**Facilitator Guide**

**Liverpool City Region Residents’ Assembly on Data and AI Innovation**

**Updated: February 18, 2025**

**IN-PERSON DAY 1 – APPROXIMATE LENGTH 5.5 HOURS**

**Topics: introductions, data and AI literacy, data and AI project examples**

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| **Day 1** | **Time** | **Exercise and Information for Facilitators** | **Facilitator Verbatim Notes** |
| **Registration opens** | 830 | **Day in Data exercise on large wall**  As participants arrive, they will enter the registration area first where Kaya and Scott will ensure their consent forms are signed and payment details filled in.  **Then they will enter the café/lounge space outside the main room. On the large wall behind the café there will be a poster inviting participants to list common activities they do during their day and how that could be turned into data. Please encourage participants to fill that in during breaks.** |  |
| **Introductions** | 1000 | **Presentation and introduction to the Assembly process and team. Remind participants of the plan for the four days.**  Go over ways of working and code of conduct.  Clearly state location of rooms for distress including quiet coffee space, the additional meeting room, and the multi-faith prayer room. | **Notes for Emily to say verbatim:**  “An additional meeting room has been booked, please feel free to leave the room at any time. It can be common for people to feel like they need time away and it is absolutely fine if anyone needs to leave the group for a few minutes to take some time. A meeting room is available for participants who need time away, there is also a multi-faith prayer room available, and a quiet coffee space.”  “If you would like an opportunity to debrief with a facilitator after the Assembly, the team will be available up to two hours after the session ends with space in the main room for quiet discussion.” |
|  |  | **Table introductions**  Led by table facilitators, ask participants to share their names and favourite biscuit. | **“**Welcome everyone, my name is \_\_\_\_\_\_\_\_\_\_ and I work at the University of Liverpool. We will be sticking together for the next four sessions, so it’s important we get to know each other before getting started.  This might seem a little strange but I’m going to ask each of you to share your name and what do you like about living in the Liverpool City Region? (can ask the biscuit question) …” |
| **CHIL presentation** | 1030 | **CHIL and public participation**  Iain Buchan welcome and introduction to CHIL  **If time! We will break for 5 minutes to discuss at the tables and then nominate one person from the table to ask the speaker one question.** |  |
| **Exploring understanding of data and digital technologies** | 1100 | Led by table facilitators  **Emily will intro at the start of the room, but table facilitators will use the script to the right.**  Adapted from Our Data Bodies’ Digital Defence Playbook:  **Part 1: Word association – 10 minutes**  **Note responses on the poster board.** | “Every day, more and more, on the news, TV, phone, or internet, we frequently hear the term ‘data’ being used. There’s ‘unlimited data,’ ‘data overages,’ ‘data plans,’ ‘personal data.’ But who actually knows what they are talking about? Today we will be exploring the concept of ‘data.’ What comes to mind when you hear the word data. What’s the first thing that pops in to your mind. There are no wrong or right answers.”  Discussion prompts:   * “What experiences does it make you think about?” * “What are some ways “data” shows up in your life?” * “What words come to mind?” * “What images do you see?” |
|  |  | **Part 2: Data Card Exercise – 20 minutes**  Present participants with data sort cards.  Ask them to take one card.  Read out three to four examples of data and projects to the group then start prompt questions. | “Now we are going to explore different kinds of data. Data can be many different things. It can be digital, personal, interpersonal (person to person). It can be collected by us or from us, provided to us by organisations, or taken from us by organisations. Not all data is digital, it can be DNA, conversations, and stories.  We’ve put together a few cards with different kinds of data on them and examples of how those data can be used in projects that benefit people’s lives. That’s not say, of course, that these data are only used in for projects like this.  I’m going to read out a few of these examples.”  [HAND OUT CARDS TO PARTICIPANTS AND READ OUT FOUR EXAMPLES]   * The quality of water where you live * Your daily step count from your smartphone * Social media posts and interactions * GP records about your healthcare appointments * CCTV recordings * Voice recordings * Your location from your smartphone * Energy and gas smart meter readings * Your purchases using a store loyalty card * Messages you send on your phone   **Discussion**:   * How familiar were you with this kind and use of data? What surprises you? * (If not surprised, ask why) * What kinds of data and data projects feel more beneficial? * What worries you? * What other kinds of data does it make you think of? |
| **Liverpool City Region presentation** | 1130 | **Presentation from Liverpool City Region Combined authority on existing and planned data project with the question – “what does beneficial and trustworthy data innovation look like to them?”**  **If time! We will break for 5 minutes to discuss at the tables and then nominate one person from the table to ask the speaker one question.** |  |
| **Lunch** | 1200 | We will break for one hour but may be shorter depending on if we are running to time.  Lunch will be held downstairs in the main restaurant. |  |
| **NHS presentation** | 1300 | **Presentation from NHS Data into Action programme lead on existing and planned data project with the question – “how do they plan to create beneficial and trustworthy data innovation?”**  Includes description of Five Safes  **If time! We will break for 5 minutes to discuss at the tables and then nominate one person from the table to ask the speaker one question.** |  |
| **Exploring what is and isn’t AI** | 1330 | **Presentation from Dr Sam Ball**  **Part 1: Word association – what do we mean by AI?**  **Part 2: Short expert presentation on ‘what is AI and types of AI?’ and how does it connect to data.** | “Before we hear from Sam – let’s quickly explore what we think of when we say, ‘Artificial Intelligence’. Similar to when we asked about data. What is the first thing that pops in to your minds when you hear the term AI or artificial intelligence? Remember there are no wrong answers.”  Discussion prompts:   * “What are some ways “AI” shows up in your life?” * “What words come to mind?” * “What images do you see?” * “What do you hear on the news?” * “What about from friends and family?” |
|  | 1400 | Break – 15 min |  |
| **Data and AI experts Knowledge Safari** | 1415 | Led by table facilitator  **Knowledge Safari**  Examples of AI and data tools will be put up around the room.  Table facilitators will lead participants in discussion on each tool, what makes it AI (or not) and participant thoughts and preferences for how it is used.  Each station will have an expert researcher or professional in data and AI. | “Now we are going to stand up and go around the room together to read through the examples….  Prompts:   * How familiar does data or AI used in the examples feel now? * What questions do you have about this project?   + If struggling – What would other people say about this project? Why? * How worrying or beneficial do these projects seem for the Liverpool City Region?   + If all beneficial, what would a worrying project look like?   + If all worrying, what would a beneficial project look like? * How important is it that these projects include local people in their design? |
| **Close** | 1515 | **Hope and fears exercise review**  Led by table facilitators – hand out blank cards for people to fill in.  Look for common themes. Table facilitators to feed back. | “We’ve heard a lot today about different kinds of data, how civic organisations are thinking about data, and examples of AI and data projects.  Let’s finish today’s session by chatting about your broader thoughts on data and AI.  We’ve got some cards to hand out that each have an image from the city region on them. They also have a space to write a hope or a fear.  Let’s take a couple minutes to think quietly about our hopes and fears. If you want to start writing, please do that.  Specifically -  “What hopes and fears (or questions) do you have about data and AI for the Liverpool City Region?”  [AFTER 5 MINUTES]  Let’s share back what we thought about. And write it down if we are ready.  [AFTER 10 MINUTES]  “I’m going to summarise what I’ve heard to the group – what do you think is most important for me to share?” |

**IN-PERSON DAY 2 – APPROXIMATE LENGTH 5.5 HOURS**

**Topics: data and AI literacy, data and AI trade-offs, introduction to data innovation charters**

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| **Day 1** | **Time** |  |  |
| **Registration opens** | 0830 |  |  |
| **Review of previous day** | 1000 | **Review of previous day by Assembly lead. Go over plan for the day.**  Remind participants of ways of working and code of conduct.  **Table discussion**  Led by table facilitators, ask participants what reflections they have from the previous session and any additional questions.  Use the previous hopes and fears cards for reflection. | [Session begins with welcome from Assembly lead]  “Welcome back everyone. We heard a lot yesterday about different kinds of data and data projects.  Let’s start today by talking about our reflections or questions from yesterday.  We’ve got our hopes and fears cards from yesterday, as well as some blank cards.  Let’s take a couple minutes to think quietly about our reflections.  [AFTER 5 MINUTES]  Let’s share back what we thought about. And write it down if we are ready.  [AFTER 5 MINUTES]  “I’m going to summarise what I’ve heard to the group – what do you think is most important for me to share?” |
| **Data and AI trade-offs** | 1015 | A guided presentation run by Careful Trouble on the ethical, including social and privacy, trade-offs of data and AI innovations. They will provide examples of data and AI projects to spark debate on the costs and benefits of these technologies. |  |
| **Lunch**  **1 hour** | 1300 |  |  |
| **Data and AI trade-offs** | 1400 | Continued from above. |  |
|  | 1445 | Break 15 min |  |
| **Close** | 1500 | **Hope and fears exercise review 2**  Led by table facilitators  Review yesterday’s answers and add new thoughts and perspectives in.  “What hopes and fears (or questions) do you have about data and AI?”  Look for common themes. Table facilitators to feed back. |  |

**IN-PERSON DAY 3 – APPROXIMATE LENGTH 5 HOURS**

**Topics: Data innovation brainstorming**

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| **Day 1** | **Time** |  |  |
| **Registration opens** | 0830 |  |  |
| **Review of previous day** | 1000 | **Review of previous week by Assembly lead. Go over plan for the day.**  Remind participants of ways of working and code of conduct.  **Table discussion**  Led by table facilitators, ask participants what reflections they have from the previous session and any additional questions. | [Session begins with welcome from Assembly lead]  **For facilitators:**  “Welcome back everyone. We’ve had a few days break since we last met.  Let’s do a quick round of table introductions and answer another ‘get to know you’ question. Today let’s share our favourite place in the City Region in summer.  Let’s start today by talking about our reflections or questions from last week – anything we want to add in to our hopes and fears.  Let’s take a couple minutes to think quietly about our reflections.  [AFTER 5 MINUTES]  Let’s share back what we thought about. And write it down if we are ready. |
| **Data and AI public** **governance - Charters around the world** | 1030 | Introductory presentation from assembly team on existing charters and how they’re used. – 10 minutes plus questions  Plus: How we are going to deliberate.  Optional: More information on data and AI engagement/governance |  |
| **Charter principles exploration exercise** | 1100 | Sort card exercise led by table facilitators on common themes in data and AI charters.  Main Prompts: What does/doesn’t surprise you about these principles? What’s missing? What’s unnecessary?  Use project example cards to prompt further discussion. | “Now that we’ve heard a bit about different kinds of charters from other places – let’s explore them in a bit more depth.  We’re going to take quite a bit of time with this exercise so we can really start to think about what trustworthy and beneficial data and AI would look like for the Liverpool City Region.  I’m going to pass out the discovery cards – on each card is a common principle and description from other kinds of charters.  What we want to focus on is whether that principle does or doesn’t surprise you. What’s missing in it? What isn’t needed. This will help us start to think about what we want in our charter.  Let’s take a few minutes to look through the principles.  [AFTER 5 MINUTES]  Okay – let’s get back to those questions now.   * What does/doesn’t surprise you about these principles? * What questions do they make you think of? * What’s clear or unclear about it? * What do these principles look like for you? * What’s missing? * What’s unnecessary?   Optional prompts:   * Do any principles seem not right? * Which ones seem exactly right?   **[NOTE DOWN RESPONSES ON POST-ITS ON EACH PRINCIPLE CARD, MAKE SURE TO GO THROUGH EVERY PRINCIPLE]**  [AT 11:45]  Let’s now look at the cards we used from the learning sessions. Specifically, the kinds of data and project example cards.  Let’s also take a look at some quotes and findings we have from our Civic Data Cooperative projects. These are the perspectives of other residents in the region.  Prompts:   * How do these projects align with the principles we would like to promote? * How do the other perspectives compare to yours? Similarities? Differences?   + Is there anything we haven’t concerned? * What’s missing? |
| **Lunch** | 1200 |  |  |
| **Hopes and fears reminder** | 1300 | **Hope and fears exercise review 3**  Led by table facilitators  Review previous day’s answers and add new thoughts and perspectives in.  “What hopes and fears (or questions) do you have about data and AI?”  “How similar or different are your hopes and fears to the charter principles?” | **“**Now that we’ve spent time looking at examples of other kinds of principles. Let’s go back to the hopes and fears cards we’ve been working on throughout the three days.  Prompt 1:  What hopes and fears are still there? What ones are you less worried about now?  Prompt 2:  How similar or different are your hopes and fears to the charter principles?  “Let’s use the hopes and fears as sort cards and put the ones we feel are most important near one side of the table and the less important ones on the other.  Let’s try and see if any match to the principles we discussed this morning.”  Optional prompts:   * How could we reword some of our hopes and fears as a principle? * What hopes and fears are relevant to the data and AI charter? Which are less relevant? * Is there anything missing now that we see them on the table? |
| **Break** | 1400 |  |  |
| **Broad principles and preferences brainstorming** | 1415 | Brainstorming activity using hopes and fears notes, the charter sort cards and post its.  Prompt: “What does trustworthy and beneficial data innovation look like in the Liverpool City Region?”  Design your charter: Use the activity sheets at the table to design what (**up to) ten principles** must be in your charter. | “Now is our opportunity to put everything together. We’re going to use the next 45 minutes to design version 1 of our table’s Data and AI Charter.  Tomorrow we will review what we put together and combine the charters with everyone else’s. This means we will be voting tomorrow. But what we create right now is just for our table.  We have a small challenge – let’s take everything we’ve talked about including from the previous two days and sum it up in 10 principles. Let’s not worry too much about getting it perfect.  Let’s start by looking at our sort cards and answering our main question:  “What does trustworthy and beneficial data innovation look like in the Liverpool City Region?”  So, let’s do what we did earlier and put everything that’s most important on one side of the table and less important on the other side.  I’m going to record this discussion so that we can use it for reporting and to accurately represent what you’ve discussed.”  **[USE POST-ITS TO KEEP NOTES AND START TO BUILD UP WHAT PEOPLE ARE SAYING IN TO COMMON THEMES. USE THE CLARIFYING QUESTIONS BELOW TO GET PEOPLE THINKING ABOUT SUMMING THINGS UP.]**  **Optional prompts:**   * **When we think of trustworthy innovation what does that mean for us?** * **When we think of beneficial innovation what does that mean for us?** * **What absolutely must be in the charter as the first principle**   + **Ignoring what’s practical – what would be ideal? What’s the best-case scenario?** * **What’s less important?**   + **Imagining the worst – what would you not like to see in the charter?** * **Which principles are harder or easier for you to imagine being used?** * **Do we think the Five Safes or FAIR guidelines should be part of it? Should they just be expected as standard?** * **What does this principle look like for Liverpool? Halton? Wirral? Sefton? St Helens? Knowsley?** |
| **Close** | 1500 | **Closing and reminder of next day’s activities** |  |

**IN-PERSON DAY 4 – APPROXIMATE LENGTH 6 HOURS**

**Topics: Data innovation charter final discussions**

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| **Day 1** | **Time** |  |  |
| **Registration opens** | 0830 |  |  |
| **Welcome** | 1000 | **Short introductory presentation by Assembly team on commonalities between the table’s discussion the previous day.**  Remind participants of ways of working and code of conduct. | **Facilitators to share back what we discussed at each table the previous day.** |
| **Data and AI principles brainstorming close (review of previous day)** | 1030 | **Review the charter your table made last night.**  Prompt: “What would you change, if anything?”  Ask participants to rank their principles from most important to least. | “Yesterday we did a first draft of what we thought a Liverpool City Region Data and AI Charter should look like.  Let’s go over that this morning and see what we like – what we don’t like – and what’s missing.  [HAND OUT PRINTED COPY OF EXERCISE FROM PREVIOUS DAY – GIVE PEOPLE 5 MINUTES TO REVIEW THEN START WITH PROMPT QUESTIONS]  “Now that we’ve all had time to think let’s answer those questions. What would we change? What did we get right?  As a reminder we really want to focus on what beneficial and trustworthy data looks like for the Liverpool City Region?”  Optional prompt:   * When we think of trustworthy innovation what does that mean for us? * When we think of beneficial innovation what does that mean for us?   At the end of the session, we’re going to ask one of our table participants to share back our table’s charter to the wider room. This will help other tables think about what we discussed and other people’s perspectives. |
| **Present your charter to the room** | 1130 | **Select one participant to share back their charter including the principles and why they were chosen.**  **Session facilitated by Assembly lead.** |  |
| **Lunch** | 1200 |  | Facilitators will spend the lunch hour combining the charters for the voting/ranking session after lunch. |
| **Participatory ranking and voting – ranked choice voting of principles** | 1300 | **Part 1: Voting/ranking starting with discussion**  Each table will receive a copy of the draft charter which will summarise the principles each table suggested.  Everyone will then rank the principles to their own preferences using the iPad at the table or their own digital device. Table facilitators will be on hand to support the voting/ranking. | **For Emily to say - 2 MIN:**  **“**We are now going to vote on the charter principles. That means combining everyone’s ideas from the tables and voting on what we think the most important ones are.  We’re using an online website called Poll Everywhere. This will help us combine everyone’s thoughts together.  We don’t have a minimum or maximum number of principles for the charter. We’d like to keep it around 10 though. If the voting is not conclusive – so we don’t have a clear answer – we will take a break and vote again.  We have ipads on the tables for you to use if you don’t have a digital device with you. The facilitators can help you vote – but we want to hear from you.  We’re going to start with a bit of discussion first.”  **For table facilitators -15 MIN:**  “Before we get started – let’s take some time to discuss what we’ve heard. This is our final opportunity to talk as a table before we vote. Let’s reflect a bit on what we heard this morning.  **Prompts:**   * After hearing from the other groups, what surprised you? What didn’t? * How ready are you feeling to vote?   + Is there anything else you want to discuss?   **[BRING LEAD FACILITATOR OVER IF ANY SIGNIFICANT QUESTIONS BEFORE GETTING STARTED. WE CAN ANSWER THEM TO THE WHOLE ROOM TO ENSURE EVERYONE IS ON THE SAME PAGE.]**  **For Emily:**  **“**Alright everyone, let’s do the first round of voting.  First, we want you to rank the principles in how important they are to be included. So please open the website on your phones or work with your table facilitator. Principles at the top of the screen are the most important. Principles at the bottom of the screen are the least important.”  **[ROUND 1 OF VOTING. FACILITATORS TO HELP THOSE WITHOUT ACCESS TO A DIGITAL DEVICE - USE IPADS ON THE TABLE TO ANSWER QUIZ QUESTIONS WITH THE PARTICIPANTS.]** |
| **Break – 20 min** | 1340 |  | **We will go on an extended break to allow time for people to reflect and for us to prepare the results.** |
| **Participatory ranking and voting cont’d** | 1400 | **Part 2: Presenting results**  Once the results are in – the Assembly lead will present the results highlighting commonalities and disagreements.  **Part 3: (optional) Second voting/ranking and presentation**  If there is significant disagreement another round of voting will occur.  **Part 4: Discussion**  Discussion led by table facilitators “which principles will most contribute to ensuring trustworthy and beneficial data innovation?” | **For Emily:**  “Alright everyone, we’ve finished our first round of voting. Let’s look.  [EMILY TO READ OUT RESULTS]  **If yes to second round:**  “So, as you can see, we don’t have strong agreement on the principles. We’ve taken out the ones that had very few votes. We have re-started the poll with just the remaining options. We’re going to take some time now to vote again. Please feel free to chat at your table.”  For facilitators:  [FACILITATORS TO HELP TABLES VOTE AGAIN]  “In this second round of voting, let’s really focus on which principles will most contribute to ensuring trustworthy and beneficial data innovation in the Liverpool City Region. We can chat about that a bit first.  Prompts:   * Where did we see disagreement? * Where did we see agreement? * Do we think we’re missing anything now? * What still ranks as most important to you?”   **If no to second round (or after second round):**  **[TO AMEND ON THE DAY DEPENDING ON HOW COHESIVE THE RESULTS ARE]**  “So, we can see some common opinions on what’s most important and what we’re less worried about. I think we are seeing a consistent enough result that we can take this away as our final version for feedback from stakeholders.  I want to thank everyone for reviewing this with us – let’s finish by taking some time to discuss the results with our table. This will be the last item we’re chatting as a table, so it’s a good time to feedback.”  **For facilitators:**  “I’m going to specifically record what we’ve been talking about so we can include quotes from everyone in the final reports. What you say won’t be identifiable to you, but it will help us represent your voice.  Prompts:   * “What does trustworthy and beneficial data and AI look like for the region?”   + “What kinds of data and AI projects are most important? * “How do these principles represent that? Where is work still needed?” * “What worries or hopes do you have for the charter?” |
| **Comfort Break** – 5 min | 1455 |  |  |
| **Designing your own data charter banner** | 1500 | A creative activity on designing a banner that represents Liverpool’s hopes (or fears) for data and AI innovation. | **For Emily:**  “I want to thank everyone for taking time with us today to decide on what the charter should look like. We’re going to end today by mixing things up a bit.  As four big groups we are going to design banners that represent what we’ve been talking about.  **Specifically:**   * **What should data and AI mean for Liverpool?** * **What are our hopes and worries?**   The facilitators will be there to help and guide you. We’ll give you a bit of inspiration now. Please use words, images, colour, all the resources on the tables to put together a vision of the future.  We will take these banners and get an artist to recreate them for us for display both for our launch event and in our offices.”  **For facilitators:**  Use the prompts above and what has been discussed in previous sessions. This activity will be participant-led, so we can have a lighter touch on guiding people through it.  Prompts:   * What message do we want to tell people – particularly other Liverpool residents or people in positions of power? * What images represent that message? |
| **Close** | 1600 | **Closing the assembly**   * Payment reminders * Debrief session reminder * Getting involved in data innovation in the region |  |