

**ITS Professional Capacity Building Workshop: Setting Strategic Direction**  
**July 7, 2010**  
**8:30 am – 4:30 pm**  
**Washington, DC**  
**Meeting Proceedings**

**Attendees:**

Valerie Briggs, ITS JPO, U.S. DOT  
Steve Clinger, FHWA, U.S. DOT  
Richard Cunard, TRB  
Kathy Frankle, University of Maryland  
Yehuda Gross, ITS JPO, U.S. DOT  
Cheryl Lowrance, Noblis  
Doug Noble, ITE  
Marcia Pincus, ITS JPO, U.S. DOT  
Suzanne Sloan, Volpe, U.S. DOT  
Grant Zammit, FHWA, U.S. DOT

**Facilitators:**

Mac Lister, ITS JPO, U.S. DOT  
Larry Raskin, Volpe, U.S. DOT  
Liz Greer, Noblis  
Charlotte Burger, Volpe, U.S. DOT

Mac Lister began the meeting by welcoming participants, describing objectives, introductions, and the roles of the group. He expressed how this meeting represents an important first strategic step for PCB Program Plan, and that the stakeholders were specifically invited because of their background, significant wisdom and understanding of the ITS PCB Program, and will help to move the program forward. The objective of the meeting and subsequent summer events will be to:

- Compile inputs to create a strategic plan for PCB specifically, including the development of a develop draft, mission, value statements, identify strategic goals.
- Receive feedback on the roadmap, e.g. how to get plan in writing format,
- Determine how this group wants to continue with this process?

Larry Raskin covered the day's agenda, desired outcomes, and ground rules for the group.

Participants expressed the following expectations or desired outcomes for the day:

- *Create good elements of a vision statement*
- *Thoughts about the strategic direction*
- *Solidify how we will leverage each others strengths- and how to ultimately deliver*
- *Who are the customers?*
- *Defining what the value is to the customer or organizations for participating with ITS PCB?*
- *What is the need?*
- *Gather thoughts from others?*
- *Out of the box thinking- set some new direction*
- *Who are our targets, how do we reach them, general direction*
- *Tap into the full range of delivery mechanisms, how to best get to the customer*
- *Create draft material to outreach to other groups towards the creation of a Program Plan*
- *Create a core group as a feedback loop for continuous learning for the Program-creation of a broad stakeholder group- outside of the DOT*
- *Need to engage the "decision makers" and the people that decide who receives training, and what useful training is- how to reach those people- what tools to use to reach these people? Elected vs. appointed- lifecycle of employees-*
- *Emerging opportunities, social networking etc.*
- *define a program that is a one-stop shop, accessible for the users*
- *Methods to keep content current*
- *What level of PCB are we prepared to invest in? Outreach, awareness, training that is tested?*
- *New ideas- need to redefine program*
- *Engage University's and engage core curriculums, new topics coming down*

- the pike- e.g. intellidrive- a series of new needs to training in the future*
- Flexibility for diff levels of organizational maturity- segmenting the target audience and defining their needs*
- What drives the customers to training? Mandated training vs. "optional" training?*

Liz Greer described the larger strategic planning process, which is starting with the development of Core Values, Mission, and Vision. She then detailed some of the high level characteristics of the transportation sector in terms of complexity and the opportunities for interconnectivity in terms of technology, people, agencies, and the consumer market.

Mac Lister spoke to the JPO ITS Strategic Plan and how it relates to the needs of the complexity and connectivity opportunities inherent in the transportation world, the legislative basis for the ITS PCB Program, past accomplishments, and outcomes of the ITS PCB Program, opportunities and threats. For example, the need to continue to be relevant as the outside world is changing, or the challenge associated with how to make ITS learning a multi-modal effort to let people know what is happening on a practitioner level.

The following critical questions and answers were discussed in terms of informing the Vision, Mission, and Core Values of the program.

***Broad vs. Narrow – Are we successful if we train a lot of people or if our projects are successful?***

- JPO has a role of developing some of the narrow material*
  - Evaluation should be broad*
- Quality vs. quantity*
  - Leads to success of projects*

***Research vs. Deployment – What do our users need?***

- key decision makers, need to create an awareness- 3 audiences: decision makers, and the whole transportation workforce, operating agency staff*
  - Need core competencies, targeted technical assistance via STIP, TIP processes,*
  - practical information to help people due their jobs*
- Core curriculum*
  - Resources for other information*
  - How to discern the best solution for users*
  - How do agency level employees find the status of ongoing or current research*

***ITS JPO vs. Partners – What is the appropriate role?***

***Role of the JPO***

- JPO identifies the core competencies for ITS, identify learning and development objectives to provide to Universities or existing entities*
  - JPO should be the one stop shop for who is delivering course material*
  - Developing curriculum around core competencies and tying this to deployment*
  - Coordinate or facilitate bringing the information together- becoming a clearing house*
- If it falls within the National Architecture, it is covered by this program*
  - Develop the content that is in the risk category- e.g. Intellidrive*
  - Upkeep of a database that coordinates training information*
  - Core curriculum for research development methods for ITS projects, e.g. how to develop a successful ConOps*

### **How do we let people know what is available?**

- One stop- shop in one place that is accessible and marketed in one place, e.g. NTTR
- Develop a diverse network of marketing to all the different professional organizations

### **Vision Exercise**

Larry Raskin took the group through an envisioning process for a desirable future for the ITS PCB program as a means to create guiding principles for a common draft vision.

Key words/phrases for Vision include:

- Happy user
- Timely, current
- One-stop shopping
- Measure of success
- Content or basics by DOT- and delivery by partners
- Masters Degree in ITS knowledge
- Professional tools
- Sought after, students eager to learn, spread the knowledge
- ITS PCB Association – develop ITS curriculum, diploma, certification, recognized internationally
- Guidance
- Thank you, you made a difference
- Champions
- Model cities that exemplify best practices
- Peers and friendships
- Trial and error
- Meeting, experience, value, application, and knowledge
- Connectivity that allows multi-modal opportunities via real time info, efficient operations, etc.
- Well trained, knowledgeable workforce that serves all user needs
- Framework that creates a legacy to support the people we serve
- People can find the information they need- the network concept
- Created a profession in ITS
- Profession, network and partnerships
- Knowledge base- core competencies
- One stop shop area that connects delivery, outside users, different specialties e.g. traffic signals, ITS standards etc.
- Multi-modal nature of ITS apps
- Benefits accrued to the “environment” as a result of ITS
- Transportation workforce into a “technology workforce”
- ITS-above the line info= Decisions makers give the green light to ITS and below the line info = training
- Open to creating different ideas
- Continuous, current, partners, helpful, useful, easy, expansive, options

### **Common words for a Vision statement:**

- Easy
- Current/timely
- Multi-modal
- Partnership
- Profession
- One stop shop
- Tools
- Comprehensive
- Customer
- Champion
- Options
- Knowledge
- Relevant
- Flexible
- Social
- Network
- Sharing
- Recognized
- Harmony
- Workforce
- Trusted
- Legacy
- Credible

ACTION: The ITS PCB Program team will use these key words to draft a Vision statement

## Mission exercise

Group to brainstorm 3-4 answers to the following questions on post-it notes:

- Answers these questions:
  - **Why we exist**
    - Legislative req's
    - ITS 101
    - Measurement
    - Adoption of new technology
    - Focal point for users
    - Establish profession
    - Social media
    - Training
    - Knowledge creation (a new idea for ITS PCB)
      - How far does research side vs. knowledge transfer side create knowledge- where is the overlap? What does the ven diagram look like?
    - Redundant

### Statement:

Provide a focal point for knowledge creation/transfer of basic/ advanced ITS information to create and maintain the profession, measure success, facilitate adoptions and deployment of new technologies, to ultimately, get Mac on youtube without being redundant.

- **Whom we serve – needs are different than the workforce**
  - Decision makers
  - Trainers/educators
  - University students (what about non-university students)
  - Transportation workforce (private/public)
    - Deploy-er
    - Technician/operators
    - Planners
    - Researchers
    - Industry

- **What we do that benefits users**

**Statement:** Provide one-stop shopping; establish knowledge sharing networks, provides core competencies, & baseline curriculum, using any tools, & technology to do it, through partnerships & delivery mechanisms to support deployments & research.

- Does PCB trigger or do we do?
- Role of sponsoring and guiding?
- **This becomes a question of “how”?**
- What is the distinction between ITS and operations?
- Why is this about deployment- and not planning, design, maintenance and operations? Deployment is happening as a commonplace activity for mature organizations. (Parking lot)
- How to make program managers use the Systems Engineering process?

**Statement:** No statement created

## Values exercise – highlighted = main values

Attribute:

- *Empower staff*
- *Provides sufficient resources*
- *Cooperation between departments/organizations = COLLABORATION*
- *Customer focus*
- *Defined roles/functions when an emergency occurs*
- *Joy and creativity in executing its mission*

- *Highly focused due to low budget*
- *Teamwork*
- *Focused on the whole- entirety*
- *Adaptive*
- *Responsive*
- *Recognition*
- *Leadership training and certification*
- *Respected(Earned)*
- *Recognized*
- *Changes with time*
- *Strength based on members*
- *Knowledgeable about current state of practice and future trends = FORWARD LOOKING*
- *Interested in new ideas and solutions*
- *Inspiration*
- *Integrity*
- *Social responsibility*
- *Collegiality*
- *Motivate*
- *Empower*
- *Hold responsible*
- *Reward*
- *Customer focus*
- *Promotes social value*
- *Inclusiveness*
- *Targeted*
- *Learn from mistakes*

#### **Main values:**

- Collaborative
- Customer focused
- Adaptive
- Responsive
- Knowledgeable and forward looking
- To become respected by demonstrating these values

#### **Filter:**

- Simple
- Internal vs. external – customer focus
- Specific

#### **Strategic goals**

For ITS PCB for the next 4-5 years

#### **WHY**

##### **Statement:**

- Create knowledge resources/portal: web based resource
- Create MOE's to track success of program, delivery (quality v. quantity issue)
- Create MOE's for tracking agency/ stakeholder improvement
- Create mechanisms/options/strategies for leveraging resources/partnerships
- Creatively use champions& model users through social media and others marketing tools
- Establish ITS profession, collaborate with stakeholders

#### **Comments/questions:**

- How to establish the ITS profession?
  - steps, levels of certification, engineering degree w/ concentration in ITS, try not to forget the non-engineer users/practitioners of ITS
- What is the body of knowledge out there?

#### **WHOM**

- Gain decision makers buy in every state and metropolitan area- gain champions to support ITS- deliver to a shorter attention span, in their language, targeted population
- incorporate ITS training in University programs (undergrad)
- Develop model state ITS training program (all levels) for all state to adopt

- Develop collaborative network of trainers and educators that feedback to the ITS PCB program

#### **Comments:**

- *develop a network that incorporates researchers- but not teaching how to do research- not ITS PCB role*
- *PM training about how to structure programs, or evaluate a specific model deployment based on a strategic set of criteria, are there specific techniques that have or have not worked? Best practices? Techniques for judging evaluation?*
- *Use professional orgs like ITE, EEE, etc. to provide benchmarks or best practices for specific research processes*
- *3<sup>rd</sup> bullet CVISN was a great example- states made business plans for this process (including training) which helped to move everyone up in the field*

#### **WHAT**

- Develop a transportation focused portal that provides an entry point to a knowledge sharing network that encompasses: comprehensive training courses, technology transfer, technical assistance, P2P, etc.)
- Establish knowledge sharing network that includes P2P, technical assistance, NTOC ITS Forum
- Provide core competencies and baseline curriculum for ITS

#### **CSF's Roadmap**

- July 20<sup>th</sup> meeting will be a strawman of sorts to present draft vision, mission, and goals
- Suggest a mix of diverse types of users- pick a targeted webinar
- Provide advanced material and expectations of what the product is for participants
- Need a level of detail regarding goals from users
- What are your expectations of the program? Needs?
  - Its hard to have the universe of "needs" and to formulate a program around that, especially when the needs can be very acute or current
  - Need for a survey to articulate needs
  - Need for a public process- but this might not get the best information- might want to do a targeted interview process e.g. a mid-level manager that know the broad vision or varying levels within an agency from a workforce perspective
- Training coordinators
- Users input re:plan/process
- Capture user needs – public
- ID biggest challenges, priorities, needs, what will show visible success?
- Stratify users? Who? Maturity?
- Needs of division offices, FHWA, MPO's, LTAPs,
- Reconvene in the fall? Who to have in the room?
  - Need for program development folks
- Timing of stakeholder meetings – link to/ with upcoming meetings and programs
- Segment "who"
- Result= rather than focus on developing strategic goal areas- focus on specific topic areas. Send info ahead of time

#### **Wrap up, Next steps**

- ITS PCB Program team will come up with a process to vet draft mission, vision, goals and will provide key points, ideas of today's meeting

#### **Parking lot issues**

- How to get to decision makers; to OLS appointed and elected, life-cycle
- Role of ITS PCB
- Centers of Excellence – how to leverage?
- Cost? Free? Who pays?
- Cross modal interaction re: ITS PCB

- Certification reqs: KSA's training
- "Deployment" vs. "plan, design and development"
- PCB relationship with researchers

**Other critical questions:**

- *What is the **ultimate value** of the ITS PCB Program? – Beyond training*
- **Marketing**- *how to let people know*
- *How do the **decision makers decide** what type of learning is needed and when?*

**Larger questions**

- *A need to develop a set of core competencies for ITS, a core curriculum e.g. NCHRP 2027 identifies core competencies, and elements of a defined core curriculum that defines ITS and all sorts of entities, organizations, can take elements of the core competencies to develop course work.*
- *Need for professional requirements to create a demand for learning, certification, or certificates e.g. PTOE as required on some govt contracts.*
- *Deployment vs. design, build, operations, and maintenance*