

The preparation of the workshop

Efficient running of the workshop depends on a number of decisions:

1. a. Format of the workshop
1. b. Who will be invited
1. c. Prepare relevant information for the participants
1. d. Training and debriefing the facilitators
1. e. Logistics: booking the room, office stationery, drinks and snacks...

Deciding on workshop format

We propose three different formats for the workshop:

- The one day project partners workshop format
- The one day stakeholders' workshop format
- The two days stakeholders' workshop

The 'one day project partner's workshop' will be particularly suitable for the projects that are practically in their early stage. Indeed, when the Project is starting, one key task is to build the first circle networks of project team and partners. In this case, the workshop might help project manager contact with partners (ministries, local authorities, universities, companies, financial supporters...) and reach agreements with them so they get committed to the Project. So, in this case, we suggest holding a one day – 5 hours with two to three facilitators-workshop with the main partners or future partners in order to ease this process.

A 'stakeholders workshop' is recommended in all the other situations for testing and evaluating the project future options with concerned stakeholders. In this case, the aim of the workshop is to increase project acceptance by identifying different stakeholders preferred solutions.

We suggest to organise the 'stakeholders' workshop in either one or two days. Decision upon the time frame should be made in accordance to availability of stakeholders and project

manager, and on the basis of previous experience of participants. If participants are not well informed about the project they might find it hard to contribute straight away with coherent proposals during the workshop.

In order to increase their awareness, it is recommended to:

- keep stakeholders informed during the entire project (newsletters, other workshops, meetings...)
- elaborating and sending an informative dossier to each participant before the workshop

NB: a two-day workshop allows a much deeper work with stakeholders, particularly appropriate when little previous information was disclosed and exchanged. In this case, the first day can be focused on discovering and discussing the different step 1 and step 2 documents (such as the project manager's vision), and the second day can be oriented to enriching the proposals and possible solutions list.

In both cases, one or two-day stakeholders workshop, it is very important to select carefully who will be invited to participate in the workshop.

Selecting workshop participants

Regardless of the type of workshop held, there are some general criteria for the selection of participants:

- Whenever there is an open conflict, controversy or strong debate, opposing parties to the conflict should be invited. The organization of the workshop has to be careful to leave room to the main conflict protagonists, excluding them usually entails that the conflict intensifies. In this case, the workshop will be unique opportunity to bring the different parties face to face and try to reach a constructive stage in the discussion when possible.
- A balanced social representativeness of the concerned population should be looked for. This includes two aspects: a) balanced representation of different social functions spheres (researchers, financiers, technology providers, market consumers, policy makers) b) variety of social actors

One good source of documentation to help this selection process are step 1 and step 2 documents : one natural path is to depart from the stakeholder selection made in step 2 and to enrich/modify it depending on the workshop objectives. The 'Actors Table' the 'Context Analysis' and the 'social network maps' (steps 1 and 2) are certainly helpful too.

Detailed guidelines for the partners workshop

Besides these general criteria, selection of the participants for partners workshop might consider the following:

- The *close-by*, main partners, closely involved in making the project come true should be considered deciding on whom to invite. Actors such as the funders, key technology providers and involved policy makers might fruitfully contribute here
- The size of the workshop in terms of number of participants should also be carefully considered. 5 to 10 participants should seem to be the most effective formats.

Detailed guideline for the selection of stakeholders workshop

- The advocates and opponents criteria: keep the balance between *close-by*, *affine*, *indifferent*, and *opposite stakeholders*, trying that all categories are well represented. Moreover, it is interesting to invite participants with no clear stated position.
- A balanced social representativeness of the concerned population should be looked for. Two complementary aspects should be considered
 - a) balancing different social functions/spheres representation (researchers, financiers, technology providers, market consumers, policy makers)
 - b) variety of social actors should be considered for invitation. Civil social organisations, public administrations, private sector companies small and big, technology & scientific experts, non-involved people (the silent majority) to name a few. For instance that would be good to think, if it is possible, to inviting men and women, young, middle age, and elder people in a balance way (in some culture, some categories tend to systematically be under-represented, especially women voice to mention one).
- Bridging actors – some actors are key pieces in the social networks. They should be invited in priority (they are unique linking between one actor and the rest of the net).
- Actors for the future - stakeholders that, despite they are not yet involved, but that should be considered for the future (see the social network map of the PM future vision for helpful insight here)
- 20 - 25 (max) participants

NB: The project manager and the Project Partners would naturally attend to the Workshop, but their position should be handled with care. The workshop is a good opportunity to listen

and learn from the stakeholders, so they should not be too prominent. To prevent the workshop to turn into an 'information meeting' one way from the project management to the stakeholders, -which would certainly inhibit most of the other participants – information should be sent to the different participants in advance.

Preparing an information dossier for participants

Accurately informing the different participants to the workshop so that they can actively participate and contribute is of extreme importance. The quality of the discussion and the proposals depend very much on this.

Different situations can be faced here depending on how much the participants have already been associated to the project so far (including in step 2 during the stakeholders meeting). In any case, and this is especially relevant if little information has been disclosed yet, the constitution of a 'stakeholders dossier' would be recommendable.

The stakeholders' dossier

Whenever the participants has been not apprised of the project before, a dossier/paper/document explaining the project should be made and sent for guarantying that there is a necessary common level of information among all them.

The most important thing for elaborating this document is always to bear in mind that for some stakeholders this will be one of the firsts contacts with the Project. So the most important information to send is the description of the Project. To do this job, some of the documents built in previous steps can be used.

We suggest that the stakeholders' dossier should include:

- two 'synthesis writing' of the present and the future vision of the project manager
- the 'stakeholders' visions'.

An alternative documentation for shorter description might the storyline format:

Example Oeko-institut

Storyline to start the vision building

Energy farmer and operations manager Norbert Werum looks at his surroundings with a sense of satisfaction. “The machine has been operating well for 2 months without malfunction or complaint; all of the teething problems that we had with the new unit have finally been solved.

The district heating customers can rely on us.” Norbert W. is one of the pioneers from the early 2000s who has made the transition from farmer to energy farmer. In addition to his farm, he has built a certified biogas plant together with four other farmers in the near vicinity and inhabitants of the neighbouring village. “Financially, it didn’t seem easy at all at the beginning, but then the prices for forage maize fell dramatically, so it must have been around the end of 2009,” Werum recalls. „Then it suddenly seemed like a good idea to cultivate energy crops and produce electricity from them. In the meantime we’ve had to upgrade our first unit”.

He and his colleagues have been successful energy entrepreneurs for 10 years now; as a result of fair contracts with their neighbours, they are not dependent on world market prices. “This new branch of business has also safeguarded livelihoods in agriculture,” says Werum’s colleague Friedbert Kaiser of the farmers’ union.

This document should be simple and adapted to their targeted readers. In addition, the dossier should be sent early on (2 weeks before the workshop would be good) and accompanied by a letter of explanation (purpose of the workshop, who will be invited, why it is important that stakeholders participate, where and how long it will stand).

The issues list

Issues as identified during step 2 and 3 (see key issues table and ranking), are the central matter for discussion during step 5 stakeholder’s workshop. A list of issues will then

preferably be sent in advance to participants, especially in case the one day stakeholder workshop format has been selected. To compose this list, different options are offered:

- Whenever there are a limited number of issues, they would preferably directly compose the issues list.
- In case there is a partner meeting organised beforehand, partners could be selecting a short list of issues for the workshop
- If the number of issues is high, and there is no previous short listing by partners of the project manager, this could then be asked to workshop participants to constitute such issue short list as a first task. In this case, that should be handy to send the list of issues in advance to them. We will call the 'short list' a 'voting list' in this case. As a result, key topics for discussion will be ranked and selected.

Thinking about and holding a training session for the facilitators of the workshop

Once it is decided what kind of workshop will be held, which participants will be invited, we recommend to organise a training session for the facilitators. On the one hand, this session is used to allocating tasks to the different facilitators, but it is also particularly useful to:

- Revising together the workshop methodology, to ensure that, in case of creating subgroups, all of them will use the same *modus operandi*,
- Deciding on the composition of subgroups (in workshop with more than 10 participants). In other words, making consensus on the distribution of the participants in the subgroups with the aim of keeping the desirable balances and reaching a good working atmosphere.
- Warning on possible 'trouble making' participants and possible "hot issues" and devising a line of action on how to handle them.
- Explaining and revising the key issues that will be discussed during the workshop, especially in case the one day stakeholder's workshop is selected. The degree of depth and details of the discussion in the workshop depends to large extend on the facilitators' comprehension of the key issues. Therefore, facilitators should have a

good knowledge of the “issues” and a clear idea on their role as facilitator of the discussion of these issues.

Example: take the following key issue- Everyday life impact of the wind project includes as sub-issue about noise and visual impact. If the facilitator has a good knowledge of the issues and the participants do not say a word about noise, the facilitators can either raise the question directly to focus the debate, or indirectly by asking the audience what kind of physical troubles they fear might be associated with the site of wind turbines.

Another aspect of the role of the facilitators might be also to suggest solutions in order to evaluate how stakeholders react to them. Again, previous preparation of the facilitator is needed here to both explain how and when make such suggestion. If facilitators should come to make some suggestion, they have to be careful not to direct the interaction too much. It will always be a much better case if the stakeholders will come to a solution by themselves. If they do not consider some important solution or options after a while, facilitators might approach them more or less directly.

Example: If stakeholders have identified noise as a real problem, but they could not devise any possible feasible solution to this, then facilitator might suggest ideas such as the installation of appropriate windows (a solution from the issues-solution table) to test how much agreement they would get.

Foreseeing the logistics

Many little details make a successful workshop, logistics being one of them. Think of all the different aspects of practicalities in advance: welcoming the participants, leading them to the meeting place, providing the necessary stationary related to each exercise, booking rooms in appropriate number and with the appropriate number of seats, when needed, paper boards, white boards with markers and post it, video projector and so on. A more detailed guideline is provided by the ‘cookbook’ in Appendix, section 5.

