

TEX City-Liaison Match: Guide to Your First Meeting

Congratulations on a successful match! At this point, we've found a connection between scientific skills and community priorities, and identified you as one of the leads of a TEX project. The next step, is moving from this general match to a specific project. In other words, honing in on the problem you want to work on together, agreeing what that work will look like, and figuring out how to get started.

As soon as you can, we suggest you schedule a meeting with your new partner(s).

The goal of this meeting is to clarify the project goals and anticipated outcomes, set some ground rules for working together, and figure out how you'll get started. Some of this you probably covered already in the matching process, but TEX experience shows it is worth taking the time to talk through it again. People forget, things change, and often you are shifting from an individual focus to a more team-oriented approach.

This document is a guide for that first working meeting. It contains a set of questions that will help you both get your working relationship off to a very productive start. You can use it as an informal discussion guide or as a template for a more formal agreement about how the project will unfold.

TEX projects include lots of different kinds of projects. Some projects are about using science to answer specific, already-defined questions; other projects are about exploring the ways in which science might advance a broad community priority. Because of this broad range, not all questions apply. As a rule, if you can answer the questions easily, you are probably pretty much done with that stage and ready to move to the next. If you are struggling to answer the question, that is a good indication of where to focus your efforts. A good idea is to identify what you need to do to get to the next step, make some assignments, and regroup when everyone has had time to do the assignment.

Our experience suggests that a good working relationship with clear communication and accountability is important to a project's success. Some of these questions address that aspect as well.

If you can, it is helpful to work through these questions in person. Each of the questions should spark a discussion.

QUESTIONS

Working Together (*Do these questions first, since they can help you with all other parts of the equation*).

1. Why are you excited about the project, and what do you think you bring to the table?
2. Do you prefer to think aloud, or are you more likely to contemplate things quietly and report back to people?
3. What is the best way to communicate with you?
4. How will you make decisions together, especially when you disagree?

Problem Scoping

1. What problem are you trying to solve? Try to frame it as openly as possible, and not preconceive a solution. For example, the question *"How can I keep storm sewers from being overwhelmed during extreme rain?"* is more open than *"How many new storm sewers do I need to build to handle climate change?"*
2. What does success look like? Describe the characteristics of a good solution to this problem. *Some possible characteristics of good solutions might be that it has a strong basis in research, offers three or more alternative approaches, gives the community a way to engage, etc.*
3. Is there a specific deliverable that you have in mind? For instance, would you like a report, presentation, or data you can act on?
4. Are there any constraints on possible solutions?

Agreeing to a Solution

1. Think of one or more potential solutions to the problem? Do they satisfy the constraints?
2. If you can't think of enough solutions, what more can you learn? Who can you talk to? Who will do it? When?
3. How can you test or evaluate these potential solutions? What additional information do you need? Are there other people you need to check in with? Who will do that check in? When?
4. What can each of you contribute to each potential solution? Do you need additional people to make the solution work?
5. Based on what you know, can you decide on a solution to pursue? If not, what else do you need to help you make a decision together? Who will get that information? When?

Implementing a Solution

1. Outline the steps in implementing the solution. Who needs to do what for each step?
2. Go through the steps.

For each step:

- a. Do you have the resources you need? If not, how could you get them?
Who will get them? By When?
- b. Alternatively, could you do a smaller step and still get started, without additional resources? What might that smaller step look like?
- c. Once you have the resources and the step matched, what do each of you need to do to complete this step? By when? When will you check in again? How will you get in touch if something unexpected happens?
- d. Once the step is complete, check in. Are you ready for the next step? Did anything you learned in this step change the overall approach?