SPARK: Checklist for hosting an observation

Hosting an observation in the SPARK program should be lightweight. You don't want to spend too much time on formalities, but you want to make the best use of everyone's time. Here's a checklist to help.

Note: This guide starts with the actual observation. If you are still in the planning stage—wondering how to schedule, advertise, pursue, or negotiate the right time for an observation—please see [the participation section of the SPARK site](). Also, be sure the [workflow form]() is completed before you start.

Part One: Before the session

- ❑ Form a rough agenda for the session.
  - What do you hope to get out of it?
  - Are there questions you want to ask your guest?
  - Are there specific processes, systems, or techniques you want to cover?
  - Who from your team will participate?
- ❑ Consider how you will respond to interruptions.

Part Two: During the session

- ❑ Set the stage
  - Remind everyone involved that an observation has multiple goals. You want to share information about what you do and how you do it, and you also want to hear about their work and environment. Discussing differences is an important part of the process.
- ❑ Take a few minutes to get to know participants. Here are a few possible questions:
  - How much do you know about what our unit does and the business units we support?
  - In short, what does your team do and what UI business processes do you support?
  - What do you hope to get out of this session?
- ❑ Review the rough agenda you prepared in Part One and adjust based on your conversation.

Part Three: The observation

Each observation will be unique, but here are a few tips:

- ❑ Define acronyms as you use them, or prepare a glossary beforehand.
- ❑ Check for understanding along the way.
  - Ask specific questions.
    - Example: Rather than "You with me so far?, " you could ask, "Are you familiar with the concept of two-way binding?"
  - Check your assumptions.
    - The topic you are covering may be outside the participant's area of expertise. You may need to break things down and provide more context.
    - A participant's skillset or background may provide a new perspective and they may be able to teach you a thing or two about the topic.
- ❑ Remember to ask for input so the learning can be two-way.
  - Again, ask specific questions. Here are some examples:

        - What is the best way you have found of managing your database backups?
        - What is your workgroup's approach to project management?

Part Four: Wrap-up and review

- [ ] Ask if participants have any final questions.
    - Here you can be a bit more open-ended. Examples:
        - What were some surprising things you learned today?
        - Is there a specific area you would focus on if you were us in terms of looking for more effective and efficient processes?
        - Is there a topic you would like to follow up on? When would be a good time?
- [ ] Ask for open and honest feedback on the session.
    - Is there anything we should do differently in future observations?
    - If you get vague answers, ask specific questions like, "Did we spend enough time on the topic?"

Part Five: Reflection and planning

- [ ] Review initial goals and think about whether you should adjust anything for future observations.
- [ ] Consider what you heard.
    - Should your unit make any changes to its processes based on what you learned?
    - Are there conversations you should schedule to explore a topic?
    - Would something you discussed be of interest to a larger group? Could you present at a community meeting, post a brief on the intranet, or host an open house?
- [ ] Put a reminder on your calendar for follow-up.
    - A week or two after the session, reflect once more on what you heard and connect with participants to see if they have new questions or want to continue the conversation.
- [ ] Fill out the post-participation survey after the session to assist the SPARK team with metrics.