Initiative for coal regions in transition webinar series

Co-creation methods for online stakeholder engagement

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ICLEI Europe

July 6, 2021 / 11:00 CET

Online stakeholder engagement

Webinar series

1. The five Ws of online stakeholder engagement
Tuesday 22 June 2021, 11:00am – 12:00pm CEST

2. Co-creation methods for online stakeholder engagement
Tuesday, 6 July 2021, 11:00am – 12:00pm CEST

3. Enabling participation in multi-stakeholder consultations
September 2021 (date & time TBC)
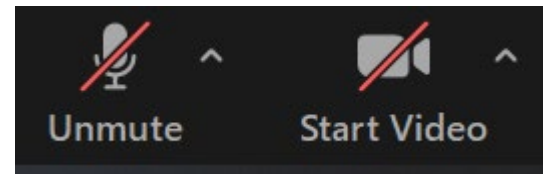
Housekeeping guidelines

Questions and comments

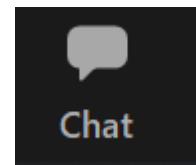Use the chat to share your **questions**. We will take them at the end.

Recording

Keep in mind that the meeting will be **recorded**

During this meeting you'll be **muted** and your **video will be off**.

Use the **chat** to share your comments and questions.

For technical support: private message to Martín Freire

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Information

 vs.

- Website / Blog posts
- E-publications
- Social Media Campaign
- Newsletter / e-mail Campaign
- Live chat / Bot

- Webinar
- Citizens' assembly
- Press conference
- Scientific conference

- Video channel
- Documentary projection
- Online Exhibition
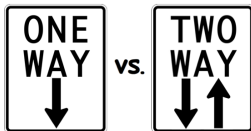
Consultation

- Online surveys
- Online polls
- Online interviews
- Discussion forum

- Live Q&A session
- Expert panel
- **Online workshop**
- Citizens' assembly
- Town Hall meeting
- **Focus groups**
- Consensus conferences
- World café

Cooperation

- Online project management and action planning
- Secure file sharing
- Wikis and shared documents
- Virtual workspaces for permanent working groups or ongoing advisory groups

- Citizens' jury
- Wisdom-council
- Consensus conference
- Round table

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Agenda

01

Preparation

02

Types of Workshops

03

Online Tools

04

Sample Methods

05

Focus Groups

06

Q&A

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01 Preparation

Online meetings or workshops?

	Meetings: where things get discussed	Workshops: where things get done
Purpose	Informing method to exchange information and share knowledge between stakeholders	Building method to engage stakeholders in problem-solving, action planning, decision-making
Scope	Shallow coverage of multiple topics	Deep, focus coverage of an issue of common interest
Length	Measured in minutes or hours	Measured in hours or days
Structure	Typically conversation-driven: Attendees speak and listen	Active participation in group activities and co-creation of materials
Preparation	Limited preparation needed. Focused on meeting agenda and presentation slides. Informally defined roles.	Time-consuming. Focused on selecting tools, preparing materials and designing activities. Formally defined roles.

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Online vs. offline workshops

Benefits of online stakeholder engagement:

- Leverages on post-COVID **mainstreaming** and **convenience** of remote collaboration tools.

- Enables **participation** beyond geographical borders and accessibility beyond physical / language boundaries.

- Provides **green**, cost-effective solutions and savings in production expenses.

- Offers **quick and efficient** ways to gather quantitative data and qualitative insights.

- Builds stakeholders' **capacity** to accelerate digital transformations.

- Enhances **transparency** and **accountability**.

Possible limitations in online processes

- Increasing online meeting **fatigue** can affect focus and levels of participation.

- Digital gap may lead to **exclusion** of some target groups.

- Production costs partly transferred to **human resources**.

- Reliability of **software & hardware**.

- Limited informal interaction, non-verbal communication.

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Great Online Workshops are…

Collaborative
Enable participation and co-creation

Enticing
Make use of visual elements and creative materials

Systematic
Well planned, efficiently organised, method-driven

Cross-functional
Bring together different perspectives and skills

Focused
Designed around concrete questions

Output driven
Workshop outcomes enable you to take action

…part of a larger stakeholder engagement processes

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Six steps

01

Articulate the **Goal** and **Questions** based on information needed

02

Define **participants mix**

03

Align **Processes** and **Activities** to questions
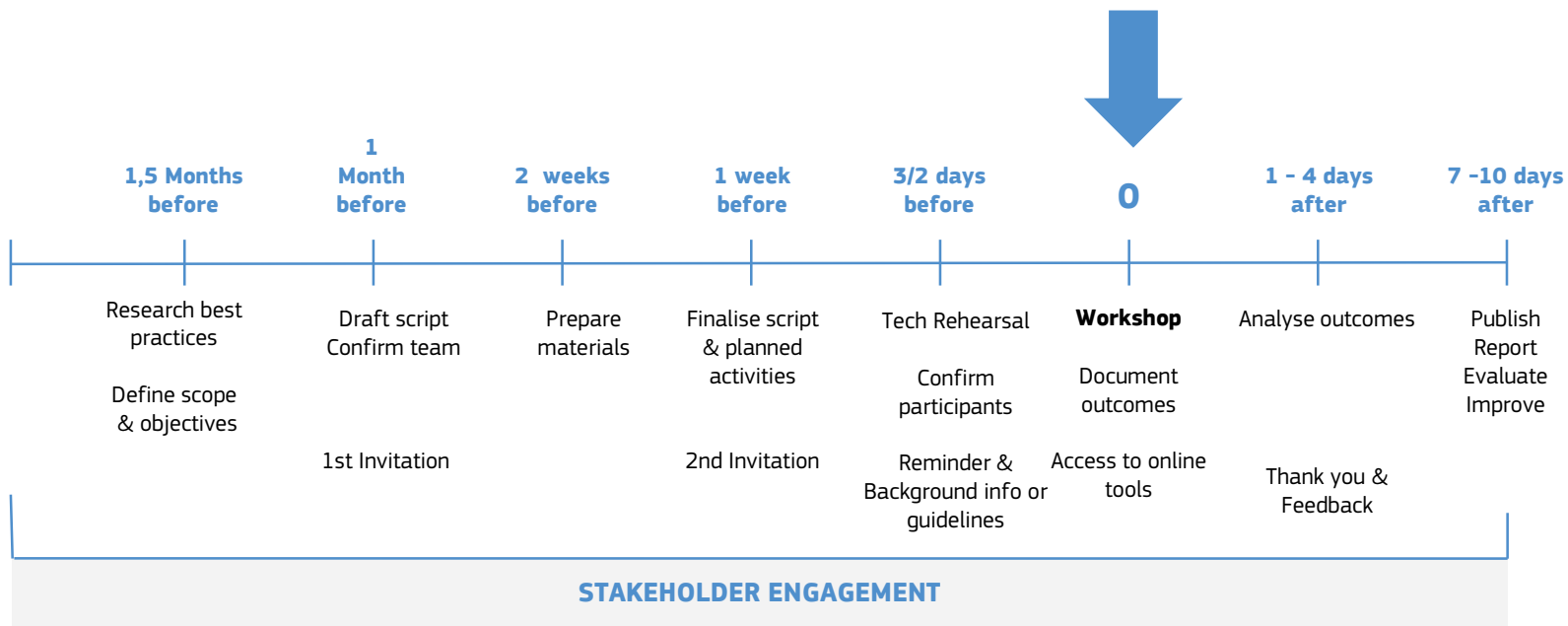
04

Conduct the **Workshop**

05

Process **information** and share **outcomes**

**06**

Take **Action** based on Workshop outputs

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Timeline

✓ **Think of tasks and subtasks**
✓ **Assign responsibilities**
✓ **Mark deadlines**
✓ **Keep it neat and clear**

1,5 Months before	**1 Month before**	**2 weeks before**	**1 week before**	**3/2 days before**	**0**	**1 – 4 days after**	**7 –10 days after**
Research best practices	Draft script Confirm team	Prepare materials	Finalise script & planned activities	Tech Rehearsal	**Workshop**	Analyse outcomes	Publish Report Evaluate Improve
Define scope & objectives				Confirm participants	Document outcomes		
	1st Invitation		2nd Invitation	Reminder & Background info or guidelines	Access to online tools	Thank you & Feedback	

STAKEHOLDER ENGAGEMENT

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Practical considerations

- Calculate enough **preparation** and follow up time +20% additional time in workshop duration

- **Facilitation team**:
  Facilitator(s), Tech host, Time keeper,

  Documenter, Conversation Assistant + Observer

- **Ideal size** 6-24 participants

  Larger groups divided into breakout rooms of 6-12

- **Clustering** of target groups in terms of age / sector / expertis / sector

- **Preload the logistics**: Send guidelines, arrange test session, provide additional technical support

- Pricing, accessibility and **GDPR** compliance of digital tools
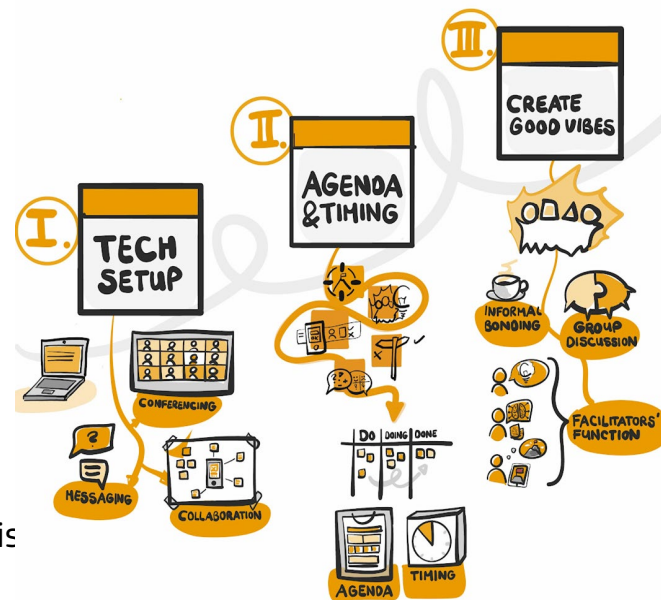
Source: design-your-sprint.ch

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02

Types

of online workshops

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Types of workshops

Discovery workshop

Empathy workshop

Design workshop

Prioritization workshop

Critique workshop

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5 Common types of workshops

What	Use to
Discovery workshop — Stakeholders converge to understand the **current state** and build **consensus** for just transition action planning	• Gather existing knowledge • Understand stakeholders' needs • Build agreement across sectors
Empathy workshop — Stakeholders create a shared understanding of the **needs** of the local community before designing a<< solution	• Shift perspectives from profit-centred to human-centred • Gain clarity on citizens' needs • Build empathy for different community groups
Design workshop — Stakeholders gather to rapidly generate and discuss a **wide set of ideas** from various perspectives	• Brainstorm ideas for a specific challenge • Broaden perspective beyond core team • Foster ownership of the action plan
Prioritization workshop — Stakeholders and decision makers come together to decide which items are **most important** and prioritise them	• Prioritise actions in order to shape a roadmap • Understand which internal initiatives are most important • Enable reality-check, prevent overload or scope creep
Critique workshop — Stakeholders collaborate to **analyse and improve** an action plan so that it meets its objectives	• Understand to what extent actions support emerging needs • Evaluate action plans with stakeholders needs as a lens • Hear feedback from external actors

Inspired by and adapted from 5 UX Workshops by NN Group

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Complementary online tools

Need	Online conferencing	Whiteboard	Shared files	Surveys and polls
Feature	Group discussion Break out rooms	Workshop Canvas Visualisation	Note keeping	Live feedback
Sample tools				

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Process design & workshop flow

Emerge

Diverge

CREATE CHOICES

Converge

MAKE CHOICES

Clear
Purpose

Clear Goal

Divergent

Convergent

Divergent

Convergent

Discover

Define

Develop

Deliver

Doing the right thing

Doing the things right

Closing

Opening

Harvesting

Exploring /
Collecting

Working out

Structuring

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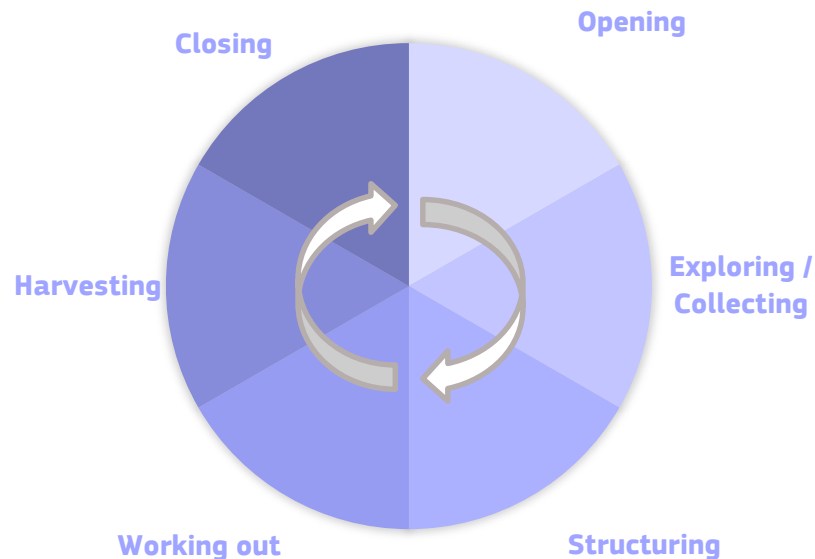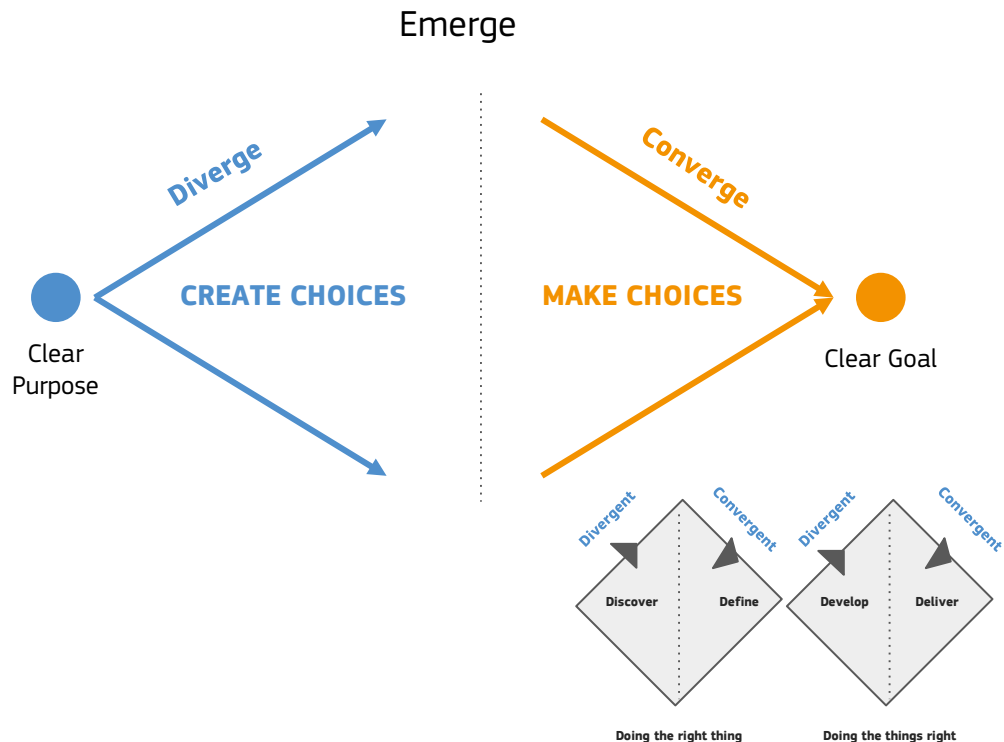
Indicative Agenda elements

Welcome, Agenda & Housekeeping

Rules of Engagement

Icebreaker

Purpose & Objectives

Tools guidelines

Diverge

Emerge

Break Out Rooms

& Group work on Canvas(es)

Break

Converge

Clear Purpose

Clear Goal

Feedback in plenary or group presentations

Prioritisation / Voting

Closing & Next steps

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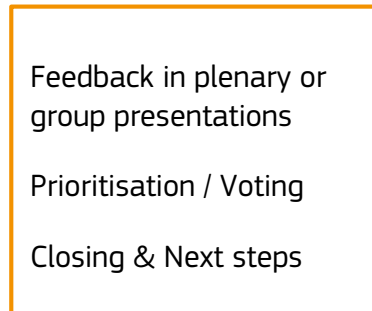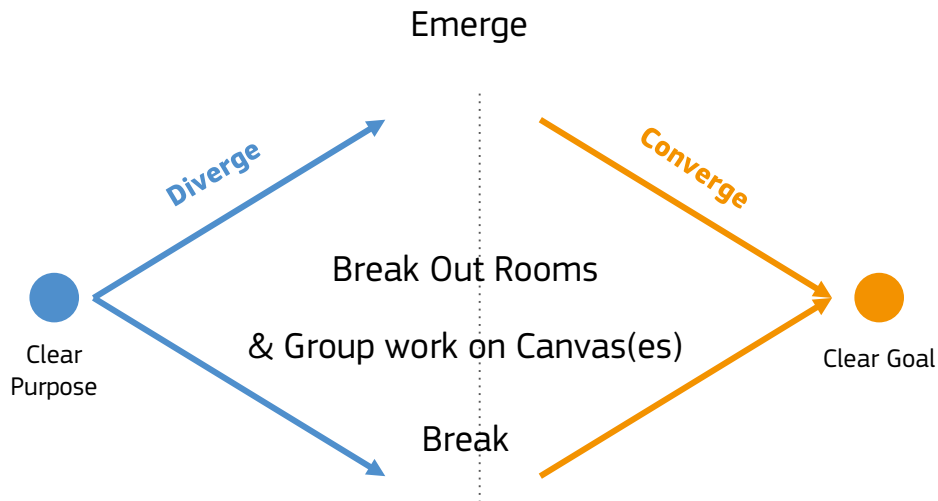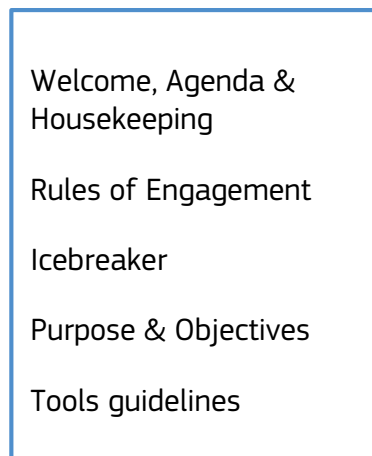
Rules of engagement

Express your ideas

There are no bad ideas

Encourage thinking out of the box

Defer judgment

Quantity over quality

Encourage collective thinking

Capture everything

Stay focused on the topic

One conversation at the time

Encourage consensus

Silence means agreement

Designing a Workshop Canvas

- A Workshop Canvas is a visual tool that **provides structure** to the planning process.

- Design a Canvas that is **divided into concrete steps / sections / questions** so as to guide group discussion and capture key insights

- **Multiply** the number of canvases according to the number of working groups to enable parallel work on same framework

- Remember to **lock visual elements** that should not be moved / edited by participants

- Use **sticky notes** to populate canvas and use

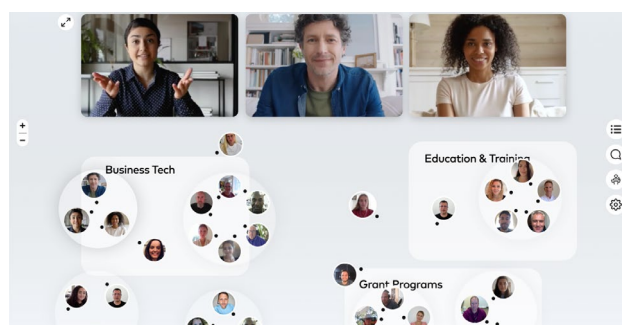 **color coding** to match sticky notes to concrete participants / activities / themes
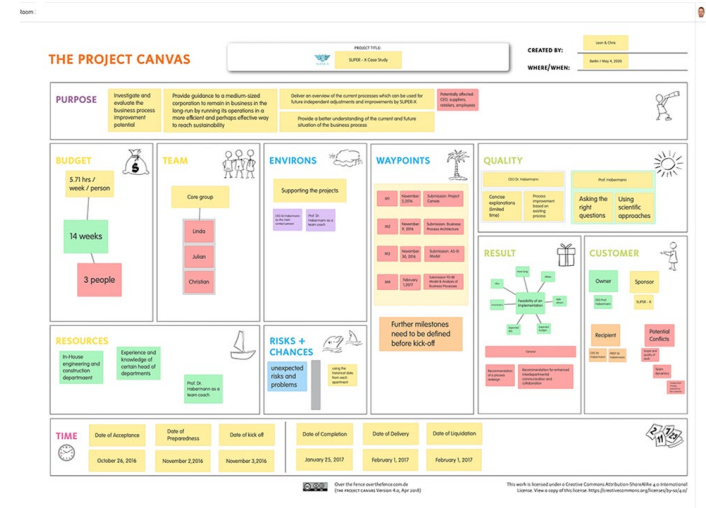
Source: OverTheFence.com.de

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Creating an online Workshop Space

Gather

wonder

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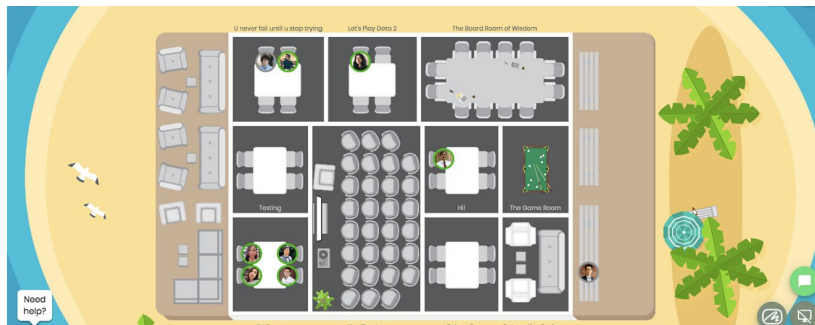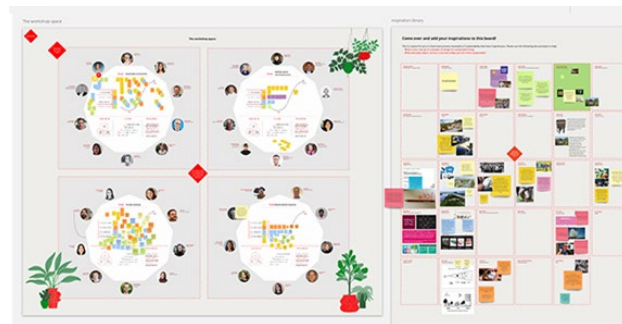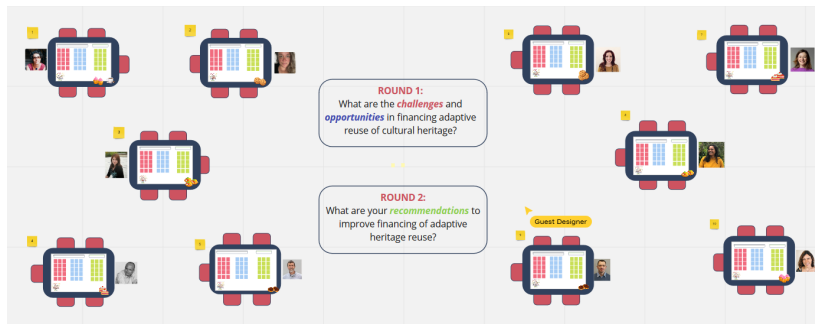
Icebreakers

Objectives

- Break the awkwardness
- Feel comfortable among group
- Get ideas flowing
- Introduce participants
- Surprise with fun element

Formats

Pairs or triads in break-outs **/** Circle **/** Online Poll **/** Chatstotms

Examples

- Introduce each other
- Share a picture
- Burning question
- Express gratitude or appreciation
- Set workshop expectations
- Find things in common
- Show an object that is red
- Weather or sports
- Fun facts and figures

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04

Methods

Co-creating

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Combining methods into broader processes

Discovery workshop
Mindmap for Stakeholder Mapping
Collaborative Analysis

Design workshop
Rapid ideation brainstorming
Clustering of ideas

Prioritization workshop
Dot voting
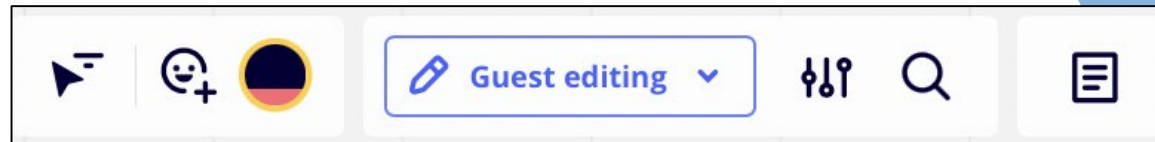Prioritization Matrix

Design workshop
Prototyping actions

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Testing MIRO

One click to select and
drag sticky notes

Double click to `type` text

Hide collaborators `cursors`

Use your mouse scroll to `Zoom` in and out OR use the navigation buttons
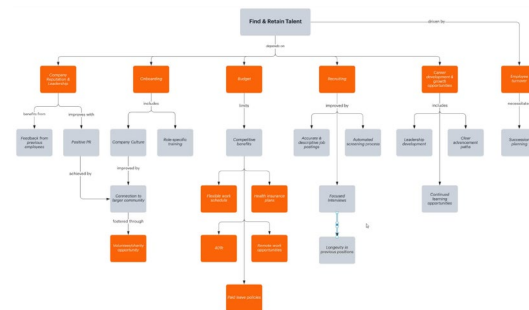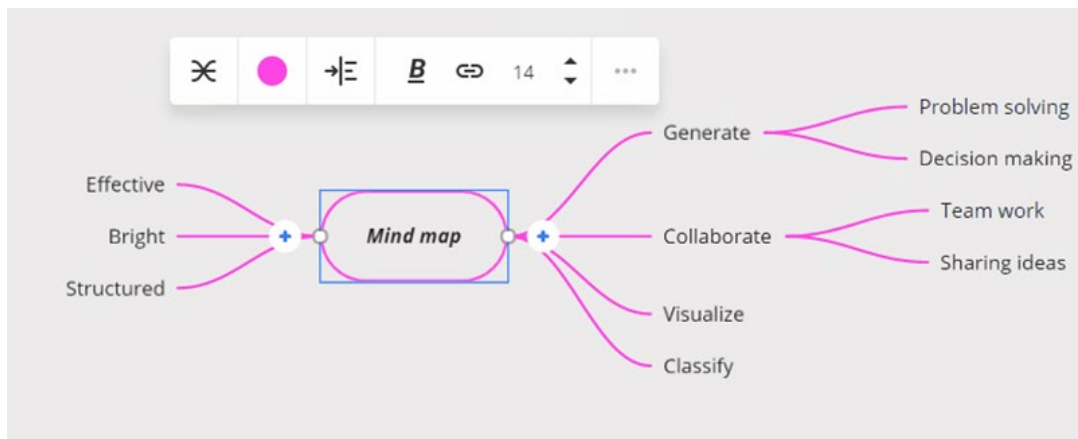
JOIN us on MIRO
Password: #CoalRegions
https://miro.com/app/board/o9J_l9Py9wM=/

Guest editing

75%

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Mindmap

A mind map is a diagram used to visually capture and organize information. It is hierarchical and shows relationships between a core theme and all related topics, in a non/linear way, similar to how most people think.
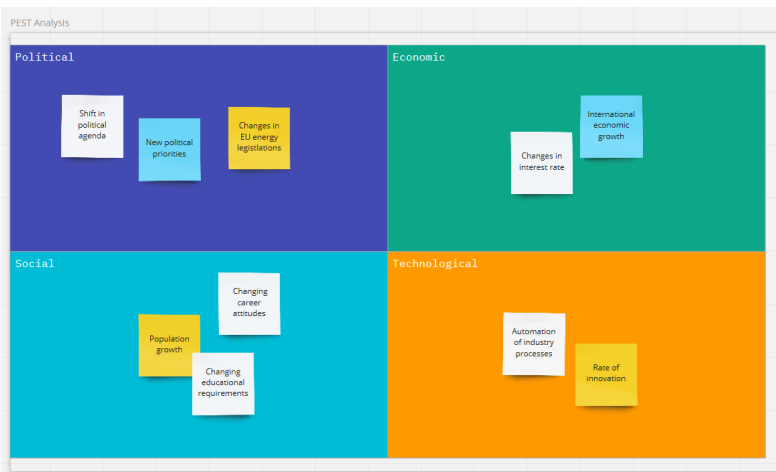

Source: lucidchart.com

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Collaborative analysis

Discovery workshop

PEST Analysis can be used to collaboratively explore **Political, Economic, Social and Technological factors** that affect the regions Just Transition Action Plans

SWOT Analysis can be used to collaboratively explore **Strengths, Weaknesses, Opportunities and Threats** that affect the regions Just Transition Action Plans

Source: MIRO templates

Source: Wikipedia

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Rapid ideation brainstorming

What initiatives/projects can help our region achieve a just transition?

Employment and welfare
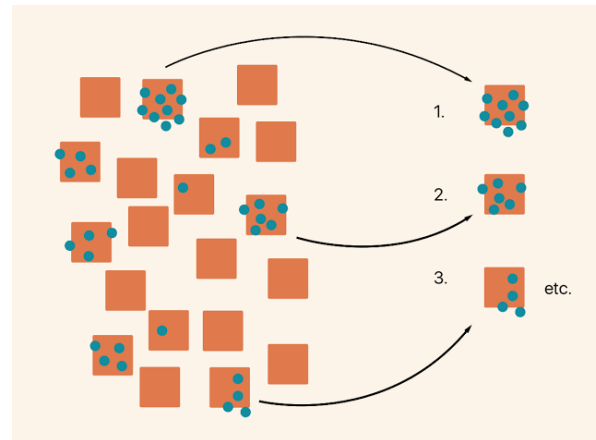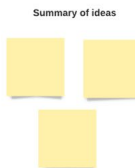
New technologies/services/industries

Reskilling, training and education

Governance and stakeholder consultation

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Dot voting

Source: Lucidspark.com

Source: Mindiply

Prioritization matrix

PRIORITY MATRIX

Manage your time using the Priority Matrix, to help you decide what to prioritize by importance and urgency. Learn more at https://conceptboard.com/blog/manage-yo...

	Urgent	Not Urgent
Important	Do First	Do Later
Not Important	Delegate	Eliminate

Source: Conceptboard.com

TASK PRIORITY MATRIX

Use this template to prioritize project tasks and determine which activities to tackle and which ones to delegate or delete to make the most efficient use of your time.

HIGH

SIGNIFICANT	URGENT
SCHEDULE These are critical tasks with minimal urgency.	**DO** These are vital tasks with substantial urgency.

IMPORTANCE

INSIGNIFICANT	NOT URGENT
DELETE These are trivial tasks with minor urgency.	**DELEGATE** These are pressing tasks with negligible impact.

LOW

LOW — **URGENCY** — **HIGH**

Source: Smartsheet.com

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Prototyping actions

Source: *thegovlab.org*

ref: http://thegovlab.org/introducing-the-digital-policy-model-canvas/
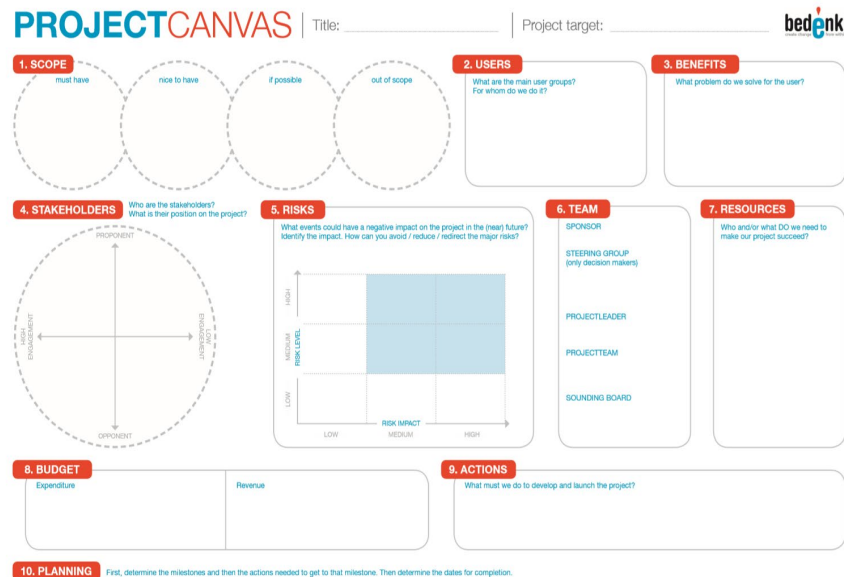
Source: *Canvasrevolution.com*

Combining methods into broader processes

Discovery workshop
Mindmap for Stakeholder Mapping
PEST and SWOT Analysis

Design workshop
Rapid ideation brainstorming
Clustering of ideas

Prioritization workshop
Dot voting
Prioritization Matrix

Design workshop
Prototyping actions

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05 Focus Groups

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Focus groups

Definition

Small group of carefully selected participants according to clearly defined criteria, who contribute in an open discussion and under moderation

Purpose

It is not to reach a common consensus, agreement, or to make decisions.

Focus groups are designed to identify perceptions and feelings and to understand what people might think about a particular product, service or topic.

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Focus groups

Size

Ideally six to ten participants

Mini focus group: four to six participants

Participant selection

Segmentation:
- Place of residence
- Age
- Gender
- Origin

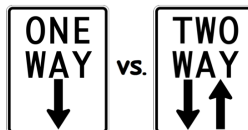- Education
- Income
- Employment relationship
  and many more

Image: Vrmakete lab / Unsplash

Focus groups

Methodology

With or without moderation

Two-way focus group

ONE WAY vs. TWO WAY

Duration

No strict rule: 60 – 90 – 120 minutes

Steps

1. Define the agenda
2. Definition of the concrete question
3. Select the participants
4. Create a concrete timetable for the discussion
5. Execution and documentation

Advantages – Online

- Independent of location
- Less resource intensive
- Easier recruitment
- Higher degree of anonymity
- Suitable for sensitive topics
- Easy documentation
- Chats can be analysed

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Online stakeholder engagement

Webinar series

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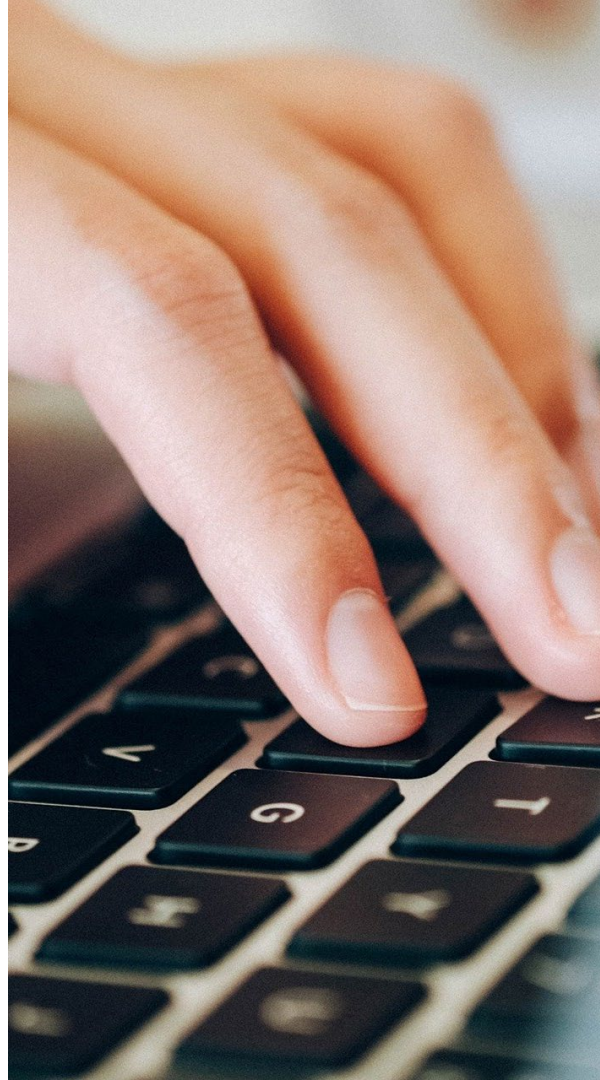3. **Enabling participation in multi-stakeholder consultations**
   September 2021

06

Q&A

Any questions?

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Before you go, leave us a note in the chat:

What do you still need to learn in order to advance online stakeholder engagement in the context of a just transition?

What would you like to discover **in the next webinar**?

Thank you.

secretariat@coalregions.eu

Website

#CoalRegionsEU

Twitter: @Energy4Europe

DG Energy's YouTube channels

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