GUIDELINES to Stakeholder Involvement – REDISCOVER

„Rediscover, expose and exploit the concealed Jewish heritage of the Danube Region"

TABLE OF CONTENTS

Foreword

In the following sections we introduce guidelines and tools that have proved useful in bringing together city stakeholders, and facilitating collaboration in the co-creation of solutions. The toolkit is intended to provide inspiration and guidance, not to be prescriptive or restrictive. We acknowledge that there are many working cultures and a variety of approaches to participation across Europe. Each Stakeholder Group faces different challenges and the tools and working methods will need to be adapted to each set of circumstances. The sections of part 1 will guide project partners through the necessary steps to build Local Stakeholder Groups and manage their activities throughout the project. A series of useful tools, documents and other resources are provided in part 2.

Part 1 Project background/specificities

1.1 Stakeholder Engagement in the project REDISCOVER

1.1.1 About the project

Partnership: The partnership is based on a core circle of 9 municipalities of cities with comparable size, historic background, Jewish heritage portfolio and cultural/tourism mission. Project partner cities include Szeged (HU, acting as LP), Banja Luka (BA), Galati (RO), Kotor (ME), Murska Sobota (SI), Osijek (HR), Regensburg (DE), Subotica (RS) and Timisoara (RO). In addition to municipalities, there are altogether 9 thematic partners and thematic ASPs participating in project implementation. These are the Institute for Culture, Tourism and Sport Murska Sobota (SI); Municipal Museum of Subotica (RS); Szeged and Surroundings Tourism Nonprofit Ltd. (HU), Jewish Community of Banja Luka (BA); Jewish Community of Montenegro; Jewish Community of Osijek (HR); Jewish Community of Szeged (HU); Jewish Community Timisoara (RO); Romanian Institute for Research on National Minorities. Project partners and ASPs collectively cover 8 out of 14 countries of the Danube Region.

Project objectives: Central and Eastern Europe was home to flourishing Jewish communities before WWII. By capitalizing on this legacy, the project stives to create value in social cohesion, tourism potential and cultural abundance. Mid-sized cities, with limited built heritage, would generally be surmounted by major attractions and well-known heritage centres on the tourism market. The challenge is to find ways to explore and build on both tangible and intangible elements, in order to create competitive cultural products, with potential to grow, and join into cross-country networks.

Main objective is to build on currently undiscovered potential in the Jewish cultural heritage of cities, and develop contemporary tourism solutions, while smartly arranging visibility, accessibility and sustainability. A key element of the approach is intangible heritage considered as a valid factor to create awareness and interest. These elements (music & literature, religion & festivals, traditions & lifestyle, cuisine & local recipes, history & contribution to the development of the local community, oral history, photo collections, legacy of famous local born Jewish personalities) are organised into creative attractions, combined with visible synagogues, cemeteries, memorial sites and buildings.

The activities of REDISCOVER represent a tourism product development process, from assessment through development to implementation and feedback. Thus, they should generally be considered as market oriented. At the same time, the outputs created, including tourism products and services developed and tested in the framework of the project, are made available, free of charge, to any interested party, who wish to include them in its business portfolio. Thus, equal treatment of all stakeholders is ensured.

Strategic Objective no.1 focuses on involving the community into the process, supporting the recognition of the value of Jewish Cultural Heritage. Through the introduction of effective means to involve relevant stakeholders of local communities, providing real engagement and actual potential to contribute to the process, the general recognition of Jewish Cultural Heritage as a true asset and potential attraction is supported. As a result, Jewish Cultural Heritage will be understood as a viable target area for sustainable tourism products by all actors of the development process (including local Jewish and majority communities and their NGOs, for-profit/non-profit tourism/cultural service providers, and policy institutions). The participatory process allows the collection and utilisation of creative, innovative, bottom-up ambitions into cultural heritage management and valorisation.

Strategic Objective no. 2 aims to develop new, interconnected cultural products/services, via a co-creation process. The project helps mid-sized cities to discover and evolve these through a community-based co-creation process. New products/services will display and exploit both known and currently hidden, undiscovered or forgotten multicultural dimensions of Jewish Cultural Heritage, providing contemporary interpretation of tangible and intangible elements. This way, the attractiveness and competitiveness of targeted cities (both as tourism destinations, and as residential areas) will be improved, while the cultural diversity of Danube Region, and multiculturalism of background societies of involved countries are also strengthened.

Main result is the rediscovery of locally available Jewish heritage, turned into jointly presented, synergic tourism assets, through a co-creative, community sourced process. Positive effects include improved awareness among younger generations, a critical mass of destination potential to achieve international visibility, and strengthening the visitor economy of targeted cities.

1.1.2 Role of stakeholder engagement in project implentation

The project plans to explore and exploit Jewish cultural heritage of project partner cities in the framework of a community sourced process, in close cooperation with local societies. To establish community engagement, wide stakeholder involvement is applied throughout the project. Stakeholders are identified with vertical integration in mind, to include all levels from individuals, businesses/communities, research institutes to administration/policy. Local Stakeholder Groups mobilise citizens to become not just beneficiaries, but active participants/contributors of cultural development, rooting in their historic heritage. The establishment of Local Stakeholder Groups and their involvement into discussion, right from the initial stage, helps to maintain local acceptance of the processes and assures compliance of outputs with the ambitions and interests of stakeholders.

Local Stakeholder Groups, consisting of NGOs, SMEs, local Jewish communities will be invited to meetings at all locations, targeted to support each phase with local information/bottom-up initiatives/hands-on experience-based feedback. Key stakeholders, identified within each Local Stakeholder Group will be involved in transnational co-creation workshops, transferring outcomes to local Local Stakeholder Groups. Key members of these groups will act as change drivers throughout the process: they will actively disseminate and multiply existing knowledge/experience and new ideas/learnings, and part of them will actually contribute to new products or services as involved partners.

Local Stakeholder Groups, and their key members play an active role in the implementation of thematic work packages of the project.

In WP3 the aim of the activities is to establish the Local Stakeholder Groups by identifying and informing **religious and cultural seniors**, **tourism service providers**, **social innovators**, **institution managers**, **potential oral/family/local history providers** of communities, and other **interested citizens/volunteers** of partner cities. Local Stakeholder Groups will act as change drivers in collection, channelling, dissemination, and multiplying of existing knowledge, experience and new ideas/learnings. These workgroups a key element of assuring that exploring and exploiting of the Jewish Cultural Heritage is of community-sourced nature, also ensuring maintaining a continuous cooperation with local societies, including existing Jewish communities, interested members of the majority society, cultural/tourism partners.

The list of local stakeholders identified by each partner city when establishing Local Stakeholder Groups is considered a database to be further developed during project implementation. In accordance with the Guidelines to Stakeholder Involvement, each partner city organises stakeholder meetings in their city, to discuss applicable methods/processes of surveying local tangible/intangible Jewish cultural heritage, and to **collect inputs for the Walkshop** planned within the famework of WP3. During stakeholder meetings, **key members** of Local Stakeholder Groups are selected to appear in the Personal History Files, a social media post-series capturing mini-stories of the visions, ambitions and initiatives of selected role model personalities.

Within the framework of WP3 the main output of Local Stakeholder Groups' work is a comprehensive, **web-based repository of identified Jewish Cultural Heritage elements**. The repository includes the classification of these items according to predefined heritage categories and an appraisal system to evaluate their tourism potential. The database also contains existing thematic/information/sales networks, and identifies potential synergies with each partner city's heritage portfolio, while being transferrable to other cities as well.

In WP4 Local Stakeholder Groups, playing a key role in the community sourced process throughout the project, are involved in a series of product development workshops. Their active contribution to the tourism products and services to be developed assures the nurturing of sustainable initiatives, in line with the expectations and interests of local communities and tourism/business context. Stakeholder involvement and bottom-up planning also underpin financial sustainability, by providing a cost-efficient way to channel relevant/updated local ideas and resources into the development process.

Local Stakeholder Groups play an important role in the series of product development workshops:

The first element of the series is the **Inventory Workshop** (organised in each partner city). These focus on the overview and discussion of local Jewish cultural heritage inventory prepared in WP3, the presentation of inspiring case studies form other partner cities, and brainstorming of potential local and joint tourism products.

The next element is the **Capacity Building Workshops**, also organised in each partner city, for 20-25 selected local tourism development partners (community members, service providers, institutions) per city. These workshops aim at developing skills of participants related to tourism product development.

Finally the **Match-making Workshop** is organised in each partner city, involving Local Stakeholder Groups, tourism service providers and related institutions. These professionally moderated events already aim at identifying integrated tourism initiatives and cooperation opportunities among the selected stakeholders, and include the presentation of case studies from other partner cities.

In WP5 interest groups including NGOs, SMEs and local Jewish communities are involved through the organisation of **strategic stakeholder workshops** in each partner city. Several members of these target groups are also direct stakeholders/partners of implemented and tested tourism products/services. Stakeholders are also part of the process of preparing the **Joint Visibility Strategy** supporting the introduction and testing of new tourism products and services, through **Stakeholder Visibility Workshops**.

1.1.3 Who could be involved in Local Stakeholder Groups in REDISCOVER project?

By definition in a narrow sense stakeholders must be those who have the power to impact an organisation or a project in some way. In a wider sense, a stakeholder is anybody who can affect or is affected by an organisation, strategy or project. They can be internal or external and they can be at senior or junior levels. Project stakeholders are all those with an interest or role in the project or who are impacted by the project.

For each project partner there is a different mix of local stakeholders that should be involved during the implementation of REDISCOVER project. In line with the definition of project stakeholders, at the outset each project partner needs to identify the stakeholders who have an interest in the results of the project, who may play a role in project implementation, or those who are impacted by the project.

Members of Local Stakeholder Groups may include:

- different departments within the local administration
- elected bodies responsible for the policy area connected to the project
- interest groups including NGOs, Jewish communities, cultural, religious, tourism and local historian civil associations of local communities

- representatives of the press
- tourism service providing SMEs (accommodation, catering and attraction venues, travel agents)

1.1.4 What is the timeframe?

Local Stakeholder Groups are set up and run within the lifetime of REDICOVER project. Their work is closely related to thematic work packages WP3, WP4 and WP5. Based on the indicative time plan of the project, the partner responsible for each work package sets up a WP schedule, providing guidance on the timeframe of each activity withing the work package.

1.2. Engaging with local stakeholders

Getting the right people in your Local Stakeholder Group is a challenging task. Having all the relevant stakeholders working together is the best way to provide a solid foundation for project results. This section will lead you through the different steps to setting up your Local Stakeholder Group.

1.2.1 Framing the Local Stakeholder Group at network level

In all cases, both the group and its results should speak for the whole community of beneficiaries. It is essential that the right stakeholders are identified, selected and invited to join. A shared mapping process among project partners is a good way to establish who needs to be invited to join and why, what contribution is expected from each stakeholder and how that contribution will be sought. The guidance included here and the tools provided in Part 2 help you undertake an effective stakeholder analysis, identify the nature and interests of the stakeholders to be involved, and consider their potential influence and interest in Local Stakeholder Group activities.

Within the REDISCOVER project a terms of reference is established setting out the main principles by which Local Stakeholder Groups are set up and run. This exercise takes place at the start of the project and provides a coherent framework for all the cities within the partnership. It is be accomplished during the Stakeholder Involvement Workshop organised at the beginning of the project, including mapping key stakeholders and deciding how REDISCOVER Local Stakeholder Group members will be involved in, contribute to and benefit from network transnational activities. Exchange among partner cities on participative approaches is also a great learning opportunity whatever the experience of the different partners in this area.

1.2.2 Setting up the Local Stakeholdeer Group at partner level

When considering which stakeholders to involve in the Local Stakeholder Group the first step is to draw up a map of similar relevant structures that already exist. If your city already has a group dealing with a similar theme, it makes sense to “piggyback”, rather than start something from scratch. This avoids duplication and a potentially negative reaction from stakeholders involved in existing structures.

Main steps:

a) Make an initial assessment of potential stakeholders: Using the network level terms of reference, each city conducts an initial collective review, together with colleagues in the municipality and other immediate partners, to identify local stakeholders. Then these first ideas about the composition of the group can be shared with the Lead Partner and Lead Expert who may well be able to advise on gaps or possible additions. In the Tools section (Part 2) you will find two tools that can help you identify the relevant stakeholders to engage with, the stakeholder analysis grid and the interest / influence matrix. These tools can be used to map local stakeholders with a first group of core local actors, for example from within the local administration, then with an enlarged group of potential members of the REDISCOVER Local Stakeholder Group. Repeating the exercise in a workshop format helps to check the validity of the initial stakeholder landscape and the REDISCOVER Local Stakeholder Group members' views can add depth and consistency to your group structure. We recommend this exercise is repeated several times during your project cycle to adapt the group if needed. The grid is particularly useful in improving understanding of the difference between potential 'primary' and 'secondary' stakeholders and can subsequently be used to affect individual roles and responsibilities within the REDISCOVER Local Stakeholder Group.

b) Engage potential stakeholders to become Local Stakeholder Group members: Once stakeholders have been identified, engaging with them can be a challenging step, especially when there is no existing cooperation on which to build. The way in which the initial approaches are made is important to create interest and motivate longer term participation. The first approach could be through individual invitations, phone calls, bilateral or smaller group meetings. It is also worth considering launching an open call to attract interest and widen participation. This can be useful in attracting specific categories of stakeholders, such as civil society representatives, or harder to reach groups. Making announcements at conferences, press calls, and in the media can also generate a buzz and bring in new stakeholders. Engaging stakeholders and maintaining their active commitment over a two-year period can be a daunting task. To get this right, try to think about the benefits to stakeholders of participating and then communicate them clearly and persuasively.

What is in it for them? Money? Influence? Inspiration? Learning? Professional reward? Networking? Better solutions to their problems? Fun?

Being part of the REDISCOVER Local Stakeholder Group can, for sure, deliver:

- project results that has fully considered the real needs of their organisation,
- better local networks that can lead to sustained future cooperation,
- closer working relationships that give better insight into the long-term vision and objectives of partners,
- a higher degree of accountability to multiple stakeholders,
- an enriching and rewarding professional experience,

- a wider perspective on the theme tackled and on their own organisations' work,
- an opportunity to learn from other parties on the theme selected and possibility of networking,
- improved skills in participation, integrated approaches and project management,

It is important to be clear from the outset that there is an expectation that members attend REDISCOVER Local Stakeholder Group meetings regularly and actively give input to the project.

Remember that you don't have a second chance to make a good first impression! When approaching potential stakeholders be convincing and realistic at the same time. Do not focus only on the responsibilities, but also on the benefits of being involved.

An exclusively top-down approach in selecting members and building the REDISCOVER Local Stakeholder Group may compromise the credibility of the group and its outputs. Think laterally and widen participation.

c) Structure the Local Stakeholder Group

As with membership composition there is no one shape for a successful REDISCOVER Local Stakeholder Group. In this respect, a number of different organisational structures can work:

Open structure: allows you to continuously adapt the Local Stakeholder Group structure as you go. On the basis of need, an open membership allows you to increase participation with relevant new stakeholders making ad hoc interventions on a specific topic.

Closed structure: a smaller group, of a maximum of 10 persons, which remains stable during the project life time, allows you to keep control of the group, to clearly allocate responsibilities and to better focus on completing tasks. Whilst this kind of structure does not automatically convey the critical mass that some processes may need, it has the advantage of allowing members to get to know each other well and build strong relationships.

Topic sub-groups: This organisation around topic sub-groups may result in higher levels of interest from members and a better control of the evolution of each group. If a number of more focused groups are developed then mechanisms need to be built in to share results between them.

Multiple level structures: another possibility is a mixture of the open and closed structures. A core group of 6 to 8 partners with a high degree of knowledge about the project theme could be backed up by a wider local network which forms the target group for the programme of local activities that the core group develops. These could include dissemination events and local consultation events, for example.

1.3 Working with your local stakeholder groups

Building a cohesive and successful Local Stakeholder Group requires energy, commitment and engagement from all the actors involved for the duration of the project. This section offers guidance on the key aspects of working with stakeholders in the framework of your Local Stakeholder Group.

1.3.1 Running REDISCOVER Local Stakeholder Groups at network level

Running a Local Stakeholder Group can be a rewarding but also a challenging and time consuming task. A successful Local Stakeholder Group is one that manages to co-produce and give input to project outcomes while dealing with different agendas, by creating cohesion and a group dynamic amongst people with sometimes very different backgrounds and expectations. Important factors for success are leadership, trust, clear information, an agreed roadmap, regular communication, and well-managed meetings.

At network level the project partner responsible for the given work package supports each city to run its Local Stakeholder Group in line with the terms of reference agreed within the network as a whole. Each Local Stakeholder Group is asked to report on meetings and progress to the project partner leading the given activity on a regular basis, for example by providing a one page summary in English after each meeting. This can be supplemented by phone calls and e-mail updates. The project partner leading the given activity facilitates exchange between partners about Local Stakeholder Group progress, for instance through surveys, reports and dedicated sessions in transnational meetings.

The project partner leading the given activity also helps to facilitate mutual learning and exchange between Local Stakeholder Group and transnational activities. Different Local Stakeholder Group members from each city attend transnational meetings, selected on the basis of potential contribution to or learning about the given project theme of transnational events. When hosting a network activity the city's Local Stakeholder Group is actively involved in welcoming guests, organising joint workshops, site visits, press conferences, and informal networking in order to meet peers from other cities.

Support provided by the project partner leading the given activity

- leading the development of terms of reference at network level
- offering guidance to Local Stakeholder Group Coordinators by phone or e-mail or through direct attendance at meetings when needed to ensure proper delivery on project results
- seeking and supporting ideas about Local Stakeholder Group inputs to transnational meetings
- giving ideas about Local Stakeholder Group meetings and good meeting animation techniques
- reviewing reports of Local Stakeholder Group meetings
- providing opportunities in transnational meetings for partners to share their experience, problems and solutions or good practices related to Local Stakeholder Groups

1.3.2 Running the REDISCOVER Local Stakeholder Group at partner level

a) The REDISCOVER Local Stakeholder Group coordinator

The Local Stakeholder Group coordinator is a person designated by each partner to be in charge of running the Local Stakeholder Group. This person may be the local project coordinators themselves, someone from within the municipality or an ad hoc external expert recruited to perform this task. The Local Stakeholder Group coordinator is the "reference person" for the group, at local level, at network level: each Local Stakeholder Group coordinator has a correspondent/ peer in the other partner cities. S/he is the person that the project partner leading the given activity refer to for all Local Stakeholder Group issues.

The Local Stakeholder Group coordinator is responsible for running the group at local level, managing the on-going process, ensuring the two-way bridge between the Local Stakeholder Group and the transnational network activities, and delivering the concrete output in the form appropriate to the given work package. They are responsible for creating a welcoming environment, and getting the Local Stakeholder Group on the right foot. Some stakeholders may not have had previous experience of participative processes, and the coordinator should make sure that all members feel at ease and that their opinions are valid and respected.

- Keeping track of meetings and documenting them for reporting and auditing purposes is a key task for Local Stakeholder Group coordinators.
- giving ideas about Local Stakeholder Group meetings and good meeting animation techniques
- reviewing reports of Local Stakeholder Group meetings
- providing opportunities in transnational meetings for partners to share their experience, problems and solutions or good practices related to Local Stakeholder Groups
- seeking and supporting ideas about Local Stakeholder Group inputs to transnational meetings

b) The REDISCOVER Local Stakeholder Group Roadmap

It is strongly recommended that each Local Stakeholder Group designs a local roadmap, based on the terms of reference agreed at network level. This is a useful vehicle to get everyone on the same page from the outset, motivate them to participate, and provide a clear vision of the process going forward.

The roadmap should specify the objectives, the expected outcomes, the resources available, and plan for all the local and transnational network activities. It should contain a tentative agenda of all meetings and a time frame for the production of the different expected outputs. It should make explicit the benefits of participation throughout the project period for Local Stakeholder Group members and be validated by the whole group.

The roadmap might, for example, include:

- Brief introduction to the REDISCOVER project
- The REDISCOVER Local Stakeholder Group objectives and expected results/outputs
- Definition of the challenge to be addressed by the stakeholder group
- timetable of meeting dates
- transnational exchange dates and themes
- outline workplan
- cousultation process on the outputs of the stakeholder groups's work

c)Organising REDISCOVER Local Stakeholder Group meetings

Well managed meetings with clear objectives and good facilitation will help keep your Local Stakeholder Group on track, and motivate stakeholders to return for the next meeting and participate fully. Circulate an agenda at least a week ahead of time. Allow space in the meeting agenda for information giving, but also plenty of time for stakeholders to speak and exchange views. Think about the venue, light, fresh air, breaks, refreshments, making sure that participants are comfortable. Consider holding the meeting in different places, so that stakeholder agencies can take a turn at hosting. Seek feedback from meeting participants, and make sure that future agendas are adjusted in the light of member comments.

Good facilitation of meetings and events helps to create the right conditions for effective participation and collaboration. Investing in specialist facilitation expertise can make the difference to the quality and outputs of the meetings.

Workshops where participants are engaged in a conversation, or involved in a hands-on activity, rather than overwhelmed by experts' presentations, are more likely to generate ideas and ownership of the outcome. The success of the Local Stakeholder Group will depend on many factors but a critical aspect is how well the meetings are run. Get all members to explore and discuss the way meetings themselves will be organised.

Local Stakeholder Group meetings can take a number of formats depending on the purpose. Here are a few examples.

Community planning events - Carefully structured collaborative events in which all stakeholders, including the local community, work closely with specialists from all relevant disciplines to make plans for the future of that community or some aspects of it.

Hands-on planning – A method of community involvement where small groups make plans for the future using table top plans or flexible cardboard models.

Interactive displays - Visual displays which allow people to participate by making additions or alterations to them.

d) Keeping the lines of communication open within the Local Stakeholder Group

Maintaining momentum and sustaining engagement from all stakeholders along the way requires good communication, both when the group is meeting face-to-face and in between meetings. Keeping regular and open communication channels invites stakeholders to provide inputs in a formal and informal way. While direct bilateral contacts help keep people informed, here is a non-exhaustive list of communications tools-both the old and the new- you can use.

Teleconferencing: This can be a cost-effective and time efficient way to keep a group in touch in between meetings, and to make interim decisions.

Email: It is good practice to send structured e-mails, gathering important information into one e-mail, for instance in a regular newsletter or update, rather than bombarding stakeholders with too many ad hoc e-mails.

Online file storage: Online library of shared documents for people to access (e.g. Huddle, Google Groups or Yahoo Groups are free, easy-to-use versions).

Project management software: Can reduce email traffic, provide forum space, host documents in central location and manage tasks (e.g. Zoho projects, Basecamp, Project Pier).

Skype / ooVoo and others: Free or cheap calls for teleconferencing by internet. The software needs to be installed on all computers, which is not always possible with organisational rules and firewalls, and may require some familiarisation.

Web 2.0 tools: New online facilities for networking are constantly being developed. Partners should not be afraid to experiment but it may be wiser to rely on tried and tested approaches when deadlines approach.

- Online forums and networking sites, such as Facebook or LinkedIn allow individuals to create groups, share information and messages
- Delicious for sharing bookmarks
- Doodle poll for scheduling meetings
- Crowdvine for bookings and agendas for meetings
- Twitter for sharing brief notes and latest news
- Flickr for photo sharing
- Slideshare for slide hosting
- Youtube for video hosting and sharing
- Blogs, digital platforms for publishing multimedia contents
- Wikis, websites for creating contents in a collaborative way by multiple users

e) Communicating to the outside world is accomplished in compliance with the REDISCOVER Communication Strategy.

1.4 Transnational aspect of Local Stakeholder Groups' work

Transnational project meetings are a core part of REDISCOVER project. They are the space where added-value is created through the exchange of knowledge and practices that takes place between cities.

Within the framework of REDISCOVER projetc, Local Stakeholder Group members also have the chance to participate in events organised in other partner cities, to see how they tackle similar problems and find specific solutions, to discuss in depth and reflect on their own practice.

In each partner city, it is the responsibility of the Local Stakeholder Group coordinator to link the transnational level of the project with the local level, with a strong and continuous flow of knowledge and information. This is the key to the Local Stakeholder Group being able to take advantage of the experience gained by other project partners and to use it to inform and add value to local implementation.

To ensure high-quality exchange between local and transnational levels, the preparation of transnational exchange activities could include:

- Share the transnational exchange programme and objectives with Local Stakeholder Group members as early in the Implementation Phase as possible.
- Start to identify who could contribute to and attend each event.
- Once each meeting agenda is available circulate it and ask Local Stakeholder Group members for feedback on their possible input
- Brief the Local Stakeholder Group members on the transnational meeting's scope and objectives.
- Explain to them what their general role will be and decide together who does what, on the basis of their skills and capacity.
- Most transnational meetings have a thematic focus. Take this into account when selecting members who participate in the meetings.
- Consider the possibilities of virtual presentations, webinars and meetings to compensate for people unable to participate in person.

Part 2 Useful tools and references

The second part of this toolkit provides some tools that you may want to use in developing and running your Local Stakeholder Group. The following tools are included here:

- Stakeholder Analysis Table
- Stakeholder Importance/Influence Matrix
- Self assessment tool for Local Stakeholder Group performance

- Problem Tree
- Action Table

2.1 Stakeholder Analysis

The stakeholder analysis table can be used to identify the interests and motivations of stakeholders, as well as possible actions to address these various interests. The first column on the left lists all the categories of stakeholders that may have an interest (or 'stake') in the project. This includes beneficiaries, intermediaries, winners and losers and those involved in or excluded from the decision-making process. They can be divided into two groups:

Primary stakeholders – those affected directly by the project, either positively or negatively, and

Secondary stakeholders – those with an intermediary role.

The following three columns in the Stakeholder Analysis table (Excel file 1st sheet) describe the stakeholders' involvement and role. The first column should summarise the actual situation and how each stakeholder is affected by the problem to be addressed. The second one should note their potential role and desire to bring about change, while the third one should focus on how the project can meet their demands.

Once this table is completed carefully reflect on what can be done in order to best meet or counteract stakeholder interests. In particular, think about what can be done to maximise the engagement of those who are likely to support the plan, and to minimise / understand the resistance of those who may be more likely to block it. In addition, it is important to assess and if necessary develop or adapt the capacity of different stakeholders to fully engage in the process. (see Importance/ Influence matrix in 2.3. to deepen this aspect).

Stakeholder analysis is a simple process that ensures that the right stakeholders are involved in the Local Stakeholder Group and in the project implementation process. As documented in Part 1, most project partners will conduct some stakeholder analysis work during the setting up of the Local Stakeholder Group. Yet further analysis is always helpful during project implementation, as the project evolves, to bring in any missing stakeholders, and check on the relevance of the membership.

2.2 Stakeholders Importance / influence matrix

Together with the stakeholder analysis, another tool that you might want to use is the Importance/ Influence matrix. Its main scope is to prioritize stakeholders, as well as to think about the right approach to take with each of them. This matrix can be used in a workshop format, as a role play exercise or as a simple tool to be filled in by participants. Once the stakeholders have been defined (in the analysis table) they can be placed in the grid below following two criteria:

Influence - how much power the stakeholder has to facilitate or impede achievement of the project and its objectives?

Importance - how much priority should the Local Stakeholder Group give to satisfying the needs and interests of the stakeholder?

a) High importance, low influence: These are stakeholders of high importance in relation to the problems, but with low influence in the process. Nonetheless, if upset they may gain influence and try to resist change. They require special attention if their interests are to be protected.

b) High importance, high influence: These stakeholders can be both significantly affected by the change and most able to do something about it, either supporting or opposing actions proposed. It is particularly important to engage these people, ensuring both that they understand what is going on and also creating a sense of ownership of what is being done. The project team will have to develop good working relationships with these stakeholders to ensure effective support for the activity

c) Low importance, low influence: These are low priority stakeholders who may nevertheless require limited monitoring or at least be kept informed throughout the process as it can be that their status evolves over time.

d) Low importance, high influence: These are stakeholders with high influence, who can affect the outcome of the actions proposed but whose interests are not the target of the actions. These stakeholders may be “deal breakers” and constitute a serious risk if not handled properly.

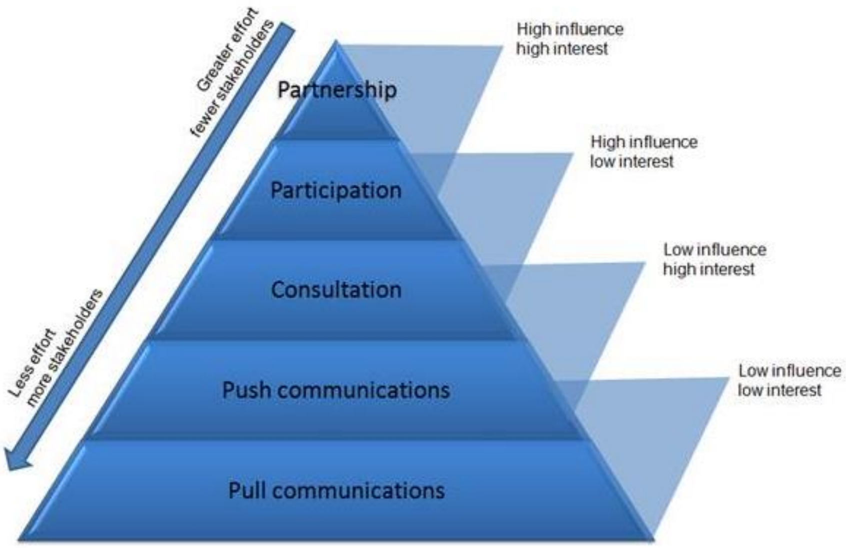
Based on the Importance / Influence matrix the appropriate stakeholder engagement approach can be determined.

Each approach is a valid method of stakeholder engagement, but more suited to particular stakeholder types. Pull communications are one-way and depend on stakeholders deciding to access the information. At the other end of the pyramid partnership engagement approaches give shared accountability, decision making, joint learning and actions. The table below describes each approach.

Engagement approach	Description
Partnership	Shared accountability and responsibility. Two-way engagement joint learning, decision making and actions
Participation	Part of the team, engaged in delivering tasks or with responsibility for a particular area/activity. Two-way engagement within limits of responsibility.
Consultation	Involved, but not responsible and not necessarily able to influence outside of consultation boundaries. Limited two-way engagement: organisation asks questions, stakeholders answer.

Engagement approach	Description
Push communications	One-way engagement. Organisation may broadcast information to all stakeholders or target particular stakeholder groups using various channels e.g. email, letter, webcasts, podcasts, videos, leaflets.
Pull communications	One-way engagement. Information is made available, and stakeholders choose whether to engage with it e.g. web-pages, or construction hoardings.

The diagram below illustrates the relationship between stakeholder influence/power and stakeholder engagement approaches.



2.3 Self-assesment tool for Local Stakeholder Group Performance

Using this self-assessment tool, the Local Stakeholder Group can score its performance on a number of dimensions:

- Frequency of meetings
- Organisation of Local Stakeholder group
- Diversity of the membership
- Participation of residents, users of services or businesses
- Empowerment of citizens, residents etc
- Other voices – have attempts been made to find out what less confident partners want?
- Involvement of Managing Authorities in Local Stakeholder meetings

- Leadership of group
- Animation and structure of meetings

This can be a very useful exercise to undertake together with Local Stakeholder Group core members. Try to get their honest opinion on the issues stated above, and most importantly how they can be addressed. Repeat this exercise a couple of times during the project cycle, while you still have time to change the things that are not going as well as they could.

The self-assessment tool comes as an Excel spreadsheet. Once it has been filled in, it provides a spider diagram outlining strengths and weaknesses of your Local Stakeholder Group performance along the different dimensions listed above. Building on this visual, the group can then explore ways to improve on the weak points and further build on the strong ones.

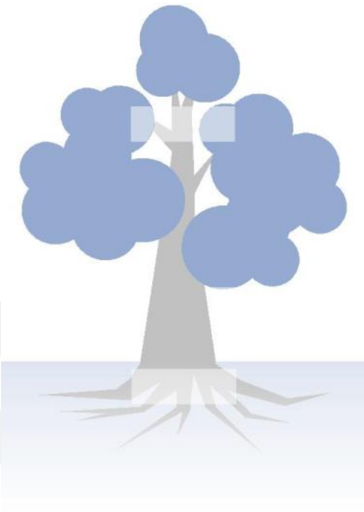
2.4 Problem Tree

Problem analysis is needed to make sure that the Local Stakeholder Group is tackling the right problem- one that has been discussed and agreed with all stakeholders. People often tend to "jump to solutions" while the experience suggests that there is real value in conducting detailed problem analysis, allowing time for discussion and reflection. What seems at the beginning to be the core issue might become, after thorough analysis, a second issue. A fresh and comprehensive understanding of the existing situation and the problems that exist is essential to enabling the right solutions to be found. Stakeholder involvement in this stage will enrich the way the problem is perceived and ensure that problems are not merely 'agency' views. It is particularly important to involve the users or beneficiaries (the primary stakeholders) in problem analysis.

Problems facing cities are complex, intractable and inter-connected. No simple solutions are likely to work and 'business as usual' approaches need to be challenged. Evidence helps people to understand the problems. This can be provided from statistics and studies already available, through specially commissioned research and through discussion at Local Stakeholder Group meetings.

There are many different ways of viewing the same problem and, depending on the perspective, different solutions will be deployed. The idea is to outline and elaborate possible choices between different options. One well established technique for working with problems in a group setting is to make a problem tree. This is a simple graphical representation of the problems, their causes and effects.

Here is how you can use it:



1. List all problems that come to mind related to the main theme. Problems need to be carefully identified: they should be existing problems, not possible, imagined or future ones. The problem is an existing negative situation, not the absence of a solution. The problems and solutions table presented below can help with this.
2. Identify a 'Core Problem' (which will be written on the trunk of the tree). This may involve some trial and error before settling on one.
3. Determine which problems are 'Causes' (write them at the level of the roots of the tree) and which are 'Effects' (the branches).
4. Arrange in hierarchy both Causes and Effects, i.e., how do the causes relate to each other - which leads to the other, etc.
5. Once your 'Problem tree' is completed, you may use another blank drawing of a tree to shift from problems to solutions. Following the same principle, re-formulate all elements into positive statements, turning problem into solution (the trunk), effects into expected change/ results (the branches), and causes into actions (the roots). If you have been working with a poster and sticky notes listing effects on the branches, it can be effective to flip these over and turn them into expected results.

2.5 Action Table

a) Expected results/ change, objectives, actions, outputs and indicators are central elements of an action plan and establishing agreement on them is a crucial part of the action planning process. Three logical steps are usually necessary and the Action Table can be used to provide an overview. The first two steps can be populated by the results of the work done on defining problems, expected results and possible solutions as outlined in previous section (2.4 Problem Tree)

b) Define expected results and objectives Starting from problems, you will have to define expected results (change) that you are aiming for. A result is the initial impact of an intervention. From expected results, you can then work out objectives. These are clear, explicit and initial statements on the effects to be achieved by a public intervention. Each specific objective in a programme must have a corresponding result indicator and a baseline. Make your objectives SMART: Specific, Measurable, Achievable, Realistic, Time Bound

c) Define actions Set out what actions are needed to achieve the expected results. The table should also include timescale and resources required

d) Define outputs Outputs are the tangible, measurable products of an action (e.g. square metres of co-working space developed). This is the place where incoherence can easily creep into plans as stakeholders sometimes try to ensure that their projects are included as actions regardless of whether they contribute to critical expected results. What is needed is an iterative and at times negotiated process to bring appropriate activities into the action table while excluding those that do not make significant contributions to the objective.

USEFUL REFERENCES

THE URBACT II Local Stakeholder Group Toolkit

http://urbact.eu/sites/default/files/urbact_toolkit_online_4_0.pdf
https://www.stakeholdermap.com/stakeholder-engagement.html