, ready by 9:30.*
9:30		Check-in opens Participants begin to check-in and can enter the forum room
10:00	10:20	Welcome and Introduction - Explain what the project is and why you have chosen to host a forum. - You may want to have a local industry professional or government official share a few remarks (less than 5 min) expressing interest in the participants' perspectives. - Be sure to explain the roles of facilitators, table observers, and guests. - Thank participants for their time.
10:20	10:30	Session 0
10:20	10:25	Introductions
10:25	10:27	Individual Responses
10:27	10:30	One word answers
10:30	11:10	Session 1
10:30	10:35	Our Driverless Futures_Session 1 video
10:35	10:40	Briefing/Writing about day
10:40	10:55	Step 1: Current Mobility Routine
10:55	11:10	Step 2: Hopes and Concerns
11:10	12:25	Session 2
11:10	11:25	NOVA clip/briefing
11:25	11:30	SAE Levels of Automation
11:30	11:55	Part A Safety and Testing Stakeholders
11:55	12:25	Part B Data and Security Stakeholders *Lunch catering arrives 12:00, ready by 12:25*
12:25	1:10	Lunch
12:25	1:00	Eat lunch
1:00	1:10	Group Photo
1:10	2:25	Session 3
1:10	1:15	Our Driverless Futures_Session 3 video
1:15	1:40	Step 1: Transportation Scenarios
1:40	2:05	Step 2: Scenario Stakeholders
2:05	2:25	Step 3: Selecting Desired Scenarios
2:25	3:10	Session 4

2:25	2:30	Our Driverless Futures_Session 4 video
2:30	2:40	Read cards
2:40	3:10	Group discussion *Afternoon snack catering arrives 3:00*
3:10	3:20	Break
3:20	4:20	Session 5: Local Session
4:20	4:30	Session 6
4:30		Wrap Up - Thank participants again for their time - While participants complete post-survey, play a slideshow with some of the preliminary results graphs from Sphinx - Explain how distribution of stipends will work
5:00		*Breakdown can begin*

Master Checklist

Fellows should develop checklist outlining the materials that will be needed to run the forum. Following is an example of a checklist from the driverless car forum.

MASTER CHECKLIST
CHECK-IN MATERIALS
☐ 2 copies of check-in list of participants (minimum – you can have more if you like and/or can separate them into A-L/M-Z)
☐ 2 copies of check-in protocol (Appx 4)
☐ Pens
☐ Printed nametags (participants, staff, observers & speakers) – for participants and facilitators, include the table number they'll be seated at on the nametag
☐ Extra blank nametags
☐ Sharpies for nametags
☐ Participant CLE code stickers (white return address labels, size 1.75" x 0.5") - 8 per person, paperclip strip of stickers to participant nametags
☐ 100 copies of consent forms
☐ 100 copies of photo release forms
☐ 50 copies of pre-surveys **(MAKE SURE PRESURVEYS HAVE CLE CODES WHEN TURNED IN)**
☐ No-photo sticker dots (used if participant does not consent to have photo/video taken)
☐ A-L and M-Z signs (separating participants into groups by last name will help expedite check-in. You may want to split the alphabet in a different way based on the last names of your registrants.)
☐ Tablecloth if venue is not providing tablecloth

☐	Folders/manila envelopes to collect completed pre-surveys, consent forms, and photo release form

TABLE MATERIALS	
☐	Pens (and pencils if needed for local session) – ~10 per table
☐	Pad of sticky notes – 1 per table
☐	Sign holder with table number – 1 per table
☐	Ground Rules for Discussion sign (we find these helpful for facilitators to refer to in order to ensure a respectful conversation at the table) - 1 per table (Appx 5)
☐	Forum agenda – 1 per table

FACILITATOR MATERIALS – We recommend presorting these materials into folders for the facilitators. You can use one folder per session (other than combining Session 0 and Session 1 into one folder). We also recommend having an extra complete set of materials just in case. This section assumes that your number of facilitators equals your number of tables.	
☐	Facilitator guide – 1 per facilitator plus one extra

☐	One set per facilitator plus a back-up set of:
	   - Session 2 Stakeholder cards
	   - Session 3 Scenario cards
	   - Session 3 Stakeholder cards
	   - Session 4 Decision Maker cards
	   - Session 4 Issues to Consider cards
	   - Group Worksheet

☐	105 copies of each of the Individual Worksheets – *7 of each per facilitator if you are using 14 tables (there will be one extra set). If your tables have more than 7 participants at them, each facilitator should have enough worksheets for the number of participants at the table. However, we **do not** recommend seating more than 7 participants at a table.*
	   - Session 0
	   - Session 1
	   - Session 2
	   - Session 3
	   - Session 4
	   - Session 5/Local Session
	   - Session 6

☐	One set per facilitator plus one backup of:
	   - Session 2 Facilitator Worksheet
	   - SAE Levels of Automation
	   - Background materials

☐	105 copies of post survey (~7 copies per table)

TABLE OBSERVER MATERIALS	
☐	5 charged recorders (observers can also use their phones instead)
☐	5 observer protocols (in Dropbox)

☐	5 notepads (or ask observers to bring laptops)

RESULTS REPORTER MATERIALS

☐	4 laptops with chargers and internet access
☐	4 copies of data recorder protocol (in Dropbox)

CHECK-OUT MATERIALS

☐	Stipends if distributing on day (cash gift cards recommended)
☐	Check-in list with space for participant signatures (participants sign when they receive stipend)
☐	Post-survey collection envelopes

MISCELLANEOUS

☐	Camera/Video camera for your Photographer/Videographer if you have not hired someone with this equipment
☐	Binder clips (helpful for organizing completed worksheets)
☐	Signs directing participants how to get to the venue from its entrance
☐	Welcome sign clearly indicating that participants are in the right place for the forum
☐	USB drive with backup of PowerPoint/videos

LEAD UP TO EVENT LOGISTICS

☐	Add any extra slides that you need for welcome, local session, speakers, etc. to the Run of Show PowerPoint. Ensure that slides that need to advance automatically have timings on them.
☐	Download all videos to the computer that you will be using for the event
☐	Put a backup copy of the PowerPoint and videos on a USB drive; Also save the PowerPoint as a PDF (PDF version will no long have automatic timing, but at least you'll have the slides)
☐	Print all materials; If you are using an external vendor for your table materials (individual worksheets, group worksheets, etc.) we recommend having them deliver the materials to you **no less than one week in advance**. Be sure to check that you have received all the materials you ordered and in the proper quantities well in advance of the event.
☐	Send table observers their protocol to look over – Ask if they are able to bring their own laptops with them.
☐	Send results reporters their protocol to look over – Ask if they are able to bring their own laptops with them.
☐	Send results reporters, observers, facilitators, staff, and participants logistics information including where to park, what to bring, etc.
☐	Assign participants to tables; At each table aim to achieve demographic diversity.
☐	Create a check-in list of participants – needs to include name, whether they have turned in consent form, photo release form, and presurvey, and a space for their signature.

☐	Check which participants have completed the pre-survey – if they have already completed, check off respective box on participant check-in list
☐	Give facilitators list of participants at their table to send a final reminder email.
☐	Print name tags for all staff/participants/guests – if they are assigned a table number, make sure that's on the name tag
☐	Prepare facilitator folders according to Facilitator Materials checklist section
☐	Print CLE code stickers, paperclip them to participant nametags
DAY OF EVENT LOGISTICS	
☐	PowerPoint and videos loaded onto main computer; Check that videos play, timing slides automatically advance, and sound works.
☐	Make sure venue is set up with linens/AV/etc. as expected
☐	Run through any tech questions you may have with AV; Make sure microphones work

6 Communication

6.1 Media Strategy

Connecting with local media outlets is valuable for both the recruitment and results dissemination phases. Traditional media outlets are valuable tools for reaching individuals who do not often use the Internet. Fellows should consider purchasing advertisement space in local newspapers or airtime on local radio stations to recruit forum participants.

Media contacts are also valuable for helping to share the forum results. Fellows could share a press release explaining the project and its goals and invite the media to attend part of the forum. Key partners should also circulate the results report.

6.2 Forum Guests

Fellows should consider inviting civic, community, academic, and industry partners to the event. Invited guests should include not only individuals who advised your team while developing your forum, but also other relevant local stakeholders. Having members of government and industry in attendance helps participants know that their voices are both heard and valued.

During the event, these guests may want to sit at tables and listen to conversations to better understand how the forums work and the perspectives of participants. They are encouraged and welcome to do so as long as they remain silent observers and do not participate in the discussion. All guests should be introduced to participants at the beginning of the day so that their role is understood. Guests should confirm their attendance in advance so fellows can explain their role as observers rather than participants.

7 Results Analysis and Dissemination

7.1 Data Entry

At the end of each session, table facilitators should collect participants' worksheets at their tables. Before turning these in to the results reporters, facilitators should ensure that each worksheet has proper identifications necessary for data entry. Results reporters will collect all of the worksheets and enter the results data. If they are unable to input all of the data during the forum, fellows must enter the remaining data so that the dataset is complete.

7.2 Data Analysis

Fellows will tabulate, compile and analyze the quantitative and qualitative forum results.

7.3 Dissemination

The forum results can be collated in a summative report and disseminated to relevant experts and stakeholders and members of the community,

Appendix 1: Form for Participant Recruitment Strategy

A. Person(s) responsible for the participant recruitment for your forum

Name	Email	Telephone	Responsibility

B. The criteria for selection

Please fill out the following tables based on the population of your city:

Age

Percentage of the population in the age group 18-24	
Percentage of the population in the age group 25-44	
Percentage of the population in the age group 45-64	
Percentage of the population in the age group 65+	

Geographic zone

Percentage of the population that lives in an urban area	
Percentage of the population that lives in a suburban area	
Percentage of the population that lives in a rural area	

Educational level

No High School Degree	
High School Degree	
Some College, No Degree	
Bachelor's Degree	
Graduate Degree	

Gender (if different from 50/50)

Percentage of the population who are women	
Percentage of the population who are men	
Percentage of the population who identify as other	

Race/Ethnicity

White	
Black	
Asian	
American Indian	
Mixed/other	
Hispanic	

Other target demographics/populations (e.g. Uses a wheelchair, visually impaired, etc.)

Characteristic	Percentage

Source(s) of data

Where have you found these data?	

D. Recruitment Strategies

Which method(s) will you use to recruit participants? (see manual)	
What is the time frame for the different steps in your participant recruitment?	
What will be the biggest challenge in making the participants reflect the general population in your city?	

How do you plan to manage this challenge?	
Other considerations you have made regarding your participant recruitment strategy?	

Our Driverless Futures: Community Forum on Automated Mobility

Congratulations! We are happy to inform you that based on the information you provided in your application, you have been selected to be one of the 100 participants from <Insert City> who will participate in a day-long discussion about driverless mobility.

General information for the event is as follows:
Date: <Insert Date>
Time: 9:30 AM– 5 PM (A light breakfast and lunch will be provided)
Location: <Insert General Location>

At the forum, you will learn about driverless mobility, ask questions, and engage in thoughtful dialogue. No prior knowledge required—we will provide some general background information. At the forum you will share your thoughts, opinions, and reflections on driverless mobility. There are no correct answers—every viewpoint is welcome and wanted! **You will receive a $100 stipend for participating in the forum.**

IMPORTANT: Please email <Insert Email> to let us know that you plan to participate in the forum.

Please RSVP either way so that another individual can have the opportunity to participate if you can no longer attend.

Once we receive your confirmation, we will send you additional information including:
- The program schedule for the day,
- Directions and parking information,
- A brief survey to complete before August 3rd, and
- Briefing materials for you to read before the meeting.

Please contact <Insert Email>   if you have any questions or concerns.

Best regards,

<Insert Name>
<Insert Title>
<Insert Organization>

Dear <Name>,

Thank you again for agreeing to join us for **Our Driverless Futures: Community Forum on Automated Mobility** at <Location> on Saturday, <Date>, 2019.

Please DO NOT share this logistics information with others, as we have selected only the number of people that we can accommodate from our applicant pool.

Below you will find an agenda and links to survey, documents, direction and transportation information. It is very important that you arrive no later than 9:30AM and check in at <Room>, so the program can begin promptly at 10:00 AM. There will be signs and volunteers to direct you.

Forum Agenda – Our Driverless Futures: Community Forum on Automated Mobility
<Date>, <Location>

AGENDA:
9:30am – 10:00am   Participant Check-In
10:00am – 10:15am   Welcome
10:15am – 10:30am   Session 0 - Introduction
10:30am – 11:15am   Session 1 – My Transportation Routine Today
11:15am – 12:50pm   Session 2 – Automated Systems, Trust and Confidence
12:50pm – 1:40pm   Lunch
1:40pm – 2:45pm   Session 3 – Future Automated Transportation Scenarios
2:45pm – 3:35pm   Session 4 – Who Decides?
3:35pm – 3:50pm   Break
3:50pm – 4:50pm   Session 5 – Local Session
4:50pm – 5:00pm   Session 6 - Evaluation
5:00pm   Wrap Up

There are a few very important items, which require action on your part in a timely manner.

Before Saturday, <Date>, 2019

1. Please complete the pre-survey at this link. Please note that you will need your **unique Participant ID/CLE** Number **<CLE CODE>**. If you are unable to complete the survey online, a paper copy of the survey will be provided for you during registration to complete before the forum. We can also email a pdf of the form if requested.

2. Please download and review the background information from this link. It will give you an idea about the basics of what will be discussed. We can also email you a pdf copy if requested.
3. BEFORE you come to the meeting, please print, read, sign and date the Consent Form and Photo-Release and bring them with you when you come to the meeting. If you are unable to print, we will have copies available for you to read and sign when you check in.
4. Please note that your $100 American Express gift card (CHANGE IF STIPEND TYPE IS DIFFERENT) will be given to you after you complete your participation in the forum.

Travel Logistics for Our Driverless Future Forum
- **Event Location:** <Location with Google Maps Link>
- **Walking Directions:** SAMPLE: From the parking area, cross over University Way to the University Center Building. There is a covered walkway to the left of the Campus Bookstore as you face the building from the road. Go to nearly the end of the walkway and enter the building through the doors on the right-hand (west) side. The La Sala room and the registration tables will be straight ahead.

Sincerely,
<Name>
<Title>
<Organization>

Facilitator Email to Participants
Hello!

My name is <Your name>, and I'll be your facilitator at the forum on driverless mobility tomorrow. I'm really looking forward to engaging with you and the other participants at our table in a day of thoughtful discussion.

As a reminder, the forum will be taking place **this Saturday, <Date>** from 9:30am - 5:00pm. The forum will be hosted at the <Location>.

Please be sure to read over the background materials, complete the pre-survey, and print, read, and sign the consent and photo release forms.

You can find directions to the <Location> and forms via this link:
<LINK TO LOGISTICS ON EITHER LOCAL PARTNER WEBSITE OR CSPO WEBSITE>

If you can no longer attend, please email <Person collecting forum responses>. Otherwise, I look forward to seeing you on Saturday!

Best,
<NAME>

Ground Rules for Discussion

- Science informs us, it does not tell us what to do

- Respect others' opinions and ideas

- No interruptions – one person talks at a time

- Listen carefully to what others have to say

- It's okay to disagree with others

- Take part in the discussion

- Give everyone a chance to speak

- Keep comments brief and to the point