SHERPA
Rural Science-Society-Policy Interfaces

D2.3 ONLINE STAKEHOLDER ENGAGEMENT SUPPORT TOOL

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1. Introduction

The overall objective of SHERPA is to gather relevant knowledge and opinions that contribute to the formulation of recommendations for future policies relevant to EU rural areas. It will create science-society-policy interfaces which provide a hub for co-creating knowledge and provide policy recommendations. This will support actors in rural development, including in coastal communities, to help rural areas take emerging opportunities and protect them from long-term threats of decline.

At its core, SHERPA is designed with two tenets of ensuring the effective use of knowledge gained from investment in research, and empowering key actors and stakeholders in the development of public policy. The interactions between research, policy and citizens will take place at local level in up to 40 Multi-Actor Platforms (MAPs) and a MAP at EU level. The Multi-Actor Approach is at the core of this design. It is a mechanism adopted by the European Commission in its strategy for EU agricultural research and innovation. The aim is to 'boost demand-driven innovation and the implementation of research, creating synergies between EU policies', and increase impacts through process of genuine co-creation of knowledge, focusing on real problems and opportunities.

In SHERPA, Multi-Actor Platforms (MAPs) will be the core forum for two-way exchanges of ideas for co-learning and co-creation of knowledge with actors at European and regional levels. Across Europe, there is a range of regional structures which can be the basis of regional MAPs (e.g. Local Action Groups (LAGs), Fisheries LAGs, regional rural development organisations, and community groups).

To function as a MAP, an existing group may need to include other types of actors to ensure representation of citizens, business, science and policy. SHERPA has assessed the appropriateness of existing structures as a basis for a first set of regional MAPs, identifying and securing agreement of groups in 20 EU regions. A second set will be formed in 20 additional regions, covering 20 EU countries in total, and a wider range of rural development topics. A further MAP at EU level with the corresponding science-society-policy representation will focus on policy at an EU level and enabling cross-country engagement and learning.

WP2-Task 2.2 of the SHERPA project is dedicated to the design, production and maintenance of an online stakeholder engagement support (OSES) tool for assisting SHERPA Facilitators and Monitors of Multi-Actor-Platforms (MAPs) during the duration of the project, and beyond. This toolbox is designed to offer hands-on guidance on methods and tools for stakeholder engagement. It is experience-based, tailored on the specific capacity and needs of its target users, easily accessible online through the project website, user-friendly, free, and is conceived to remain tuned on the needs of its users.

The OSES toolbox is based on the review of a large series of stakeholder engagement methods and tools with respect to suitability for use in SHERPA, inputs from WP4 on results from research projects on methods for engaging stakeholders. The review informed the selection of most suitable methods and tools for engaging target stakeholders in SHERPA MAP events, depending on the topic, profiles of stakeholders, level of involvement, number, skills of MAP Facilitators and Monitors, and time available for the stakeholder engagement exercises. Additional tools for supporting MAP Facilitators and Monitors in their stakeholder engagement activities were reviewed and included in the toolbox whenever relevant.

To ensure that the OSES toolbox was finely tailored to the respective experience, capacity and demand for methodological support from MAP target facilitators and monitors, an online survey was launched in December 2019 to collect valuable insights from its intended users.

Moreover, on January 16th, 2020, a training workshop for SHERPA MAP Facilitators and Monitors was held in Brussels with the participation of all these key actors in the MAPs. During the event, the OSES toolbox was presented in a specific interactive session, together with the main findings of the above-mentioned survey. The discussion that followed was instrumental to gather some additional feedback from the about 45 participants. Their inputs were considered during the finalisation of the OSES toolbox.

The following sections provide details about:

- Key lessons from previous projects having addressed stakeholder engagement from different angles
- The main findings of the online survey from December 2019
- A synthesis of the feedback gathered from the training workshop held in January 2020.

Next to this, the content of the OSES toolbox is presented, notably the list of the guidance sheets, which are available in full in the Appendix that closes this document. These guidance sheets are the core of the online stakeholder engagement support tool. They have been designed to make the information easily accessible and to guide readers to additional information if needed. They are meant to provide inspiration to MAP Facilitators and Monitors to facilitate their tasks. The application of the methods and tools presented is therefore not compulsory. Each guidance sheet will be presented in a dedicated section of the SHERPA website in a user-friendly manner. The guidance sheets will be updated taking into consideration the experiences and feedback received from the MAPs.

2. Stocktaking from previous relevant projects

The OSES toolbox is informed by desk research that was carried out to map relevant EU projects, particularly, but not only, in the areas of research and innovation and rural development, to understand what drives stakeholder engagement, and to identify where and how multi-actor platforms' dynamics can be optimised.

In total, 27 projects were examined, including from six from FP7 and 21 from H2020. They are briefly described below (in alphabetical order).

- AGRIFORVALOR. H2020 project aiming at closing the research and innovation divide by connecting practitioners from agriculture and forestry with research and academia as well as with associations and clusters, bio-industry, policy makers; business support organisations, innovation agencies and technology transfer intermediaries in multi-actor innovation partnership networks in order to valorise and exploit side-stream biomass resources from agriculture and forestry.
- BIOVOICES. H2020 project focusing on ensuring the engagement of all bioeconomy relevant stakeholder groups through a platform, that will involve a plurality of voices with different perspectives, knowledge, and experiences whilst also animating open dialogue, co-creation and mutual learning between them.
- BLOOM. H2020 project aiming at bringing together through co-creation methods partners from across Europe to debate, communicate, and engage the public in the potential of bioeconomy.
- BUILDUPON. H2020 project with the objective to engage and empower a 'critical mass' of over 1,000 stakeholders in multi-stakeholder platforms, with the process of defining and implementing their long-term national renovation strategy.
- CARISMA. H2020 project aiming at assessing policy and governance questions that shape the prospects of climate change mitigation options and discussing the results with representatives from the CARISMA target audiences to incorporate what can be learned for the benefit of climate change mitigation.
- CIMULACT. H2020 engaging citizens and stakeholders in co-creation of research agendas based on real and validated societal visions, needs and demands. The project objective includes expanding the outlook and debate on Science, Technology and innovation (STI) issues, and create shared understanding between scientific stakeholders, policymakers and citizens.

- CIVISTI. FP7 project consulting national citizen panels through an informed deliberation process, focussing on long term visions, needs and concerns of the citizens; developing an analytical model for transformation of the visions into relevant issues for future science and technology; by use of the analytical model, through stakeholder and expert participation processes, analysing the citizen visions and transform them into possible priorities for research programmes; validating the priorities through a second round of citizen consultation.
- COASTAL. H2020 project with the objective to formulate and evaluate through Multi-Actor Approaches combined with System Dynamics business solutions and policy recommendations aimed at improving the coastal-rural synergy to foster rural and coastal development while preserving the environment.
- CONSOLE. H2020 project aiming to build a community of practice (CoP) – multi-actor and multidisciplinary teams from 13 countries – to co-create a contractual framework to be tested in real decision-making contexts. The aim is to improve the implementation of innovative contract solutions for the provision of agri-environmental-climate public goods under various conditions across the EU and prepare for the future of food and farming.
- CO-VAL. H2020 project with the objective to discover, analyse, and provide policy recommendations for transformative strategies that integrate the co-creation of value in public administrations by conducting research on the paradigm shift from the traditional top-down model to demand and bottom-up driven models when citizens, civil servants, private, and third sector organizations voluntarily participate in the development of transformative innovations addressing changing needs and social problems.
- DESIRA. H2020 project aiming at developing a methodology - and a related online tool - to assess the impact of past, current and future digitalization trends, using the concept of socio-cyber-physical systems, enrolling agriculture, forestry and rural stakeholders in co-developing scenarios and policies in Living Labs established in 20 European Regions.
- ENGAGE2020. FP7 project aiming at making an overview of potential praxis in Horizon2020 for societal engagement in research and innovation and related activities, with the aim of increasing the use of such praxis.
- GONANO. H2020 project enabling co-creation between citizens, researchers, industry, civil society organisations, and policy makers across Europe to align future nanotechnologies with societal needs and concerns.
- MAKING-SENSE. H2020 project focusing on exploring how open source software, open source hardware, digital maker practices and open design can be effectively used by local communities to fabricate their own sensing tools, make sense of their environments and address pressing environmental problems in air, water, soil and sound pollution.
- NANO2ALL. H2020 project aiming to establish a European-wide sustainable platform for mutual learning and informed dialogue among all stakeholders (researchers including social sciences and humanities, industry/ business, the public including Civil Society Organisations and the media, as well as policy-makers and research funders) to improve transparency and societal engagement in responsible nanotechnology.
- NANOCHANNELS. FP7 project aiming to create a programme of campaigns and events, designed to engage a wide range of stakeholder groups in an open debate of ethical, legal, and social aspects raised by developments in nanotechnology; a vital step to build a public consensus in nanotechnology issues.
- NEWBIE. H2020 project addressing the challenge of enabling new entrants to successfully establish sustainable farm businesses in Europe through transdisciplinary network of farming organisations,

educators, advisors, researchers and industry stakeholders, who will assemble, assess and exchange the state of the art on new entrant farming enterprises, and establish national and European new entrant support networks.

- ORGANICITY. H2020 project seeking to build a strong foundation for future sustainable cities through co-creation by a wide range of stakeholders, combining top-down planning and operations with flexible bottom-up initiatives where citizen involvement is key.
- PACITA. FP7 project with the objective to distribute capacity and enhance the institutional foundation for knowledge-based policy-making on issues involving science, technology and innovation, supporting the processes of democratic policy-making on issues involving science, technology and innovation, providing comprehensive insight into knowledge on opportunities and consequences, facilitating democratic processes of debate and clarification, and formulating policy options.
- PERARES. FP7 project aiming to strengthening public engagement in research by developing multi-annual action plans, involving researchers and Civil Society Organisations in the formulation of research agendas and the research process.
- POLIRURAL. H2020 project aiming to find ways to steer changes in rural areas, such as depopulation, land abandonment and the loss of biodiversity within an inclusive learning environment where rural populations, researchers and policymakers come together to address common problems.
- RURALIZATION. H2020 project seeking to trigger a process of ruralisation as counterforce to urbanisation, that is, a development towards a new rural frontier offering new generations stimulating opportunities for economic and social sustainability within a rural context through the study of new approaches and instruments in practice, and by developing these in a multi-actor context.
- SCALINGS. H2020 project with the objective to study three co-creation instruments (living labs, public procurement innovation, and co-creation facilities across robotics, autonomous driving and urban energy to shape industry and business practices by providing guidance for scaling up activities across contexts.
- SCIENCE2SOCIETY. H2020 project seeking to create, pilot and share good practices, guidelines and training materials that improve awareness and practical performance in seven concrete university-industry-society interfacing schemes especially affected by Science 2.0 and open innovation.
- SISCODE. H2020 project seeking to understand co-creation as a bottom-up and design-driven phenomenon that is flourishing in Europe (in fab labs, living labs, social innovations, smart cities, communities and regions); to analyse favourable conditions that support its effective introduction, scalability and replication; and to use this knowledge to cross-fertilise Responsible Research and Innovation practices and policies.
- SPEAK NGI. H2020 project aiming to establish and enact an open, dynamic and continuous consultation process with initially 8 key stakeholder groups on a citizen centric quest to discover their needs for the Next Generation Internet (NGI).
- VOICES. FP7 project piloting a methodology and process to involve European citizens in the definition of research priorities, in the area of urban waste.

2.1. Key lessons from previous projects having addressed stakeholder engagement

Based on the analysis of the different stakeholder engagement methods and tools tested in the 27 projects mentioned above, some lessons can be drawn that seem relevant for SHERPA MAPs concerning what drives stakeholder engagement, and where and how can multi-actor platforms' dynamics be optimised for learning and responsiveness to political and societal needs:

- In co-creation processes getting from dialogue to action is challenging. This is particularly relevant for SHERPA MAPs co-creation efforts. To encourage stakeholder engagement, discussions should be specific enough to affect the decisions of the actors involved. This applies to the selection of topics, but also to possible courses of action: who is the problem owner? Which actions can address the issues identified during co-operation in the MAPs?
- Defining what is at stake is key. SHERPA MAPs will therefore need to have a clear problem definition and to cultivate a sense of urgency ('where's the urgency?' Why do stakeholders have to respond now?). The rationale for involvement has to be made clear. Likewise, it is important to find a shared purpose that can drive a fruitful collaboration between stakeholders.
- Regarding the selection of topics for the MAPs, the following considerations are essential:
    - Knowledge: to what extent do various stakeholders possess general knowledge of the topic?
    - Maturity: to what extent have various stakeholders already developed opinions on the topics?
    - Complexity: Are the selected topics highly complex, such that a great deal of (technical) information is required?
    - Controversy: Are the topics highly controversial and has the debate become polarised to the extent that consensus is difficult to reach? Conversely, a controversial topic may serve to facilitate or encourage the recruitment of stakeholders to include relevant stakeholders beyond 'the usual suspects'.
- Dividing issues into practical themes, rather than abstract or theoretical rural development policy or technical research terms and asking different stakeholders for their views as to how solutions can be found can be an effective way to facilitate a genuine influence on something that is important to non-specialised stakeholder groups (e.g. citizens) rather than something on which they may have no influence at all.
- Building mutual trust between stakeholders is key for the success of SHERPA MAPs. People and organisations have to be open and to see the 'win-win' of co-creation, and to trust each other.
- It is important for SHERPA MAPs to include a diverse group of stakeholders, going beyond traditional networks. This should be next to the usual 'public suspects' and include a broad range of the general public. Likewise, through the involvement of citizens continually from the start of the MAP process, SHERPA MAPs can anticipate contributions that can serve to enhance the responsiveness of research and innovation processes to public values and concerns.
- With regards to the type of stakeholders to involve in the MAPs, the purpose of the initiative is key. Clearly understanding stakeholders and their interests, both separately and in relation to each other is essential for identifying who is relevant to involve. Therefore, an important step involves the creation of a stakeholder map and a materiality map. Materiality addresses the question as to who is material to the initiative, who can make or break the work of a MAP.
- In order to ensure a sustained level of engagement, it is necessary to address one or more of stakeholders' motivations. This can be achieved by demonstrating that it does make sense to look

at the broader dimensions, shifting from a product-driven ('here is my theory, what do you think?') to a demand-driven approach ('how can I help you?').

- It is important that the co-creation process generated in SHERPA MAPs leads to tangible results that are of interest for the stakeholders involved.
- Keeping stakeholders informed about what will happen with the results of the SHERPA MAP events or how the project recommendations might be used is important to build trust and trustworthiness. People who invest time and energy in such collaboration activities need to be able to trust that their time was well-spent by getting feedback about how their influence was or was not taken into consideration.
- Likewise, the transparency of the co-creation process is important, as SHERPA MAP stakeholders need to know that even if their inputs were not taken into account, they were considered in a transparent manner and an explanation is given as to the way decisions were made.
- It is important to develop a shared language in SHERPA MAPs in order to establish a successful group in which every stakeholder understands each other. In relation to that it is equally essential to take into account any cultural differences.
- It is important to manage expectations so that SHERPA MAPs' stakeholders are aware of what is offered in exchange for their involvement in a MAP and they know what they can accomplish with the SHERPA project.
- It is important to ensure transparency about the engagement process from the point of recruitment for SHERPA MAPs, notably regarding:
    - Roles and responsibilities of all involved
    - Engagement rationale (i.e. why individuals were recruited, expectations with respect to representativeness, etc.).
- Facilitation is fundamental to support the aims of the SHERPA MAPs co-creation process. Attention should be paid to potential biases of experts. MAP Facilitators should be able to guide the process and know how to provide balanced information. In order to empower all different stakeholders to participate in debate, it is necessary to create a level-playing field, in which contributions from a stakeholder category are recognised as being as valuable as those of the others.
- To avoid the risk of top-down enforced debates, SHERPA MAP Facilitators should re-think the provision of informational inputs to be more interactive. Rather than assuming in advance the kind of information needed by stakeholders and preparing expert inputs, stakeholders could be invited earlier in the event to voice their information needs.
- With respect to the level of specificity required for successful events, the level of specificity should change over time. In the beginning, MAP stakeholders should feel welcome to contribute openly. Over time, questions should become more focused.
- Time is an essential factor to get to meaningful levels of engagement in SHERPA MAPs, notably:
    - time for stakeholders to really get to the heart of the topics
    - time to get to know each other
    - time to develop meaningful connections between disciplines, sectors, different views on the same topics.
- Another important factor is flexibility in the development of the co-creation process, which allows MAP Facilitators to adjust the process to evolving – political or societal needs – expressed by stakeholders.

- It is essential for the legitimacy and for the success of a SHERPA MAP's co-creation process that facilitation and evaluation of mutual learning are made an explicit aim of any activity.
- Follow-up with involved stakeholders following an event is crucial to achieve sustainable and desirable levels of stakeholders' engagement and to identify any changes in awareness, reflexivity or practice.
- The use of creative formats in the workshops, for example future workshops, scenario workshops and world cafés, can be useful to tease out stakeholders' concerns and visions about a given topic, stimulate their exchanges regarding how they envision the future and open up different dimensions in the debate which can lead to new perspectives.
- It is important for MAP Facilitators to keep different activities interconnected when first stakeholders are involved to formulate actual research policy topics and recommendations, and these recommendations are then communicated to key policymakers with the aim of inspiring and shaping national and European research programmes.

The desk research conducted on the 27 projects above was supplemented with consolidated insights gathered from the partners of the SHERPA consortium.

In the second part of the project, during the planned review of the OSES toolbox (See §6 below) the analysis of past projects could be enhanced on the basis of the tools delivered under WP4, which is specifically dedicated to the stocktaking of relevant past and on-going project results. In addition, CartoDÉBAT tools produced in collaboration with the Paul Valéry University of Montpellier may be considered for inclusion into the toolbox.

3. Main findings of the online survey with MAPs

The online survey launched at the beginning of December 2019 was key to define the scope of the OSES toolbox, by providing relevant data and information regarding the specific experience, capacity, and demand for methodological support coming from MAP Facilitators and Monitors.

With 25 responses from representatives of 18 different organisations, 80% of project target countries covered, and a balanced split between MAP Facilitators and Moderators, the survey could be considered as representative of the OSES toolbox's intended users.

With regards to target users' perceived experience in key skills areas of stakeholder engagement, the analysis of the responses showed that MAP Facilitators and Monitors indicate to have relatively little experience in identifying and engaging relevant stakeholders for a MAP and in analysing and monitoring level of stakeholder engagement, whereas in communicating to stakeholders, and consulting with stakeholders, their (self-assessed) level of experience indicate to be relatively strong.

The demand for specific methodological support was weakest for guidance on how to set up an interview / face-to-face meeting with a stakeholder (48% very low or low demand vs 28% very high or high demand).

It was equally, or almost equally, split for receiving methodological guidance for making online calls or videocalls (36% very low or low demand vs 36% very high or high demand), for sharing online files and documents (40% very low or low demand vs 44% very high or high demand), and for setting up a consultation with stakeholders (32% very low or low demand vs 44% very high or high demand).

Finally, the demand for methodological support via the OSES toolbox resulted to be strongest for the following:

- Facilitating co-learning and co-creation in a MAP (96%);
- Assessing and monitoring the level of engagement of stakeholders in MAP activities (88%);

- Ensuring all participants can assert their views in a discussion (dealing with power differences and conflict) during a SHERPA event / meeting (80%);
- Managing stakeholders involved in a MAP (75%);
- Using social media to communicate about your activities on SHERPA; and gathering participants' feedback after a SHERPA event / meeting (72%);
- Communicating with participants and other relevant audiences after a SHERPA event / meeting (68%);
- Engaging with stakeholders before a SHERPA event / meeting (64%);
- Facilitating multi-actor processes (60%).

4. Feedback gathered from MAPs

During the training organised in January 2020 for MAP Facilitators and Monitors, additional feedback was collected from the about 45 participants, representing all the MAPs targeted by the SHERPA project. The key points are summarised here below:

- The main findings of the survey were confirmed to be substantially valid.
- The demand for guidance on the stakeholder engagement process to be created in each MAP is strong, notably as far as definitions of MAP process, co-creation, facilitation, and methods and tools for stakeholder engagement are concerned.
- The original name 'OSES tool' might lead to misunderstandings in some target users as to the content of the deliverable, considering that no new tool is going to be created, but rather a tailored collection of already existing methods and tools for stakeholder engagement. Hence the change of name from now on into 'OSES toolbox' that is likely to be clearer and more effective at aligning target users' expectations to what they are going to receive.
- The average number of stakeholders involved in a SHERPA MAP is between 10 and 20. This data is relevant for determining which event methods are to be included in the OSES toolbox as relevant for MAP Facilitators and Monitors.
- Several MAP Facilitators and Monitors do not have a clear understanding of the benefit of embedding a sound – and well structured – stakeholder engagement approach into their MAP-related work from the very beginning. Notably, the different key phases of a stakeholder engagement process are not equally clear for all MAP Facilitators and Monitors, notably as far as stakeholder engagement planning is concerned.

  Likewise, an area where clarification seems to be useful concerns the crucial matching to be made between topics selected by MAPs and relevant stakeholders, methods and tools. As important is to stress the correct timing for having MAP core members defining first the topics, second for identifying and recruiting external stakeholders and only then choosing relevant methods and tools for facilitating their engagement.
- Finally, the discussion highlighted the need for striving for consistency and synergies between the OSES toolbox and the relevant work that will be carried under the other WPs, notably under WP 5 and 6, as far as the development of tips for interpersonal skills and facilitation are concerned, as well as for recommending tools and methods which may be correct in theory but not always fitting to the specific context of the MAPs.

5. Content of the OSES toolbox

5.1. List of guidance sheets on stakeholder engagement methods and tools

Stakeholder engagement methods and tools can be divided in three main categories:

1. **Communication**. The three communication methods are interactive, push, and pull. *Interactive communication methods* are multidirectional. When one requires an immediate response, and when the information one is communicating is sensitive with the possibility of being misinterpreted, one may well turn to interactive communication. It involves one or more people exchanging thoughts and ideas, with responses gathered in real-time. Examples of these methods are calls, videocalls, meetings, and interviews.

   Push methods are from sender to receiver, and are preferable when one distributes information, yet is not looking for an immediate response - or if the matter one is trying to convey is not urgent or sensitive. However, as soon as the recipient views the message, some action is required. With these methods there is no confirmation that the information is understood. The most used push methods are sending emails or newsletters using an email distribution list.

   Pull methods are all about providing group access to common information. The receiver, however, must recover this information. These methods are used for a large audience who requires access to information for their use. For example, if stakeholders want the latest project information, they can search the project website in order to read the project documentation.

2. **Interpersonal**. Such skills include building trust, resolving conflict, active listening and helping people overcome the resistance to change. Such methods help deal with stakeholders who are unaware, resistant, neutral, supportive or leading. Interpersonal methods of building trust and resolving conflict are required when stakeholders are resistant or neutral whereas active listening is used for supportive and leading stakeholders in order to maintain that level of engagement.

3. **Management**. Management skills are used to achieve tangible results. For example, the MAP Facilitator facilitates the process of decision making and co-creation of a Dynamic Action Plan or of a MAP Position paper and manages change, or the MAP Monitor observes the stakeholder engagement process, capturing and assessing progress on targets and on process and reporting about it.

The core architecture of the OSES toolbox has been designed in response to the challenges linked to these three domains. Notably, fourteen guidance sheets have been developed to respond to the challenges identified in each area.

Communication methods and tools

1. How to organise a MAP event aiming at regional and local level.
2. How to engage with stakeholders before a SHERPA MAP event.
3. How to organise the registration of participants to a SHERPA MAP event.
4. How to engage with stakeholders during a SHERPA MAP event.
5. How to gather participants' feedback after a SHERPA MAP event.
6. How to communicate with participants and other relevant audiences after a SHERPA MAP event.
7. How to use social media to communicate about SHERPA MAP activities

8. How to make online calls or videocalls.
9. How to set up a consultation with stakeholders.

Interpersonal methods and tools

10. How to facilitate a SHERPA MAP event.

Management methods and tools

11. How to share online files and documents.
12. How to analyse stakeholders in view of achieving and maintaining their engagement in a MAP.
13. How to keep a record of SHERPA MAP stakeholders.
14. How to monitor and assess the level of engagement of stakeholders in MAPs' activities.

The toolbox including all the guidance sheets is available in full the Appendix. They will be uploaded on the SHERPA website. Such a toolbox is by no means to be considered an exhaustive guidance on stakeholder engagement. Nevertheless, it has the purpose and merit of offering an inspiring, not-binding comprehensive selection of methods and tools that have been carefully prepared to respond as much as possible to the specific experience, capacity, and needs of SHERPA MAP Facilitators and Monitors.

Each guidance sheet provides tailored guidance regarding a specific set of practical methods and tools contributing to supporting the establishment and management of a sound stakeholder engagement process. Provisions regarding their future review and update are formulated further below under § 6.

6. Review and update of the OSES toolbox

The OSES toolbox is meant to undergo a regular review to keep it updated with changing needs and demands from its target users, as well as to adjust it based on the lessons learnt during the first half of the SHERPA project before the second wave of MAPs is launched. The monitoring of the experiences with these tools in the 20 ongoing MAPs will provide valuable information for updating the toolbox.

The schedule for the review and update of the OSES toolbox should follow the plan below:

- 2021 March: Mid-term review
- 2021 September: First update (in connection to the overall update of the overall SHERPA Strategy for Communication, Stakeholder Engagement, Dissemination).

APPENDIX: GUIDANCE SHEETS

1. How to organise a MAP event at regional and local level?

In the SHERPA project, Multi-Actor Platforms (MAPs) are the core forum for two-way exchanges of ideas for co-learning and co-creation of knowledge with actors at European and regional levels. To function as a MAP, an existing group may need to include other types of actors to ensure representation of citizens, business, science and policy.

SHERPA MAP Facilitators and Monitors are in charge of the stakeholder engagement process. SHERPA MAP Facilitators are the ones who drive the process, the Monitors support the Facilitators and also observe, capture and report on progress on targets and process. The Facilitators strive to get a good balance between groups, create a safe space for dialogue. They draft the Dynamic Action Plans, guide discussions through MAP discussion papers, and summarise those in MAP position papers. The Monitors are responsible for reporting and evaluating the work. Communication is also an important task for both Facilitators and Monitors.

Organising meetings with stakeholders is essential to get their engagement and collaboration to the definition and pursuit of the objectives of each MAP. Every MAP has at least 10 members. They also involve a number of external stakeholders. The expected number of stakeholders involved on average in a MAP event is between 10 and 20. Making such events successful is of paramount importance for achieving progress in co-creation and co-learning between stakeholders and ultimately for the creation of lasting science-policy-society rural interfaces across the European Union.

This guidance sheet provides a selection of event methods that seem particularly suitable for helping MAP Facilitators and Monitors accomplishing this crucial task. The selection is based on the Engage2020 Action Catalogue, which is an outcome of the [FP7 Engage2020 project](), and on the application of the criteria below.

- Objectives of the SHERPA project: provide inputs for the design of future research policies, with a focus on preparation of work programmes under Horizon Europe; support the implementation of policies relevant to rural areas in the 2021 2027 programming period; support the setting of the direction of rural policy in the next programming period (after 2027).
- Objective of participation from stakeholders: involving; collaborating; engaging.
- Geographical scope of application: Regional; local.
- Participants: Policymakers, researchers; civil society representatives.
- Skills required in the application of the event method: intermediate subject matter expertise; basic IT skills; Intermediate facilitation skills, basic event organisation skills; basic project management skills.
- Number of participants: between 10 and 20.
- Retaining participants: there are certain times in the process where participants may leave the MAP and others may join.
- Budget needs: low.
- Time needed for execution of method: less than three months.
- Context of process: includes both online and face-to-face elements.
- Engagement of participants in the preparation of method: stakeholders can be involved in the preparation of and during the process.
- Digital skills needed from participants: Basic.
- Transparency of engagement process: The whole process can be made transparent easily.

- Time available for discussion: The process allows substantial time for deliberation and discussion among participants.

The suggested methods (in alphabetical order) are: Focus Groups, Future Workshops, Scenario Workshops and World Cafés.

Focus Groups

The focus group is a qualitative method for determining the preferences of stakeholders or for evaluating strategies and concepts. Participants are selected according to certain characteristics in common that relate to the selected topic and are grouped into 8-10 people. The method is often used to generate or evaluate hypotheses and ideas in conjunction with a quantitative method, or as a primary data-collection method.

The questions participants are asked are typically qualitative and open-ended, therefore the information is open to interpretation. The answers have depth, nuance, and variety. Group dynamics, interaction and non-verbal communication need also be observed. The focus groups can reveal what the participants are really thinking and feeling, even though their responses may be harder to score on a scale.

There are 3 main characteristics of the focus groups:

- The group focuses on a specific topic;
- There is a facilitator whose job is to keep the group focused on discussing the specific topic;
- There is some careful planning behind the group's composition and the group discussion in order to create an environment in which people feel free to talk openly. Some members of the group may need to be encouraged by the facilitator to express their opinions.
- The focus groups are structured and directed, yet, allowing for the free expressions of opinions by the participants, they can gather a lot of in-depth information in a relatively short time. The method is often used to generate or evaluate hypotheses and ideas. At the end, the information gathered in the discussion should be summarized in writing.

The main results of this method are:

- A summary of the group results;
- Research data;
- Reliable knowledge on e.g. people's preferences with regard to problem solutions of the specific research topic, etc.;
- The method allows direct observation of the participants' reactions during the focus group session, which adds to the data collected via the method.

Further information: http://actioncatalogue.eu/method/7409

Future Workshops

A Future Workshop is a method for planning and forming a vision of the future in a specific geographical area. Future Workshops help define aims and identify problems by local stakeholders.

The purpose of this method is to formulate concrete solutions and action proposals with a group of participants based on their own experiences. Future Workshops are usually held on a local issue or challenge or in connection with the planning of a local action concerning a particular development. A

Future Workshop usually involves 15-25 participants. Usually these workshops are open to all with some targeted selection. The aim is to involve participants who are directly affected by a problem and are able to remedy it.

Future workshops incorporate a three-phase process, sometimes preceded by presentations which outline the workshop objectives:

- Critical analysis phase involving detailed analysis of the situation/technology;
- Visionary phase where future visions are built upon the analysis in the first phase; these are then subject to a reality check;
- Implementation phase where the visions are turned into actions.

Following the completion of the workshop, the action plan should be monitored and if necessary adjusted with more workshops planned. One of the most common models of future workshops involves a one-day workshop where the critical phase takes place in the morning, the visionary phase takes place in the early afternoon, and the implementation takes place in the second half of the afternoon.

The future workshop method is particularly suited to assessing issues at the local level. The results of a future workshop may be included in a report, but most importantly they should lead to action and /or the creation of a new interest group. The idea is to work towards action proposals the participants can implement themselves.

Further information: http://actioncatalogue.eu/method/7391

Scenario Workshops

The scenario workshop is an instrument for participatory planning, based on dialogue and collaboration between a group of local citizens, stakeholders, experts and policy makers. The method aims to stir dialogue, provide the opportunity for exchanging experience and knowledge about existing barriers and possible solutions, enhance the understanding on the central topic/problem of discussion, and facilitate consensus on proposed solutions among the involved groups.

The purpose of the scenario workshop is to assess different solutions to specific problem. The solution can be technical, regulatory or an alternative method to organise or manage a problem. The scenario workshop is a two-day meeting involving 20-30 local representatives such as citizens, policy makers, stakeholders, technology experts and private sector representatives. Before the workshop, a set of scenarios is developed and used as visions and inspiration at the scenario workshop. From these the participants develop visions in groups through discussion such as local plans of action to solve the problem.

Before the workshop:

The organiser appoints an external planning group which comprises several people with specialist knowledge on the workshop topic. A set of scenarios is written, describing alternative ways of development. The scenarios represent different technical and organisational solutions with social and political values. Participants are carefully selected, and they are asked to read the scenarios beforehand.

During the workshop:

The workshop is guided by a facilitator and the participants are divided in 'role groups' or 'theme groups' according to experience and interests. The workshop combines group work with brainstorm, debate, voting, presentation and plenary sessions. The process is divided into the following three phases:

- Phase 1 'Critical analysis':

  The participants comment on the scenarios based on their views, knowledge and experiences, providing both positive and negative feedback and highlighting barriers. It should be made clear to participants that the scenarios are not predictions and the aim is not to select or assess the scenarios. The primary objective is to use particular scenarios to help participants develop their own visions.

- Phase 2 'Vision making':

Using the knowledge gained from the critical analysis phase, the visionary phase focuses on developing personal visions for future development. The participants' personal visions are discussed in the group. Each participant can choose elements and parts from the critical analysis phase to create their own vision. The participants continue to work in groups within their expertise theme and formulate different visions.

- Phase 3 'Implementation':

  The visions have to undergo a process to become realistic, and the group has to consider barriers such as economic, cultural, social, organisational, political or technical. All groups present their ideas in plenum and there is time for discussion, clarification and priority. The visions turn into action proposals that are gathered in a final action plan. The action plan contains the visions with a focus on the solutions about implementation.

The main results of this method are:

- An action plan, including the created visions, and new ideas and recommendations for future actions, policies and initiatives.
- A networking opportunity for citizens, stakeholders and policy makers, allowing them to interact, exchange knowledge and experiences, develop common visions and produce a plan of solutions for future action on a specific problem.
- Policymakers can gain new knowledge about the citizens' discussions.
- Citizens can gain new knowledge and awareness in a specific topic.
- The method can contribute to better and more sustainable decisions in fields where future changes depend on the engagement and participation of citizens.
- The workshop brings people together who usually don't meet and discuss local problems. This can dissolve prejudices that can be a barrier in local issues.

Further information: http://actioncatalogue.eu/method/7453

World Cafés

World Café is a method for engaging groups, both within organisations and in the public sphere. World Cafés are based on seven design principles and a simple method. This method is founded on the assumption that people have the capacity to work together, no matter who they are.

The setting should create an environment which is most often modelled like a café (including round tables with 4 or 5 chairs). The host should begin with a welcome and an introduction in the process. A World Café process begins with the first of three or more twenty-minute rounds of conversation for the small group seated around a table.

After the first round each member of the small groups moves to another table. One person will stay at the table and is a table host for the next round and briefly fills them in on what happened in the previous round. Each round of a World Café is prefaced with a question designed for the specific context and desired purpose of the session.

After the small groups, the participants are invited to share results from their conversations with the rest of the whole group. These results are reflected visually in a variety of ways, most often using graphic recorders in the front of the room.

Summed up, a World Café follows seven core design principles:

1. set the context;
2. create hospitable space

3. explore questions that matter
4. encourage everyone’s contribution
5. cross-pollinate and connect diverse perspectives
6. listen together for patterns, insights, and deeper questions, and
7. harvest and share collective discoveries.

A main result of World Cafés is graphic recording, which involves capturing people's ideas and expressions in words, images and colour. This documentation is created by the participants of the World Café. It allows the group's collective work to be shared with others as a framework and guide.

A further analysis is the basis for written and visual documentation of the methods results and recommendations. A personal presentation of these outcomes in the workshop provides the platform for a discussion of their practical consequences and implementation.

World Cafés can create results to generate new ideas, to enable joint decision-making on key strategic issues, to discover new ways for collaboration, to reflect on the implications of a complex issue and in identifying specific step(s) for further exploration and implementation.

Further information: http://actioncatalogue.eu/method/7402

2. How to engage with stakeholders before a SHERPA MAP event

Engaging stakeholders not only at a SHERPA MAP event or after it, but also before the event is held is a good strategy to increase the impact of a meeting. A first way to do it for SHERPA MAP Facilitators and Monitors is to involve target stakeholders in the preparation of the event, notably for the selection of the topics that will figure in the event agenda. The first proposed approach to assist MAP Facilitators and Monitors in identifying the relevant topics for a MAP event consists of three steps as follows.

- First, a message should be sent to target participants with a short introduction to the MAP event's objectives, and an illustrative list of topics. The message should explain for target participants that at the event they will get the chance of developing with the help of other peers a series of topics, integrating their own experience and needs into the areas of work of the MAP.
- Next, to ensure that the MAP event is demand-driven, target participants should be invited to indicate a preference of topics that they would like to develop at the MAP event, choosing from a list of options indicated in the message.
- Moreover, target participants should also be informed that their feedback will be considered to define the topics selected for the discussions at the event.

This approach makes it easier for SHERPA MAP Facilitators and Monitors to:

- understand which topics are a priority for the target audience;
- fine-tune the event agenda, taking into account the feedback collected from the target participants;
- increase interest from relevant stakeholders in the event;
- increase the quality of stakeholders' participation;
- increase the quality of the discussions and of the interactions with stakeholders;
- increase stakeholder engagement during and after the MAP event.

Another effective way for raising the interest of target stakeholders in a MAP event and increase their engagement in it is to ensure that they come prepared at the event and with useful ideas and topics to discuss, thus making the overall knowledge exchange more effective and interactive. This can be achieved again through focused communication prior to the event. Examples of communication tools that can be used for that purpose are

- briefings introducing the event, its topics and / or speakers;
- relevant publications covering the topics proposed in the agenda to stimulate target participants with prior reading;
- thematic surveys to provoke debates and reflection that can continue at the event;
- social media posts stirring the interest of target participants in the event and create online discussions likely to be further developed at the event.
- Articles on traditional media.

3. How to organise the registration of participants to a SHERPA MAP event

One significant factor that acts as a bridge between planning a SHERPA MAP event and making it successful is the registration process. Indeed, the effectiveness of the registration process strongly contributes to determine how many people will actually participate in your event.

Here are some guidance and tips that you can adopt in order to design a seamless registration experience that participants will appreciate.

1. Choose a smooth registration medium.

The first step is to choose a registration medium where your potential attendees will register for the event. Event registration online is the recommended choice. Online registration calls for an effective and convenient platform for event registration. There are many solutions that could be used for online registration. Some event registration platforms that could be, in principle, suitable for organising a SHERPA MAP event are EventBrite, EU Survey, Google Forms, and SurveyMonkey. They are briefly described here below. The tools are presented in alphabetical order, not in order of priority.

- **EventBrite** is an event management and ticketing website. The service allows users to browse, create, and promote local events. The service does not charge a fee to event organizers if the event is free. The online registration form makes it possible for participants to register online. This registration page is made in the style of your event. The fields are efficient and well equipped with filters, pull down menus or radio buttons. The system allows participants to receive a personal link directing to the registration form of the event, where they can fill in or change their data. Another feature is to file different participant types (VIPs, internal staff or members). With a personal code or link, they are authenticated and granted access to the system. You can give them different opportunities and questions, such as a free dinner for VIPs and special workshops for members. The system also allows participants to choose parallel sessions in the registration form. Maximum numbers per session can be set. If a session is full, it will be declared, and it is not possible to choose the session. Last, with the parallel session management you can add and edit descriptions of speakers and sessions. These descriptions will pop up when the participant clicks on the session in the registration form.
- **EU Survey** is an EU-based online service that can be used for preparing registration forms for events. Its interface is relatively user-friendly and generates automatic reports of the responses with charts and statistics. Results can be exported in different formats. Two additional strengths of this tool are that it is free and that it is available in the 23 official languages of the European Union.
- **Google Forms** is a tool that allows collecting information from users via a personalized survey. The information is then collected and automatically connected to a spreadsheet. The spreadsheet is populated with the survey responses. The Forms service's features include, but are not limited to, menu search, shuffle of questions for randomized order, limiting responses to once per person, shorter URLs, custom themes, automatically generating answer suggestions when creating forms, and an 'Upload file' option for users answering questions that require them to share content or files from their computer or Google Drive. To create a Registration form in Google Forms, visit the Google Forms site and click on the 'Event Registration' template. They give some suggested questions you may want to ask on the template.
- **SurveyMonkey** is an online survey development cloud-based software that allows to gather registrations, send directions all in a single form. No more group emails to deal with, no more maps as attachments. The best part of using SurveyMonkey for planning your SHERPA MAP event is that you will get information back in a format you can actually use. Know right away which speakers to book. Immediately see how many chicken, beef, or vegetarian meals to order. And when you are

done with your event, send a post-event survey that helps you see what to improve for the next one.

2. **Use a short registration form**.

Registration forms should be concise along with being relevant. The recommended info and data to include are:

- Full Name
- Organisation name and address
- Email
- Phone

In addition, custom fields should be considered to gather data that matters for the event, as suggested below:

- Questions about expectations for the meeting; previous experience with the main subject;
- Dietary preferences;
- Food allergies;
- Mobility issues;
- Visual or hearing impairment;
- Date and time of arrival/departure, flight number;
- Role (Speaker, Participant, Moderator, etc);
- Consent for GDPR-compliant use of photos and videos, as well as for any other personal data collected for the event.

3. **Follow up on registration.**

Having invitees register for a SHERPA MAP event does not necessarily mean that they will actually show up. People might simply forget about your occasion or lose interest. A good practice is therefore to make sure that even after target participants have registered, follow ups are done through relevant messaging and confirmations. This ensures that your invitees remember your event and keeps them motivated.

Reminders sent by email should include event updates as they come to build the interest in the event. When writing a reminder email for a SHERPA MAP event, you don't need to include all the information about it. The basic elements to include in an event reminder are:

- A personal greeting to make the invitees feel special;
- The purpose of the event;
- The date and time of the event;
- Information regarding where the event venue is. Consider adding a screenshot of Google maps, and add it as an image to your event reminder;
- It could be useful also to consider adding information regarding parking or public transport information, or anything else that comes to your mind and you think is relevant and helpful (for instance you can also add a link to your email for recipients to let you know if they cannot make it);
- Your contact info for participants who might have questions;
- The logo of the project and the EU logo.

With regards to the ideal frequency for sending a reminder, a best practice is to send event reminder emails three times:

- one week before the event;
- one day before the event;
- on the day of the event.

4. How to engage with stakeholders during a SHERPA MAP event

The traditional event model puts all the attention on a stage where speakers and key stakeholders control the information statically given to the audience. This creates a one-way information stream instead of an exchange of knowledge and ideas. This methodology is changing in favour of more interactive and collaborative formats, a selection of which – particularly relevant for SHERPA MAP events – is presented here below.

1) Include an icebreaker at the beginning of the agenda is a good way to get things off to a great start. There are many ways to warm up an event, to energise the audience, help them quickly connect and buy into the purpose of the event. Icebreakers are recommended in the following circumstances:

- Participants come from different backgrounds.
- People need to bond quickly so as to work towards a common goal.
- The group of participants is newly formed.
- The topics under discussions are new or unfamiliar to many people involved.
- The MAP Facilitator needs to get to know participants and have them know him/her better.

What matters is that the chosen method is fairly simple. Three good examples of icebreaker are described below:

- The One Word: pick a phrase that is central to the topic why you have gathered and have everyone write down or say a word that comes to their mind in relation to it. For instance, ask participants to share one word that they think describes the goal or the MAP process that are needed. Once everyone has shared their phrases, discuss the results. This game helps explore different viewpoints about a common challenge, before starting the meeting.
- The Little Known Fact: ask participants to share their name, department or role in the organization, and one little known fact about themselves. This 'little known fact' becomes a humanizing element that can help break down differences such as grade/status in future interaction.
- Paired Interviews: ask participants to get into twos. Each person then interviews his or her partner for a set time while paired up. When the group reconvenes, each person introduces their interviewee to the rest of the group.

2) Quizzes and questionnaires to help your audience to know more information about the topics and speakers by letting them ask and answer the questions during the event. There are lots of products that could be used for creating interactive presentations, workshops, and meetings. Two of them that are very user-friendly and seem to be particularly suitable for meeting the needs of SHERPA MAP events are Mentimeter and Sli.do. They are described briefly here below. The tools are presented in alphabetical order, not in order of priority.

Mentimeter is an application that enables users to share knowledge and real-time feedback on mobile devices with presentations, polls or brainstorming sessions in meetings, gatherings, conferences and other group activities. The app is designed for small to large audiences. It makes them feel involved by enabling them to contribute to presentations with their smartphones, laptops, or tablets and shows aggregated results live.

Mentimeter also allows to add polls, word clouds, Q&As, slides and more to presentations to help you create an interactive and inclusive experience for your audience. Your audience uses their smartphones, laptops, or tablets to vote on questions and engage with the presentation. *Mentimeter* thus makes for an overall fun presentation experience, where opinions and ideas get heard. The app can be used for free for three questions. After that it requires a fee.

Another interesting feature of this app is that it allows to export and analyse data on the polls, thus making reporting easier and accurate. Results can also be shared and data gathered even compared over time to measure the progress of your audience.

Sli.do is another application with interesting features. It can be used for collecting real-time insights about your audience, ask your participants their opinion and letting them vote instantly from any mobile device. Results of a poll are then shared live with your audience, so that results can be displayed on a screen and a Facilitator immediately engage in a group discussion.

Likewise, during Q&As it can be used to crowdsource the best questions from your audience, letting participants decide which questions they would most like to discuss. Turning on moderation any inappropriate questions can they be filtered before they go live.

As the users remain anonymous, both *Mentimeter* and *Sli.do* increase the quantity and quality of questions by removing fear.

3) Encourage voting by creating fun live polls. Live polls are definitely one of the most fun ways to boost up the attention. Let your participants vote via the *Mentimeter* or *Sli.do* applications and show them results on a diagram in real time. You can encourage them to ask about different aspects of the event, like speakers' topics and graphics or let your audience rate different subjects and opinions.

4) Make memories creating some souvenirs from the SHERPA MAP event. You can, for instance, ask participants to take a group picture and then share it with them.

5) Networking at the event is another useful good practice. When planning the event agenda allow for sufficient time (i.e. 20-30 minutes) during breaks for participants to get to know each other and exchange ideas.

5. How to gather participants' feedback after a SHERPA MAP event

Using post event surveys is fundamental for SHERPA MAP Facilitators and Monitors to create strategies for continuous stakeholder engagement improvement success. Such surveys allow to collect precious feedback from attendees to learn about their needs and expectations.

Following MAP events, it is therefore recommended that SHERPA MAP Facilitators and Monitors directly at the MAP event distribute and collect post-event assessment forms or after each event send post event surveys via email asking attendees to complete an online event feedback survey.

Creating online event surveys with survey software gives the ability to manage respondents and responses online with an intuitive survey management system. With an advanced online survey management system[1], MAP Facilitators and Monitors can easily upload contact information of event attendees, invite respondents to complete your online event survey with email invitations, keep track of who has responded, save partially completed surveys, send email reminders to those that have not responded, and view results in real-time.

Post event surveys often provide the most meaningful feedback. This gives attendees the opportunity to evaluate the effectiveness of various aspects of your events such as individual speakers, seminar topics, training sessions, product demonstrations, accommodations, as well as rate their overall experience with a SHERPA MAP event. The objective of post-event surveys is to determine whether the efforts MAP Facilitators and Monitors put into event planning met the expectations of target stakeholders.

To ensure the highest participation rate, it is recommended to send post event survey to attendees as soon as the event has ended, while their experiences are still fresh in their minds or even to dedicate the very last moment of the meetings to fill the survey. The most important information collected from post event surveys is whether attendees found value in the event, whether it was worth their investment of time and resources, and whether they would participate in the event again. Because these questions are so important, ask those questions early in the survey.

Below are samples of questions to ask in your next post event survey.

General Feedback Questions

- What were your primary objectives for the SHERPA MAP event (knowledge, networking, etc.)?
- Did the event meet your objectives?
- What could the event organizers have done differently?
- Was the location of the event suitable (travel time, convenience, etc.)?
- Compared to other similar events you have attended, how does this event compare?
- Would you participate in this event again?
- Would you recommend this event to a colleague?

Speaker Feedback Questions

- Was the session topic/-s delivered as promised?
- Were the speakers engaging?
- What were your objectives for this session?
- Did the speakers meet your objectives?

[1] See guidance sheet 3 on 'How to organise the registration of participants to a SHERPA MAP event' for suggestions of survey tools.

- Did the speakers include the right level of topic detail?
- What topics would you like to have seen covered?
- Can the information you gathered from this session be applied to your activity?

Here below a tailored sample post-SHERPA MAP event feedback form is provided that can be further customised as appropriate.

POST-SHERPA MAP EVENT FEEDBACK FORM

Title of SHERPA MAP event: ____

Date of event: ____________ **Location of event:** ____________________

INSTRUCTIONS: Please tick your level of agreement with the statements listed below

	Strongly agree	Agree	Disagree	Strongly disagree	Don't know
1. The objectives of the event were met					
2. The MAP Facilitator/speakers were well prepared and able to answer the questions					
3. The content of the sessions was easy to follow and understand					
4. The event materials were relevant					
5. The co-creation approach was helpful and relevant					
6. The event was interactive and engaging					
7. The event length was appropriate					

8. The three things that impressed me or interested me most were …

→
→
→

9. The topics or issues that were not clear to me were …

10. The topics that I would have liked to see included in this event are …

11. I will recommend this event to colleagues… (Please explain why)

☐ YES ☐ NO

12. Do you have any suggestions to improve this event?

THANK YOU FOR COMPLETING THIS FEEDBACK FORM!

INPUTS RECEIVED WILL BE USED TO IMPROVE FUTURE SHERPA MAP EVENTS.

THIS FORM SHOULD BE HANDED TO THE ORGANISERS AT THE END OF THE EVENT.

ALTERNATIVELY, THIS FORM CAN BE SUBMITTED TO [ADD EMAIL ADDRESS].

6. How to communicate with participants and other relevant audiences after a SHERPA MAP event

Once a SHERPA MAP event is over, the most important part is follow-up. Without an effective follow-up strategy, the time invested into getting to know the target audience risks ultimately being wasted – and this is where a bespoke approach is essential.

Throughout follow-up actions, it is indeed possible to see which stakeholders are the most engaged, how the engagement level of each of them has changed, and whom MAP Facilitators and Monitors should prioritize time for that next steps – whether it is to book a meeting or to invite them to a future MAP event.

The basic elements of a successful post-event communication are the following five.

1. **Thank you email.**

Send a simple follow-up email right after the event to all participants who attended the MAP event.

2. **Send an email to no-shows**

If a target stakeholder registered but did not show up at the MAP event, it might be for several reasons: conflict with other events or commitments on the same date, travel issues, diminished interest, etc. It is therefore smart to contact them and share some content about what has happened even to that part of the target audience. This increases the chances that they will keep following the next activities carried out at the MAP event in the future.

3. **Share relevant content**

Send the proceedings of the event, speakers' presentations, list of participants, photos, videos, but also information on the next steps (new MAP event dates, discussions, topics to address, etc.). It is also important to share the link to register to the SHERPA Newsletter 'Rural Interfaces', as well as the link to the SHERPA Blog.

4. **Send a post-event assessment form**

Following MAP events, it is recommended that SHERPA MAP Facilitators and Monitors directly at the MAP event distribute and collect post-event assessment forms or after each event send post event surveys via email asking attendees to complete an online event feedback survey.

For more information and tips about how to gather participants feedback, please see the specific How to gather participants' feedback after a SHERPA MAP eventHow to gather participants' feedback after a SHERPA MAP event.

5. **Follow up in person**

Contacting directly those participants who seemed more engaged at the MAP event is also important to increase the chances that they understand that their commitment is appreciated and thus stay engaged also in the future activities of the MAP. It is recommended for SHERPA MAP Facilitators and Monitors to plan for follow up activities early on (already) before the event.

Press release

A press release is a tool that SHERPA MAP Facilitators and Monitors can consider for communicating after a SHERPA MAP event. It is about 400 words long and can be used to get media coverage (from a journalist, influencer, blogger or podcaster) of a brilliant news story related to a SHERPA MAP.

It must be remembered that most press releases about events fail because they simply say 'an event is happening'. An event on its own is not news that draws attention.

The ideal structure of a press release includes the following nine sections.

Press release structure

1. Send date, SHERPA project logo and EU logo
2. Headline with the news hook
3. Introductory paragraph to grab the attention of the reader
4. Paragraph 2 and 3 to develop the story with factual pieces of information
5. Quotes of a front person (with full name and position) involved in the story, delivering the 'why' behind the story
6. Key messages related to the mission of the SHERPA MAP
7. Closing quote, for instance of another person having attended the event whose endorsement gives your story/achievements more credit
8. Closing paragraph, for instance showing what are the next steps for that MAP activity
9. ENDS. Always finish your press release with the word 'ENDS'.

For further references and general tips on how to write a good press release look here.

Website

The SHERPA project website can be used for communicating about SHERPA MAP events' news-worthy outcomes (e.g. latest publications, outcomes). As a good practice, a piece of news can be provided to the project's central communications team, and which could take the following form:

- As an article (e.g. about main achievements and lessons learnt) to be published on the bi-monthly SHERPA newsletter 'Rural Interfaces' to expand the debate about an interesting topic beyond the usual 'rural development policy' communities.
- As a post in the SHERPA Blog. The blog (animated twice a month with new content) will take the form of short articles about rural stakeholders' stories, reporting their views, experience, knowledge, science around a specific topic relevant for the project. The aim is to stimulate debates amongst rural and coastal stakeholders on 'hot topics' developed in the MAPs.

Social Media

SHERPA MAP Facilitators' and Monitors' communication and outreach related tasks include publishing at least 1 social media post per MAP meeting (before, during or immediately after). They are also expected to have as many MAP members as possible register as followers of the SHERPA social media accounts and relay social media posts published by the central communication team to increase outreach.

Following up with participants using social media is another useful way to keep the conversation going, reconnect with past attendees, and make your attendees repeat attenders for your future MAP events.

Content-wise, a post could mention some interesting discussion that took place, what is Sherpa aiming to do and who was there and link to the official SHERPA website. Use the SHERPA project logo, hashtags (#SHERPA2020, #EUrural) and project handle (@rural_interfaces) to establish an identity that makes it easy for your messages to be immediately recognised as associated to the MAP's work.

After an event, posting photos is a great way to connect and engage with attendees. Tagging them in photos and giving shout outs to them on social media can also be effective. Prior to posting, it is important to ask participants' permission to publish photos or video material collected at the event if it is about specific people with faces and intros.

Social media can also be useful for hosting conversations with attendees. Twitter chats using a common hashtag and an agreed upon time to have a live chat are a solution to consider for SHERPA MAP Facilitators and Monitors. This helps create buzz about the MAP event and continues the conversation after the event while also encouraging attendees to stay involved, active and connected with other attendees.

Another social media that can be used to connect with stakeholders after a MAP event is Facebook groups. Each event can have its own group where target stakeholders can join and continue discussing, networking, connecting, etc and it is a great way for continued networking but also to give more enriching opportunities for exchange and engagement to attendees.

For more information and tips about how to use social media, please see the specific guidance sheet 7 on 'How to use social media to communicate about SHERPA MAP activities.

7. How to use social media to communicate about SHERPA MAP activities

Social media may be used strategically to create and maintain stakeholder engagement. Generating awareness, along with information sharing and word-of-mouth, cultivating long-term relationships, developing new cooperation and exchange relations, and building image and reputation, are the primary purposes for stakeholder engagement. Thought awareness raising and increase community engagement can be identified as the most relevant social media engagement strategies for SHERPA MAPs.

- **awareness raising**. SHERPA MAPs address topics that in most cases already well known by both scientists, policymakers and civil society actors. However, the way those topics are dealt with through the creation of interfaces where all relevant actors are engaged, may be considered an interesting novelty. To create authentic and lasting awareness, it is therefore recommended that MAP Facilitators and Monitors avoid solely publishing promotional messages, and instead focus on content that emphasizes the values of SHERPA first.
- **increase community engagement.** For SHERPA MAPs to be successful, it is not only important that the right stakeholders are made aware of the project's objectives and potential impacts on them. What also matters is that they decide to actively engage into its MAPs' activities. Useful tactics that SHERPA MAP Facilitators and Monitors might find effective to achieve that goal include giving them something to do. Even something as simple as asking a question can increase their engagement rate.

Content should be the centre of MAPs Facilitators' and Monitors' social media strategies. To create engaging content here some useful tips and tricks:

- Use the SHERPA project logo, hashtags (#SHERPA2020, #EUrural) and project handle (@rural_interfaces) to establish an identity that makes it easy for your messages to be immediately recognised as associated to the MAP's work.
- Take advantage of user-generated content and interactive content to allow your social media followers to serve as billboards and provide an incentive for target stakeholders to interact with you. Whether it is using a hashtag or posting a comment or a photo, encouraging customer content is a good move for boosting your engagement rate. Identify the usernames of the key stakeholders for the outcomes of the MAP (e.g. Municipalities, National Rural Networks, Farmers unions, etc.)
- Likewise, profit from every opportunity to interact or pick your follower stakeholders' ideas. Even something as simple as asking a question or posting a poll can do the trick[2].
- It is also paramount to underline that stakeholders usually expect prompt responses but also meaningful conversations on a regular basis. Hence, it is advised to SHERPA MAP Facilitators and Monitors to ensure conversations or engagement opportunities are not left unattended. Timeliness is essential.

Here below follows a brief presentation of the main social media channels. It is essential to stress the need to choose the channels used by the stakeholders one is trying to reach out to – which might not always be the same ones one is already using. The tools are presented in alphabetical order, not in order of priority.

Facebook is an online social media and social networking service with more than 2 billion users worldwide that can be accessed from devices with Internet connectivity, such as personal computers, tablets and smartphones. After registering, users can create a customized profile revealing information about themselves. They can post text, photos and multimedia which is shared with any other users that have

[2] For more guidance on online polling please read also the guidance sheet on How to engage with stakeholders during a SHERPA MAP event.

agreed to be their 'friend', or, with a different privacy setting, with any reader. Users can also receive notifications of their Facebook friends' activities and activities of Facebook pages they follow.

SHERPA MAP Facilitators and Monitors can use a Facebook account to reach out to project stakeholders, in particular those not fully covered by LinkedIn, as well as for public outreach and for showcasing outputs.

***Twitter*.** is a microblogging and social networking service on which users post and interact with messages known as 'tweets'. Registered users can post, like, and retweet tweets, but unregistered users can only read them. Users access Twitter through its website interface, through Short Message Service (SMS) or its mobile-device application software ('app'). This social media channel can be used for short news flashes, using a clear and crisp style, not too descriptive or institutional. It allows for texts of a maximum length of 280 characters.

It is recommended to SHERPA MAP Facilitators and Monitors to use Twitter to communicate instantly and engage with the target audiences from society, science and policy stakeholders. In each message the project 'handle' should be used: @rural_interfaces. Likewise, SHERPA-relevant hashtags (#SHERPA2020, #EUrural) will allow streamline communication of specific products and actions helping stakeholders connect outside of physical meetings and boosting exchanges among them.

Twitter can also play an important role during MAP events, where live tweeting will be enabled. Live tweeting will participate in creating a knowledge community linking participants, panel and experts, as well as audiences following the events remotely.

SHERPA MAP Facilitators and Monitors can benefit from Twitter for:

- posting relevant news and information related to the work done within SHERPA MAPs,
- following relevant accounts from key stakeholders and engaging with them (e.g. retweet)
- creating conversation with followers, sparking debate on hot topics addressed by SHERPA MAPs, and gathering their views,
- providing relevant content (information on latest trends and new relevant developments),
- posting or retweeting about events, reports and initiatives from other projects or other activities from relevant stakeholders,
- promoting other events connected to the SHERPA project.

Instagram is a photo and video-sharing social networking service with more than 1 billion users worldwide. Instagram allows users to upload photos and videos to the service, which can be edited with various filters, and organized with tags and location information. An account's posts can be shared publicly or with pre-approved followers. Users can browse other users' content by tags and locations, and view trending content. Users can like photos and follow other users to add their content to a feed. It also allows messaging features, the ability to include multiple images or videos in a single post, as well as 'Stories', which allows users to post photos and videos to a sequential feed, with each post accessible by others for 24 hours each.

This channel can be interesting for SHERPA MAP Facilitators and Monitors to share visual outputs (i.e. on-the-ground snapshots shared by participants in a MAP event).

LinkedIn is a business and employment-oriented social media service that operates via websites and mobile apps. It is mainly used for professional networking and counts about 650 million registered members in 150 countries. LinkedIn allows members to create profiles and 'connections' to each other in an online social network which may represent real-world professional relationships. Members can invite anyone (whether an existing member or not) to become a connection.

For SHERPA MAP Facilitators and Monitors LinkedIn can be a relevant channel for networking with people and professional organisations from the target stakeholders mainly belonging to the private sector and academia.

SHERPA MAP Facilitators and Monitors can benefit from LinkedIn for:

- Joining specific groups to discuss ideas and share related news.
- Creating and animating groups to discuss specific matters related to the scope of the MAPs.
- Sharing status update to ask questions to people in the network or share news or insight.
- Identifying more stakeholders, companies, researchers, policymakers, etc., potentially interested by the MAPs results and engaging with them,
- Informing about events and meetings organised by the SHERPA MAPs.

Youtube is a video-sharing platform that allows users to upload, view, rate, share, add to playlists, report, comment on videos, and subscribe to other users. Unregistered users can only watch videos on the site, while registered users are permitted to upload an unlimited number of videos and add comments to videos.

A dedicated YouTube channel can be useful for SHERPA MAP Facilitators and Monitors to publish and collect MAPs related multimedia products.

8. How to make online calls or videocalls

Voice over Internet Protocol (VoIP), also called IP telephony, is a method and group of technologies for the delivery of voice communications and multimedia sessions over Internet Protocol (IP) networks, such as the Internet. VOIP Calls and video conferencing have gone from a travel-saving feature that can be used occasionally to an indispensable tool for everyday collaboration.

Moreover, the specific context of the SHERPA MAPs, where stakeholders are spread out across many geographic locations, brings complex challenges for communication. Adding colleagues and partners to the mix it is hard to think about talking to all these people without extensive travel, which brings restrictive costs.

This is where video conferencing can deliver a serious boost to SHERPA MAP Facilitators and Monitors for handling their contacts with MAP stakeholders.

Here a few video conferencing software solutions are presented to help making the best choice. The tools are presented in alphabetical order, not in order of priority.

Freeconference provides a completely free conference call solution service with high-quality audio and video capabilities. Free features include calls that can accommodate up to 1 000 participants, up to five online meeting participants, dial-in numbers and access via mobile apps. One major perk of this video conferencing tool is its ease of use, as no downloads are required to start using it. Plus, moderator controls allow the individual who is running the video conference keep the meeting on track. It also allows text chats, screen sharing and document sharing. There are paid plans available for upgrading the service with additional features.

GoogleDuo is a software solution for simple, high-quality video calls for smartphones, tablets, and computers. It allows 1:1 calls and group calling with up to eight people featuring end-to-end encryption. Google Duo works on Android (unlike its competitor FaceTime) and iOS smartphones, tablets, computers. No account or subscription is necessary. Another relatively new feature, video messages let you record a quick video when you do not have time to call or when the person you are calling cannot pick up. Video messages can be personalised with text and emojis, or even by drawing on the message with a brush tool.

Skype is a good tool if one needs a simple way to video chat from a computer, phone, or tablet and tends to have smaller group meetings or 1-1 conversation. In addition to audio and HD calling, the software allows instant messaging during a call, screen sharing, call recording, and the option to call phones at affordable calling rates. The free version of Skype works well for small teams and is ideal for carrying out interviews. With the Skype video chat app, group video calling for up to 50 people is available for free on just about any mobile device, tablet or computer.

Zoom offers simplified professional video conferencing and messaging across any device. It enables quick adoption with meeting capabilities that make it easy to start, join, and collaborate across any device. Zoom Meetings syncs with your calendar system and delivers streamlined enterprise-grade video conferencing from desktop and mobile. It provides chat with groups, searchable history, integrated file sharing, and 10-year archive. Furthermore, it easily escalates into 1:1 or group calls. The software brings HD video and audio to meetings with support for up to 1 000 video participants and 49 videos on screen. It records your meetings locally or to the cloud, with searchable transcripts. Multiple participants can share their screens simultaneously and co-annotate for a more interactive meeting. Another feature potentially of interest for SHERPA MAP Facilitators and Monitors is that Zoom enables polling and Q&A, allows virtual hand-raising and tracks engagement with Attention Indicator. This system is accessible through paid plans.

WhatsApp is the most popular instant free messaging app in the world, connecting more than a billion people. These users share instant messages and multimedia files for free, and more interestingly, can talk for free without limits. The app works on nearly all smartphone models, is available for computers and works on Wi-Fi, 3G, and 4G networks. With voice calls, one can talk (only) with other WhatsApp users, even if one is calling someone located in another country. And with free video calls, it is possible to have face-to-face conversations with other WhatsApp users for when voice is not enough. WhatsApp voice and video calls use your phone's Internet connection, instead of your cell plan's voice minutes, so one does not have to worry about expensive calling charges.

9. How to set up a consultation with stakeholders

Listening to stakeholder concerns and feedback is a valuable source of information that can be used to improve the design and outcomes of SHERPA MAPs, and help MAP Facilitators and Monitors to identify and control external risks. It can also lead to future stakeholder engagement and collaboration.

Stakeholder consultations are a useful tool to help SHERPA MAP Facilitators and Monitors with the following:

- Identifying and tracking stakeholders' needs and expectations
- Identifying and tracking stakeholders' perceptions and attitudes
- Gathering feedback from stakeholders on specific developments of the MAPs, including evaluation of progress.

The inputs collected through a consultation from internal and external stakeholders can be key to the success of MAPs development, and the longer-term success and direction of the SHERPA project.

There are several objectives that can be pursued through stakeholder consultations:

- Consultation on specific developments within MAPs
- Consultation to establish future stakeholders needs and ensure these are taken into account into the development of MAPs' work, as appropriate.
- Consultation to ensure buy-in from relevant stakeholders and to ensure the MAPs are not moving away from the expectations and needs of those who have an interest in them.
- Consultation to present new positions being discussed within the MAPs or remind of existing positions and collect stakeholders' feedback.

Carrying out a targeted stakeholder consultation could bring a series of benefits to SHERPA MAP Facilitators and Monitors, including:

- Decision making within MAPs will be more informed and in tune with those whom the actions will affect.
- Contribute to increase engagement and sense of ownership for the MAPs' work in the consulted stakeholder, as they will feel they have inputted into the final outcome and that their views have been taken into account.
- Contribute to highlight the need for stakeholders to compromise on their positions, as by reading the findings of a consultation they will also understand that their perspective may not be shared by all.
- Contribute to increase transparency of working methods and thus build trust among stakeholders, as it proves determination to engage with them in meaningful two-way communication, and recognises the important role stakeholders at all levels can make to the work of the MAPs which will directly or indirectly affect them.

A consultation process is generally organised in three main steps as follows:

1.Planning
- definition of the purpose and scope of the consultation
- definition of the target audience
- identification of the consultation methods
- definition of timing

2.Implementation
- publication of the consultation
- collection of responses
- analysis of responses

3.Follow-up
- preparation of presentation of consultation findings
- communication to all relevant stakeholders of consultation findings - and changes to the MAPs' work based thereof.

With regards to methods available for SHERPA MAP Facilitators and Monitors for conducting stakeholder consultations, the following three seem to be the most suitable.

- *Quantitative* consultations allow for gathering inputs from larger numbers of stakeholders and are often structured into largely closed questions and rating scales. They produce data for statistical analysis that can be very useful. Examples of these methods are surveys, and e-surveys. The main features of these methods are that:
    - They provide quantitative information
    - They contribute to raising awareness of the SHERPA MAP ongoing, past and/or future work
    - They do provide data that can be used for numerical or statistical analysis
    - They do not provide qualitative information.
- *Qualitative* consultations use open styles of discussion and debate, usually with from small to medium large stakeholder groups. MAP Facilitators and Monitors may use these methods for capturing views and perceptions which are truly held by the stakeholder, but perhaps not immediately explicit. Examples of these first methods are **focus groups** and **interviews**. The main features of these methods are that:
    - They provide qualitative information
    - They contribute to stakeholder engagement and trust building
    - They contribute to creating /maintaining relationships with relevant stakeholders
    - They may be more costly than quantitative methods, i.e. focus groups
    - They do not provide data that can be used for numerical or statistical analysis.
- *Hybrid qualitative-quantitative* allow for mixing the research for stakeholder views with the need to get comparable and measurable data at a reasonable cost. Open online debate consultations and large public meetings are examples of this third category of methods.

There are several tools that can be used by SHERPA MAP Facilitators and Monitors for carrying out online consultations. Three of them have been selected as particularly suitable and are briefly described below. The tools are presented in alphabetical order, not in order of priority.

EU Survey is an EU-based online service that can be used for collecting stakeholders' views on a specific issue and carry out satisfaction surveys. Its interface is relatively user-friendly and generates automatic reports of the responses with charts and statistics. Results can be exported in different formats and easily shared or published online. Two additional strengths of this tool are that it is free and that it is available in the 23 official languages of the European Union.

Google Forms is a tool that allows collecting information from users via a personalized survey. The information is then collected and automatically connected to a spreadsheet. The spreadsheet is populated with the survey responses. The Forms service's features include, but are not limited to, menu search, shuffle of questions for randomized order, limiting responses to once per person, shorter URLs, custom themes, automatically generating answer suggestions when creating forms, and an 'Upload file' option for users answering questions that require them to share content or files from their computer or Google Drive. Responses are neatly and automatically collected in Forms, with real time response info and charts. All data can then be exported to many formats, shared and published online. This tool allows the creation of surveys for free, but it also includes a paid upgraded version for accessing more complex features.

JotForm JotForm's software helps design creative and personalized forms for all purposes and does so with a simple drag-and-drop mechanism. The best part of the process is that changes are synced upon completion and can therefore be retrieved in cases of sudden internet loss and work can be finished offline. It creates forms with a drag and drop creation tool and an option to encrypt user data. The competitive edge of the builder is robust collaboration, as forms can be built in groups by an unlimited number of collaborators. Where the new version of this system shines the most is definitely collaboration, as users can now connect in real time, and work simultaneously to maximize the potential of their form and bring all cool ideas on the table. As usual, edits are saved automatically on the way, which means one does not have to worry whether the good work done will be corrupted by someone else's suggestions. All form versions are stored consequently, and one gets to choose the best one in the end. JotForm is not free – although it allows a free limited trial – and has flexible pricing scheme.

SurveyMonkey is an online survey development cloud-based software that allows to conduct consultations in a single form. With this tool it is possible to create surveys benefitting from a rich range of customizing features, gather feedback via weblink, email, mobile chat, social media. The interface automatically analyses the consultation results and gets powerful analysis features, such as charts and tabs. Results can be easily exported to many formats such as CSV, XLS, PDF, PPT, and SPSS and shared or published online. This tool is not free, but offers several flexible plans and it exists in different languages.

10. How to facilitate a SHERPA MAP event

During SHERPA MAP events, in particular interactive workshops and events where co-construction dynamics are relevant, it is essential to ensure a proper facilitation of the discussions and of the exchanges among the stakeholders.

Here below some tips and tricks, as well as suggestions of methods that might be of help to MAP Facilitators and Monitors with the event facilitation process.

- **Manage**. It is important that the facilitator of the event manages the participation, group dynamics in order to achieve the event objectives (possibly established prior to the event with inputs from the target participants).
- **Check in quickly at the start.** A good practice for allowing participants to get to know more about each other and bring their attention into the room, so everyone is mentally present for the conversation is to open the event by a quick check in, by asking questions like 'What is one thing you hope to accomplish in this meeting today', or 'What one word best describes your mood at this moment?' .
- **Focus on the goals.** A brief review of the desired outcomes and agenda items at the opening of an event is an effective way to get the audience aligned toward accomplishing the meeting goals.
- **Encourage and balance participation.** Some participants may be less vocal than others, and their voices are still important. The facilitator should create a safe space for them to engage. An effective way to do it is to ask open-ended questions to draw people out, like, 'What do you think?', 'What would you do?' and 'What other ideas are you considering?'. Another approach is to first split participants into small groups for discussion to encourage participation from quieter team members, and then bring everyone back to the full group and ask for conversation highlights.
- **Capture.** A lot of information is usually produced during an event. It is key that all relevant pieces of information do not get lost. MAP Facilitators, with the assistance from Monitors, should capture information in a comprehensive and organised manner, and ensure that it is accurate, of high quality and in a format that makes it easy to share.
- **Closure.** Before the end of an event, it is a good practice to take some time for wrapping up the most important points (decisions, tasks, next steps) raised during the previous discussions, so everyone knows how to follow through. Restating the key outcomes verbally helps the group feel a sense of accomplishment. Asking participants to verbally check-out gives people a space to express final questions or concerns and creates meeting closure.
- **Assess.** Another good practice is that MAP Facilitators and Monitors cooperate in the revision of the event proceedings, in particular as regards key decisions, points of agreement or disagreement between stakeholders, next steps, etc.) and assess whether the objectives of the event have been met, as well as identify areas for improvement, which is useful to formulate any next steps.

There are a wide variety of intervention techniques. Whatever technique is used, it is important to try to give participants an opportunity to take responsibility for recognizing the situation and deciding what to do about it. Below a selection of basic methods to help the facilitation process are briefly illustrated. These techniques can be particularly useful to make views emerge, as well as to unblock a discussion that is stalling or overcome disagreements between stakeholders.

- **Reinforce agreement**. This facilitation technique consists of reinforcing the agreement participants made previously to regain focus or move the group forward.
- **Make a proposal to participants**. This technique consists of suggesting how to move forward, and in always checking for understanding and agreement with the group before taking an action.

- **Accept, legitimise, deal with or defer**. When a participant brings forward an issue or topic that is unrelated to the meeting agenda, this approach helps addressing the situation in a constructive way.
- **Synthesize**. Several different conversation themes may emerge simultaneously in a meeting, and the facilitator needs to get everyone on the same page before moving forward. This technique consists of asking the participants to take a step back, name the various topics, and decide with the participants which ones to pursue. Alternatively, suggestions can be provided for narrowing the conversation or organizing themes so that the meeting stays on track to achieve the desired goals.
- **Acknowledge**. Acknowledge the statement of a stakeholder to draw the audience's attention on it.
- **Pause**. This technique is useful for boosting the focus of the conversation. Once the main subject has emerged, the facilitator pauses and provides time for silent reflection. Ideally, participants are asked to to write down their thoughts to help internalize what has been said and to identify concerns or questions free of the influence of others' opinions.
- **Parrot**. Parrot the statement without agreeing or disagreeing to stimulate a reaction from the audience.
- **Decide**. Decide is thee participants can deal with a statement in the moment of if it is better to defer the statement to a later time (or event).
- **Boomerang**. Asking a question back to the participant who asks it or open the conversation to the whole group is an effective technique to consider in order to generate participation and answers from the whole group, not only the facilitator.

11. How to share online files and documents

SHERPA Facilitators and Monitors will often have the need of sharing files (documents, tables, pictures, presentations, videos, etc) online for various purposes. File sharing online via an email is fine for small-scale files. But it would be a frustrating task if one is trying to send large or numerous files. That is where online file sharing services come in.

There are several file sharing platforms offering plenty of storage for free or through a license and provide abundant features. The SHERPA project offers the free possibility to the MAP to employ the project management platform used for the SHERPA project, Basecamp.

Basecamp is a project management tool, that would allow MAPs communicate better and organise their work. Basecamp includes the tools all MAPs would need to work together: message boards, to-dos, schedules, docs, file storage, real-time group chat, and automatic check-in questions. It allows to share documents and work together on specific document (linking them to google docs). The communications team of the project can set the Basecamp platform for each of the MAPs. The only data needed are the names and email addresses of the MAP members.

There are also other free file sharing sites that seem suitable for SHERPA MAP Facilitators and Monitors. The tools are presented per category in alphabetical order, not in order of priority.

Google Drive is one of the best free file sharing sites that allows to share any files instantly. One can upload any kind of file, ranging from documents, spreadsheets, PDFs, photos, videos, etc. and send the shared link to the receiver. This online file sharing tool offers users free 15GB space which can be upgraded later with a nominal fee.

The main benefits of Google Drive are:

- The uploaded content is shareable with anyone by inputting the recipient's email address and the access link will be delivered to their email address.
- Shares high-quality photos and large documents with anyone and they will be able to access them anytime.
- Allows users to edit, modify, and control permission of the files by making them public or private.

WeTransfer is another free file transfer software which has interesting features for SHERPA MAP Facilitators and Monitors. The protocol which this file transfer software follows is secure, which makes it a popular choice among all the users. The overall interface of this software is also very well developed by its developers. That is why millions of users use We transfer software on their devices to transfer files with ease. There are some fewer limitations of this software which includes No password protection protocol and limited storage time etc. But using WeTransfer software, one can transfer data of almost 2 GB in one go without any particular file size limitation. All one needs to do is to enter the Email address of both recipients and senders to start the file transfer process. Once one fills up all the required fields successfully, one will see that file transfer will be done in some fewer seconds. The best part of this software is that there is no need for a registration process in this file transfer software. WeTransfer is open-source software, which means that every user will be able to use it for free without any charge. The maximum file size which you can transfer using this software is 2GB.

12. How to analyse stakeholders in view of achieving and maintaining their engagement in a MAP

Clearly understanding stakeholders and their interests, both separately and in relation to each other is essential for identifying who is relevant to involve in a SHERPA MAP and for understanding what are the best strategies to foster their engagement, upon which the success of every MAP, and of the SHERPA project as a whole, ultimately depend.

There is an array of stakeholder analysis techniques that may be useful to consider for SHERPA MAP Facilitators and Monitors. In the next sections one is presented that seems most responding to the identified needs of SHERPA MAP Facilitators and Monitors.

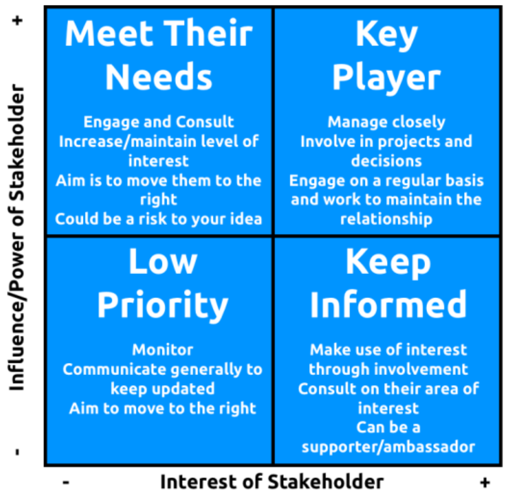
Power/ Influence versus Interest Matrix

This tool is based on the Power versus Interest grid described by Eden and Ackermann (1998, 121-125, 344-346), and seems suitable for the needs of MAP Facilitators and Monitors because it helps focusing on the key stakeholders who can make or break the work of a MAP. In turn, this also helps in stakeholder prioritizations.

By using this matrix, one can determine which stakeholders to manage closely and which stakeholders require minimum effort. With this information, it becomes possible to develop a specific approach and strategy for the identified stakeholders. This helps channel time and energy on the stakeholders that matter the most. In addition, it helps you create a communication and stakeholder strategy.

The analysis divides stakeholders into four groups. The model recommends a specific type of treatment for each of these groups. Below an example of a Power/ Influence versus Interest Matrix.

Figure 1: Power/interest vs Interest Matrix



Source: https://www.pinterest.com/pin/546765210994965668/?lp=true

The steps for preparing a Power/Influence versus Interest Matrix are the following:

- Document the interests and motivations of stakeholders in your MAP
- Identify the stakeholders that can make the MAP unsuccessful
- Identify conflicting interests and relationships between stakeholders
- Determine the level of participation required from each stakeholder and the level of involvement each stakeholder is willing to give
- Identify stakeholders whose influence evolves during the MAP life cycle

- Additionally, determine communication media and style best suited for each stakeholder.

The following questions can help you determine the level of influence stakeholders have on the outcome of the MAP:

- What are the responsibilities of each stakeholder?
- What do each stakeholder expect from the MAP and how does he/she benefit from it?
- Are there any conflicting interests that the stakeholder may have with the MAP?
- How committed is the stakeholder to the MAP? Is he/she willing to commit tangible resources (time, ideas, inputs, etc)?
- What are the consequences of not managing a certain stakeholder?
- Which problems, affecting which stakeholders, does the MAP seek to address or alleviate?
- Whose needs, interests and expectations will be met most by the MAP?
- Which stakeholder interests converge most closely with the MAP objectives?
- Which stakeholders can have a negative influence on the MAP? How can this be countered or mitigated?
- Can stakeholders influence others, who are the dominant stakeholders?

By getting answers to these questions, you will be able to understand the actual influence of stakeholders for a MAP and manage them appropriately by using the Power/Influence versus Interest Matrix for stakeholder prioritization.

13. How to keep a record of SHERPA MAP stakeholders

Solid stakeholder management is crucial to the success of a SHERPA MAP stakeholder engagement, process, particularly as specific MAPs will be dealing with different stakeholder contacts. To be effective at managing stakeholder relationships within each SHERPA MAP, Facilitators and Monitors may consider using a Stakeholder register from the early beginning.

The Stakeholder register is a maintained tiered database or contact sheet for all stakeholders involved in a MAP. It contains a list of all external and internal project stakeholders. The content of a Stakeholder register can be flexibly customised. However, a Stakeholder register typically addresses the following basic questions:

- What are the stakeholder names, contact information, position, organisation?
- What are the stakeholder expectations, interests, impact, and requirements?
- Which stakeholders are critical for the MAP and which ones are more active for specific MAP activities?
- How often do stakeholders require communication and what is the preferred communication method?
- What type of communication is required to reach them?

An example of a basic Stakeholder register template is illustrated below.

Table 1: Template for stakeholder register

Stakeholder Name	Title and Role	Contact Information	Expectations / Concerns	Interests	Power	Influence	Communication requirements	Notes

When populating a Stakeholder register, it is recommended that MAP Facilitators and Monitors consider:

- Nominate a relationship lead and a primary contact. The relationship lead will have overall responsibility for stakeholder activity and will be a senior manager. The primary contact will be responsible for relationship building (there may be several different primary contacts dependent on the number of stakeholders).
- Ensure stakeholder management is a regular agenda point on progress and update reporting.
- Have a process to highlight good and bad practice

- Identify needs for update and modifications.

It is finally important to stress out that this template is a register and is not designed for performing stakeholder analysis. Stakeholder analysis must be performed separately. The value of a Stakeholder register depends on the quality of the stakeholder analysis carried out. It is therefore useful to refer to the specific guidance sheet no.12 on How to analyse stakeholders in view of achieving and maintaining their engagement in a MAP.

14. How to monitor and assess the level of engagement of stakeholders in MAPs' activities

Monitoring the level of engagement of stakeholders in SHERPA MAPs' activities is an essential task, mainly relying on MAP Monitors. The appropriate tool to help them perform their job and understand what the best ways are to adjust strategies and plans for engaging stakeholders is the 'Stakeholder engagement assessment matrix'. The objective of this matrix, as specified in the Project Management Body of Knowledge (PMBOK) within the Plan Stakeholder Management process, is to maintain or increase the effectiveness of stakeholder engagement activities throughout the life cycle of the SHERPA MAPs.

The stakeholder engagement assessment matrix is a way of analysing and portraying the level and direction of stakeholder engagement. Through this analytical tool gaps between the current and desired level of engagement can be identified. Actions and communications required to close these gaps can be identified by SHERPA MAP Facilitators and Monitors using expert judgement.

Every stakeholder fall into one of the following five categories based on level of support for the project:

- unaware - does not know about the project or its potential impacts on them
- resistant - aware of the project and its impacts, but not in support of it
- neutral - aware of the project, not resistant or supportive of it
- supportive - aware of the project, and supports it and its potential impacts
- leading - aware of the project and of its potential impacts, and actively ensuring its success.

The stakeholder engagement assessment matrix classifies each stakeholder into their current status (C), and their desired status (D).

This facilitates tracking of stakeholder buy-in activities. If a stakeholder, for example, is currently in the 'neutral' category but needs to move into the 'supportive' category, this process can be actively tracked until the current status and the desired status are in the same column.

Often, stakeholders start out in the 'unaware' or 'resistant' categories but must be moved into the 'neutral' or 'supportive' categories. These are difficult situations that require active management to change a stakeholder's mind.

Here below an example of a stakeholder engagement assessment matrix (C=current level of engagement; D=desired level).

Table 2: Stakeholder engagement assessment matrix

Stakeholder name, role	Unaware	Resistant	Neutral	Supportive	Leading
Stakeholder 1	C			D	
Stakeholder 2			C	D	
Stakeholder n				C D	

The stakeholders can be identified by name or role. Key individuals should probably be listed individually. Less critical or large groups, like 'potential multipliers', may be listed as a group. Use the Stakeholder register to identify who should be listed and use the results to update the register. For more information about this, please see the **Error! Reference source not found.**'.

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