

LIVING LAB FACILITATION GUIDE

CRE THINK

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Developed for the CRETHINK Project

CONTENT

Introduction to the guide	2
Introduction to the framework of the living lab.....	3
What is a living lab?	3
Co-creation and working with wicket problems in the living lab.....	3
The co-creative living lab process.....	5
The steps of the living lab process.....	5
Facilitating the cooperation	11
Facilitate continuous reflection and learning	13
How to continue the cooperation	13
How to spread the word	14
Facilitating online living lab Activities	15



INTRODUCTION TO THE GUIDE

Cities are dynamic environments that undergo constant transformation. They inspire people to develop innovative solutions to the different challenges they face in everyday life. Greater collaboration between different actors of the urban context is therefore essential to ensure a liveable space for citizens, while improving the quality of life and reducing pressure on the environment. Co-creation processes, in fact, are centred around participatory actions that require a high level of collaboration between actors from the public and private sectors as well as civil society representatives.

Within this context, the purpose of the CRETHINK project is to develop methods and facilitate co-creation processes among cross sector actors to promote sustainable solutions in local communities, inspired by the UN SDG no. 11 about resilient local cities and communities. This document has been developed as a facilitation tool to be tested during the project period. It is designed for individuals who want to trigger a change in their city or neighbourhood by working together on specific urban challenges. The aim is to provide a guide and road map to navigate and facilitate local case project activities applying co-creation methods and tools while addressing local needs around sustainability topics and finding solutions to complex problems.

Target groups for the guide:

- Public, private and civil society actors involved in organizing and facilitating local living labs.
- Public, private and civil society stakeholders engaging and participating in living lab activities.

This guide has the format of guidelines and principles for process facilitation of living labs. The guide is structured in a progressive order, starting with an introduction to the concept of the living lab as a methodology for co-creation to solve wicket problems. Then the guide introduces the different elements of facilitating the living lab from the good start, to the different steps in the living lab process, to facilitating and maintaining the cooperation, to how to continue the cooperation and spread the word to others, as well as how to work online and work with evaluation and documentation of the living lab processes. The guide can be read from start to finish, or you can use the table of contents to find the relevant topic you want to read about.

The Facilitation Guide has been developed along a line of other tools for the CRETHINK project. As supplements to this guide, you can also find the CRETHINK Methodology and CRETHINK Toolbox, which we also refer to in this guide. Since every local context will have different conditions, it is important to note that this guide can never be a complete step-by-step guide, but the facilitators of a local living lab will always have to adapt the guidelines to their own context and situation.



This guide is a prototype version, developed for testing in the CRETHINK project. We know that there might be things that we missed or that could be done better and we therefore invite you to hack the guide and provide us with feedback about its usability and suggestions, so we can make it better for future use. At the back of the guide you can find contact information for the CRETHINK project partners from each partner country.

INTRODUCTION TO THE FRAMEWORK OF THE LIVING LAB

WHAT IS A LIVING LAB?

The concept of the living lab has its origin in open innovation models developed for the business world, encouraging private software developers to co-create tools and applications in collaboration with citizens and target groups in order to develop innovative and relevant products. The concept of the living lab is today more broadly viewed as a participatory platform for open innovation that supports experimentation with real stakeholders in real contexts, often related to citizen-driven innovation in the context of redefining city services.

However, the approach is no longer confined to improving products or services, but now also targets broader societal and social aspects of innovation. There is no single definition of the living lab, and the concept of living labs is often used by scholars, public authorities and politicians in many different formats, uses and under many different names such as urban living labs.

The living lab can be called both a method and a space for participation in innovation processes. In CRETHINK, the concept of the living lab is applied as a framework for a co-creative process. It is not necessarily understood as a process initiated by public authorities who invite other stakeholders to contribute to find shared solutions to a predefined problem, but rather as a tool and platform for equal participate of cross sector partners in a process to develop shared solutions, which can take on many different formats.

WANT TO READ MORE ABOUT LIVING LABS?

On the ENoLL website you can find a long line of research papers, methodologies, toolkits etc about living labs and co-creation:

<https://enoll.org/publications-list/enoll-publications/>

CO-CREATION AND WORKING WITH WICKET PROBLEMS IN THE LIVING LAB

Co-creation has been developed as an approach and method for working with ‘wicked problems’, which are common in our complex and interdependent society. Wicked problems share the following characteristics:

- They are challenges that affect a multitude of stakeholders
- There is disagreement about and no single or perfect understanding of the challenge and the solution.

- We are talking about complex challenges. Standard solutions do not work, and multiple stakeholders are needed to find and partake in solutions.
- These problems are context specific and ever changing. Often working with the problem and developing solutions will uncover new layers to the problem that will need to be solved.

Many of the social and environmental challenges currently on the agenda such as climate, mobility, health and integration can be considered as wicked problems. A central idea in co-creation is that wicked problems must be tackled through collaboration among the relevant and affected stakeholders in ways that support mutual understanding and creative problem solving.

The co-creation approach was originally developed by private companies, focussing on innovating products and services by involving customers and other stakeholders. Lately, the approach has been adapted by public sector organizations collaborating with the relevant companies, educational organisations and civil society organisations to handle wicked problems.

Living labs is a methodology developed to support collaborative innovation among stakeholders from different contexts co-designing new products or solutions. Living labs are especially suited for working with wicked problems, where many possible solutions seem to fit to the problem. The living lab approach allows for exploration of situations where innovative solutions can be hidden behind a complex web of stakeholders and possible solutions.

Living labs can in practice be conducted in different ways; however, they share the following characteristics:

- The purpose of the living lab is to find holistic solutions to complex problems by combining many different perspectives and competences
- Living labs are participatory platforms for open innovation
- The living lab concept is about engaging stakeholders, citizens, and end-users in the collaborative design of new services, products etc.
- A central idea in living labs is to support experimentation with real users in real contexts

DEFINITIONS OF KEY CONCEPTS:

Co-creation: When actors from different sectors, e.g. public organizations, citizens, civil society organizations and private companies, collaborate to make better use of each other's assets, resources and contributions to achieve innovation, better outcomes or improved efficiency"

Innovation: The application of ideas that are novel and useful. Creativity, the ability to generate novel and useful ideas, is the seed of innovation, but unless it is applied and scaled, it is just an idea.

Open innovation: When the innovation process promotes collaboration with people and organisations outside of the organisation or group working with the product, service or challenge in question, promoting a break from silo mentality and secrecy, in order to bring in relevant expertise and perspectives to the innovation process.

- Living labs are iterative, creative processes that are continuously adjusted according to feedback
- Living labs may apply methods from many different fields such as ethnography, sociology, and psychology

Sources:

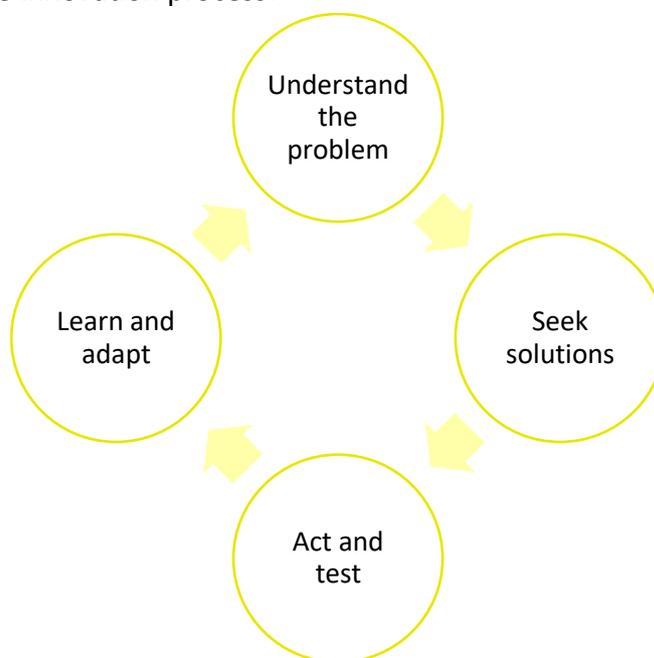
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THE CO-CREATIVE LIVING LAB PROCESS

THE STEPS OF THE LIVING LAB PROCESS

As mentioned earlier the aim of the living lab is to facilitate open innovation, in real life settings, meaning inviting many different stakeholders into an innovation process to develop solutions through testing and experimentation. There are many models and frameworks for innovations processes. In this guide we have been inspired by the classical design circle and the Collective Intelligence Design Playbook developed by the innovation foundation - Nesta. In the following we introduce 4 steps in the innovation process:



These steps can be used for the overall design of the entirety of the living lab, but can also be iterated numerous times and be included in every step or activity that will be conducted in the living lab. It can also be beneficial to jump between the steps and look at them together, when planning a specific step of the living lab process.



In the following, we introduce the 4 steps, line up the important questions to be worked with in each step, and refer to useful tools that can be used in the different steps. We recommend to use the descriptions and questions in the planning of the living lab to structure the activities. During the work in the living lab they can also be used as check lists that you can go back to, to remind you of the important considerations and questions. In the CRETHINK Methodology you can find a Living Lab Design template, which can be used to design the overall process and each step of the living lab.

1 UNDERSTAND THE PROBLEM

The first step is about mapping out your understanding of the issue you want to work with, and figuring out, what additional information is needed, and how to gather that information and who to involve in order to form a foundation for developing ideas for solutions to test out. The goal is to generate contextualised insights, facts and information on the dynamics of a specific situation or issue.

The following questions are meant to support your planning of the first step and can be used as a check-list to help facilitate the process:

Start by defining the challenge:

- What is our targeted issue and purpose?
- Who is affected by the issue?
- What is the change we want to bring about?
- What is our timeframe for action?
- What are our constraints?

Then explore what information/data/ideas are needed to find and how to do it:

- What do we specifically need to know/find?
- How do we collect this data?
- Are there any ethical issues with using this data or involving people?

Then explore who you need to involve and how they can best be engaged:

- Who can help us understand the problem?
- What do we want those people to do?
- How do we reach those people?
- What might motivate them to be involved?

Then explore how to bring together people and the collected information, and how to make sense of the results:

- How will we interact and share information?
- How will we make sure people can contribute independently and freely?
- How will we bring together our information (store, clean, process, share)?

- How will we make sense of the information we collect?
- What biases might there be in our information?

Then lastly decide how to act on the collected information

- Who should act on the gathered information, and what do they need, in order to do this?
- Who will we share our information with?
- Who should provide feedback to the process and how?
- How do we know if we're on track and creating change?
- How to we measure impact on the targeted issue?

When working with these questions, we recommend that you use different workshop and brainstorming activities to support inclusive creative idea development. Below. Below in the Facilitation Guide and in the CRETHINK Methodology you can find recommendations relevant tools to support the cooperative processes in the living lab. In the CRETHINK Methodology you can also find a template for an *issue map*, which can be used to identify different factors that influence the targeted. You can also find a *stakeholder map*, which can be used to identify the different stakeholders that are related to the issue and which can be involved in different ways to gain more information and insight into the issue.

2 SEEK SOLUTIONS

When you have the needed information about the targeted issue, this next step is about exploring ways to tackle the issue. You can seek out already tested solutions from elsewhere or develop ideas for novel approaches that you want to test. You can seek out information from many different sources like scientific literature, connect with other organisations or individuals who might already be working with the issue or invite relevant stakeholders to help you come up with new relevant ideas.

The following questions are meant to support your planning of the first step and can be used as a check-list to help facilitate the process:

Start by considering what data or ideas you need to find and how to do that:

- What solution(s) are we looking for?
- Where might solutions already exist?
- What methods will we use to find solutions?
- Are there any ethical issues to consider?

Then explore who can contribute to finding the information or ideas and how to engage them in the process:

- Who could create a solution?

- What do we want people to do?
- How will we reach those people?
- What incentive(s) will we offer to people for sharing their solutions?

Then explore how you want to bring people and the information or ideas together and how you want to connect them:

- What process do we use for people to share their solutions?
- How can we support people to contribute ideas effectively?
- How will we judge which ideas to support or test?

Then lastly, explore who will need to act and what they need in order to do this:

- Who can help test the solutions?
- Who can adopt successful solutions or help them scale?
- What will be our approach to partnership or intellectual property?
- Who should provide feedback to the process and how?
- How will we know if we're on track to creating change?

When working with these questions, we recommend that you use different workshop and brainstorming activities to support inclusive creative idea development. Below in the Facilitation Guide and in the CRETHINK Methodology you can find recommendations relevant tools to support the cooperative processes in the living lab. In the CRETHINK Methodology you can also find a template for a *stakeholder map*, which can be used to identify the different stakeholders that are related to the issue and which can be involved in different test activities in the living lab.

3 ACT AND TEST

In this step, you bring together a diverse range of stakeholders who are affected and/or knowledgeable about an issue, to work collaboratively to test out selected solutions. Here you should also monitoring the implementation of initiatives in order to later be able to analyse the results and share the knowledge with others. Therefore it might be relevant to look at step 4 while planning step 3. In this step, the co-creative process among the involved stakeholders and participants in the living lab is key. Further below in this guide, you will find several sections about how to facilitate cooperation in living labs.

The following questions are meant to support your planning of the first step and can be used as a check-list to help facilitate the process:

Start by defining the outline of the actions you want to do:

- What is the solution(s) we want to test?
- What is the change we want to bring about?
- What is our timeframe for action?
- What are our constraints?

Then make a concrete action plan:

- What do we specifically need to do, in order to test the solution(s)?
- How will we do it?
- Are there any ethical issues to consider?

Then figure out who you want to engage in your test actions:

- Who will help test the solution, and how can we best engage them?
- What do we need people to do?
- How do we reach these people?
- What will motivate them to get involved?

Then look at how you will connect the types of action you want to do, the people you involve and the information you gather in your actions:

- What type of action(s) and cooperation(s) do we need?
- How will we bring together people to test the solution(s)?
- How will people contribute or interact?
- What do people need to know or have to contribute effectively? (e.g. will we provide factual information on the subject and guidelines for participation?)
- How will we make sure people can contribute independently and freely?
- How will we make sense of all the information, ideas and results we collect?

Then look at how you will create change through your actions and results:

- Who will need to act on the ideas, information and results we develop and what do we need them to do?
- What do they need to see or know in order to do this?
- How might we share this information with others to enable them to act on the solutions and results we have developed?
- How will we know if we're on track to creating change?

In this step, the co-creative process among the involved stakeholders and participants in the living lab is key. Below in the Facilitation Guide and in the CRETHINK Methodology you can find recommendations relevant tools to support the cooperative processes in the living lab. In the CRETHINK Methodology you can also find a template for a *stakeholder map*, which can be used to identify the different stakeholders that are related to the issue and which can be involved in different test activities in the living lab.

4 LEARN AND ADAPT

In this step you follow up on the learning you have gained in the testing of the developed solutions. Here you might combine multiple sets and types of data as well as engage the different types of stakeholders that you have involved in your activities. Think about how you want to take the

gathered learning and insights with you into new actions and tests, or pass on the knowledge to others, so they can also benefit from your experiences.

The following questions are meant to support your planning of the first step and can be used as a check-list to help facilitate the process:

Start by figuring out what kind of information and learning you want to gather from the test activities of the developed solutions:

- What questions do we need to answer?
- What do we need the information for?
- Who will the answers benefit?
- What is our timeframe for collecting the answers?
- What are our constraints?

Then make a plan for collecting the answers:

- What specifically do we need to know?
- What data might help us answer these questions?
- How will we collect this information?
- Are there any ethical issues we need to consider with using this data or involving people?

Then figure out who should help answer your questions?

- Who do we want to engage?
- What do we want people to do?
- How will we reach those people and how will we involve them?
- What might motivate them to be involved?

Then figure out how you will bring people and the collected data together and make sense of it:

- How will people contribute or interact?
- How will we make sure people can contribute independently and freely?
- How will we bring together our data (store, clean, process, share)?
- How will we make sense of the data and knowledge we collect?
- What biases might there be in our data?

And finally decide how you want to act on the collected knowledge and learning:

- Who do we want to act on the knowledge we create, and what do we need them to do?
- How will we document our knowledge and make it available for others to use?
- How will we know if we're on track to creating change?
- What did we learn about our developed solutions?
- How do we want to improve our solutions?
- How do we want to take our learning with us into our future work?

In this step, reflection and evaluation of the living lab is essential. Further below in this guide, you will find several sections about how ensure learning and evaluation in the living lab, while still keeping the facilitation of the cooperation among the participants in mind.

Source:

Nesta – the collective intelligence design playbook, Kathy Peach, Aleks Berditchevskaia, Theo Bass.

FACILITATING THE COOPERATION

1 THE GOOD START

It is essential for the collaborative innovation process to give priority – and thus spend time – on building the relations and common ground among participants, as this will constitute the foundation of the collaboration. This is particularly true for co-creation processes that are emerging processes with a high degree of complexity and unpredictability. A good start thus includes building relations as well as adjusting expectations and a common purpose among the participants. It also includes acknowledging the diversity inherent in the collaboration in terms of the driving forces, perspectives and agendas, which the participants bring into the collaboration.

In the CRETHINK Methodology you can find recommendations for tools that can ensure a good start. These include facilitation tools that 1) Helps the participants develop mutual understanding and trust, 2) Establishes a context to make all participants feel welcome and respected for their interests and perspectives and 3) Helps reduce uncertainty and increase clarity in terms of the purpose, roles etc. of the collaboration.

2 HOW TO CREATE GOOD COOPERATION IN A DIVERSE GROUP

As mentioned earlier a central idea in co-creation is to bring together actors with different perspectives and knowledge together to solve a common task. Thus, diversity among participants in terms of perspectives, knowledge and power is an inherent characteristic of co-creation processes. Co-creation processes tend to be demanding for participants that are challenged by complexity, insecurity and concerns in terms of giving up their identity and interests.

An important task of the facilitator in co-creation is to help the participants make the best of diversity. We know from both experience and research, that an essential – and difficult - prerequisite for succeeding with co-creation is to embrace and encourage diversity among participants rather than ignoring or repressing it. As a facilitator the task here is to give voice to different positions and agendas in the room.

Another important task inherent in facilitating co-creative processes is to tackle power-asymmetries. Co-creation processes are characterized by participants with very different

powerbases collaborating on a common task, e.g. citizens collaborating with researchers or professionals from big, public institutions. The ideal of co-creation is to obtain equal relations in collaboration – an ideal that requires conscious facilitation.

In the CRETHINK Methodology you can find recommendations for tools suitable for tackling diversity among participants in co-creation. These include 1) Creating a space for different perspectives and opinions, 2) Develop a holistic image of the challenge and 3) Talk openly about agendas and motives.

3 HOW TO MEDIATE INTERNAL CONFLICTS

In general, welcoming both positive and negative sentiments and leaving space for shared reflection among participants on the emotional aspects of the collaboration is a useful tool. Conflict reduction may be reached by leaving space for ‘feelings meetings’ or talks during the collaboration, allowing participants to talk about feelings related to the collaboration. Often, the possibility to articulate sentiments and be listened to, will reduce frustrations and conflicts.

Containing positive and negative emotions in collaboration and mediating conflicts is another important task of the facilitator since they are delicate situations to manage in the process of co-creation. Conflicts can be interpersonal, when they involve two or more people within the team, or intergroups, when they are between two or more homogeneous subgroups - for example, change agents versus participants.

Knowing how to practically and effectively manage conflicts is very important, because otherwise they can undermine the group's cohesion and, consequently, the results of teamwork. While there are many ways of dealing with conflict management, a few tips for recognizing and solving conflict when working in a group can be found in the related section of the CRETHINK Methodology.

4 HOW TO MAINTAIN MOTIVATION

The outcomes of participative projects designed to address societal needs is often a collective one, with less direct benefits for the single participants (groups or individual). Working under a shared motivation or innovation umbrella, such as sustainability, circularity and inclusivity makes both individual benefits and contributions stronger. Since participants are not specifically selected for certain motivations, ideas, or shared values, there is often a greater need to find stimuli to motivate them to contribute and to be involved, even more so in complex systems such as the urban context. Understanding how to motivate a team is, therefore, of paramount importance.

In order to keep group productivity and performance high, it is crucial to keep participants energised and motivated. To this aim, you can refer to the related section in the CRETHINK Methodology

where a set of selected motivation techniques is provided, learning how you can apply them throughout the co-creation process.

FACILITATE CONTINUOUS REFLECTION AND LEARNING

As co-creation processes are characterized by a high degree of complexity and unpredictability – it is important to continuously facilitate learning and reflection among participants on the collaboration as well as the common task. This may for example be done by:

- Finalizing each meeting/session with a round of reflection among participants on how the collaboration is going and what might be improved
- Facilitating meta-discussions among participants on the progression of the task, asking questions like: "What is the status of our task?", "Are we working in the right direction?", "Should anything be changed or prioritized differently" etc.

When you plan your living lab, it is important to think about how to collect the information, learning, reflections and evaluations developed during the living activities along the way, while you remember them. It is also important to consider how to turn these important learnings into new actions, and help improve the work in the living lab, by taking them into account.

It is recommended to evaluate your work in the living lab continuously as a basis for improvement – and to document your activities and progress. This may be done by using a shared logbook. You can for example use the logbook developed by the CRETHINK project, which can be found in the CRETHINK Toolbox.

It is a good idea to discuss early in the project what success criteria and indicators you wish to apply – and how you will measure the impact in the case. You can for example identify criteria for evaluating performance, quality of contributions, learning results among participants, process quality, level of impact on outside stakeholders, information activities etc.

HOW TO CONTINUE THE COOPERATION

Even if living labs aim at solving real challenges in real settings with real people, they may be at risk of becoming 'bubbles' of collaboration with only a weak connection to the participants' everyday activities.

To strengthen collaboration among the participants between living labs and the use of living lab learning in everyday practices of the participants, the following advice may be helpful:

- Be sure to make room for socializing and shared experiences in connection with the living labs. This may happen in the form of excursions, visits, walks, cultural events or dinner/lunch. Shared experiences and a possibility of socializing will strengthen the social and personal ties between participants, which makes them more likely to keep in contact outside the living labs.

- Terminate the living labs with participants reflecting on how to best integrate learning from the living lab in their everyday practice – and to formulate a specific task to solve in their own context, e.g. in terms of spreading the knowledge or methods from the living lab to their organisation
- Ask the participants to reflect on ways of making use of each other's perspectives and competences outside the living lab setting – and the value this may create. Ask them to follow up on these reflections by making specific agreements to meet, talk or continue working together on specific tasks

HOW TO SPREAD THE WORD

The results and experiences of co-creation projects are significant only if they are used and lead to functional changes in the community. In this framework, a thorough project communication must be seen as one of the steps (and conditions) functional to achieving the expected impact. Spreading the word about local project activities and results generates, in fact, an open communication through which accumulated experiences, effective and innovative solutions can become the common heritage of an entire community. It also represents both a starting point for new initiatives and a necessary precondition to encourage comparison, integration and evolution of models and strategies of intervention, to better adapt them to the changing environmental and institutional situation as well as the nature of complex problems in urban contexts.

Important considerations for communication about your living lab work:

- How to insure that you have an open and continuous communication from the beginning?
- Information and knowledge should be shared openly from the early stage of the living lab.
- Make sure to invite people with different knowledge and experiences to participate in the activities.
- Engage stakeholders, citizens, and end-users in the collaborative co-creation of solutions, actions and ideas for building sustainability.
- Consider who you want to inform and which communication methods or channels are the best in order for you to reach them.

Engaging key stakeholders and the general public includes ways to attract and involve individuals, groups, and organisations who may be affected by a project or may affect the project. Some practical tools designed to effectively communicate during the project lifecycle by providing information in the right format, at the right time, to the right audience, and with the right impact are listed in the CRETHINK Methodology. In the CRETHINK Methodology you can also find a template for a stakeholder map that can help identify the different relevant stakeholders to inform about your living lab activities, and who can perhaps also help spread the word about your work even further in their own networks.

FACILITATING ONLINE LIVING LAB ACTIVITIES

When working over a longer period of time, especially in these covid19 times, it might not always be relevant or possible to meet physically, especially with several people that you might want to involve in your living lab processes. Therefore, online meetings or workshops can be an important tool. In this section we have collected a line of recommendations and guidelines for conducting online meetings or workshops, as well as a list of useful exercises.

Carefully planning and designing an online workshop is only half the battle. Running a remote workshop or virtual meeting presents many challenges – some of which are unique to remote facilitation scenarios. Furthermore, all facilitators know that a process often needs to be adjusted on the fly and in remote workshops, choosing when and how to do so requires some consideration. Here are our tips on running an online workshop or meeting:

TAKE REGULAR BREAKS

Staring at a screen often takes more mental energy than a face-to-face meeting. When working online, it can also be easy to lose track of time and go for a long time without stepping away from the screen. Design your agenda to feature breaks and do not be tempted to remove them. Giving your team a moment to recharge can help ensure the efficacy of the workshop. In-person workshops often have breaks every two to three hours.

In a remote workshop, you may want to have breaks more frequently. Also, make it clear that it is okay to take a comfort break if necessary! It is worth noting that using online energizer activities and a mix of group discussion and solo-work activities can also ease the fatigue that can set in during an online session. Encourage your participants to step away from the computer during a break. Go outside, meditate, or grab a snack – whatever it is, giving the brain a moment to rest is imperative for successful workshops and keeping everyone at the top of their game.

GET EVERYONE ON WEBCAM

Effective communication is not just about words – body language, facial cues, and vocal reassurance all factor into making productive discussions. Getting everyone on webcam so that you can all see each other is a great way to increase engagement in a remote workshop and help people feel connected. Remember that in order to facilitate this, you will want to let the participants know this is expected of them and to prepare accordingly so they can feel comfortable doing so. What this does not mean is reprimanding people working from home for their kids or pets walking in but advising them to take steps to help the workshop be productive. Any working situation holds the possibility for curveballs to occur and in extraordinary circumstances or new working arrangements, it is also important to be considerate and empathetic.

BE KIND

On that note, it is worth mentioning that online workshops and remote working is new to many people. Working in traditional settings has its own ruleset and etiquette and making the transition to working from home and dialing into online meetings can be difficult to adjust. Be kind, be considerate and be patient. It takes time to get your head around remote meetings and what online workshops entail. By giving people all the tools, they need and outlining your expectations, you are making a great start but remember to be empathetic. Lead by example, acknowledge the difficulty or strangeness and move forward together. Once you and your organization have it down, remote working and online meetings can be effective for everyone – in the upskill and teething period, try to be kind and compassionate.

ONE DEVICE PER PERSON WHERE POSSIBLE

As much as possible, ensure that every participant has their own device. This means that they can contribute to the chat channel and ask questions, see necessary slides or material clearly and can mute themselves when necessary. One device also means you can more clearly manage individual recipients and their visual profile when speaking will be more focused. If the design of your workshop requires individual work, this may be a necessity. One device per person is not always achievable, particularly for hybrid teams or times when large numbers of people call in from one location. The key in those circumstances is having rules, which allow everyone to contribute, maintain focus and mean you can manage recipients effectively.

MANAGE THE AUDIO

Most online meeting tools allow the administrator to control the audio of individual recipients. While it's worth asking your participants to self-regulate, to mute their mics when not speaking, to be respectful and limit cross-talking, it's also a good idea to have the tools to mute all and control the audio of the room. Good facilitation is all about managing the group through a process and facilitating effective communication – being able to do so quickly and efficiently can help ensure the workshop is a success.

HAVE ONE LEADER, BUT TRY CO-FACILITATING

Online workshops can benefit from having an additional facilitator, particularly when working with clients as a freelancer or with external organizations. If you are working with an external group, having a co-facilitator from that team can ensure those people have a voice they trust helping to guide them through the process.

Having a co-facilitator in the room during hybrid meetings can also be useful when it comes to managing the group and keeping everyone engaged. In those situations where you have some people collected together, having one facilitator looking after the remote participants and another looking after the live folks is a good strategy. When you do co-facilitate, it is still worth having a



single leader or owner of the workshop helps to ensure that the process is effective and to be able to make changes if something isn't working. Find what works for you and your team but remember that everything you do should be in service of helping the group engage with the process.

ENSURE CLARITY AT EVERY STAGE

Exercises and activities are part of the bread and butter of many workshops and group processes. Including a mix of different activities when facilitating remotely can also help keep an online group engaged and energized. All the exercises you run in an online setting should be clearly explained and clarified before you begin. You do not have the same opportunities to wander a room and course correct your participants in a remote setting so take the time to get everyone started on the right foot. It is worth remembering that this goes back to choosing the right games and activities for your remote workshop and ensuring they work in an online setting. Keep them simple and easy to explain and practice how you deliver the instructions.

WATCH YOUR TIMING AND CONSIDER THE USE OF TIMEBOXING

Staying on time in a meeting is always a consideration, though discussions and activities often take longer in an online setting. Without due consideration of structure and facilitation style, there is the potential for unstructured conversations to go on and distract the whole group from moving forward. Timebox your activities and open discussions to keep everyone on track and focused. Set ground rules about live discussions that means everyone can stay focused. Use text chat channels or methods such as one breath feedback to find the balance between letting everyone speak and keeping your workshop moving forward.

RECORD THE MEETING OR WORKSHOP

It is likely that not everyone can make it to your remote workshop, particularly if your team is globally distributed and works across several time zones. Record the workshop so people who cannot attend can also benefit or so you and your team can review important points and improve your process later on. You may also want to use transcription software for easy reference or so that teammates with hearing difficulties can engage with what has been done. All that said, bear in mind that a recorded workshop is not the same as participating in a live workshop, and depending on the needs of your group and the number of people who could not attend, you might be better to run multiple workshops. The process is often as important as the outcome and you will not want to deprive people of that experience unless necessary.

HAVE A MODERATOR FOR TEXT CHAT CHANNELS

On the subject of text channels, having a place where participants can make notes and ask questions for the group or facilitator while keeping the meeting moving is a great approach. Moderating that channel and answering those questions while also facilitating a workshop can be difficult and mean you are less effective in other areas. If the needs of the workshop or size of the group calls for it,

consider getting someone to moderate the text channel, respond to questions where appropriate and pass on questions or topics for group discussion if necessary. Finding a way to ensure everyone is heard and able to voice concerns while also keeping the process moving is good for everyone.

USE POLLS AND ANONYMOUS VOTING

Using polls with your participants can be an effective way of getting the feedback you need quickly and efficiently. Remote facilitation often requires that you simplify and redesign parts of your in-person process to be more efficient in a live setting. Some aspects of the online workshop will be exactly the same as the one you run in the flesh, whereas others simply take too long or require rethinking to be effective in an online setting. The key here is to facilitate contributions and collaborations from your team without getting bogged down. Use online tools such as online polling to make the process more efficient and consider allowing anonymous voting if you are having trouble getting people to speak up.

PRE-RECORD WHAT YOU CAN

In a remote setting, having pre-recorded videos of walkthroughs, tutorials or product demonstrations can not only save time but reduce pressure in the session. Many recipients really benefit from the inclusion of videos or images and varying the way in which information is delivered can help keep people engaged. By preparing elements prior to the workshop, you can achieve this while also limiting the impact on your stress level. Remote facilitation is often a matter of juggling a lot of items at once. Easing the number of items, you need to juggle on the day can really help you excel as a facilitator, particularly if you are new to the field.

In the CRETHINK Methodology you can also find some examples of exercises that can be used to structure and facilitate group processes in an online environment.

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