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Summary of the Dream Session Journey

**DAY 0**
- **EVENING**
  - Introductions
  - Activities to get to know each other
  - Inspirational digital transformation examples
  - Reception

**DAY 1**
- **MORNING**
  - Introduction
  - Design thinking activities to validate key problem areas
  - Develop and refine ideas that address the problems areas
  - Retrospective

- **AFTERNOON**
  - Each group pitches their fully developed idea to the room
  - Reflections on session progress
  - Define next steps

**DAY 2**
- **MORNING**
  - Session to formulate vision of digital transformation
  - Activities to develop value proposition, underlying concept, visual prototype, and proposed pilot plan for each finalist idea

- **AFTERNOON**
  - Each group pitches their fully developed idea to the room
  - Reflections on session progress
  - Define next steps

**Initial Dream Statement**
- Introduction
- Dream, design, deliver framework; TR: context, vision, and dreams
- Who is instrumental in the dream?
- Decision Making Process
- Define next steps

**Refine the Scenario**
- Introduction
- Dream, design, deliver framework; methodology; approach; Define next steps

**Dream Orientation**
- Introduction
- Dream, design, deliver framework; methodology; approach; Define next steps

**Session Orientation**
- Introductions
- Validate as-is problem areas, journey maps, and key pain points;
- Set session expectations; Define next steps

**Dream Refinement Kickoff**
- Introduction
- Dream, design, deliver framework
- Description of the dream
- Refine the dream through persona development and journey mapping
- Define next steps (including individual and small group interviews)

**Finalized Dream and Personas**

**Dream Orientation**
- Introduction
- Dream, design, deliver framework; methodology; approach; Define next steps

**Session Orientation**
- Introductions
- Validate as-is problem areas, journey maps, and key pain points;
- Set session expectations; Define next steps

**Session Orientation**
- Introductions
- Validate as-is problem areas, journey maps, and key pain points;
- Set session expectations; Define next steps

**Finalized Dream and Personas**

**Dream Book Delivery**
- Collaborative development of the final Dream Book

**Dream Book Book Creation**
- Collaborative development of the final Dream Book

**Dream Book Delivery**
- Collaborative development of the final Dream Book

**Initial Dream Statement**
- Introduction
- Dream, design, deliver framework; TR: context, vision, and dreams
- Who is instrumental in the dream?
- Decision Making Process
- Define next steps
DREAM Statement

How might we create culture that protects the data of the people we serve (survivors) and the people who serve them (volunteers) in a way that still allows us to get “shit” done?
Protecting Those We Serve and Ourselves

FEMA ‘major privacy incident’ reveals data from 2.5 million disaster survivors

by Joel Achenbach, William Wan and Tamara Lush
March 22, 2019 at 6:44 PM

Non-profits are a target for data breach

Data Breach Might Have Exposed Client Data

The NonProfit Times | News | April 23, 2019

A potential data breach was reported to police by the United Way of the Big Bend (UWBB) in Tallahassee, Fla.
The Team Rubicon Culture (Pre-Dream)
Dream Session

Human-centered design uses our **empathy** and **creativity**, inspiring us to find new and better ways to help and protect those we serve.

“Even with little-to-no experience in the process, you can come in here with an open mind and start with a big problem and come to a solution. You’ll be surprised with how creative your team gets and you’ll be very pleased with the outcomes that you receive.”

*Brian Calcagno – Development/Strategic Partnership*
Four teams used **Design Thinking** to create innovative solutions with high impact for four personas.

**Empathize**
- Personas
- Pains, Needs, Trends & Technology (PNTT)
- Journey Maps

**Define**
- Risks
- Prioritization

**Ideate**
- How Might We?
- Brain Writing
- Idea Matrix
- Brand Swap
- Round Robin

**Prototype**
- Vote
- Prototyping
- Pitch
- Feedback
Dream Process - Empathize & Define

Four personas and their journeys.

EMPATHIZE
- Personas
- Journey Maps
- Pains, Needs, Trends & Technology

DEFINE
- Risks
- Prioritization
Dream Process - Ideate

IDEATE

- How Might We?
- Idea Matrix
- Brain Writing
- Brand Swap
- Round Robin

Idea Generation

- Measure training activity and known data loss
- A/R communicatio n and process
- % tune incentives
- Avg. # of courses considered per person by Territory.
- # of courses completed
- Habit in field activities performed
- Content delivery mechanism
- Engagemen t metrics -> Drop in attendance
- DATA PRO
  - TR volunteer
  - SMART goals
- Idea Matrix
- Brain Writing
- Brand Swap
- Round Robin
- 9

Idea Matrix

- Newsletter mentions social media campaigns
- Standup meetings
- Social media awareness
- Social media engagement
- Social media influencers
- Social media metrics
- Visual badges or internal quall in Internal message boards

Mapping Themes and Selecting a Solution

- Emphasis on risks, threats, real examples
- Landing pages specific to where people are on their journey
- Visual badges or internal qualifications in email signatures
- Visual tokens safe to wear in the field like attached to a graph
- Visual tokens safe to wear in the field like attached to a graph
- Make sure to explain Why
- Peer communication
- Socialize the importance
- Display badges on Grayshirts
- Data needs to be identified
- Security
- KPIs
- Annual report
- R&I dog tags
- BLL tag
- Regulatory
- USA, OSHA, DOT, FDA
- USB dog tags
- Peer access
- IRP - Report IRP when you are in IR
- 文化相關 poor culture
- “TR learn” permeate whole culture
- Survivor self-registration, section of IR website - prominent & friendly
- STRUCTURES
- Programs
- Infrastructure
- 2-Way Communication
- Immediate Services
- Easy
- Difficult
- Low Security Risk
- High Security Risk

TEAM RUBICON
WIPFLI
Microsoft
NETHOPE
Dream Process - Prototype

**Possible Solutions – Time to Vote!**

**PROTOTYPE**
- Vote
- Prototyping
- Pitch
- Feedback

**Solution Pitch – “Home Base”**

A secure online portal dedicated to rebuild projects where homeowners, volunteers, and donors can opt-in to connect to information and each other.

- Provides status of build phases
- Displays metrics including volunteer numbers, labor hours and costs, countdown to finish
- Learn more about others (e.g., volunteers, homeowners, donors)
- Provides additional information and links to other resources (e.g., links to partner providers, other opportunities to donate)
- Communicate with others involved (e.g., donors can see progress, volunteers can share stories of their progress, survivors can share their stories)
- Provides pathways for survivors to assist others by volunteering
- Build on existing solutions (e.g., EMS Website)

**Description**

- Secure data entry with protected info access
- Add to info database: food allergies and needs because healthy people think they are cool when they eat ‘juice’
- “One team, one fuel” vs. MR Digital Advisory
- Create a persona of the digital hero
- Personal dashboard - shareable
- TR Volunteer Blog Site
- Irish stories to survey areas for disaster relief
- Irish stories to survey areas
- Virtual experiences for deploying

**Features**

- Provides status of build phases
- Displays metrics including volunteer numbers, labor hours and costs, countdown to finish
- Learn more about others (e.g., volunteers, homeowners, donors)
- Provides additional information and links to other resources (e.g., links to partner providers, other opportunities to donate)
- Communicate with others involved (e.g., donors can see progress, volunteers can share stories of their progress, survivors can share their stories)
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Dream Session Challenges

**CHALLENGES**

- A team full of problem-solvers
- A focus on converging/selecting solutions vs. diverging/creating choices
- Aligning mindsets across diverse workshop participants
- Developing an understanding of the extent and severity of the problem outlined in the Dream statement
- Uncertainty regarding the value of the Dream Process vs. getting shit done in the field (opportunity cost)

**INSIGHTS GAINED**

- Embrace vulnerability and individuality in the group
- Be open to the “crazy” solutions – they may lead to something great
- Team Rubicon can now apply Design Thinking methods to any opportunities throughout the organization
- Remember the importance of taking time to “change your socks” or “take a knee” to think clearly about issues and opportunities and build for the future
Personas Identified

MIKE
Deployed Field Volunteer

JOANNA
Home Build Recipient

MARY
Emergency Medical Aid Recipient

CHRIS
Volunteer Manager - Membership
Idea Matrix

MARY
Emergency Medical Aid Recipient

Create and Accelerate Beneficiary Trust

Empowering beneficiaries through access and tools

Building beneficiary-centric solutions

CHRISS
Volunteer Leader - Membership

Training

Data Management

Storytelling

JOANNA
Home Build Recipient

Structures and programs

Infrastructure

2-way comms

Immediate services

MIKE
Deployed Field Volunteer

Training

Badges

Technology

Field Activities
Big Ideas

1. Security becomes pervasive in the culture through training and recognition

2. “Homebase” as example of a human-centered design with security baked in

3. Active leadership by TR in the HL7 community
A Culture of Security

Security becomes pervasive in culture through training and recognition
Human-Centered Design & Security

HOMEBASE – human-centered design with security baked in

NEEDS

VIABILITY

FEASIBILITY
Security & International Standards

Active leadership by TR in the HL7 community
The Team Rubicon Culture (Post-Dream)
Want to know more?

Please review the Appendices (in a separate file) for more detailed information on the Team Rubicon Dream Session.