

Action Learning Programme to Enable City Governments' Readiness

Deliverable D8.2

Version N°2

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Abbreviations and acronyms

Acronym	Description
WP	Work Package

Summary

This report introduces the "Engagement Process Building Blocks Tool" a product designed to help cities engage citizens and urban stakeholders in their efforts to achieve climate neutrality. The product consists of four decks of cards, each deck representing different building blocks, that enable users to explore and make decisions about goals, context, design choices, and methods of engagement. This product becomes an effective support service when a specialist / facilitator is deployed with these cards.

Keywords

Product: A physical and/or digital artefact that can be used independently by a user without the need for any additional, outside facilitation or interactions to achieve a particular goal.

Service: A full set of tailored experiences and interactions delivered with and by means of a topical specialist's use of the product with users in order to enhance the contextual nuance of the product and the precision of its use, while also more holistically enabling the achievement of a particular goal.

Engagement: Active and conscious empowerment, collaboration, and mobilisation of a plurality of agents, in this case, to reach climate neutrality.

Citizen engagement and participation: By combining the two previous terms "citizens" and "engagement", we mean the wide range of ways in which people, on their own or as part of formal or informal groups, participate in democratic decision making, civic and public life to actively shape and implement, in this case, the transition to climate neutrality.

Urban stakeholders = the wide range of organised interests and groups who form part of a city's ecosystem. The term urban stakeholder can be interpreted as an individual with a stake or interest in an issue, and it can be interpreted as an organised group and their representatives (such as a business, a trade union, a civil society organisation, a bank, or a lobbying group).

Democratic Infrastructure: A persistent, generally available set of elements that enable the continuous development, reinforcement and reimagining of democracy in a defined context. In practice, this means Democratic Infrastructure exists when a mix of elements - including but not limited to 1) a contextualised plan for democracy, 2) capabilities, 3) networks, and 4) governance systems - operate in a given context with (A) flexibility, (B) consideration of the longer-term, and (C) the capacity to enable democratic self-improvement. This is infrastructure that enables efforts, now and in the future, to strengthen and reimagine Democracy.

1. Executive Summary

This report introduces the "Engagement Process Building Blocks Tool" a product designed to help cities engage citizens and urban stakeholders in their efforts to achieve climate neutrality. The product consists of four decks of cards, each deck representing different building blocks, that enable users to explore and make decisions about goals, context, design choices, and methods of engagement. This product becomes an effective support service when a specialist / facilitator is deployed with these cards. This report also introduces the contributions the team of consortium partners has made to the development of the Capability Building Service, which is still in the process of being finalised and launched.

Many of the challenges around engagement are addressed in [D 8.1: Desktop report on engagement: 'A NZC call to action for a participative to carbon neutrality and beyond'](#). In this first report published in 2022, we made the case for cities to transform decision-making processes and engage citizens and urban stakeholders in meaningful participation to powerfully contribute towards the ambition and goals of the European *100 Climate-Neutral and Smart Cities by 2030* Mission. This Engagement Process Building Block Tool, which helps cities engage citizens and stakeholders, does so in a way that addresses several takeaways and action points from the D8.1 report. Furthermore, this tool also builds on the symbiotic interaction with the 112 Mission Cities through the NZC Cities Needs Assessment, NZC City Advisors' work and NZC City Panels, and the internal NZC Consortium interactions, especially with WP6-10. These diverse insights contributed to the directionality of the tool, which focuses on building capabilities to understand how to collaboratively (and meaningfully) design a high-quality engagement process in a specific context of the 112 Mission Cities. By thinking about the *goals* of the engagement, the *context* elements and the appropriate *design choices*, this product helps the city to move away from a method-driven approach and increases the likelihood that the engagement process is embedded, builds trust, and makes it fit for purpose.

More broadly, this tool can support teams aiming to start approaching engagement not as a one-time process but as part of building longer-term democratic infrastructure. By building the capability of democratic design among different stakeholders, by creating a shared goal and vision about engagement and by embracing a new way of co-creation, this tool can be used to begin building democratic infrastructure for the longer term.

This product offers a highly visual, collaborative, and playful user-experience which aims to enhance users' understanding and ability to apply frameworks for designing citizen and urban stakeholder engagement processes. The product consists of four decks of cards to focus users' attention on each theme relevant to the design of an effective engagement process: goal(s), context, design choices and methods. Additionally, the product includes an instruction guide that provides more explanation on how to use the card decks as well as an appendix of terminology, to ensure users can understand, learn, and utilise language that is helpful to designing effective engagement processes. This guide and appendix also offer a simple mechanism to equip specialist facilitators with a knowledge of how the cards work as they enable more in-depth and contextually refined use of the product. The product provides guidance for exploring each of these themes in a co-creative way and arriving at decisions or directions together. It can be used to explore alternative ways forward, assess needs, and reach agreement on key aspects between different stakeholders before you start the detailed design of the engagement. With experience, it can also become an extremely useful, go-to product to support the actual co-creation and design of those engagement processes.

- Cities will have a better understanding of what it means to design an engagement process in a specific context for a particular goal and build the capability to design engagement processes.
- Approaching engagement in a co-creative way will make it more embedded and create a shared vision between different stakeholders.

- By consciously considering the objective, context and choices and methods, engagement processes towards carbon neutrality will be more fit for purpose, more ambitious and with more long-term effects.
- The product's step-by-step approach can reduce the barriers to engaging citizens and stakeholders.

This product will be available for use and download from the NetZeroCities Portal. City Advisors and, eventually, the City Support Groups (as deployed through SGA) will be trained and equipped to facilitate the service experience associated with this product. Moreover, the overall tool will be connected to other WP8 services through the WP8 Service Model. The initial version of the Service Model will be finalised in M20.

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2. Design Process (Methodology)

The following is a detailed summary of the methodology and design process the team used to create an Action Learning Programme to enable city governments' readiness. This includes 1) the "Engagement Process Building Blocks" and 2) our contribution to the NZC Capability Building Service. This section will offer clarity regarding what this process looked like, who was part of the process, as well as how different insights were integrated.

2.1 Action Learning

Desktop research was carried out by Democratic Society to compile, analyse, and understand different science-based pedagogies (1) that **enable learning** and internal capacity building to support readiness for participation in complex (urban) sustainability challenges (2). This benchmark provided the basis for the key Principles of How Learning Happens. These key principles consist of five dimensions of learning, supported by methods and guiding questions, which together offer a strategic direction for planning and structuring the WP8 Action Learning programme.

Key Principles of How Learning Happens: An approach to learning that scales from personal to systemic.

The key principles of how learning happens intend to be inspiring and powerful foundations to enable the capacity and capability building, cultivating "new practices" at the level of individuals, teams, organisations/communities, and society. These practices are enablers for learning how to experiment more effectively and embed these into finding new solutions to advance towards Climate Neutrality.

At the **individual level**, key learning principles can enable motivation, courage, capacities, and skills that support us when we step into our personal leadership.

At the **team level**, key learning principles can enable the capacity for collective reflection, co-creation, alignment, co-decision-making, collective action (agency) and accountability.

At the **level of organisations & communities**, key learning principles help develop a culture that welcomes and embraces diversity, can discern and value shared purpose and aspires to serve and mobilise actions to tackle the needs of an organisation or community.

At the **societal level**, the key learning principles can support the formation of a healthy collaborative ecosystem of diverse communities and organisations, understanding the larger contexts we are always embedded in and benefiting from the knowledge and experience born of our diversity.

What is the purpose of having key learning principles?

- Explicit and meaningful approach to foundational design principles for capacity and capability learning services.
- Clarify our assumptions of how we believe learning happens.
- Allow us to question assumptions and learn from practice (scaling)
- Offer us guidance in planning and structuring our capacity and capability building programme/services.
- Offer alternatives to more traditional ways of training.
- Offer additional elements to be incorporated in more traditional ways of training.
- Building capabilities rather than creating dependencies
- Key learning principles as Design Guidelines

Five key learning principles have been identified that are important for ensuring and building a culture of learning at different scales. Each key learning principle includes a method(s) that follows the purpose of the learning principles and key guiding questions.

A. Learning to Learn & Strategic Learning

Lifelong learning

Learning takes place and should take place at all ages and in all different situations (formal, informal, non-formal, professional development) (3).

Guiding questions

- How to shift mindsets to see failure as non-permanent and a chance to learn?
- How can we ensure inclusive and equitable learning opportunities?
- How to store/codify/disseminate knowledge?

Method examples

Communities of practice, coaching dialogue, resonance learning tools, dialogue interviews

B. Learning from & for action

Challenge-Based Learning

Learning focused on creating actions and solutions to real challenges with the aim of creating real impact (2). This type of learning involves learning by doing and learning from existing (inter)national or local practice (6).

Guiding questions

- How can we best support learners to use new skills in their daily practice?

Method examples

Visioning exercises (Setting a North Star), mapping activities, prototyping, collaborative problem-solving, reflective practice, guided journaling.

C. Learning with & from others

Social learning

Reflective and critical thinking are best trained in situations in which there are multiple viewpoints and assumptions are challenged. Understanding others' viewpoints is key to and foster change within and beyond individual organisations (4,5).

Guiding questions

- How can we create an environment in which different assumptions and viewpoints are seen as assets rather than as a challenge?

Method examples

Case clinics, collective sensemaking, participative system mapping, job shadowing, peer coaching.

D. Vertical Learning

Transformative or Transformational Learning

Vertical Learning is about becoming critically aware and questioning our own assumptions and those of others. It involves experiencing a deep structural shift at the level of thought, feelings, lenses and ultimately, actions (7).

Guiding questions

- How can underlying assumptions be made explicit?
- How can we create a space in which critical thinking is encouraged?

Method examples

Theory U, power mapping, holistic personal development, dialogue partners, safe spaces, deep & active listening.

E. Embodied learning

Experiential Learning Theory, Embodied learning

Embodied learning focuses on the non-mental factors involved in learning, which concerns lived experiences or storytelling and that signal the importance of the body and feelings (8,9).

Guiding questions

- How can we work with different forms of knowledge?
- How do we work with feelings and emotions?

Method examples

Experiential learning beyond formal classroom, role plays (“being put in somebody else’s shoes), safe spaces, theatre of the oppressed, theatre for living, the work that reconnects.

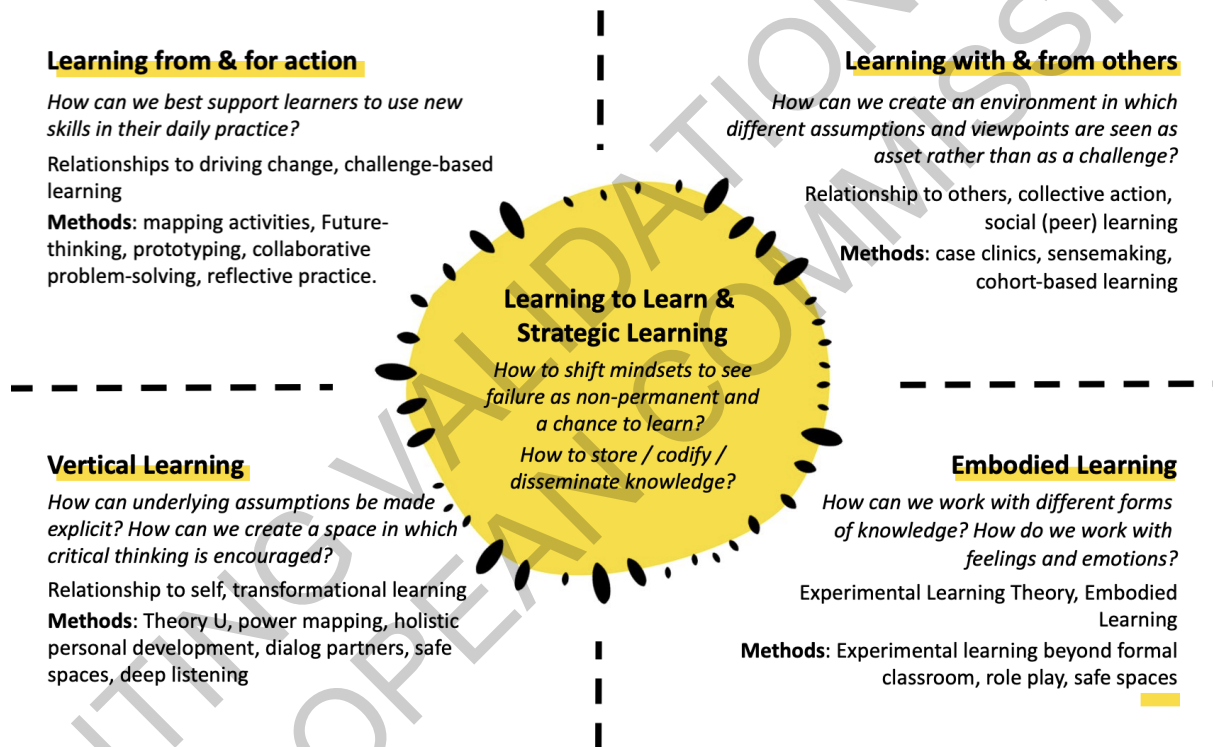


Figure 1: Key Learning Principles

2.2 Engagement Process Building Blocks

To create the "Engagement Process Building Blocks," the team began by conducting an extensive primary and secondary research effort. This allowed for the development of insights into the different modes by which learning can occur (*see above*), as well as how best to engage citizens and stakeholders. This included developing a rapid literature review of expertise in the fields of pedagogy, education, and learning as well as primary research - interviews, focus groups, and workshops - with individuals from cities and consultants who deliver support to cities. This primary research enabled the team to identify typical challenges when it comes to learning about and executing the design of citizen and urban stakeholder engagement processes as well as useful ways to address those issues.

The **key insights** from this initial research revealed an effective product / service would need to:

I. Be Adaptable

- A. ***A tool to serve this purpose should be able to function as a product which can support independent learning in the different cities in this Mission.*** This means it must be a tool which can be used without a specialist or facilitator present by individuals within a municipality or a Transition Team to yield general learning about citizen and stakeholder engagement and, generally, how to design engagement processes.
- B. ***A tool to serve this purpose should be able to function as part of a cohesive learning "service."*** This means it must be a tool which can be leveraged by a specialist or facilitator to deliver a cohesive service experience with individuals within the municipality or a Transition Team to yield contextualised and precise learnings about citizen and stakeholder engagement as well as how to design engagement processes.
- C. ***A tool to serve this purpose must be able to function as part of a cohesive design and decision-making "service."*** This means it must be a tool which can be leveraged by a specialist or facilitator to deliver a cohesive service experience with individuals within the municipality or a Transition Team to yield contextualised and precise design plans and decisions for a specific citizen and stakeholder engagement process.

II. **Enable Collaboration** In order to facilitate the development of a shared understanding of why and how to design a citizen and stakeholder engagement process, this product/service should encourage and enable collaboration amongst diverse members of a municipality, a Transition Team, and others from across the local ecosystem.

III. **Be Playful** Members of NetZeroCities municipalities and Transition Teams have tremendous demands on their time and a plethora of documents to read, tasks to accomplish, and individuals to meet. Nonetheless, there is tremendous evidence which points to the efficiency and effectiveness benefits of play and playful modes when it comes to learning and decision making. As such, by designing a product/service to feel playful - without feeling trivial or childish - we enable individual users to more rapidly and collaboratively delve into the challenging topics and challenges the Engagement Process Building Blocks product/service explores.

Simultaneously, in order to afford language accessibility for users with regards to the terminology used in a final product, the team began developing a glossary (see annex 2). This glossary was carried forward along with the other product developments with the hypothesis that it would likely need to be integrated back in with the other elements of the product to enable an effective user experience.

The key insights we derived from the primary and secondary research led to the concept creation of a deck of cards, which municipal and Transition teams could use to learn about engagement and act on those learnings. An initial prototype of this deck was developed and tested with NetZeroCities consortium partners and City Advisors. The feedback from this usability testing was that this initial prototype deck featured too much variety and did not enable a clear sequence of activities and focus of learning for users.

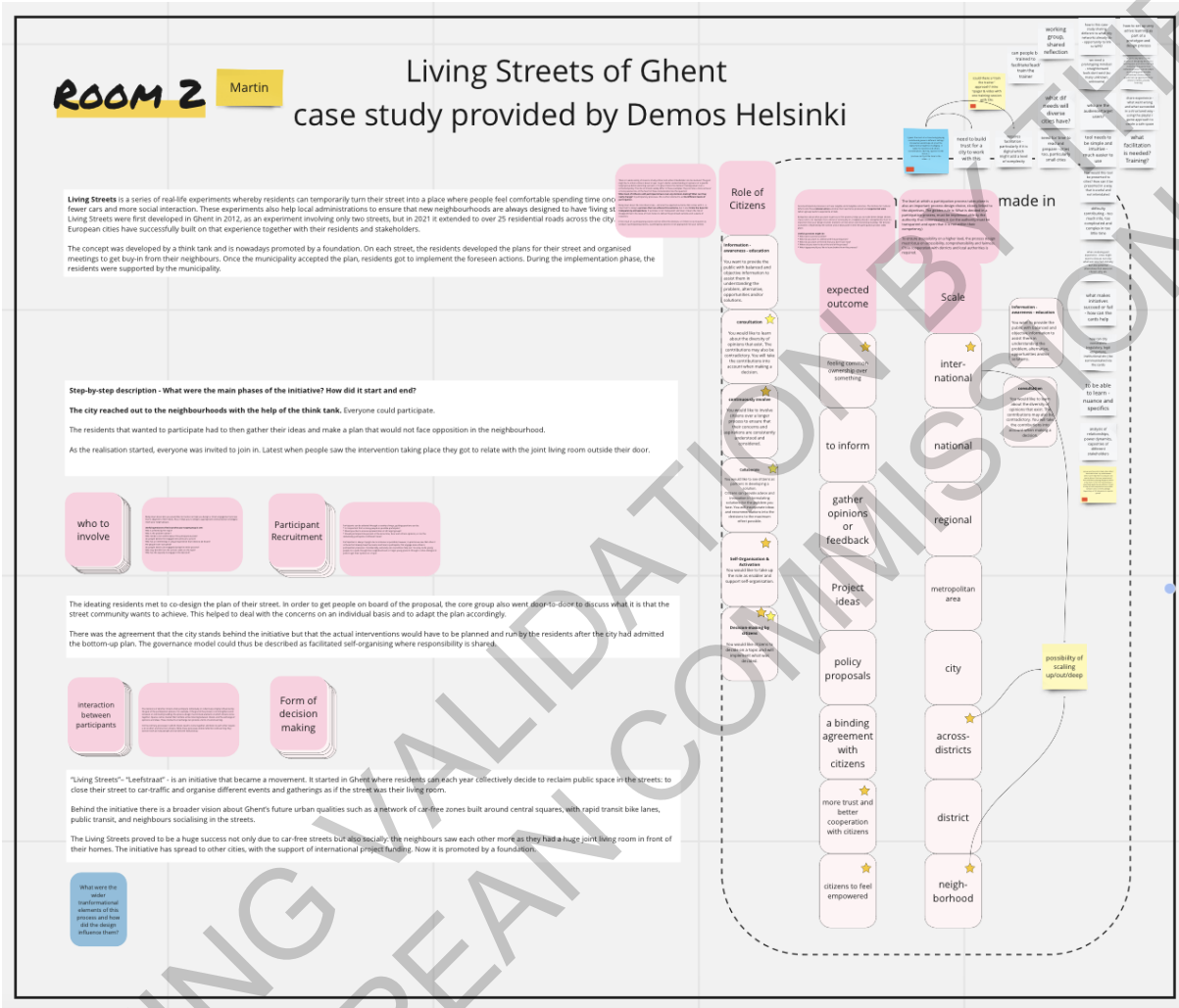


Figure 2: NZC Consortium Testing Session 19 September 2022

The team tested revised conceptual models of the product, again, with consortium partners. This testing revealed the benefit of the simplicity of card decks - as compared to more complex board game typologies for orienting learning and decision making.

Having determined that a card deck was the suitable mode for enabling playful, collaborative, and highly adaptive learning and decision making, the team set to work designing decks and initial guidance for how to use them. A third iteration of the product was developed and tested with members of the NetZeroCities City Panel on January 17, 2023. Feedback on the deck was positive but indicated:

1. It would be extremely important to offer even more clear rules for use of each deck, especially for teams who might want to use the product on their own; and
2. It would be quite helpful to offer a full service, by which a specialist could facilitate teams' use of the decks to support the design and decision making for a citizen and stakeholder engagement process.

Through this iterative process of testing and refinement, the team developed the final product, which includes four decks that enable users to explore and make decisions about goals, context, design choices, and methods of engagement.



Figure 3: Engagement Process Building Blocks Card Decks

2.3 Capability Building Services

The initial primary and secondary research conducted by the team served the double purpose of informing the design of the Engagement Process Building Blocks as well as informing the development of a cohesive capability building service. In fact, use of the Engagement Process Building Blocks as a service with a specialist - not solely as a product for independent use by municipal, transition, and local ecosystem teams - is meant to fit, interoperable, with the other capability building service elements that are still being developed.

Nonetheless, the team has been involved throughout all the ongoing design phases of the capability building service. As mentioned previously, the team contributed key, initial research which has informed the design and prioritisation of the different modalities of learning - summer school, masterclasses, and coaching - that will be made available for cities to participate in. Moreover, the team has contributed to the precise modular design this capability building experience is meant to take on. This means each of the capability building modules that will be made available to cities will include insight and instruction for how cities can most effectively engage citizens and stakeholders along the way.

3. Service/Product Name

3.1 The city's journey through the service

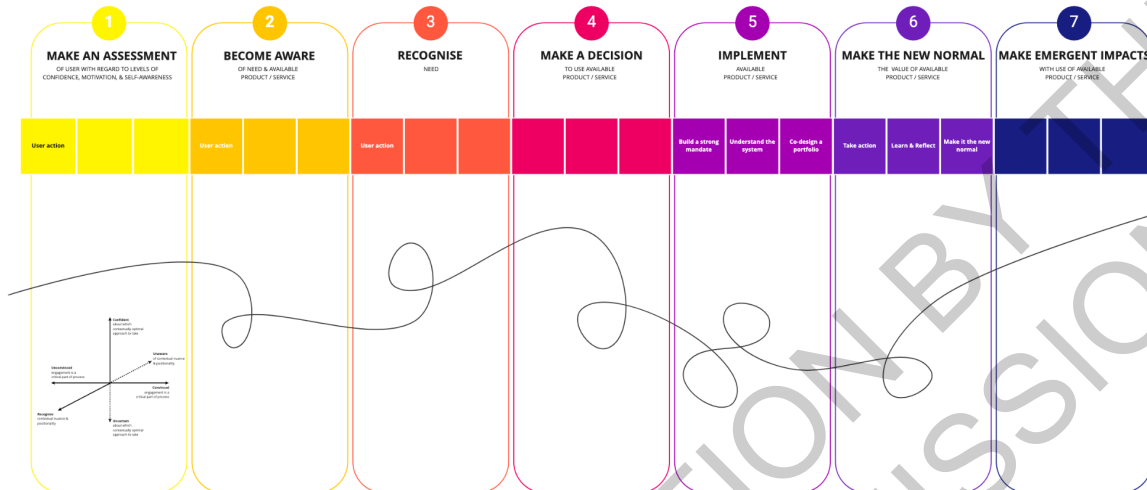


Figure 4: Template User Journey to Support Consideration of Cities' Journeys to, with, and from use of the Product / Service

3.1.1 Engagement Process Building Blocks

In order to best understand the cities anticipated journey to, with, and from the Engagement Process Building Blocks, it is helpful to differentiate between the 1) Product experience and 2) Service experience.

3.1.1.1 Independent Product Experience

The product consists of four card decks. The first two (goals and context) are the analytical phase. Here the focus is on which challenge the engagement should respond to and the constraints and opportunities in the specific context. The last two decks (design choices and methods) are the visioning phase. This phase looks at the choices for building the engagement process.

While this product can be used in diverse learning environments that are considering engagement processes and what makes their design successful, it is best applied within municipal teams. The Engagement Process Building Blocks add most value when used to bring people together with diverse expertise and perspectives (such as when working with multiple city departments) or when working with people who might value interactive approaches.

This product is for a particular use-case. This is when a city's use of this product will be most effective and leads to the most insights.

- **Determine a Targeted Case or Topic in Advance of Use:** The tool can be used for a more general conversation about citizens engagement but works better when there is already an idea of a case or topic where you want to engage citizens.
- **4-7 Diverse Individuals Participate**

- This tool is more effective when bringing together different thematic and engagement expertise and perspectives in a conversation. For example, people with expertise in climate, policy expertise, governance, participation, policy makers, neighbourhood workers, ...
- Cities bring together 4-7 people
- The tool can be used with civil servants of different departments, partners, stakeholders, and / or citizens who will bring a unique set of perspectives
- **Plan for a Half-Day to Use Product** Going through the full length of the different decks takes at least half a day. This time does not need to be spent in one session as the different decks into different sessions.
- **Be Prepared to Discuss, Explain, and Think Out Loud** This tool can be used as a means to discuss, explain and think out loud. The card decks can make decision processes more explicit, helping teams reach a shared understanding, question initial assumptions and address potential barriers and opportunities more thoroughly.

Card decks and steps

The full “*instruction guide*” and the “cards” can be found in annex 1.

Deck 1: Goals of the citizens and stakeholder engagement

Step 1: *Group discussion whether the predefined goals apply for their case.*

Step 2: *Group discussion about other possible goals of the engagement.*

Step 3: *Rank a top 3 of the most important goals.*

Deck 2: Context elements (constraint or opportunities) that have an impact on the engagement process.

Step 1: *Group discussion about the impact on the engagement process of some predefined context elements.*

Step 2: *Group discussion about other elements in the specific context that have an impact on the engagement process.*

Step 3: *Rank a top 5 of context elements that have the most impact on the engagement process.*

Deck 3: Design choices: 8 themes with different design options

Step 1: *The group familiarises itself with the first theme and the different options.*

Step 2: *Group discussion about possible options within the theme that are missing.*

Step 3: *Group discussion about which option or combination of options is the best choice for the specific engagement process based on the goals and the context elements.*

Step 4: *Steps one to three are repeated for all the other themes in the deck.*

Deck 4

Methods as building blocks to create engagement processes.

Step 1: *Group discussion about the predefined method building blocks and whether they fit in the specific design framework of engagement process.*

Step 2: *Group discussion about other possible methods.*

Step 3: *Rank a top 3 of the methods that fits best the design choices.*

After finishing all the steps in each deck, the group explores and discusses different elements of the design process, and choices that have been made. The choices and decisions can serve as a framework to get a view of the overall direction of engagement design. This can be used as a framework that can be developed into an implementable design by experts or, for more experienced cities, by the city itself.

3.1.1.2 Service Experience

The service associated with use of the Engagement Process Building Blocks product will include a trained facilitator and expert in citizens and stakeholder engagement. This individual or team of individuals will guide the municipal team through the various steps and card decks. (For the full instruction guide and all the cards, see annex 1)

Role of the expert facilitator

- **Read** the instructions and **Guide** the group through every step of the process in a way which optimally contextualises use of the product to the setting of the municipal team.
- **Facilitate** the discussion with special attention to power dynamics and make sure that everyone has equal opportunity to speak and express their opinion.
- **Offer Expertise**, such as additional information and examples when cards are unclear.
- **Offer Insights** in the connections between the different card decks, for example: which goals lead to which design choices? What is the impact of context elements like time and money on the methods you choose?
- **Coordinate** with the city to develop the outcomes of the tool into a full engagement design.

3.1.2 Capability Building Services

The design of this service is still in process, but it will be based on the latest iteration of the City Learning Journey, which will be operationalised as a key element of the NZC platform and deployed on the NZC portal via the Learning Journeys model (presented in D3.2). This learning journey is a learning experience shared by several cities in a cohort, guiding them through 8-9 modules of learning, which coincide and support cities to gain new capabilities to iterate their Climate City Contracts. These modules are part of the contracts, therefore, become an essential document, but also, an important, supported process to scaffold broader capability building and local ecosystem activation. The overall City Learning Journey will be based on cities' real experience of climate action and the development of their Climate City Contract (CCC). More information on the Capacity Building Services can be found in D6.4.

The abovementioned modules will be delivered by City Advisors and the City Support Groups with some support from the Domain Expert Groups by means of direct coaching, masterclasses, summer school programmes, and wayfinding to knowledge repository resources. These modules will also leverage the Knowledge Repository and the relevant collections our teams (T8.1, T8.2, T8.3, and T8.4) have been developing. The modules will also enable knowledge transfer based on peer-to-peer learning and cohort-learning, which will help inform further iterations of the Knowledge Repository with cases that come from the cities' implementation of the mission.

The modules of this Capability Building Service will include:

- I. Kick-off and Creation of a Common Understanding
- II. Enabling Commitments
 - A. May include guidance on: Establishing an initial citizen and stakeholder engagement strategy and building capabilities to engage effectively; and How to design and implement a Vision Co-Creation process.
- III. Emissions and Emission Contributors Inventory
 - A. May include guidance on: Mapping stakeholders - Identifying, Analysing, and Engaging key stakeholders; and Activating a local ecosystem - Strategies, tactics, methods, and tools.
- IV. Planning (a Portfolio) for 2030

- A. May include guidance on: Activating a local ecosystem - Strategies, tactics, methods, and tools.
- V. Investment/s Evaluation
 - A. May include guidance on: Integrating quantitative and qualitative investment data.
- VI. Funding Strategy and Financial Instruments
 - A. May include guidance on: Tactics and tools for participatory budgeting and other engaged methods for democratised decision making with financial instruments.
- VII. Filling the (NZC CCC) Templates
 - A. May include guidance on: Accurately summarising and integrating details and data from/for citizen and stakeholder engagement processes.
- VIII. Formalising Commitments
 - A. May include guidance on: Establishing distributed accountabilities based on citizen and stakeholder engagement.

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4. Next Steps

In order to effectively launch and deliver the Action Learning Programme to enable city governments' readiness to engage citizens and urban stakeholders we will take the following steps.

4.1 Engagement Process Building Blocks

4.1.1 Independent product

Over the next month, we will continue to refine the "Engagement Process Building Blocks" tool, testing the product and service with more cities and training partners on how to deliver the service. Our aim is to ensure that the tool is accessible, effective, and useful for cities of all sizes and levels of experience in citizen and stakeholder engagement.

Testing of the tool (March 2023)

The tool will be tested both in a live environment and online with people of different countries and languages. This will give insights in the timings, the clarity of the concepts of the cards and the instructions. Based on this test we can refine the cards and the instructions

Adding information

For each of the cards we want to add information about the concept in an additional guide. This information can be used to look only when a certain concept is not clear enough.

Based on first experiences with the cities we will review the cards in the four card decks. Some cards might be added or deleted based on the experiences of the cities.

We will create an expansion card deck with 'reflection questions or principles of quality citizen and stakeholder engagement towards carbon neutrality. After the initial four card decks, these cards can serve as a check or revision of the initial choices. It can explore principles like inclusion, transparency, accountability, equality, fairness, and impact of the process.

4.1.2 Service

As indicated above, we see that there is also a need for a full service that comes with this tool. This service would consist of an engagement expert who can facilitate the use of the tool, as well as provide more insights into the various linkages and pathways between the different decks. With this service, we can go a step further and create an implementable design with the cities. This service will be further developed as part of the SGA.

4.2 Capability Building Service

The Capability Building Service will be finalised by the end of March based on the collaborative and co-creative input of partners from across the consortium. The final framework and sequence of modules will be determined based on testing and feedback from cities. The final modalities of delivery will be determined based on learnings from best practice, testing with cities, and confirmation of optimal delivery methods and resources from City Advisors and the SGA's City Support Group. Additionally, SGA2 will enable the team to scale different parts of the Capability Building Service resources to the rest of the cities.

5. Conclusion

The Action Learning Programme will be a valuable resource for cities seeking to engage citizens and stakeholders and activate an inclusive ecosystem for change in their efforts to achieve climate neutrality. Our team has conducted extensive research and design work to create a tool that is flexible, collaborative, and adaptive. We are committed to working with cities to help them implement the tool effectively and to continue refining it to meet their needs. We believe that effective citizen and stakeholder engagement is critical to achieving climate neutrality, and the Action Learning Programme (and integrated products and services) will be an important step towards that goal.

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ANNEX 1 Engagement Process Building Blocks Tool – Instruction Guidebook

You can find the Engagement Process Building Blocks Tool [components online on Miro here](#).

ENGAGEMENT BUILDING BLOCKS

A COLLABORATIVE WAY TO APPROACH THE DESIGN OF YOUR CITIZEN AND URBAN STAKEHOLDER ENGAGEMENT PROCESSES

En route to achieving climate neutrality, you will need to engage with citizens and urban stakeholders across your city. The Engagement Building Blocks offer a visual, collaborative, and playful way to learn and implement frameworks for designing such an engagement process.

It can be used to explore alternative ways forward, assess needs, and reach agreement on key aspects between different stakeholders before you start the detailed design.

With experience, it can also become an extremely useful, go-to tool to support the actual co-creation and design of those engagement processes.

COMPONENTS

- 1 instruction guidebook
- 1 glossary
- 4 quick-start examples

SET A GOAL
We aim to
CREATE NEW SOLUTIONS
with our engagement process

1 goals deck

CONSIDER CONTEXT
Our
TECHNICAL OPPORTUNITIES
are important to consider because...

1 context deck

MAKE DESIGN CHOICES
When it comes to
EXPECTED OUTPUT
our choice is
PROJECT IDEAS

1 design choices deck

CONSIDER METHODS
We can adapt
SMALL PANEL DELIBERATIONS METHOD
to match our goal, context, and design ideas.

1 methods deck

BEFORE YOU BEGIN

What is this tool for?

This tool offers a visual, collaborative, and playful way to gain understanding of frameworks for designing citizen and urban stakeholder engagement processes.

The tool helps to consider and evaluate the different elements that affect how best to build this process and takes you step by step through different choices that need to be made. The result is the framework of the design of the engagement process. It provides insights into which basic building blocks can best be used to build a specific engagement process.

It can be used to explore alternative ways forward, assess needs, and reach agreement on key aspects between different stakeholders before you start the detailed design.

With experience, it can also become an extremely useful, go-to tool to support the actual co-creation and design of those engagement processes.

The tool consists of four card decks:

- The first two (goals and context) are the *analytical phase*. Here the focus is on which challenge the engagement should respond to and the constraints and opportunities in the specific context.
- The last two decks (design choices and methods) are the *visioning phase*. This phase looks at the choices for building the engagement process.

Analytical Phase

Visioning Phase



Who is this tool for?

This tool can be used in diverse environments where engagement processes are being considered and elements for a successful design are being evaluated. That said, it is best applied within city teams.



Including more and different perspectives in your use of the Building Blocks, will offer a better and more precise view of the factors which will have an impact on your engagement process.

Helpful Tip: The Engagement Building Blocks add the most value when you bring together people with diverse expertise and perspectives (such as when working with multiple city departments) or when working with other people who value interactive approaches.



How is this tool best used?

The Building Blocks were designed to be used in particular circumstances and settings. This is when they can offer the most useful support and insights. The instructions we offer align with this use-case. That said, we expect there may be many ways you could use this tool effectively. Consider these instructions, but feel free to experiment with what seems to work best for you in your situation.

Number & Diversity of People:

The use of this tool is more effective when bringing together different thematic and engagement expertise and perspectives in a conversation, for example people with expertise in climate, policy expertise, governance, participation, policy makers, neighbourhood workers, etc.

- We recommend using this tool with 4-7 other people.
- We also recommend using this tool with colleagues, partners, stakeholders, and / or citizens who will bring a unique set of perspectives.

Instruction Guide:

Use this instruction guide leads you step by step through the process of the different card decks.

Glossary:

A glossary accompanies the card decks. For each card there is a description of what the card means and questions the group may ask itself to reflect on this topic. There is no need to use the glossary if the concepts on a card is sufficiently clear.

Facilitated or Unfacilitated:

The tool can be used with or without expert facilitation.

- When there is no facilitator, one of the participants can lead the group by reading the instructions on each card deck out loud.
- We recommend using the Building Blocks with an experienced facilitator when the group is big, participants have different levels of experience or very different power positions.



Targeted or General Use:

The tool can be used for a more general conversation about citizens engagement but works better when there is already an idea of a case or topic where you want to engage citizens.

Timing:

To give enough time for meaningful reflection and conversation, going through the full length of the different decks takes at least four hours. However, this time doesn't need to be spent in one session as you can easily split the different decks into different sessions.

Discussion and thinking out loud:

Use this tool as a means to discuss, explain and think out loud. The card decks can make decision processes more explicit helping teams reach a shared understanding, question initial assumptions and address potential barriers and opportunities more thoroughly



USING THE GOALS DECK

Estimated Time Investment: ~45 minutes

Explanation

Participation and citizen engagement can serve different goals. Before you start designing your process it is important to have a clear idea of what goal it serves. This has an impact on the design choices you will make. This deck helps you to take steps towards defining the goal of your project.

There are cards with previously defined goals of engagement which can serve as inspiration. There are also blank cards to define your own goals and ranking cards to prioritise these goals.

Instructions

1. **REVIEW** the cards with the predefined goals. For each, discuss whether it is a goal for engagement in your city/project. Keep the cards that are important goals and put the others away.
2. **BRAINSTORM**, as a group, other possible goals of engagement in your city. These goals, shared by the group, may be written on the blank cards.
3. **DISCUSS** the goals cards you've selected and written.
4. **PRIORITISE** the goals that are most important for the engagement in your city. Place each of the Priority Card (#1-3) on the respective goals, i.e., place the #1 Priority card with your highest priority goal, the #2 Priority card on your second highest priority goal, etc.
 - Make sure the group agrees on these 3 most important goals.
5. **CONGRATULATIONS!** You have determined the main goals and the lower priority goals of your engagement process.
 - Make sure the output is saved. If you use the tool in a live setting, take a picture of the chosen cards, or hang them on the wall or a flipchart. If you are using the tool online, make sure the output is saved on an online whiteboard or take a screenshot. It will be an important guide for the conversations about Design Choices and Methods selection.



6. PROCEED to considering your context (deck 2).

<p>SET A GOAL</p> <p>Our</p> <p>#1</p> <p>Goal</p>	<p>SET A GOAL</p> <p>Our</p> <p>#2</p> <p>Goal</p>	<p>SET A GOAL</p> <p>Our</p> <p>#3</p> <p>Goal</p>	
<p>SET A GOAL</p> <p>We aim to</p> <p>BUILD COMMUNITY</p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p>ADD NEW PERSPECTIVES</p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p>EARN POLITICAL TRUST</p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p>CREATE NEW SOLUTIONS</p> <p>with our engagement process</p>
<p>SET A GOAL</p> <p>We aim to</p> <p>CREATE CONNECTIONS</p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p>ENHANCE TRUST ACROSS CITY</p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p>EMPOWER CITIZENS</p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p>CREATE A SENSE OF SHARED OWNERSHIP</p> <p>with our engagement process</p>
<p>SET A GOAL</p> <p>We aim to</p> <p></p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p></p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p></p> <p>with our engagement process</p>	<p>SET A GOAL</p> <p>We aim to</p> <p></p> <p>with our engagement process</p>



USING THE CONTEXT DECK

Estimated Time Investment: ~60 minutes

Explanation

Equally important as setting out the goal/s of an engagement process, is understanding the context that engagement process will be designed and executed in. Context elements create constraints or opportunities for the engagement process. Your context includes the resources you have available to execute the process - such as time and money - but also the political and cultural context, past, legal and demographic aspects.

This deck helps you to define all the context elements that you have to take into account to design your process. There are cards with some important context issues that you need to consider before designing your process. There are blank cards to specify the specific situation and to add more context elements that are important for your process. Just like in the first deck, there are ranking cards to consider which context element will have the most impact on your process.

Instructions

1. **REVIEW** the context cards one-by-one as a group. Consider the specific situation of your process / city and how certain contextual elements might impact your engagement process. Repeat for all cards.
 - As you consider each context card, record any specific details about your city that relate to the context element on a card.
 - Place any cards which you need more information for in a separate place. This gives a good overview of what information is still missing to think about the design of an engagement process.
2. **BRAINSTORM**, as a group, about other possible elements in your specific context that might be important to consider because they can have an impact on the engagement process. Write these on the blank cards.
3. **DISCUSS** the context cards you've selected and written.



4. **PRIORITISE** the context elements that are most important to consider for the engagement in your city. The objective is to identify which context elements will have the biggest impact on your engagement process. Place each of the Priority Card (#1-5) on the respective context element card. Discuss what the context elements are that will have the biggest impact on your engagement process and rank a top 5.
 - Make sure the group agrees on these 5 most important context elements.
5. **CONGRATULATIONS!** You have considered the most important context elements and have a better understanding of what information is still missing. Make sure you have the outcome at hand when you proceed to weighing Design Choices (deck 3).
6. **PROCEED** to consider your design choices.

CONSIDER CONTEXT Our #1 Contextual Consideration	CONSIDER CONTEXT Our #2 Contextual Consideration	CONSIDER CONTEXT Our #3 Contextual Consideration	CONSIDER CONTEXT Our #4 Contextual Consideration	CONSIDER CONTEXT Our #5 Contextual Consideration
CONSIDER CONTEXT Our TIMING is important to consider because...	CONSIDER CONTEXT Our BUDGET is important to consider because...	CONSIDER CONTEXT Our TEAM is important to consider because...	CONSIDER CONTEXT Our POLITICAL WILL & INFLUENCE are important to consider because...	CONSIDER CONTEXT Our HISTORY is important to consider because...
CONSIDER CONTEXT Our CLIMATE & ENVIRONMENT are important to consider because...	CONSIDER CONTEXT Our TECHNICAL OPPORTUNITIES are important to consider because...	CONSIDER CONTEXT Our LEGAL FRAMEWORKS are important to consider because...	CONSIDER CONTEXT Our CULTURE & NORMS are important to consider because...	CONSIDER CONTEXT Our INEQUALITIES is important to consider because...
CONSIDER CONTEXT Our CO-BENEFICIARIES is important to consider because...	CONSIDER CONTEXT Our EXPECTATIONS & PAST EXPERIENCES is important to consider because...	CONSIDER CONTEXT Our DECISION-MAKING PROCESSES is important to consider because...	CONSIDER CONTEXT Our is / are important to consider because...	CONSIDER CONTEXT Our is / are important to consider because...



USING THE DESIGN CHOICES DECK

Estimated Time Investment: ~90 minutes

Explanation

Based on your goal/s and your context, there are some choices you need to make in order to put together an effective engagement process. These are the design choices which will make your engagement fit-for-purpose.

There are no inherently right or wrong choices, but some are more fit for purpose and the specific context. Every choice has advantages and disadvantages, the goals and the context are the best guidance to make those choices. The choices are not always black and white, there can be some possibilities to combine different options or to have an option in between. This deck helps you think of some of the best design choices for your process. This card deck consists of seven themes, each with a range of options to choose from. The seven themes are: **(1) Who is Participating;** **(2) Relation with Participants;** **(3) Expected Output;** **(4) The Scale of Engagement;** **(5) Ensuring Equitable Access and Participation;** **(6) Ways of Interacting;** and **(7) Making Decisions.**

Instructions

- 1. KEEP YOUR GOAL AND CONTEXT IN MIND.** Make sure you have the output of the first two card decks (goals and context) in front of you. This will be an important guidance to choose between the different design options.
- 2. PICK A THEME** to start with. There no theme that necessarily has to come first, so start with whichever them the group feels most excited to take on first.
- 3. REVIEW,** as a group, the different option cards for each theme. The options are listed on each theme's card at the bottom of the card.
 - Read the options out loud or give the group the time to familiarise themselves with the different options.



4. **CONSIDER** whether there are important options missing. Write the missing options down on the blank cards of the theme.
5. **DISCUSS** with the group which option or combination of options is the best choice for your engagement process. In doing so, try to see which option best leads to the goal/s you prioritised from the first deck.
 - Save the best choices from each thematic deck
6. **REPEAT** this process for each of the other six themes.
7. **CONGRATULATIONS.** You made some important choices for the framework of your engagement process. The outcome will be your guidance for the next step.
8. **PROCEED** to consider methods (deck 4).



USING THE METHODS DECK

Estimated Time Investment: ~45 minutes

Explanation

A method is not the same as a participation process. With methods you can build a process. This means you can also combine different methods. There is a close link to the design choices and the methods.

This deck consists of cards with predefined building blocks of methods and focuses on what your engagement process can actually look like. Each method can be examined to see if it fits the objectives, context and design choices made earlier. The list of method elements is endless. Again, there are blank cards to add possible options yourself and cards with numbers to see which methods best fit the framework of this engagement process.

Instructions

1. **REVIEW** the methods cards one-by-one as a group. For each, discuss whether it is a method that fits in the framework of your design based on the goals, context and design choices.
 - Keep the cards with methods that fit and put the others away.
2. **BRAINSTORM**, as a group, about other possible methods of engagement that could fit and write them on the blank cards.
3. **DISCUSS** the methods cards you've selected and written.
4. **PRIORITISE** the methods that can most effectively meet your goals, in your context while accomplishing your design choices. Use the priority cards to designate the prioritised methods.
 - If you came up with more than 3 methods, select three that best fit your engagement process



5. **CONGRATULATIONS.** You have come up with possible methods that you can use to build your engagement process.

CONSIDER METHODS Our <h1>#1</h1> Method to Adapt	CONSIDER METHODS Our <h1>#2</h1> Method to Adapt	CONSIDER METHODS Our <h1>#3</h1> Method to Adapt	
CONSIDER METHODS We can adapt ONLINE IDEATION METHODS to match our goal, context, and design choices.	CONSIDER METHODS We can adapt ONLINE VOTING METHODS to match our goal, context, and design choices.	CONSIDER METHODS We can adapt LIVING LAB METHODS to match our goal, context, and design choices.	CONSIDER METHODS We can adapt SMALL PANEL DELIBERATIONS METHODS to match our goal, context, and design choices.
CONSIDER METHODS We can adapt BIG GROUP DELIBERATIONS METHODS to match our goal, context, and design choices.	CONSIDER METHODS We can adapt PARTICIPATORY BUDGET METHODS to match our goal, context, and design choices.	CONSIDER METHODS We can adapt MULTI-ACTOR NETWORK PROCESSES to match our goal, context, and design choices.	CONSIDER METHODS We can adapt WRITE YOUR OWN METHOD to match our goal, context, and design choices.



CONGRATULATIONS

Together with your team, you have accomplished a meaningful first step. Using these decks - Goals, Context, Design Choices, and Methods - you have developed a framework, which can serve as a starting point to build and implement your citizen and stakeholder engagement process.



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Annex 2 Engagement Process Building Blocks – Card Decks

You can find the Engagement Process Building Blocks Tool [components online on Miro here](#).

Goal Deck



Context Deck

CONTEXT

CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT
Our #1 Contextual Consideration	Our #2 Contextual Consideration	Our #3 Contextual Consideration	Our #4 Contextual Consideration	Our #5 Contextual Consideration	Our BUDGET is important to consider because...	Our CLIMATE & ENVIRONMENT are important to consider because...
CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT
Our CO-BENEFICIARIES is important to consider because...	Our CULTURE & NORMS are important to consider because...	Our DECISION MAKING PROCESSES is important to consider because...	Our EXPECTATIONS & PAST EXPERIENCES is important to consider because...	Our HISTORY is important to consider because...	Our INEQUALITIES is important to consider because...	Our LEGAL FRAMEWORKS are important to consider because...
CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT	CONSIDER CONTEXT
Our POLITICAL WILL & INFLUENCE are important to consider because...	Our TEAM is important to consider because...	Our TECHNICAL OPPORTUNITIES are important to consider because...	Our TIMING is important to consider because...	Our is / are important to consider because...	Our is / are important to consider because...	Our is / are important to consider because...

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Design Choices Deck

DESIGN CHOICES

MAKE DESIGN CHOICES When it comes to ENSURING EQUITABLE ACCESS & PARTICIPATION our choice is TO MAKE PARTICIPATION FEEL ACCEPTABLE	MAKE DESIGN CHOICES When it comes to ENSURING EQUITABLE ACCESS & PARTICIPATION our choice is TO MAKE PARTICIPATION FEEL AFFORDABLE	MAKE DESIGN CHOICES When it comes to ENSURING EQUITABLE ACCESS & PARTICIPATION our choice is TO MAKE PARTICIPATION FEEL APPROPRIATE	MAKE DESIGN CHOICES When it comes to ENSURING EQUITABLE ACCESS & PARTICIPATION our choice is TO MAKE PARTICIPATION FEEL AFFORDABLE & ACCOMMODATING	MAKE DESIGN CHOICES When it comes to ENSURING EQUITABLE ACCESS & PARTICIPATION our choice is TO MAKE PARTICIPATION FEEL APPROACHABLE	MAKE DESIGN CHOICES When it comes to ENSURING EQUITABLE ACCESS & PARTICIPATION our choice is TO MAKE PARTICIPATION FEEL APPROACHABLE	MAKE DESIGN CHOICES When it comes to EXPECTED OUTPUT our choice is A SHARED VISION	MAKE DESIGN CHOICES When it comes to EXPECTED OUTPUT our choice is BINDING AGREEMENTS	MAKE DESIGN CHOICES When it comes to EXPECTED OUTPUT our choice is FEEDBACK ON LEGGING PLANS
MAKE DESIGN CHOICES When it comes to EXPECTED OUTPUT our choice is POLICY RECOMMENDATIONS	MAKE DESIGN CHOICES When it comes to EXPECTED OUTPUT our choice is PROJECT IDEAS	MAKE DESIGN CHOICES When it comes to EXPECTED OUTPUT our choice is MAYBE HAVE OWN CHOICE	MAKE DESIGN CHOICES When it comes to MAKING DECISIONS our choice is 2/3 MAJORITY VOTING	MAKE DESIGN CHOICES When it comes to MAKING DECISIONS our choice is CONSENSUS	MAKE DESIGN CHOICES When it comes to MAKING DECISIONS our choice is CONSENT	MAKE DESIGN CHOICES When it comes to MAKING DECISIONS our choice is MAJORITY VOTING	MAKE DESIGN CHOICES When it comes to MAKING DECISIONS our choice is BANKING	MAKE DESIGN CHOICES When it comes to MAKING DECISIONS our choice is SERVE YOUR OWN
MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is FOR THEM TO MAKE DECISIONS	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is TO COLLABORATE WITH THEM	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is TO COLLABORATE WITH THEM	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is TO CONSULT THEM	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is TO ENABLE SELF-ORGANISATION AND CO-OPERATION	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is TO INFORM THEM	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is TO INVOLVE THEM COLLECTIVELY	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is SERVE YOUR OWN CHOICE	MAKE DESIGN CHOICES When it comes to RELATION WITH PARTICIPANTS our choice is A CITY FOCUS
MAKE DESIGN CHOICES When it comes to THE SCALE OF ENGAGEMENT our choice is A DISTRICT FOCUS	MAKE DESIGN CHOICES When it comes to THE SCALE OF ENGAGEMENT our choice is A NEIGHBOURHOOD FOCUS	MAKE DESIGN CHOICES When it comes to THE SCALE OF ENGAGEMENT our choice is A REGION FOCUS	MAKE DESIGN CHOICES When it comes to THE SCALE OF ENGAGEMENT our choice is SERVE YOUR OWN CHOICE	MAKE DESIGN CHOICES When it comes to WAYS OF INTERACTING our choice is ANONYMOUS PARTICIPATION	MAKE DESIGN CHOICES When it comes to WAYS OF INTERACTING our choice is DELIBERATION OR DECISION	MAKE DESIGN CHOICES When it comes to WAYS OF INTERACTING our choice is INDIVIDUAL EXPRESSION	MAKE DESIGN CHOICES When it comes to WAYS OF INTERACTING our choice is SERVE YOUR OWN CHOICE	MAKE DESIGN CHOICES When it comes to WAYS OF INTERACTING our choice is AFFECTED DEMOGRAPHICS
MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is DIFFERENT STAKEHOLDERS	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is SELECTED MEMBERS OF THE TARGET AUDIENCE	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is MARGINALISED PUBLICS	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is REPRESENTATIVE SAMPLE	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is WHOEVER WANTS TO	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is SERVE YOUR OWN CHOICE	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is SERVE YOUR OWN CHOICE	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is SERVE YOUR OWN CHOICE	MAKE DESIGN CHOICES When it comes to WHO IS PARTICIPATING our choice is SERVE YOUR OWN CHOICE

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Methods Deck

METHODS

CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS
Our #1 Method to Adapt	Our #2 Method to Adapt	Our #3 Method to Adapt	We can adapt	We can adapt	We can adapt	We can adapt
			BIG GROUP DELIBERATIONS METHODS	LIVING LAB METHODS	MULTI-ACTOR NETWORK PROCESSES	ONLINE IDEATION METHODS
			to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.
CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS	CONSIDER METHODS
We can adapt	We can adapt	We can adapt	We can adapt	We can adapt	We can adapt	We can adapt
ONLINE VOTING METHODS	PARTICIPATORY BUDGET METHODS	SMALL PANEL DELIBERATIONS METHODS	WITH YOUR OWN METHODS	WITH YOUR OWN METHODS	WITH YOUR OWN METHODS	WITH YOUR OWN METHODS
to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.	to match our goal, context, and design choices.

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Annex 2 Engagement Process Building Blocks – Glossary

You can find the Engagement Process Building Blocks Tool [components online on Miro here](#).

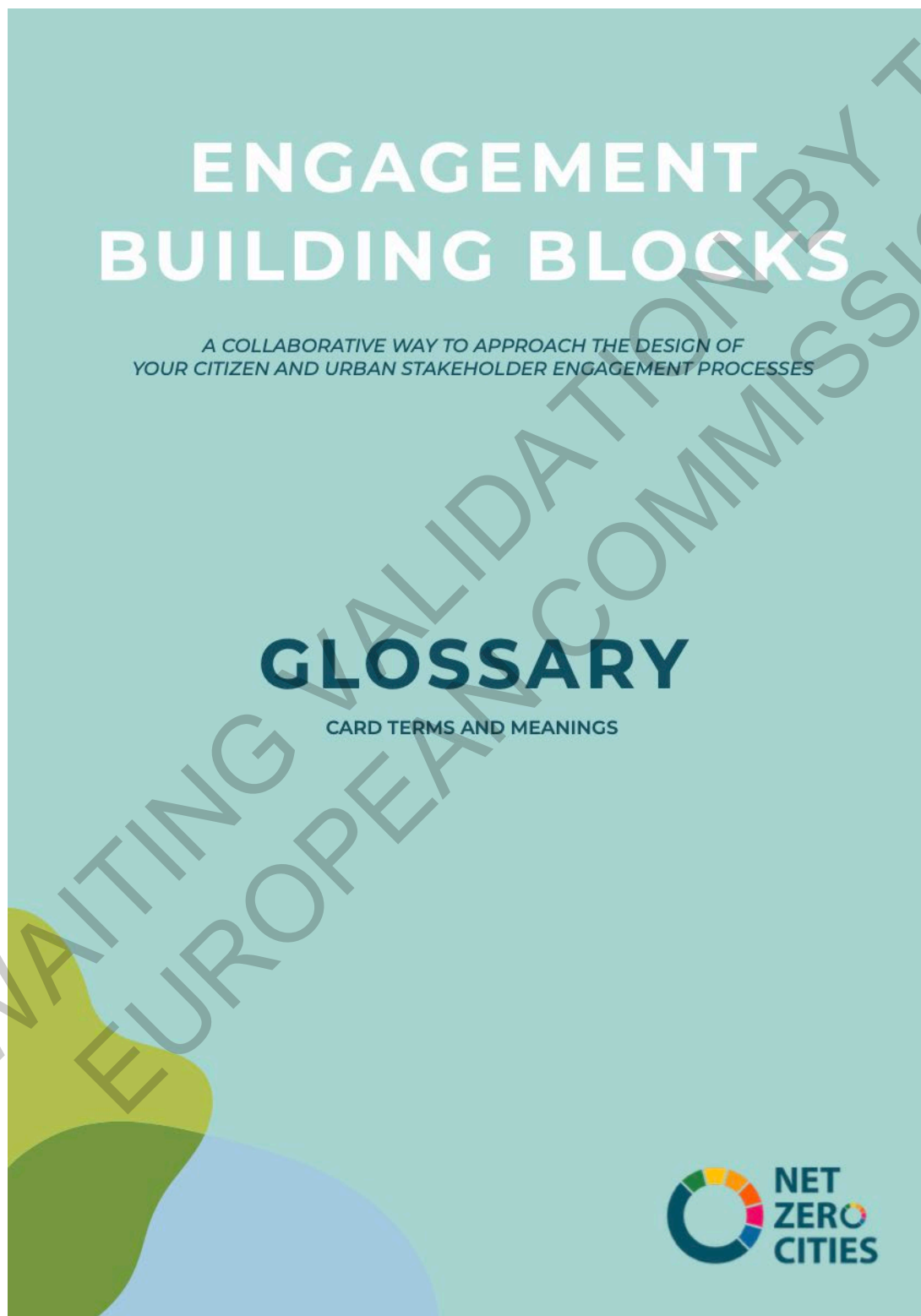


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