WHITEPAPER FOR THE PEER REVIEW PROCESS

Methodology Guide – December 15, 2021

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INTRODUCTION

"To excavate is to open a book written in the language that the centuries have spoken into the earth."
(Spyridon Marinatos, Greek archaeologist)

The cultural heritage of the cities surrounding the Danube is rich and diverse but unearthing it – in some cases literally – is the easiest part.
The partners of this project are facing the same challenges:

1. How to preserve the remains and integrate them into the built environment, the so-called "urban fabric" of the city
2. How to incorporate this archaeological heritage into the contemporary social environment
3. How to provide sustainable development and have an economic impact beyond the local level through cultural tourism

ArcheoDANUBE will improve and intensify cooperation between relevant actors in order to preserve, support and valorise cultural heritage through archaeological parks as a means of archeotourism development.

JULY 1, 2020 – DECEMBER 31, 2022 *2 157 540 €*

The logical steps of the process envisioned by the partners in the application form are the following:

- Collecting and reviewing available good practices for a catalogue and summarizing the state of the art regarding heritage preservation in a Baseline Study
- Developing a methodology for the design of Local Archeo Plans (LAPs) and an innovative toolkit to support the promotion and management of urban archaeological sites
- Surveying the local situation and elaborating an action plan (the LAP) in every partner city, which includes the implementation of various pilot actions
    - **The peer review process detailed in this guidebook is connected to these pilot actions – their design, implementation and evaluation.**
- Accumulating and disseminating the key findings, enabling capitalisation and the identification of the most important policy learnings

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1 CONTEXT

Describing the Transnational Think Tank process

WHY IS IT NECESSARY?

"A group of experts who are brought together to develop ideas and give advice on a particular subject."
(Cambridge Dictionary)

The definition above is for the word *'think tank'* which was used to describe the process of discussing and evaluating the pilot actions in the framework of the ArcheoDANUBE project.

In the application form, every partner had to – at least – outline their idea of what kind of pilot actions they would like to implement to improve the preservation and presentation of cultural heritage: changes in local regulations, small-scale investments, awareness-raising, etc. The nature of these actions has already been decided, but the finer details must still be hashed out in most cases – this is a part of the Local Archeo Plan development currently underway in every partner city.

Although the representatives of the cities know the local circumstances the best, the closer they are to the design of the Plan, the harder for them to notice the potential mistakes in their work. Capitalising on the experience of most scientific fields, **the partners envisioned the Transnational Think Tank process taking the form of a peer review**.

Continuing the habit of linking exact definitions to the project terminology, the following explanation can be found by looking up *'peer review'* in the Cambridge Dictionary:

"the process of someone reading, checking, and giving his or her opinion about something that has been written by another scientist or expert working in the same subject area".

The main purpose of the Think Tank workshops (which will be explained later in this document in more detail) **is to exchange knowledge and experience about the pilots between external experts and the partnership.** This accumulated knowledge base will enrich the target partner's work and give added value to the planned interventions. It will also provide an opportunity for the reviewing experts to share their own thoughts in the topic and build a cooperative relationship with the reviewed partner and the other participants.

PEER REVIEW – PROS AND CONS

Knowing the benefits of a peer review, it is not surprising that it has become the chosen methodology of the partnership.

As mentioned already, **peer review is a useful way to avoid making** obvious – or not so obvious – **mistakes**. Maybe the reviewer will notice a wrong assumption or faulty logic in the strategy, or just shares their own experience in the topic which clarifies a few points. Either way, two – or more – heads are better than one.

It is important for the project's **durability and transferability** to document the pilot actions from the planning stages in a way that is **understandable to** not just the implementing partner, but to **outside observers**, too – the Think Tank workshops will ensure this.

Thinking outside the box is something the partners must achieve by themselves, but to **think *beyond* the box** – beyond what they already know –, they will need the help of their peers to provide an **outside perspective**.

Hearing an **external confirmation** that their strategy is sound not just validates the partners' work, but also gives them **confidence** to implement their plan diligently.

However, there are a few factors the partners have to keep in mind to avoid well-known problems with peer reviews.

Peer reviews are often **time consuming**, and therefore, expensive. The partners will have to hold off on implementing the pilot actions until their workshop can be organized and finished, but to avoid unnecessary delays, **the process was planned to be as clear and streamlined as possible** *(see the next page for details)*, **with realistic deadlines**.

The reviewers can only work with **correct information**, but due to their outsider status, they won't always notice if something is missing – especially in the case of specific local issues. To mitigate this problem, this paper will outline **a way to clearly present the pilot actions and their context** for the participants, hopefully avoiding misunderstandings during the evaluation.

Subjectivity is an issue if there is no objective – and general – methodology for the review. This document will include **guidance, tips and specific templates** which should be used by every participant – this way the results can be compared and documented based on the agreed upon criteria.

1

THE PROCESS ITSELF

The following figure demonstrates how the partners will go **from planning** the pilot actions **to** actually **implementing** them – and how the **Transnational Think Tank process** fits into this.

1. IDENTIFYING AND PRESENTING THE PILOT ACTIONS

The pilot actions themselves are selected **from the actions proposed in the Local Archeo Plans** with the help of the LSGs (Local Stakeholder Groups) and the affected inhabitants. Six city partners have already planned theirs in detail in the application form, but four of them have only identified their category.

3. EVALUATION OF THE PEER REVIEWS AND THE PILOT ACTIONS

The responsible knowledge provider for each workshop will evaluate both the peer review and the given pilot action based on a **pre-designed template** and the **agreed-upon criteria** – the final output will be **a comprehensive document about the whole partnership** *(Deliverable T3.1.2)*.
The deadline allocated to this activity is **June 30, 2022**.

2. HOSTING AND PARTICIPATING IN THINK TANK WORKSHOPS

These **intensive, in-depth discussions between experts** from the partners and other professionals will be organised by each pilot city. Besides hosting one, every city has to participate in at least two other workshops based on geographical distribution – the knowledge provider partners must participate in at least three overall.
The deadline allocated to this activity is **May 31, 2022**.

4. IMPLEMENTING AND DOCUMENTING THE PEER-REVIEWED PILOT ACTIONS

Each pilot partner is responsible for **testing at least one solution** (a.k.a. delivering a pilot action) and **documenting it** properly **for transnational dissemination and possible adaptation**. One mandatory part of the documentation is a short – maximum 3-minute – **video** with English subtitles *(Deliverable T3.2.1)*.
Therefore, the implementation of the pilot actions will probably be followed by a local video crew in each city. The deadline allocated to this activity is **December 31, 2022**.

ROLES IN THE PARTNERSHIP

The ArcheoDANUBE partnership has 12 ERDF (European Regional Development Fund) partners, 2 IPA (Instrument for Pre-Accession Assistance) partners and one ENI (European Neighbourhood Instrument) partner. Besides these **15 'core' members**, **6 associated strategic partners** (ASPs) have also joined the project.

10 partners were given the responsibility of implementing a pilot action, and therefore **organizing a Think Tank workshop**, in their – or their associated partner's – city:

- Municipality of *Ptuj* (MOP)
- West Pannon Regional and Economic Development Public Nonprofit Ltd. (WPRED), working with the Savaria City Museum (an ASP) in *Szombathely*
- National Museum of Unification *Alba Iulia* (MNUAI), working with the Alba Iulia Municipality (an ASP)
- City of *Vodnjan* – Dignano (GVD)
- Bulgarian Association for Transfer of Technology and Innovation (BATTI), working with the Municipality of *Balchik* (an ASP)
- Regional Development Agency of Pilsen region (RDAPR), working with the City of *Starý Plzenec* (an ASP)
- *Rousse* Regional Museum of History (RRMH)
- Municipality of Centar *Sarajevo* (OC)
- Museum of *Srem* (MS), working with the European Affairs Fund of AP Vojvodina (an ASP)
- Primăria municipiului *Chișinău* (Chișinău)

The **5 knowledge provider** (KP) **partners** will **participate** in 3-3 workshops as experts, but only **evaluate** the peer review and the pilot actions of 2-2 to share an even workload between them.

- Association Culture & Work (ACW)
- Institute for the Protection of Cultural Heritage of Slovenia (ZVKDS)
- Sustainication e.V. (SUST)
- First Hungarian Responsible Innovation Association (EMFIE)
- Romanian Academy Cluj Branch, Institute of Archaeology and History of Art (IAIAC)

The 'pairings' of the partners for the workshops can be found in Chapter 2.

PILOT ACTIONS

The pilot actions will be practical solutions to the project challenges *(see the Introduction)*, transferred for testing in at least two other participating countries.
They can be divided into three distinct categories:

- **Small-scale investments** (inexpensive/no-cost solutions) These were detailed in separate work packages in the application form and mostly involve 3D modelling and visualization of archaeological items/locations using VR and AR technology and computer software.
  Locations: Alba Iulia, Romania; Chișinău, Moldova; Sremska Mitrovica, Serbia; Vodnjan, Croatia; Ptuj, Slovenia; Ruse, Bulgaria
- **Applying project principles** (investment plans, action plans, technical drawings) **to guide investments in the partner cities** (from ERDF co-financed national OPs, for example)
  Locations: Balchik, Bulgaria; Sarajevo, Bosnia and Herzegovina
- **Educational, awareness raising and promotional activities for sustainable tourism**
  Locations: Szombathely, Hungary; Starý Plzenec, Czech Republic

Pilot cities in the ArcheoDANUBE project

BEFORE 2

Preparing for the Think Tank workshops

MATCHMAKING

The first step to kickstart the process is the decision of which partner goes where – any other considerations must take place between the relevant partners. The 'pairings' should be determined based on the following factors:

- **Every city partner must participate in** at least **two workshops** (besides organizing one), while the **KPs** must participate **in three**.
- The summary evaluation of every workshop will be done by (one of) the participating KPs – there are 5 of them for the 10 workshops, so **every KP must prepare two reports**.
- The name of the workshops – *Transnational* Think Tank – suggests that the participating partners should be as **diverse** as possible in terms of their **country of origin**.

The table below is a suggested arrangement of the partners for the 10 workshops – the goal was to assign everyone to the required number of peer reviews to the closest geographical locations, when possible (in case they will be held face-to-face which would be preferred by the partnership). However, the format of the meetings (online or offline) depends on the decision of the given participants and their respective COVID-situation.

HOST PARTNER	MOP	WPRED	MNUAI	GVD	BATTI	RDAPR	RRMH	OC	MS	Chişinău
KNOWLEDGE PROVIDER #1	ACW	SUST	EMFIE	SUST	IAIAC	ACW	ZVKDS	ZVKDS	EMFIE	IAIAC
KNOWLEDGE PROVIDER #2		ACW		ZVKDS		SUST	IAIAC	EMFIE		
CITY PARTNER #1	RDAPR	RDAPR	BATTI	WPRED	Chişinău	MOP	MS	RRMH	RRMH	BATTI
CITY PARTNER #2	WPRED	MOP	Chişinău	OC	MNUAI	GVD	OC	MS	GVD	MNUAI

Every column of this table shows the participants of one workshop. The second row (with the green letters) identifies the KPs who will be responsible for not just participating in, but also evaluating the given workshop (and pilot action).

DESCRIBING THE PILOT ACTION

The topic of the peer review workshop will be the pilot action of the given host partner. Although the workshop agenda itself should include a presentation of this **pilot action**, **the experts must have a chance to study it beforehand**, not just reacting to it during the meeting.

Therefore, it's important to prepare a summary about the selected pilot action. This shouldn't be too time-consuming, since it will be elaborated in the Local Archeo Plan anyway – the partners only have to arrange that information for the participating experts **in an easy-to-understand format** (and in English).

The suggested template contains the following sections:

❖ **BASIC INFORMATION of the site/location**
Everything that is important to know **to understand the pilot action and its envisioned impact** (type of archaeological site/remains, size of the location, conservation/restoration status, significance, accessibility, legal and administrative framework, pictures, etc.)
Most of these are included in the LAP, but the partners only need to present the **pilot action-relevant parts** of that description here.

❖ **INTERVENTION LOGIC**
This section must follow the Logic Frame thinking which outlines the connection between the ends and means of an intervention in a linear way *(see the figure below)*.

DESCRIBING THE PILOT ACTION

Challenges

The partners should outline the issues being addressed by the pilot action and the context in which it will take place. This is more than just a **problem statement – the core reasons behind the challenge** must also be identified.
Example #1: the site only attracts a small number of visitors, because it's missing some facilities and the experience of visiting it is not enjoyable enough
Example #2: the locals and/or visiting tourists do not know about the archaeological park, because the budget allotted for marketing is small

Objectives

The next step is describing the **vision** the partner wants to achieve – this includes the long view, but also **specific goals and objectives** on the way.
Example #1: developing and promoting new (low budget) services for a better experience → increased number of visitors → investments to develop the site with new features
Example #2: building partnerships (finding sponsors) to attract more visitors (especially from the local community) → using the increased profits to raise the marketing budget and focus on promotion more

Actions

Before explaining the minutiae of the pilot action, the partners need to summarize the activities to conclude the intervention logic. This description must be enough for the experts to understand **how the pilot will support the achievement of the objectives and present a solution** to the problem/challenge. It's important to remember that the pilot action does not have to solve every part of the problem or connect to every single objective, but **it must be clear why it has been chosen**. (It is possible that the participating experts can suggest additional activities that will cover more ground.)
Example #1: designing a new participatory activity (e.g. arts and crafts)
Example #2: involving local artists for new on-site installations → launching a marketing campaign with leaflets and social media presence (among others)

DESCRIBING THE PILOT ACTION

Results

The *actions* described in the previous section will lead to *specific outputs* – direct products of the delivery (a new arts and crafts workshop, an exhibition of local artists, etc.). However, the *objectives* must also be "paired" with *specific result indicators* which **capture the change the partners envisioned**. These can either be **quantitative or qualitative**, depending on the nature of the objective. The important thing to remember is that while output indicators are closely linked to the actions (and their baseline value is often zero), the result indicators are the measurement of true change in a situation, but usually mean **a contribution, not a direct cause-and-effect** between the intervention and the outcome.

Example #1: If the objective is to increase the number of visitors, one of the result indicators should definitely be the number of visitors in a given month, which can be easily compared to a baseline value (i.e. visitor numbers before the pilot action).

Example #2: If the objective is to raise the marketing budget and focus on promotion more, the result indicator can be the amount of money the organization spends on marketing activities (again, comparing the before and after values) or the percentage of the marketing budget compared to the overall amount (which is even more descriptive statistically).

❖ OPERATIONAL DETAILS of the pilot action(s)

The operative details are (1) the **timeline** of the activities, (2) the necessary **resources/costs**, (3) the **funding sources** and (4) the **monitoring** activities – these can be greatly varied depending on the action. Note that:

1. The deadline for implementing the pilot actions is the end of 2022 (i.e. the end of the project).
2. The resources can be HUMAN (facilitators of the arts and crafts workshop, external marketing experts), PHYSICAL (a room for the workshops, a printer for producing promotional materials), INTELLECTUAL (e.g. partnerships) or FINANCIAL – some of these can be readily available (i.e. a location), but not everything.
3. Although the pilot actions are included in the project budget, it won't hurt if the partners are creative in identifying funding sources (e.g. looking for sponsors).
4. The monitoring activities depend on the selected indicators (e.g. the number of visitors can be calculated based on ticket sales, but their satisfaction should be measured through surveys).

STEPS OF ORGANIZING THE WORKSHOP

The flowchart below outlines the key steps of organizing (and implementing) the Think Tank workshops.

STEP 1

ONE-ON-ONE CALL BETWEEN THE PARTNERS

A short online meeting between the relevant partners (i.e. the pilot city host and the peer review visitors) where they agree on the format, date and other key details of the workshop

STEP 2

DRAFTING THE AGENDA

The host drafts the agenda of the workshop which includes making decisions about the venue (or online platform) and the tools to use during the peer review *(see Chapter 3 for specific examples)* → sending out an OFFICIAL INVITATION

STEP 3

FINALIZING THE PILOT ACTION SUMMARY

After sending out the pilot action summary with the invitation, the experts have the chance to ask clarifying questions and make requests if something is hard to understand or relevant information is missing → final version

STEP 4

IMPLEMENTING THE TTT WORKSHOP

Implementing and documenting the Transnational Think Tank workshop based on the previously agreed-upon methodology

STEP 5

EVALUATING THE PILOT ACTION

Filling in the evaluation template for the workshop and the peer reviewed pilot action *(see Chapter 4 for details)* → finalizing the IMPLEMENTATION PLAN

MEETING THE PARTICIPANTS

The first step in the process is organizing **a short online meeting between the relevant partners** (based on the matchmaking table). This is important to clarify some things in advance and make a decision in the following key topics:

- **FORMAT** – The final word on this is largely dependent on the **COVID-19 situation** of the participating countries at the time of the workshop, but also on the vaccination status of the specific participants. European countries can have different – and often conflicting – travel restrictions at the same time. Ideally, the partners will wait until it is possible to hold an in-person workshop, but safety is paramount: if any partner feels that it would be dangerous to meet in person and the deadline is approaching, an online platform could be used instead – Chapter 3 will include organizational tips for both options.
- **DATE** – If the decision on the format of the meeting has been made, the partners need to agree on a date as soon as possible – even if it will be online, the participants need to prepare for the peer review, while in the case of an offline workshop, the hosting partner will have a lot more logistics issues to think about and arrange (venue, catering, accommodations, additional programmes, etc.).
- **PARTICIPANTS** – At this point, the hosting partner must be able to describe at least the general type of their pilot action, so the participating partners can decide which experts would be the most beneficial for the peer review process to delegate from their side. Ideally, they will determine their **list of participants** during this meeting, but – in case they need more time – the **number of participants** should be sufficient.
- **LANGUAGE** – In order to assure that nothing is “lost in translation”, the host partner can agree on **providing professional interpretation** during the workshop – this decision should be based on the participants’ knowledge of English. The partners should also discuss any **possible underlying issues arising from cultural differences** which might be of great importance and attempt to mitigate them.
- **OTHER REQUIREMENTS** – Every other part of the meeting agenda can be determined by the participating partners. It is crucial that they inform the host about their **relevant needs** in time (online platforms their organization cannot use because of security reasons, experts with special dietary and/or health care needs, etc.)

DRAFTING THE AGENDA

After the meeting between the participants is done, the next step is drafting the agenda. The duration of the workshop can be varied *(see* *Chapter 3* *for more)*, but the key elements are the same – a typical peer review workshop should have:

- A presentation of the about-to-be-reviewed material
- A section dedicated to clear up any arising issues
- An interactive review session
- A closing part for drawing conclusions

Naturally, these are just the **bare essentials** of the meeting – in order to make it more interesting, the host partners would be wise to **complement the list above with other programme points** to make the workshop exciting and livelier. On the other hand, the key parts of the meeting can also be planned in **a creative way to engage the participants more actively**.

Note: Although the next page contains examples for an online and offline workshop agenda, their methodology (e.g. the use of MURAL) will only be detailed in the next chapter. Moreover, the logistics of organizing an in-person meeting (arranging travel, accommodation and catering, for example) won't be covered.

The draft agenda should be sent to the participants for a **final confirmation** – after the necessary modifications (if any), the hosting partner will send out an **invitation** with the final version, including their pilot action summary.

TASK	RESULT(S)	DEADLINE
Preparing a summary about the selected pilot action	Draft pilot action summary for peer review	2 months before the workshop *(internal deadline)*
Organizing an online meeting between the relevant partners	Date, format and indicative participant list of the workshop	
Planning and sending out the agenda for comments	Draft agenda	6 weeks before the workshop *(internal deadline)*
Modifying the agenda & inviting the experts	Final agenda, official invitation	
Modifying the pilot action summary	Final pilot action summary	1 month before the workshop *(internal deadline)*

DRAFTING THE AGENDA

Example for a face-to-face workshop agenda

DAY 1 (arrival)	
19:00 – 23:00	WELCOME DINNER Ice-breaking exercises to introduce the participants
DAY 2 (workshop)	
9:00 – 9:20	**Opening – "setting the scene"** Welcoming speech by the mayor Discussing the agenda and the "rules" of the workshop
9:20 – 11:00	**Guided tour of the archaeological site**
11:00 – 11:15	COFFEE BREAK
11:15 – 12:15	**Presenting the PILOT ACTION** Presentation + Q&A session
12:15 – 13:15	LUNCH
13:15 – 14:45	**Interactive PEER REVIEW session** *15 minutes:* START-STOP-CONTINUE exercise by partner groups *35 minutes:* Discussing the comments made by the participating experts in mixed groups (min. 1 host city representative/group) *10 minutes:* Short session between the host city representatives to finalize their learnings
14:45 – 15:00	COFFEE BREAK
15:00 – 15:25	**Learning log and planned changes** Plenary discussion of the key learning points and the next steps
15:25 – 15:30	**Closing – "final" words by the host city**
15:30 – 16:30	FREE TIME
16:30 – 18:30	**Guided tour of the city** (optional)
18:30 – 19:30	**Cultural performance: folk dance & music**
19:30 – 22:30	DINNER – selection from the local cuisine, with wine tasting
DAY 3 (departure)	

Example for an online workshop agenda

9:00 – 9:30	**Opening – "setting the scene"** *5 minutes:* Welcome video of the "host" city *10 minutes:* Discussing the agenda and the "rules" of the workshop *15 minutes:* Ice-breaking session to introduce the participants
9:30 – 10:30	**Presenting the PILOT ACTION** *10 minutes:* Pre-recorded video tour of the archaeological site *30 minutes:* Presentation, followed by an interview with a local expert *20 minutes:* Q&A session
10:30 – 11:00	COFFEE BREAK
11:00 – 11:10	**"Wake-up call"** Refreshing exercises guided by a video
11:10 – 12:10	**Interactive PEER REVIEW session** Breakout rooms for every participating partner *15 minutes:* START-STOP-CONTINUE exercise in MURAL *35 minutes:* Breakout room visit by the host city (one representative per room) to discuss the comments made by the participating experts *10 minutes:* Knowledge transfer between the host city representatives
12:10 – 12:30	**Learning log and planned changes** Plenary discussion of the key learning points and the next steps
12:30 – 12:40	**"Appetizer"** Cooking video about the local gastronomy
12:40 – 12:45	**Closing – final words by the host city**
12:45 –	LUNCH

FINALIZING THE PILOT ACTION SUMMARY

If the partners keep the timeline mentioned on page 17, the experts will receive their invitation and the pilot action summary 6 weeks before the workshop and have **at least a week to read it through and give feedback**.

This feedback is NOT about the quality of the *pilot action* – the goal is to enhance the **quality of the *description***: it must be easily understandable and contain every necessary detail for an informed peer review.

The following list can help the partners in evaluating the summary and preparing their suggestions for modifications (if they have a need for any):

LEVEL 1

It is unlikely that this will be an issue, but the first ”checkpoint” a partner has to reach is preparing **a fully completed summary with clear and concise language**. None of the partners has English as their first language – misunderstandings can occur and it's better to clear these up before the workshop. If an expert sees an expression or a section that is hard to understand properly (and the reason is not their language skill level), they should ask for clarification.

LEVEL 2

If the template is filled in according to the guide and the text is understandable, the next level is checking it for possible **missing information** or **unclear reasoning**. If the partners feel that describing the challenge would benefit from relevant statistics, for example, or the objectives are too vague to clearly connect with the actions, these clarifying questions should be asked from the host partner as soon as possible so they can modify the content of the summary.

LEVEL 3

It's possible that they feel that the described actions can be changed to serve the objectives better, or the costs could be lessened in some way, or just have a specific good practice in mind that can help. Whatever the case, all of the above concern the **quality of the pilot action**, so the **questions and comments on this level should be noted** *(see the next page)*, **but** raising them **can wait until the TTP workshop**.

The task of the host partner is to **finalize the pilot action** summary based on the requests of the partners and send it out to the experts again.

REVIEWERS – HOW TO PREPARE

What can the participating partners do before the workshop to ensure the success and added value of the peer review (and ultimately the pilot action)?

As mentioned on the previous page, the reviewing experts should **prepare with questions and comments** based on the pilot action summary to save time during the workshop. Some of their questions might be answered during the host partner’s presentation, but if not, they should **mention them in the Q&A session**.

Here are five general tips to help:

1. BE CONSIDERATE

”Clear and concise language” does not mean that the experts should remark on **minor grammatical errors and typos**, doing line-by-line editing. If the text is understandable, just ignore these and **focus on the professional content**.

2. BE DEPENDABLE

Don’t rush reading through and commenting on the material. The participating partners should make sure that the experts they would like to delegate have **enough available time to allocate for this task**. If something comes up, the expert should notify both their partner of origin and the host.

3. BE CONSTRUCTIVE

Avoid harsh or disparaging comments. The goal of the peer review is to help the pilot partner to improve their implementation plan so make sure to **provide constructive and helpful feedback** – noting not just the potential problems/mistakes, but possible solutions/modifications, too.

4. BE CONSISTENT

If an expert has many **comments**, it would be wise to **structure them** by using a numbering system, or dividing them into **major and minor issues** to help the host partner in prioritizing between them.

5. BE GENEROUS

It is entirely possible that a pilot action summary is so well-done that some of the experts have no remarks or just think that a section of the description or element of the pilot action is so creative that it deserves a commendation.
Although these preliminary notes are for the expert’s eyes, they shouldn’t be afraid to **compliment the host partner** if something has turned out really well.
(Using the START-STOP-CONTINUE exercise ensures that these remarks will come to light during the workshop to motivate the host.)

3 DURING

Hosting and visiting the Think Tank workshops

STEP 4

Note: although the partners will strive for organizing face-to-face events if at all possible, we will use two icons in this chapter, separating sections based on what type of meeting we are talking about (online or offline).

GENERAL ADVICE

Before talking about the specific programme elements and the tools the partners can use, it's important to establish a few general **guiding principles** regarding the *duration* and *content* of the workshops.

DURATION

If the partners decide to have a **face-to-face meeting**, the shortest amount of time in which a workshop like this can be accomplished is **3 days**: two days for arrival and departure and a whole day for the workshop itself.

If the circumstances due to COVID do not allow this, the peer review should be held **online**. In this case, the partners could go for two solutions:

- A very intense **1-day or half-a-day** workshop (as can be seen in the "fake" agenda)
  - It can be finished in one sitting and the participants may achieve a deeper level of focus.
  - The effects of "Zoom fatigue" can be severe and it is exhausting to concentrate for this long.
- **Two or three shorter** – approx. 2-hour – **workshops** (one for presenting the pilot action, one for discussing it and maybe one for summarizing the resulting changes)
  - The experts have more time to review the pilot action based on the presentation and their participation is less tiring this way.
  - It's harder to agree on several dates that work for everyone, and the participants must get into the "peer review mindset" every time.

CONTENT

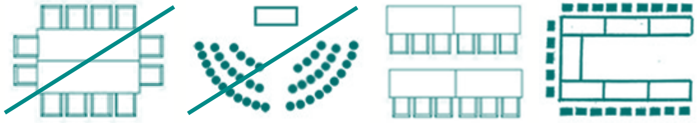
Regardless of the event format, it is always a good idea to incorporate some kind of **ice-breaking session** at the beginning. This is especially important in the case of virtual meetings – every partner is feeling the negative effects of social distancing. There are **fun exercises** on the internet, but even a quick **online poll** can create the right atmosphere to start *(see this page for more tips in this topic)*.

Avoiding monotony is another way we can make a meeting more interesting. **Using different methods** will create a dynamic process which has a chance to reach a higher level of engagement. **Mixing professional and "recreational" elements** can also keep the participants interested. This chapter will list specific examples and tools for both offline and online workshops.

SELECTING THE 'VENUE'

Selecting the perfect venue for a face-to-face workshop can be a potential pitfall: the capacity of the building/conference hall, its **internet connection** (which should be a given in the 21st century) and other factors are crucial depending on the type of programme elements the host partner is planning.

The participants will need a room large enough to conveniently **seat 15-20 people**, ideally **in an informal setting**. Avoid meeting rooms with a large fixed table in the middle, surrounded by chairs that are hard to move – it is impossible to have an engaging interactive session in such an environment. The arrangement of classrooms in schools and larger rooms in community centres can work.



If there's a plan to have a site visit, it's also a wise decision to find a place in the immediate proximity of the target area (otherwise the host needs to provide – and find the time in the agenda for – transport to and from).

In the case of online meetings, the **virtual platform** the host uses is just as important, although usually not for capacity reasons. There are several service providers in the field.

Zoom: In 2020, the company found itself in the middle of numerous privacy problems, but that's in the past: in addition to fixing many bugs, Zoom also acquired a company called *Keybase* to improve its security. Calls can be protected by a unique ID and password, and participants can connect via a web app, a desktop version or phone.

Zoom has **the most extensive feature set**: besides the usual video conference options (allowing screen sharing, having group and private chat, etc.), the host can create a waiting room, assign the participants to **breakout rooms** for group work and launch **polls** inside the platform, for example.

It has a free version – with a 100-people and 40-minute limit – and a **Pro version for 14 euros per host per month with 1 GB of cloud recording space**. (The Business and Enterprise versions are around 19 euros, but they can only be activated with multiple users – 10 and 100, respectively.)

Source #1 & #2

SELECTING THE 'VENUE'

Teams: **For companies already using Office 365**, Microsoft Teams is clearly the best choice – it is included in the prize of the package. Although it takes some time to get familiar with the different settings and the layout of the options, the **integrations** for the calendar of Outlook and other elements of the Office family are a clear advantage. People who are used to Skype for Business can also find it convenient, since Skype is being phased out for the benefit of Microsoft Teams.

As for the available features, it is famous for **making the participants easy to "handle"**: multiple feeds can be fixed on the screen (both the administrator and a speaker, for example). There is also a function which ensures that anyone raising their hand is displayed immediately to draw attention if there are questions or problems that need to be solved. Teams also allows the creation of breakout rooms, but their management has a **higher learning curve** than in Zoom.

The **Microsoft 365 Business Basic** package (which includes Word, Excel, PowerPoint, Teams, Exchange, OneDrive and SharePoint) is **5.33 euros per user per month**.

WebEx: Cisco's Webex was designed in the form of two apps: **Webex Meetings** and Webex Teams. The latter is similar to Microsoft Teams in that it has a video conferencing option, but mainly focuses on other collaboration functions, while the former is specifically **designed for hosting online events**.

The use of Webex is **intuitive** since its interface is not that different from the other services, relying on an **easy-to-understand dashboard**. When planning a meeting, aside from the standard functions such as date, time and duration, agenda items can also be added. From the point of view of interactive work, it also includes a **virtual whiteboard for sharing notes** which can substitute the need for a more complex virtual collaboration platform if there's no time or capacity to choose and learn to use one (like MURAL or Miro).

Webex is available in a free version (with a 100-people and 50-minute limit) and a **Starter version for 14.25 euros per host per month with 5 GB of cloud recording storage**. (The other two options – Business and Enterprise – are only recommended for long-time users hosting large events with 100+ participants frequently.)

HOW TO USE ONLINE PLATFORMS

Regardless of which online platform is used by the partners, there are several characteristics of an online meeting that should be carefully considered.

SHARING VIDEOS

As mentioned already, breaking the monotony with short videos can be beneficial to keep the participants ”on their toes” and engaged, providing variety and different stimuli during an innately tiring experience. However, sharing videos directly through Zoom or Microsoft Teams can decrease the quality of the material: the host cannot be sure that the given system is not overloaded and it’s entirely possible that **the video** (or audio) **will lag and struggle to load**.

Solution: **Upload the videos to YouTube** – or another video sharing platform – and **then copy the link into the chat window**, so the partners can view it in their own browser (while muted, of course). Videos shorter than 10 minutes can be easily shared this way – the host can instruct the partners to indicate if they are finished by writing in the chat or turning on their camera. **Videos longer than 15 minutes are best to be avoided** because ”leaving” the call for that long might disrupt the atmosphere of the meeting.

MANAGING THE CHAT

Besides the speakers and the facilitators of the interactive sessions, it’s important to have a person who acts as a **”master of ceremony”**: introducing the next speaker, providing commentary between the programme elements, etc. – but this is not all. **One additional person** is needed **for watching the chat and providing technical support** (managing the breakout rooms, for example): the partners might need help (especially at the beginning of the meeting) and will also use the chat to ask questions about the ongoing presentations. It is best to wait for the end of a section – **collecting** these **questions** in the meantime – and then **asking them** from the speaker one by one **during the Q&A**.

BREAKOUT ROOMS

Every platform this guide mentions is capable of supporting the creation of breakout rooms. These are important, because **mixing group work with plenary presentations** is another way to avoid monotony. It is also crucial in **giving an opportunity for everyone to share their thoughts** which might be harder to accomplish in a larger group. Whichever platform the host ends up using, they must become familiar with this feature in advance.

TOOLS TO KEEP IN MIND

The next few pages will go through the **three most important elements of the workshop** – ice-breaking, presenting the pilot action and interactive work – and methods the host can use to implement them effectively.

HOW TO BREAK THE ICE

In the case of a face-to-face meeting, the host would be wise to select at least one **ice-breaking exercise** to start the workshop with. The internet is full of them, but the easiest choice might be **BINGO** – a 5x5 grid filled with statements for which the participants need to acquire signatories about whom the given statement is true.
The task involves a bit of competition: if someone collected five different names in a row or a column, they must say BINGO to win – the game is usually played until the third one.
The statements can be generic: someone who *"speaks a language you don't"* or *"has their birthday in the same month as you"*, but "project-related" entries are also possible (someone who *"doesn't like the Indiana Jones movies"* or *"has visited archaeological museums in more than one country"*) – be creative!

Other ice-breaking games can be found HERE.

BINGO

Get signatures in the fields below from people about whom the given statement is true. DON'T WRITE THE SAME NAME IN MORE THAN ONE FIELD!
If you have collected five names in a row or a column, say BINGO!

FIND SOMEONE, WHO...

...speaks a language you don't speak.	...has a pet that is not a dog or a cat.	...has the same eye colour as you.	...stopped smoking.	...can't drive.
...walks (or runs) more than 10 000 steps every day.	...has the same taste in music as you.	...has their birthday in the same month as you.	...likes to have a glass of wine to dinner.	...has more than two kids.
...was born in the same decade as you.	...usually bikes to work.	...speaks more than 3 languages.	...practices the same sport as you.	...prefers winter over summer.
...has been in a country where you've never been before.	...is vegetarian.	...likes to read in their free time.	...is left-handed.	...plays a musical instrument.
...has lived for more than 6 months at a time in a foreign country.	...watches the same TV show you do.	...loves dancing.	...doesn't own a car.	...has the same hobby as you.

TOOLS TO KEEP IN MIND

When planning an online meeting, the potential number of ice-breaking exercises are still the same, but they are less varied since the ”resources” they involve must be in virtual space.

POLLS: Anonymous polls are a good start to any meeting, especially if the questions are funny and/or related to the project topic: e.g. *Which fictional archaeologist would you like the most to meet in real life? River Song (Doctor Who), Indiana Jones, Lara Croft (Tomb Raider) or Diana Prince (Wonder Woman)*. **This feature is included in Zoom**, so if a partner thinks about using that, the tools on the right side of the page are not necessary.

QUIZZES: These serve the same goal as polls, but they are more **competitive**. For ice-breaking, it can be a good idea to **test the participants' knowledge about the other partner cities**, focusing on fun and/or project-related facts.

WORD CLOUDS: Creating a live word cloud by everyone answering the same question at the same time is also an interesting exercise. Again, the nature of the question can be varied: *”In which month were you born?”*, *”What historical figure would you like the most to have dinner with?”*, etc.

Slido: This website has options for **polling** and **quizzing** the audience **in real time** and allows the participants to **ask questions** from any device and **vote** for their favourite ones (although it's easier to use the built-in chat of the given online platform for this, even if it doesn't provide voting or ranking opportunities). Slido has a **user-friendly interface** which is very easy to learn and manage for both the host and the participants due to its **clear event code system**. It has a **free** version – with a 100-people limit, **3 polls per event and Q&A** – and an **Engage version for 10 euros per month with** the additional option of **quizzes**.

Mentimeter: Mentimeter offers the **same features** as Slido, but also an additional one – the live creation of **word clouds**. It also has a **presentation builder** which means that speakers can also use it to design a presentation filled with live interactions – but this is for the more ”advanced” users. All in all, Mentimeter requires a **higher learning curve** from both the host and the participants: the latter must follow **on-screen instructions** to submit their poll responses, for example, which can be **challenging for a less tech-savvy audience**. Its **free** version includes up to **2 question and 5 quiz slides**, while the **Basic version** gives **unlimited access for 12.7 dollars per month**.

TOOLS TO KEEP IN MIND

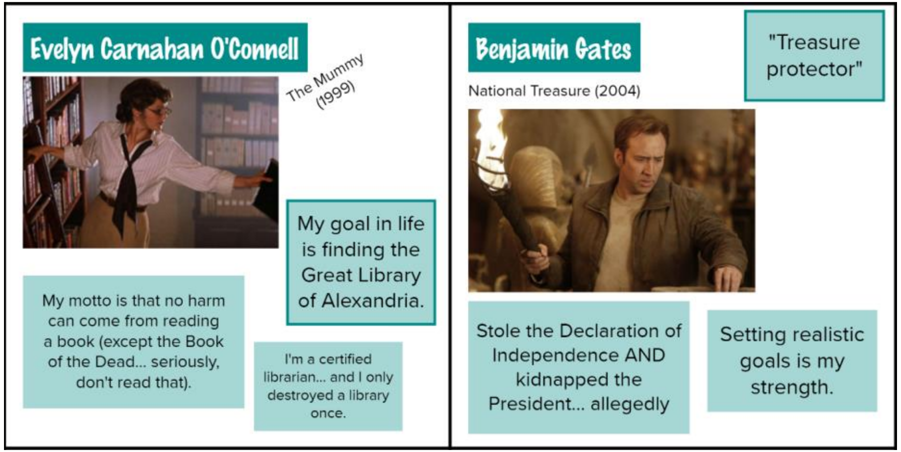
If a partner plans to work in **MURAL** for the interactive session(s), it might be a good idea to have the ice-breaking exercise on the same platform – this way, the participants can practice its use before the actual peer review.
This guide only covers *this* *aspect of MURAL here; other tips can be found on the pages about the* ***interactive session****.*

The easiest setup in MURAL for ice-breaking is a **pre-made grid** which the participants can fill in at the beginning of the meeting or even **in advance** to have more time – in the latter case, **the workshop can start with reviewing the entries**.

First, they should select the square with their name on it (since the list of participants should be finalized before the workshop), then **upload a picture** that captures their personality and/or interests and **write 3 "superpowers" on sticky notes**: something they are good at (skills, knowledge, achievement they are proud of, etc.).
It could be work-related, but they should choose at least one that is personal (e.g. playing a musical instrument, doing sports) – and maybe one that could be useful for the project, too.

Real example from an Interreg Europe project

Examples from fiction



TOOLS TO KEEP IN MIND

Presentations are unavoidable parts of every meeting – in the case of the Transnational Think Tank workshops, their main role is the **introduction of the pilot action** to the participating experts.

The most important decisions related to this programme element are **selecting the speaker(s)** and **arranging the content** (which was already outlined in the pilot action summary).

The host should find a speaker who is **authentic and confident in the topic** since this will lead to a more honest discussion between the experts and someone whose knowledge of the pilot action is credible and who can easily answer any emerging questions. It is also possible to have **more than one speaker**, especially if the pilot action encompasses many different professional areas (conservation efforts, visitor engagement, marketing, etc.).

While the presence and passion of the speaker is often enough to sustain interest face-to-face (besides the quality of the presentation, of course), **virtual presentations are harder to listen to**, especially for a long time and even if they are done by a highly competent speaker. However, there are several methods that can be used to counteract this (and make in-person presentations more engaging, too).

- PowerPoint can be used to design visually pleasing and structurally sound presentations, but **creating slides with a graphic design platform** instead *(see the paragraph about Canva on the next page as an example)* can enhance the visuality of the presentation even more.
- Shorter, less than 10-minute sections can be pre-recorded as **video presentations** (using Prezi Video or Mmhmm, for example – *see the next page for more*). This is useful for breaking the monotony, but also in case of technical problems, since the link can be shared in the chat and the partners can watch it separately. It's also a great way to ensure that experts knowledgeable in the pilot action can give their input even if they are not present at the time of the workshop for some reason.
- **Polls** are not just tools to break the ice – interspersing longer presentations with quick questions "shakes up" the audience by forcing them (gently) to interact with the speaker and each other.

TOOLS TO KEEP IN MIND

Canva is a graphic design platform which is used to create **visual content** (social media graphics, presentations, posters, documents, etc.) through professionally designed and fully customizable – often thematic – **templates**.
The editing workspace of the website is very **easy to learn**, and includes not just the templates themselves, but hundreds of thousands of free **photos, icons and graphics**. The platform is **free** to use if the designer avoids **premium materials** – **Canva Pro** offers those with **branding** opportunities and an additional **100 GB of cloud storage for 13 dollars per month**.

Prezi Video: Prezi is a Hungarian visual communications software company founded in 2009. Ten years later, they launched Prezi Video, letting their users give **virtual presentations live or pre-recorded**. The platform transforms traditional slides into more **dynamic** ones by adding movements between objects, rotating and zooming in on the screen. Prezi Video can be **integrated into every video conference service** this guide discussed previously. Modifying the templates is easy, but **creating new slides is more difficult** compared to other platforms, requiring a higher learning curve.

Prezi Video is technically **free** to use, but a few crucial features, such as the ability to download materials, are only available to paying customers. Prezi Video (with Prezi Present and Prezi Design) offers a **Plus package for 14 euros per month** and a **Premium version for 18 euros per month which includes offline access** through a desktop app.

Mmhmm: Using Mmhmm, it is possible to change the background of a presentation or live chat to hundreds of different places, shapes and colors and bring it to life with moving figures and special effects, **creating interactive recordings**. It is very **easy to use** and especially **easy to apply in Zoom**. With **mmhmm Free**, Premium Tools are available for **one hour each day**, while **mmhmm Premium provides unlimited access for 8.33 dollars per month**.

These tools can be mixed in any way a host sees fit: a face-to-face presentation can be followed up by a short video presentation of an expert who's not present and vice versa – this should work online, too.

TOOLS TO KEEP IN MIND

Incorporating only frontal methods would be a mistake, especially if the workshop is held online. **Interactive sessions** are crucial to enrich meetings – and to discuss the **peer review** of the pilot actions.

We can talk about interactions in terms of expert discussions planned as a part of the agenda and/or interactions with the audience.

- **Q&A sessions** are a must – we need **at least one**, but preferably one after every presentation (if there are more).

The ideal way online is someone moderating them based on questions in the chat *(see* ***this page****)*.

- The actual peer review can take the form of a **roundtable discussion with the** participating **experts** (arranged in advance), but one part of the presentation might also be **a panel with stakeholders who know the local context**.
- **In-depth one-on-one interviews** can be conducted live or even recorded as a video or podcast – this would allow diving into the pilot action through the perspective of someone who is familiar with its inner workings.
- Personal meetings allow the visit of the given pilot location, but **site visits** can also be pre-recorded to be presented online.
- **Group work** will be very different in the case of online and offline meetings.

Face-to-face, after the presentation (and the Q&A) the host might decide to:

1. Give the experts 10 minutes to **review their notes**
2. Assign them to **small groups** (e.g. by partner, if there are more than one expert from one) to discuss their findings and **select the most important suggestions** they would like to share with the pilot city, writing them down on sticky notes
3. Let them **present** their thoughts in a plenary session so the host can ask **clarifying questions**

These activities require only paper and pens for the personal notes, coloured sticky notes for the group and plenary discussion and a space on the wall (or somewhere) where the **sticky notes** can go and be **organized thematically at the end of the exercise**.

The same structure can work online, too, but it must be accomplished through the use of breakout rooms and a virtual collaboration platform.

TOOLS TO KEEP IN MIND

MURAL is a virtual collaborative platform with an easy-to-use **digital workboard**. It allows users to create more productive and engaging virtual sessions through **guided visual teamwork**.

Its **unlimited canvas** can be built into workspaces for **collaborative exercises**. The participants write on **coloured sticky notes** which can be grouped together and voted for – the tasks can also be done under a countdown. Elements (like the background or a grid for an exercise) can be locked by the facilitator so the participants won't drag them over the screen accidentally. MURAL also has a Summon feature where the host can force the participants to the same view that they are looking at.

The platform interface can be a bit of an acquired taste (hiding the Text tool under the icon for Sticky notes, etc.), but **its navigation is very smooth and easy to handle**.

The **Free package** includes only **5 murals**, but unlimited participants, while the **Team+ version** offers both **without limits for 12 dollars per month**.

Miro is another visual collaboration and whiteboarding platform, very similar to MURAL.

It allows the use of **sticky notes, freehand drawing and presentation mode**, but also **voice/video chat** and **screen sharing** – the latter ensures that everyone is looking at the right place on the board, although the participants need to actively click the Join alert to opt in.

Visually, Miro contains many prototyping **charts**, business **canvas grids**, and **templates** for design thinking, project management and brainstorming – overall, these grids are in a **very high professional quality**, supported by an **intuitive layout with subtle and smooth animations**.

The **Free version** includes only **3 editable boards**, while the **Team version** offers unlimited editable boards and visitors, with the addition of private boards and custom templates **for 10 dollars per month**.

Although both of these tools are more useful in case of online meetings, their templates can be implemented in physical workshops, too – this guide will showcase two of them on the next page.

TOOLS TO KEEP IN MIND

START-STOP-CONTINUE

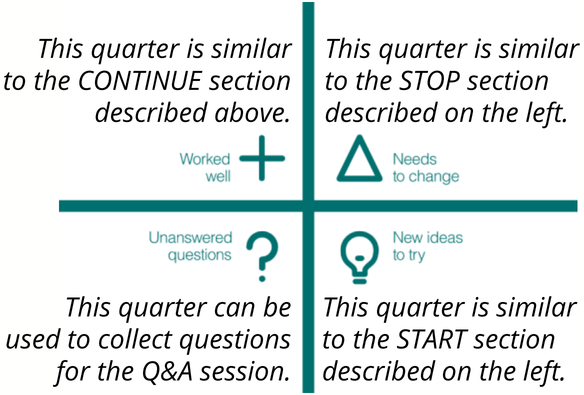
This exercise works both on paper and virtually. Despite its relatively easy setup, it can be a thorough and holistic way of evaluation for the pilot actions – this is the reason why it's included in the Evaluation report. As the name implies, the exercise has three steps:

START: In this section, the participants suggest things that are currently **missing** from the pilot: e.g. resources which will be needed but haven't been foreseen so far; additional activities that would serve the objective better. A list here isn't a comment on the quality of the action – rather, it ensures a knowledge exchange between the partners, sharing expertise **to improve** an already well-made plan even more.

STOP: This is where the experts focus on the elements of the pilot action that are **inefficient** in their current form, do not support the achievement of the objectives and/or could even have a **negative impact**. Again, the participant partners' expertise will come in handy here: maybe some of them have tried one of the activities before and they met resistance or run into barriers – sharing their experience will be beneficial to the pilot city to **avoid making** the same **mistakes**.

CONTINUE: This guide mentioned that the experts should be generous with **compliments** if it's warranted – this section is the place for sharing them. If some of the activities or elements of the pilot action are exceptional and should be implemented at all costs, the experts must include them here **to validate the host's idea**.

There are alternatives to the START-STOP-CONTINUE exercise – a simple **feedback grid** should also serve the same goal:



Alternative exercise (feedback grid) for the peer review session

TOOLS TO KEEP IN MIND

Summary table of every tool

The highlighted rows show which tool is more familiar to and preferred by the writers of this document.

TOOLS	FEATURES	EASE OF USE	COSTS
Zoom	Has the most extensive feature set (screen sharing, group and private chat, waiting room, breakout rooms, polls, etc.)	Very user-friendly, easy to learn	*Pro* version for 14 euros per host per month with 1 GB of cloud recording space
Teams	Makes the participants easy to ”handle”: multiple feeds can be fixed on the screen, anyone raising their hand is displayed immediately, etc.	Has a higher learning curve than Zoom, but for companies already using Office 365, it should be familiar	Microsoft 365 *Business Basic* package (Word, Excel, PowerPoint, Teams, Exchange, OneDrive, SharePoint) for 5.33 euros per user per month
Webex	When planning a meeting, agenda items can also be added; includes a virtual whiteboard for sharing notes	Intuitive, relying on an easy-to-understand dashboard	*Starter* version for 14.25 euros per host per month with 5 GB of cloud recording space
Slido	Polling and quizzing the audience in real time; the participants can ask questions and vote for their favourite	User-friendly interface which is very easy to learn and manage due to its clear event code system	*Free* version with a 100-people limit, 3 polls per event and Q&A + *Engage* version for 10 euros per month with the additional option of quizzes
Mentimeter	Additional features: live creation of word clouds, a presentation builder to design a presentation filled with live interactions	Higher learning curve – on-screen instructions can be challenging for a less tech-savvy audience	*Free* version with up to 2 question and 5 quiz slides + *Basic* version with unlimited access for 12.7 dollars per month

TOOLS TO KEEP IN MIND

Summary table of every tool

The highlighted rows show which tool is more familiar to and preferred by the writers of this document.

TOOLS	FEATURES	EASE OF USE	COSTS
Canva	Fully customizable templates (presentations, posters, etc.) + free photos, icons and graphics	Easy-to-learn editing workspace	*Free* to use; *Canva Pro* with premium materials, branding and 100 GB of cloud storage for 13 dollars per month
Prezi Video	Dynamic slides (movements between objects, rotating the screen, etc.); compatible with Zoom, Teams and Webex	Offers easy-to-modify templates, but creating new slides is more difficult	*Plus* package for 14 euros per month; *Premium* package for 18 euros per month with offline access through a desktop app
Mmhmm	Hundreds of different places, shapes and colors for background, moving figures and special effects	Very easy to use (and apply in Zoom)	*mmhmm Free* with Premium Tools for one hour each day; *mmhmm Premium* with unlimited access for 8.33 dollars per month
MURAL	Unlimited canvas with collaborative exercise templates; coloured sticky notes; voting; timer; lockable elements; Summon	Occasionally ”clumsy” interface, but with smooth and easy-to-handle navigation	*Free* package with only 5 murals, but unlimited participants; *Team+* package without limits for 12 dollars per month
Miro	Sticky notes & freehand drawing; presentation mode; voice/video chat & screen sharing; templates in a very high professional quality	Intuitive layout with subtle and smooth animations	*Free* version with only 3 editable boards; *Team* version with unlimited editable boards and visitors + private boards and custom templates for 10 dollars per month

DOCUMENTING THE WORKSHOP

Documenting the meetings properly is necessary for project reporting (both to the FLC and the Joint Secretariat). *Capturing the learnings of the peer review is another matter entirely and it's detailed in Chapter 4.*

Every host partner must have a "package" ready no later than one week after the workshop, which includes the following documents:

- **Invitation** – this will be a partnership-wide e-mail which includes the agenda and the pilot action summary *(see this page)*
- **Agenda and/or script** – usually a Word or a PDF document (the script might be an Excel)
- **Participant list** – both the preliminary list and the signed attendance sheets for every day of the meeting
- **Visual documentation** – at least 10-12 HQ photos from different sessions of the workshop (video recordings are not mandatory)
- **Presentation materials** – their format depends on the methods the partner used (PowerPoint and/or Canva slides, etc.)

In case of an online meeting, the differences in the requirements concern the following:

- The *participant list* should be a **screenshot** of the meeting with a **visible attendance list**.
- For *visual documentation*, recording the workshop is preferable, but the package must also include at least **10-12 screenshots**.
- There will probably be a greater variation in the *presentation materials*: if the host used **MURAL**, the workspaces should be exported from the site in the form of HQ pictures – documentation is also necessary for the **Slido polls, Mentimeter word clouds, etc.**

It is a wise choice to **document** not just the "end result" – the Transnational Think Tank workshop –, but also the lead-up activities: e.g. **the one-on-one call** with the participants where the details of the meeting were discussed and agreed upon.

This documentation package isn't complete – the documents related to the *professional content* of the workshop (i.e. the pilot action summary, the evaluation report) should also be included, but these will be discussed later.

TIPS FOR THE PARTICIPANTS

Just like when preparing for the workshop, the **attitude** and **behaviour** of the experts during the meeting determines the success of the peer review. This page lists a few **"ground rules"** every participant should keep in mind.

1. RESPECT THE MEETING

It's important that the experts **come prepared**: reading through the pilot action summary and making notes in advance *(see this page)*. But coming to the workshop prepared isn't enough: the participants must be **ready to engage** in constructive discussions **and contribute** with any information they have that could potentially improve the pilot action. The content of this paper – and therefore the responsibilities of the experts – was confirmed by the partners, and everyone must **comply with the requirements** according to the agreed-upon methodology.

2. RESPECT EVERYONE'S TIME

Time is a scarce resource and delays are a constant companion of workshops. The host and the participants will try to mitigate the possibility of technical problems, but those can (and probably will) occur. However, delays caused by not sticking to the timetable is another matter. The first step to avoid them is **arriving on time and staying** in the meeting for the whole duration to not fall behind on the material.

Moreover, every expert must be conscious of the agenda and the **allocated time for each task**, holding themselves to it. *Everyone* is responsible for keeping the meeting on track so don't be afraid to speak up respectfully if the discussion seems to be drifting towards an unrelated or unimportant topic. **Leaving others time** to share their perspective is also crucial – no one should monopolize the workshop, even if they have extensive experience in the topic.

3. RESPECT THE OTHER PARTICIPANTS

Listening when others speak is a basic sign of respect, but it can be hard when someone is fatigued by the continuous online calls or from travel. The participants must do everything in their power in advance to be able to give their **full attention to the meeting** (exercise, eat, drink coffee, whatever works best). If difficult subjects emerge and there's no consensus, treat the others with **tolerance** – assume the best intentions, but always **ask questions** to better understand anything that is unclear **to avoid misunderstandings**.

AFTER 4

Evaluating the peer reviews and the pilot actions

EVALUATING THE WORKSHOPS

Evaluating the Transnational Think Tank workshops is a complex issue – the participants must give feedback about the workshop itself to fine-tune the methodology, but also about the pilot action which was the topic of the meetings. To streamline this process and not drown the partners in paperwork, this guide proposes a **common template** which includes the evaluation of both.

Although the responsibility to prepare this evaluation is the **knowledge provider**'s who was designated to the given workshop, but – to support their work – the participating partners will be asked to summarize their thoughts which then the KPs can compile into **one workshop/pilot action evaluation report**.
The **final report** (Deliverable T3.1.2) which describes *every* workshop and pilot action will be written **by WPRED** until the end of June, 2022 – specified in the application form – **based on the KP reports**.

After 1 week	***After 2 weeks***	***June 30, 2022***
Min. 2 reports done by experts	*One report done by the KP*	*One final report done by WPRED*

The evaluation template has the following sections connected to the workshop (not the pilot action!):

- **Name** of the evaluating partner – the name of the expert(s), optionally
- **Date, format** (online or face-to-face)**, location/platform** (at least the city in the former case)**, topic** (name/title of the pilot action) **and participant number** of the event
- **START-STOP-CONTINUE** evaluation of the workshop
    - What was missing from the workshop (and should be in the next)? *E.g. no ice-breaking session*
    - What didn't work as well as expected? *E.g. too short Q&A; too long site visit without added value; not enough interaction between the experts*
    - Which elements were implemented successfully? *E.g. dynamic and informative video presentation*
- **Quantitative evaluation**
  These statements relating to the workshop will have a 1 to 4 scale (Strongly disagree, Disagree, Agree, Strongly agree), providing a way to create a **comparative analysis** of all workshops under the same criteria.

EVALUATING THE PILOT ACTIONS

The evaluation template has the following sections connected to the pilot action which was peer reviewed by the participants:

- **Intervention logic**
  The experts should demonstrate that they have understood the basic logic of the pilot action by **describing it in their own words briefly** (in 500 characters). This is a good way to check if there is any confusion remaining after concluding the workshop.
- **START-STOP-CONTINUE** evaluation of the pilot action
  This section is similar to the same exercise described on this page.
  - What is missing from the plan (but should be included)? These could mean additional resources and/or activities, **new ideas to try**, etc.
  - What elements of the pilot action are unnecessary or just inefficient in their current form?
    This part includes everything that **needs to be cut** from **or changed** in the implementation plan.
  - What should **stay the same** in the plan?
    If something sounds very good and potentially successful, the experts will indicate them here.
- **Q&A summary**
  Having a memorandum of every question that was asked and answered during the Q&A is good for posterity and might also orient the other workshop hosts to what kind of information they would need to include in their own pilot presentation.
- **Quantitative evaluation**
  These statements will have the same 1 to 4 scale as the ones about the workshop and also the same goal: providing a way to create a **comparative analysis** of all pilot actions under the same criteria.

This template will be used by both the experts and the **KPs**, but – as the guide already mentioned – the latter will have the additional task of **structuring the individual expert reports into one** coherent evaluation (interspersed with their own comments, of course).

Creating a **project level report** about the pilot actions is a harder task due to its magnitude: WPRED must **compile 10 evaluations and draw appropriate conclusions** about the peer review process and the pilots, too.
The template for this report will be designed at the beginning of 2022, before the first workshop.

IMPLEMENTING THE PILOTS

The host partner will receive the comments included in the evaluation report 2 weeks after the workshop – based on the peer review and the report, they can make modifications in **the pilot action summary** which **will become an implementation plan** at this point, guiding the actual process of realizing the pilot idea.

Every partner will have at least **6 months to implement** their peer reviewed pilot action (from July to December 2022). These will typically be regulatory changes, small-scale investments, awareness-raising activities, the reorganization or redirection of existing services, etc. *(see this page for more information)*.

Giving advice about implementing these pilots is not easy since every one of them is different, but two things are important generally for project reporting reasons and also for reaching the objectives successfully:

- Check the pilot action summary and use it as an implementation plan *(see above)* by **monitoring the progress** of the activities and the status of the funds and the indicators.
- **Document** the pilot action with the same diligence as the peer review workshop. This could mean different things with different pilot actions: if it includes an awareness-raising campaign with an event, save the invitation, the Facebook posts, the programme, take pictures and make the participants sign an attendance sheet. If you have to buy equipment for the site, you might just collect every invoice and then take photos of them in situ.

One specific documentation method was included in the application form as a separate deliverable (Deliverable T3.2.1): **a short – maximum 3-minute – video with English subtitles**. Why is this a good way to immortalize the process?

1. **Easy to distribute** (especially on social media)
   Nowadays, almost every target audience uses some form of social media – its type usually depends on the age of the given person. These videos can be used to **disseminate the results** of the project widely.

2. **More likely to get watched until the end**
   People prefer short-form video because it's over quickly. Only 24% of them will watch a video over 20 minutes, while 58% will only finish those that are under a minute.

The list continues on the next page.

Source #1

IMPLEMENTING THE PILOTS

3. **Easy to remember**
   The short attention span of viewers might bother professional video makers, but they should be reminded that short videos are also more **likely to be remembered** in detail, having **more impact** in the long run.

4. **More likely to be clear and structured**
   When someone knows that they have only 3 minutes to convey their message, they will make sure to include only the most important elements in an **easy-to-understand and logical** way – this approach makes the creators of the video **more focused** and less likely to be lost in the details.

There are three questions to consider about the video.

WHO?

The project allows the hiring of a professional video crew, but the technology available to individuals today (smartphones with high-quality cameras, free video-editing apps, etc.) might make that unnecessary: one person can easily collect enough footage and then edit the final video based on a pre-designed script.

WHAT?

Although the application form mentions one 3-minute video, it’s not out of the question to **create more** if the pilot partner feels that this would be better for dissemination – the statistics shared on the previous page support the idea of creating 3 videos, for example, each of them under one minute (which is very similar to URBACT’s vox pop video requirement).

HOW?

There are several ways the video(s) can be structured.

Shooting on location and maybe providing some **voiceover narration** about the pilot is the basic approach which can be enriched by including **interactive and creative elements**: short **interviews** with visitors for an outside perspective, including **graphic design** (e.g. a comic or an animated drawing) to explain the process in an entertaining way, etc.

The partner can decide to include a ***Before* and *After* look** of the pilot location if the nature of the change is physical, i.e. involves the procurement of new equipment.
The two sections can even be **split into two videos** to truly separate the initial situation/expectations and the final result.

SUMMARY TABLE

Before the workshop

PAGE(S)	TASK	OUTPUT(S)/RESULT(S)	DEADLINE
12-14	Preparing a summary about the selected pilot action	Draft pilot action summary for peer review	2 months before the workshop *(internal deadline)*
16	Organizing an online meeting between the relevant partners	Date, format and indicative participant list of the workshop	
17-18	Planning and sending out the agenda for comments	Draft agenda	6 weeks before the workshop *(internal deadline)*
	Modifying the agenda & inviting the experts	Final agenda, official invitation	
19	Modifying the pilot action summary	Final pilot action summary for peer review	1 month before the workshop *(internal deadline)*
23-24	Selecting and setting up the venue/online platform	Address of the location or link for the online meeting	
26-35	Planning the details of the workshop (choosing the speakers, identifying collaboration methods, etc.)	Detailed script	1 week before the workshop *(internal deadline)*

SUMMARY TABLE

After the workshop

PAGE(S)	TASK	OUTPUT(S)/RESULT(S)	DEADLINE
36	Documenting the workshop	Package: invitation, agenda and/or script, participant list, pictures and videos, presentation materials + Evaluation reports by the experts	1 week after the workshop *(internal deadline)*
39-40	Evaluating the workshop and the pilot action	Compiled evaluation report by the KP	2 weeks after the workshop *(internal deadline)*
	Compiling the individual reports of the knowledge providers into a coherent document *(done by WPRED)*	**Deliverable T3.1.2** (Evaluation of peer reviews and assessment of pilot actions)	1 month after the last workshop *(internal deadline)* **June 30, 2022** *(project deadline)*
41-42	Finalizing the pilot action summary	Implementation plan	1 month after the workshop *(internal deadline)*
	Implementing the pilot action	**Activity T3.2** (pilot action), with documentation: **Deliverable T3.2.1** (short video)	**December 31, 2022** *(project deadline)*

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