



D.3.2 – Concept and methodology of Interactive Workshops

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1 EXECUTIVE SUMMARY

The deliverable on “Workshop concept and methodology” describes the steps and methodologies leading to the briefing, organisation and reporting of the interactive workshops to be held as part of the PRO-IDEAL PLUS ICT Days in the targeted Latin America countries. The participatory methodology is based on FUTOUR (www.futour.it) as subcontractor to INMARK to facilitate and moderate the workshops.

On the basis of the objectives of the workshop, the project adopts innovative interactive methodologies. The deliverable describes the specific methodology that has been chosen, and related preparatory briefing activities, logistics and use of space, communication to involve and inform participants, workshop processes and facilitation techniques, contingency planning and reporting.

The activities in the deliverable follow a before, during and after chronology to help understand the steps to be taken in each phase of the workshop.

2 OBJECTIVES

The Workshops Concept and Methodology deliverable is addressing the following two primary objectives:

- Animation, information, involvement and engagement of potential participants to the FP7 ICT programme in Mexico, Colombia, Costa Rica and Cuba.
 - To familiarise with the FP7 ICT programme and with the mechanisms of European funding
 - Prepare the ground to guide them in a proactive way to project proposal writing
 - Identify demand driven core issues and ICT priorities for research
 - Stimulate involvement and self-organisation of Project Angels in each country to support potential project participants in proposal idea assessment, consortium building and proposal writing.
- Design, organisation and facilitation of interactive awareness raising workshops and coaching sessions using state of the art participatory methodologies to stimulate the interaction among groups of 25 to 30 local participants.
 - Networking, clustering and teambuilding among participants
 - Connective intelligence and contactivity
 - Demand-driven project design and identification of needs, requirements
 - Innovation through interaction and creativity techniques
 - Sharing of information
 - Knowledge generation
 - Engagement of the stakeholders and fostering of working groups
 - Provision of guidelines for workshop logistics and reporting

The above objectives guide the whole spirit of PRO-IDEAL PLUS and are the basis for the workshop tasks and activities that are described in the sections below.

3 PARTICIPATORY METHODOLOGIES

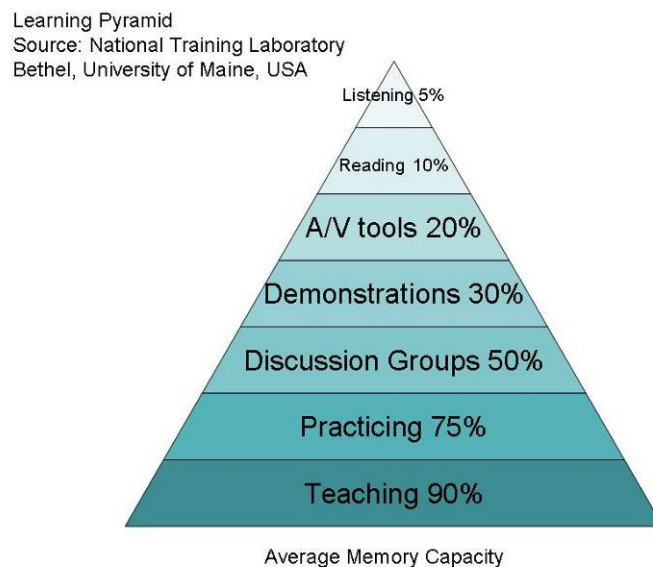
Participatory methods, facilitation and creativity techniques have been introduced in the PRO-IDEAL PLUS project to maieutically raise the awareness, stimulate creativity, innovation and engagement of the key stakeholders of the target countries- researchers, industry, university, SMEs, policy makers and national/local government and end users – so as to increase the quality and quantity of Latin America and EU ICT R&D cooperation projects.

The project has adopted new participatory methods of working to raise awareness and engage interested persons in the target countries Mexico, Costa Rica, Colombia and Cuba in the FP7 ICT programme, the mechanisms of European funding and guide them in a proactive way to project proposal writing.

PRO-IDEAL PLUS counts on a vast experience with state of the art and cutting edge methodologies for co-creative and user centric policy making, strategy design and the development of products or services. These methodologies can enrich the operational strength of the project both by performing action research in the project activities and by supporting an interactive transfer of the methods.

As the old saying goes “every road leads to Rome” but also “Rome was not built in a day”. It takes much attention and preparatory work to ensure that events involving local stakeholders can raise the awareness, stimulate the creativity and mobilise the energies so as to empower the local stakeholders and lead to the desired involvement and engagement in EU FP7 ICT projects.

As can be seen from the average memory pyramid below, the more interactions exist, the more active the participants become and the more knowledge is retained.



We briefly describe the possible steps and provide some examples of successful methodologies and tools and then the specific chosen method and approach:

1. Briefing and design of the participatory process or event
2. Typologies of interactive workshops
3. Participatory Methodologies
4. Contingency Planning

3.1 Briefing and design of the participatory process or event

Every interactive activity has to be designed very carefully as it involves many people and may require complex organisational and logistics arrangements. Therefore the briefing and design of a workshop are crucial aspects that may lead to the success or failure of the event.

The briefing and design phase are organised to with the promoters of the event according to a specific preparatory checklist including the following main issues:

- the objectives to be achieved by the workshop
- topics and specific issues to be discussed in plenary or parallel sessions
- typology and number of participants and stakeholders to be involved and invited
- use of space and logistics, including the selection of the venue and catering
- adaptation of different methods and facilitation techniques
- communication strategies to involve, inform and disseminate results
- external experts to be involved
- facilitation team preparations and training of the support team
- draft programme and timing and output of the various sessions

All these issues require what Jac Geurts, an expert facilitator from the Netherlands defined as the three Ps of workshop organisation: Proper Prior Planning.

A workshop is both a time consuming and a time saving activity. Time consuming because it requires a great deal of organisational effort and meetings to make sure that all aspects are clearly prepared and ready, as in a party, a concert or any event where many people are involved. A time saving and very powerful activity as it can lead to drastic changes and innovations in the behaviour, in the collaboration and ability to mobilise energy and intelligences of diverse stakeholders and people.

Much therefore depends on the ability of the internal team to make sure that all the aspects of the checklist are carefully taken care of. So for instance the internal team involved in such a preparatory activity needs to establish if the agenda and objectives to be tackled in a meeting are overambitious, if they can involve experienced facilitators and robust participatory methods to ensure a strong interaction and engagement of users. The room size and its furniture needs to ensure an easy movement of people and the venue and ambiance should provide a comfortable settings to make sure participants feel at ease during the intense workshop activities.

All these activities require interviews to the local organisers and sponsors of the participatory process to ensure their buy in and support as leadership as well as visits to the spaces that will be used for the workshops to define the best logistics arrangements. Once the focus and topics of the process have been identified the team will decide about the best methods to be applied and adapted to the local context, thinking also of possible contingency activities in case some unexpected event may take place (eg. too many or too little participants, discovery of other important issues and themes that were not in the original plan, etc.). All these will be agreed among the team (the experts in participatory methods and workshop facilitation), the local organiser (eg. the partners of a project or key supporters for the event/workshop) and the sponsors (eg. funding agencies, policy makers and local authorities).

3.2 Typologies of interactive Workshops

There may be several models to implement local workshops and awareness activities. These depend on local attitudes, time-frame, logistics and budget. Here we summarise three main possible formats of interactive workshops followed by specific possible typologies and sizes of groups for facilitation:

- Frontal and interactive workshop:
 - Frontal workshop in the morning to introduce the core issue of the workshop, the state of the art and possible alternatives.
 - Interactive workshop in the afternoon to design possible proposals, support networking and systemic innovation relating to the project objectives.
- Blended workshops:
 - Mix of interactive and frontal activities across the day of the conference with a core part for both the interactive and frontal session.
- Stretched workshops:
 - Distribution over time of more integrated events of the first and second format, including press conferences, specific animation events with actors, study circles etc.

Within each of the above possible formats - frontal, blended or stretched - to support the interaction among local stakeholders so as to meet the objectives of the PRO-IDEAL PLUS project, the team has identified two possible levels of interaction that may be blended with specific participatory methodologies, according to local needs:

- micro group facilitation and participation in short term processes.
- macro group facilitation integrated, long term processes.

For the micro **group facilitation** (from 5-10 to 15-25 people) there may be methods and tools that are more suitable for analysis, knowledge creation, learning, action planning and micro facilitation skills such as active listening, group process characteristics, visualisation. Such events may generally last from a minimum of one hour to a maximum of eight. The micro facilitation skills represent the building bricks to organise also large group facilitation events.

For the **macro group facilitation** (from 25 to 100 people but also higher numbers) there is a need to give the event a specific structure, process and involve facilitators, tools and technologies to organise the activities, logistics and all that comes before, after and during the event. The use of these large scale intervention tools requires also a combination of several micro facilitation techniques.

The philosophy of the different methods, tools and participatory methodologies will be described briefly in the next section.

3.3 Participatory Methodologies

Participatory methodologies have been developed with a view to create an environment favourable to innovation and change as well as to involve stakeholders and citizens in decision making processes. These methods can be adopted and integrated according to the objective pursued and the boundary conditions in the local context (governance model and power distribution, culture, openness, and so on). Some methodologies are more appropriate to raise awareness and stimulate communication, others aim more at the analysis of problems and the formulation of projects.

Some methods are more efficient in the presence of small groups or which facilitate negotiation and the development of operational strategies. These participatory instruments have the objective to stimulate the interaction process and dialogue among stakeholders. Structured proceedings and visual techniques help participants to communicate and rationalise ideas, thereby stimulating reflection and creativity on common development strategies or on the formulation of specific solutions in the form of a programme or project, functional to the local context in which they emerge.

The project involves FUTOUR as subcontractor and will therefore apply the “fast prototyping” philosophy of **Future Centers** in several of its dynamisation activities. Future Centers are foresight enabling workspaces, people-centered public spaces and work environments in which citizens and stakeholders from government, business and non-governmental organizations can meet and explore new directions for thinking about and tackling a wide variety of social issues and problems.

Future Centers help make knowledge accessible and useful to people and organizations. They can be both physical and virtual meeting spaces – buildings, public spaces, neighbourhoods, cities and local regions. They are places where people with needs can meet people with talents, where people with ideas can meet people with hands and the capacity to turn ideas into practice, where knowledge and ideas can find resources and test-beds for concepts and projects.

They often have the character of a laboratory, where thinking is combined with doing to create and test ideas for enabling citizen participation and improving the cohesion, economic resilience, democratic processes, and quality of life of a community or region. They strengthen and support existing communities and – as linked cooperating centers throughout a larger area – a region, a country, Europe as a whole – they can help create opportunities and catalyze participation throughout extended communities and networks. In a flattening world, where linking networks, improving access to knowledge and technologies, and enhancing cooperation and creative problem-solving within regions and between regions is of increasing importance, Future Centers can work as powerful engines for economic and social innovation.

Participatory methods can be applied to reach the following objectives:

- Integration of knowledge and valorisation of the collective intelligence within the project:
- Formulation of multi-stakeholder projects (network) for local development, sustainability and innovation
- Territorial marketing initiatives, collective programming, territorial pacts,
- Formulation and co-design of new products, services, research programmes, training, organisation, continuous learning, exchange of experiences and knowledge management

The PRO-IDEAL PLUS interactive workshops will use state of the art facilitation techniques and methods to cater for the local context, space and number of participants. The FUTOUR team is composed of facilitators and policy design experts with a vast experience in the use and adaptation of methodologies to support awareness raising, creativity, problem solving and decision making. The team has facilitated about 350 workshops with over 15000 participants on social, economic, cultural, technological issues across many countries in the EU and internationally. The activities of the team have been focusing on the development and implementation of strategies, policies, on the redesign of processes and innovative practices and on the design of products and services. FUTOUR is the first Future Center with a nomadic dimension and is involved in participatory and user centered activities of PRO-IDEAL PLUS. The methods will take care that activities will be performed by combining the possible formats of workshops and interactive events indicated above (frontal, blended, stretched and micro and/or macro).

The possible methods to be used on the basis of an assessment of the FUTOUR key facilitator may include:

- Open Space Technology.
- Knowledge Café
- Safari
- Digital Mosaic
- EASW
- Reporters from the future.
- Barcamp

We hereby describe briefly the way in which some of the applied methods work.

Open Space Technology. With Open Space Technology (OST) offers a method to run meetings of groups of any size. It allows diverse people to address complex or possibly controversial issues. Participants are asked to define a possible common working agenda and a series of topics of work around a specific issue to be discussed such as for instance "What initiatives should we jointly design to foster cooperation with EU in ICT R&D?". OST works best in situations involving conflict, complexity, diversity of thought or people and short decision-times.

The rules envisage that participants can present specific proposals and projects and that just like in a marketplace they may move to the topics and groups that they may like most. Each person who makes the proposal has to guarantee the possibility of writing an instant report with the outcomes and main issues discussed by the group.

The role of the facilitator in the Open Space is very important as it has to create the right atmosphere to engage all participants into the common working space and make sure that all the principles and rules of OST are respected. The OST workshop normally lasts for one and a half to two days with very intense interaction among participants. The logistics of the workshop require one large room where chairs can all be placed in a circle or a series of concentric circles and a series of breakout rooms to allow the creation of working groups. The room size and number of breakout rooms depends on the number of participants. There has to be a desk with drinks, coffee, fruit and food where people may serve themselves as they keep working. This method works on the principles of freedom and responsibility and counts on the inbuilt self-organising energy of people when facing specific challenges. It may be used with very large numbers of people but requires a careful preparation and definition of objectives, logistics (food, venue, etc.) and follow-up actions. The Open Space Technology (OST) has four main principles that apply to all participants during the workshop:

- Whoever comes are the right people: this alerts the participants that attendees of a session class as "right" simply because they care to attend.
- Whatever happens is the only thing that could have: this tells the attendees to pay attention to events of the moment, instead of worrying about what could possibly happen.
- Whenever it starts is the right time: clarifies the lack of any given schedule or structure and emphasizes creativity and innovation.
- When it's over, it's over: encourages the participants not to waste time, but to move on to something else when the fruitful discussion ends.

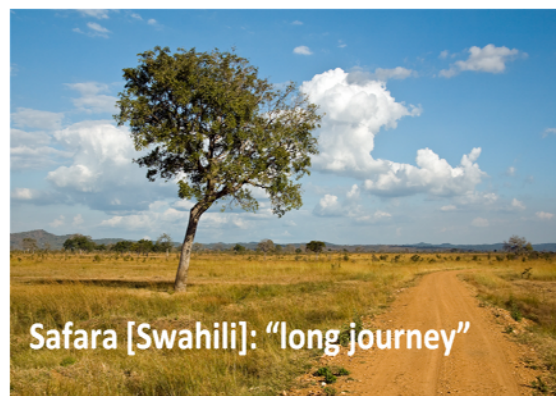
And also there is one "law", the "Law of Two Feet" (or "The Law of Mobility"), which reads as follows: If at any time during our time together you find yourself in any situation where you are neither learning nor contributing, use your two feet. Go to some other place where you may learn and contribute. This law, together with the principles stimulates self organisation and is a very strong way to foster empowerment, engagement, responsibility and motivation for all participants.

Knowledge Cafè. This method has been used by large private and public organisations as it allows much interaction and the exchange of ideas among participants in a relatively short time.

The method envisages a close analysis of a set of possible issues to be explored and tackled by participants. The issues are tackled in rounds of interactive discussions based on core questions where participants sit in tables of up to 6 people with one person acting as main host per each table. After each question round the host remains to summarise and gather what was said at her or his table while the remaining persons move to other tables as ambassadors of knowledge. They initially share the experience and ideas discussed in their previous table and listen to the host, then move on to the next question to discuss and explore other aspects. After some rounds of discussion the groups have mixed several times and there has been a great deal of knowledge transfer and idea generation. In the final round the tables may propose a list of ideas, priorities or actions relating to the main issue under discussion.

Safari. The principle of the safari bears some similarity with the knowledge café in the sense that it envisages too the exploration of specific issues but in this case the issues are represented as stations or milestones where the people move to and create an incremental picture of ideas and suggestions. After an analysis of the issues at stake for the participants the facilitator and his team organise as many working stations as the issues and distributes the participants evenly in all these working stations where they work for some time and then move on to the next station until they visit every station and issue of the workshop.

Participants analyse the specific issue or question defined at their safari station, they discuss and create a series of ideas, concepts and models that then drawn or written on specific materials so as to leave "traces" and insights for the next visitors of the station. This method allows an in depth analysis of the various perspectives and the creation of an incremental, wiki-like picture of the knowledge and experience of the participants relating to the issues being discussed.



Digital Mosaic (MODĪ). The Digital Mosaic (MODĪ) of FUTOUR is a combination of high tech and high touch methods and tools. It is an innovative facilitation approach that stimulates creativity, accelerates decision making processes and the development of ideas ensuring that the systematic management of creativity and innovation becomes a key factor for success. Through creative, brainstorming and problem solving sessions, by using a set of wireless keyboards that can gather the ideas of participants the MODĪ creates a shared mosaic of solutions, suggestions, strategies, policies that may lead to the design of new programmes, projects, services or products.

The MODĪ envisages four steps: a) an interactive discussion among groups of people on questions posed by the facilitator and its team; b) writing and visualisation of the ideas and proposals in a large screen that may be seen by all participants; c) reading together all the ideas with the search of points of convergence, synergies, syntheses and new proposals. All the information may be immediately collected into a final report that contains the answers, ideas and concepts emerging from the participants to the workshop. To organise this workshop with about 35 people is a need for a room with about 8 tables and as many chairs as the number of participants, a large screen and a projector with about 3500 lumen to visualise what is written by the groups.

European Awareness Scenario Workshop (EASW). It consists of a series of participatory techniques that create an environment favourable to change, innovation and creativity, so facilitating – through the interaction of the various stakeholders and competencies - the decision process by a group. The EASW methodology consists in the following phases: a) Scenario development; b) Mapping and involvement of stakeholders and local organisation; c) Workshop – Formulation of visions and elaboration of ideas.

The method may be used with groups of up to 40 people divided into four parallel working groups. In the vision making session there are four stakeholder groups (e.g. Policy makers, entrepreneurs, experts, citizens/users). In the idea generation phase the groups are mixed to work on four specific core issues (e.g. entrepreneurship, sustainability, learning, networking). The workshop generally requires two full days to identify future visions and define specific action plans. The logistics of the method require a core facilitator and the support of four group facilitators to coach the parallel groups. The space for the workshop requires a plenary room for the initial, intermediate and final meetings where all participants are present at the same time. For the working groups there is the need of four rooms with visualisation tools (flip chart, etc). The method is robust and has a good track record of successful experiences. It requires a strong team to manage all the different processes.

Reporters from the future. This method has been developed by the FUTOUR team to involve large groups of local actors in interactive action research on specific issues that are of importance to a group of citizens. It involves three main phases: a) workshop to define the issues to be analysed and to create editors to investigate and create a newsletter/blog on such issues; b) investigation, search, collection of photos, documents and interviews to deepen the knowledge and create a series of articles for the newsletter to be discussed with policy/decision makers; c) preparation of the draft of the newsletter by the teams of reporters and presentation of its draft number to the policy/decision makers to gather ideas and suggestions and to define possible future items for the policy agenda.

This method integrates parts of other methods and gives them a depth and perspective. It requires more meetings and a strong organisation to also define possible logistics and back up the work of the reporters with technology to prepare

the drafts of the articles on collaborative workspaces and or publish them on blogs. It also requires one core facilitator, an art director and a logistics manager to ensure that all organisational and communication aspects are fine tuned as well as one facilitator/coach to support each team of reporters until they deliver the first issue of the newsletter.

Barcamp. A BarCamp is an ad-hoc gathering born from the desire of people to share and learn in an open environment. It is an intense event with discussions, demos, active participation and interaction from attendees. The meeting follows many of the approaches of the Open Space Technology (OST) method as there is not a pre-determined agenda of speakers, just a big issue on which people want to discuss. The objective is to bring people together, share knowledge and propose ideas, plans, programmes and actions. The BarCamp is a method that originates in the community of web developers but "non-conference" approach is being extended to many other fields. The main rule of the BarCamps is "No Spectators, only Participants".

All participants are normally expected to prepare a presentation/debate or participate in some way in organizing the event. All presentations, discussions and proposals occur on the day of the event but it is good practice to upload a note, a slide presentation or a video to the BarCamp's website.

There is no fixed initial agenda but it is co-created by the participants. A number of meeting rooms is made available in proportion to the number of registered proposals and working groups for parallel sessions. In the morning of the BarCamp, those who propose specific issues or topics to be discussed in working groups place a small poster with their topic in one of the available slots (divided by 1 hour sessions and meeting room). Other participants refer to this board to choose which session to participate in at any given time.

Each meeting room is equipped with flip chart paper, markers, and empty reports to write the outcomes of the session. Every group creates a report from their session that is typed into a main BarCamp report from the "Press Room". The local organisers might use the the Barcamp web site (www.barcamp.org) for registration and event information when organizing the events so as to facilitate the involvement and give great visibility to each national safari workshop.

3.4 Facilitation

Advantages for groups that use facilitators include a well-structured meeting, focus on a common goal and a common process, record of the group's discussion and decisions, and an efficient way to reach consensus and productive outcomes. Facilitators provide strategies to handle conflicts between members as well as other non productive participant behaviours that impede the group's process. They also absolve group participants from the responsibility of handling the discussion or staying neutral.

Disadvantages can occur when facilitators are not effective. If a facilitator loses objectivity, the group may feel manipulated by the facilitator's approach. Also, if the facilitator does not manage the group's process effectively, the group will either waste time reaching consensus or in some cases may not meet their goals at all. Finally, groups can become overly dependent on a facilitator and may not learn the skills and strategies necessary to make decisions.

Given the vast experience of the FUTOUR facilitator there will only be advantages as well as a gradual empowering process of the participants stimulated by the use of maieutic techniques in the facilitation style. This will ensure:

- Increase Participation, Consensus, and Buy-in.
- Capture ideas & Generate Better Solutions.
- Generate Clear Action & Accountability Plans.
- Maximize Meeting Productivity & Results.
- In the process we will be ensuring that the meeting experience is a positive and energizing experience for all participants, building a strong foundation to drive all post-meeting actions, whilst increasing team cohesiveness.

3.5 Reporting

The outcomes of each interactive workshop will be organised into a short executive report that will include the outcomes of the notes taken by each station manager as well as a general description of the workshop process, methods used and adaptations.

3.6 Contingency Planning

The methods described above are an example of possible instruments, tools and techniques applied within interactive focused workshops. The FUTOUR team has identified a set of possible methods and combinations of methods that can be most suitable to fit with the PRO-IDEAL PLUS events. We will describe them in the next section even if the team will need to be ready to make any further adaptations that may emerge from local circumstances.

Even if the team will strive to ensure that all the preparatory activities, logistics and methodological aspects are guaranteed to have the maximum success, the presence of facilitators with much skill and experience with group dynamics will ensure that even during the workshop there can be some last minute adaptation.

4 INTERACTIVE WORKSHOP PROGRAMME

This section describes the interactive activities that will take place before, during and after each workshop in the target Latin American Countries.

4.1 *Preparatory interaction and communication*

Local organisers will use the appropriate tools to facilitate the direct registration, collection of preliminary topics and ideas from participants, visibility and transparency of all the event process, e.g. the Barcamp website that can help to involve and monitor the number of participants. As in parties all participants are happy to know who else is coming and by opening the registration at least one month in advance so that anyone can add their name and contact details there can be a viral effect in terms of success and pre-engagement of participants. An example version of the Mexico event has been launched on the Barcamp site (see http://barcamp.org/mexico_ict_proidealplus_camp).

4.2 *Frontal seminar moderation*

This activity, according to the current local ICT Days programmes will take place in the morning of the first day of each local workshop.

The PRO-IDEAL PLUS team can support the moderation of the frontal part of the workshop programme by ensuring that there is good time keeping and by fostering debates by facilitating specific question and answer sessions.

4.3 *Interactive workshops with the Safari*

According to the current local ICT Days programme this interactive and participatory activity will take place in the afternoon of the first day of each local workshop.

There can be some ice breakers and networking exercises that can be used to help the participants to know each other, strengthen their motivation and create an environment favourable open discussion, collaboration and engagement. A specific exercise that will be used in the introductory session is the **Speed dating exercise**. This is normally very fast (15 to 30 minutes depending on the number of participants and duration of the workshop), and managed by the facilitator that acts also as time keeper. All participants are invited to introduce themselves to other participants they have never met before. The facilitator gives 2 to 4 minutes (1 to 2 minutes each) talking to each person and find out who they are, what is their expertise and competence and what they want to get from the programme and workshop.

On the basis of the information gathered and of the programme objectives the method that has been chosen for the participatory sessions of the local workshops will be the Safari. While the method principles have been described above we hereby describe the main steps that will be adopted in the specific interactive session of the PRO-IDEAL PLUS workshops.

The method provides a framework and a process for organising the group focus and activities. The issues and topics relating to the content will be decided with the local organisers and on the basis of the ICT priorities for upcoming calls for proposals.

The possible steps in the Safari interactive workshop of PRO-IDEAL PLUS are:

- Participants divide in **four** groups, one for each station (i.e. topics such as personal health systems, computing systems, energy efficiency, future Internet), depending on the ICT Work Programme topics and identified priorities, to brainstorm on problems, objectives and actions relating to that safari station.
- **One person** (ideally from the local partner) stays at **each** station/topic to facilitate and harmonise the work.
- The brainstorming at the first station (i.e. personal health systems) lasts for about **20 minutes** then people move to their next station/topic.
- The brainstorming at the second station (i.e. computing systems) lasts for **15 minutes**: participants **read the previous ideas and add further ones** to the work of groups then move to the next safari station/topic.
- The brainstorming at the third station (i.e. energy efficiency) lasts for **15 minutes**: participants **read the previous ideas and add further ones** to the work of groups then move to the next safari station/topic.
- The brainstorming at the fourth station (i.e. future Internet) lasts for **15 minutes**: participants **read the previous ideas and add further ones** to the work of groups.
- **At the end** of this journey through the main topic stations of the Safari **each group** convenes back to their first station so as to prepare, for **20 minutes**, a **presentation poster** summarising the main findings: problems, objectives and actions.
- Each group is given **5 minutes** to present the posters and collect the material as suggestions for the specific **thematic areas for projects**.

The outcomes of these sessions will represent the basis for the work of the Project Angels and for the direct advisory work to be performed by the PRO-IDEAL PLUS team in the second day of each local workshop.

5 USE OF SPACE AND LOGISTICS

The success of a meeting or workshop essentially depends on how well prepared it is. You have to anticipate everything so that you can concentrate on the business at hand during the meeting itself. Our experts in meeting organisation offer you the following checklist: an indispensable tool to help make your meeting a total success.

5.1 *Before the workshop*

Things to decide:

- The dates and times of the meeting.
- The place where the meeting will be held, taking into account how easy it is to get to, transportation possibilities, parking, etc.
- The number of participants. Try to the maximum to have gender balance as it helps in creativity and action.
- The number, the size and the configuration of the meeting rooms.
- The IT equipment, the audiovisual equipment, and the connections you will need.
- The number and the types of rooms necessary for each day.
- Your needs in terms of meals and catering (breaks, lunches, dinners, cocktails).

Before the big day, don't forget to:

- confirm and update your reservation (meeting room, guestrooms, meals and catering, etc.).
- confirm the list of participants as well as the number (total number, number by day / by room, if necessary).
- specify the signage for the meeting rooms.
- send a list of the names of participants staying at the hotel (if the meeting takes place at a hotel).
- send participants the minutes or a review of the meeting.
- take notes to use in organising your next meeting.
- set the meeting agenda.
- send the agenda to the participants.
- send participants relevant practical information (hotel address and contact details, directions to the hotel, parking availability, times, name of the meeting room, equipment that will be available for presentations, etc.).
- prepare the materials you will need for the meeting (files on the discussion topics), presentation aids (laptop, USB key, CDs, DVDs, brochures, products for demonstration, boards, etc.), printouts of the agenda, the list and contact details of the participants, etc.).
- You can also have all materials needed for the meeting delivered to the venue 48 hours in advance – just make sure you inform the venue that you wish to do this.

5.2 Organisation of space

Space is king when organising interactive events as people are actively working and creating solutions.

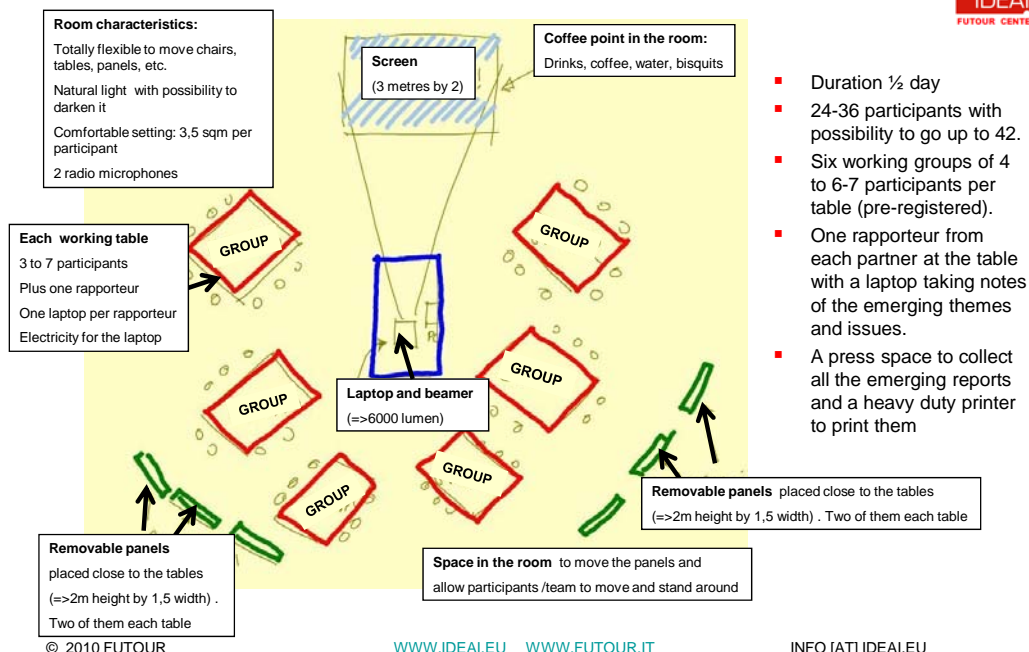
It is important to have a flexible room where the chairs, tables and panels for each working group can be easily moved. The best way to convey this organisation of space is to imagine the seating arrangements of a wedding or of a cabaret. As we are supposing the participation of 24 to 36 people we envisage the creation of six working groups of six to seven participants each as well



as one rapporteur per working group (rapporteurs are indicated by the local partners and take notes on the emerging themes and issues. The size of the workshop room for such a group has to be estimated in about 200 square metres and groups should be distributed so that they can see the main screen, are in line of sight between each other but sufficiently distant so as to hear each other when working. In the diagram we suggest to provide each group with two panels of 2 metres height by 1,5 metres of width for the posters of the Safari. But if the room allows using the walls then the groups can be placed close to the walls (provided that they can also see the main screen with the beamer). The tables should be used mainly as support for note taking or for the rapporteur as most of the work is performed standing up in front of the panels and poster (therefore they can also be of a relatively little size compared to the group dimension (e.g. 1x2 metres).

The below image shows the ideal workshop space

Organisation of spaces for a workshop (24-36 participants)



5.3 During the event

- Let the local organisers handle all the practical aspects of your meeting.
- Let the facilitator from the FUTOUR IDEAI team take care of the workshop content, objective and process.
- Focus on the objectives you want to meet and enjoy your event to the fullest.

5.4 After the event

- thank the participants and/or speakers.
- meet with the FUTOUR facilitators to evaluate the event (action review).
- follow up the workshop participants.

5.5 Food and catering for thought

The catering aspects are a fundamental part of the workshop organisation as they can be a key element in creating an environment favourable to collaboration, innovation and creativity. Please look for a good trade off between quality and cost so as to provide the best possible quality at sustainable prices.

Coffee point

- It is important to provide participants with a coffee point on a separate table in the workshop room so as to have fresh fruit, juices, biscuits, coffee, water (this will be taken by participants as they work rather than at a coffee break). This way the participants will feel that the workshop is like an extended coffee break where they can work, discuss and enjoy the time with the other participants.

Lunch break

- The lunch can be a very important moment for socialising and networking among participants.

5.6 Stationery and equipment for each workshop

- Consumables for **each** workshop
 - o 10 large paper sheets of 1x1,5 metres either brown or white packaging paper to be placed on the removable panels or walls
 - o Two flip charts with 30 sheets of flip chart paper each.
 - o 30 blue and 30 black flip chart markers for writing on paper (classic permanent markers with rather large point such as those from BIC) -10 red markers, as above. (see the picture aside for the typology of required



markers). One 3M Spray Mount can for the main working metaplan area.

- 100 sheets of A3 paper and 100 sheets of A4 paper.
- Paper masking tape for sticking the paper on panels. 2 roll of 1,5 cm height, 1 roll 4-5 cm height. See the image of the paper masking tape aside.



- Technology in **each** workshop

- One laptop per working group for each rapporteur (we envisage 6 groups). These need to have word processing software and the possibility to copy the files with a usb memory stick.
- One laptop for the speaker/facilitator
- A powerful beamer to show slides about the project and workshop. The larger and more luminous the room the more powerful has to be the beamer to be seen (ideally 3500 lumen in a group of about 50 participants).
- One laptop with a large screen for editing and printing the report.
- A b/w printer to print the instant report by the end of the meeting.
- Ensure good electricity connection to all tables and working teams

6 ANNEXES

6.1 Invitation letter sample

We hereby enclose a sample invitation letter to facilitate the information and involvement of participants. Letters should clearly indicate the benefits of participation and allow a simple feedback from the stakeholders.

Dear XYZ

We are pleased to invite you to the workshop organized by XXXX (local partner organisation) and the PRO-IDEAL PLUS Consortium about R&D ICT cooperation between Latin America and Europe. This interactive workshop will allow participants to discuss and find together solutions, ideas and projects relating to the following question.

[here write in bold the question or objectives e.g. "what projects should we design to collaborate with EU countries and make our economy and society more innovative and sustainable?"].

The workshop will take place on [indicate the date] in the [write venue, room, floor..] from the [write hour of beginning] to [write hour of ending time] and will use innovative interactive and creative methodologies and techniques so as to foster the creation of robust proposals to be submitted to next ICT call for proposals.

The workshop will be facilitated by FUTOUR, an Italian company specialized in idea generation, creative problem solving, people-centric innovation and decision making.

[add a sentence if catering (food/coffee) is offered for free by the organisers]

The workshop will involve around 35 participants in the area of ICT, including researchers from Universities and industry, SMEs and project managers.

We are pleased to give you this exclusive opportunity.

The participation is free but there is a need for registration as the number of places is limited.

Considering that participants will have a stronger position and competence for presenting proposals for funding with the EU after such an interactive workshop and that the event is exclusive you should confirm your participation only if you really intend to participate.

If you intend to participate please send an email by [indicate date and time of deadline] to [write the name and email of the person who takes the registrations or local organiser] indicating your interest in participation, your competencies/skills (what you can provide as person and organisation in case of a project) and what you are looking for from other possible partners. For any information do not hesitate to contact us [write the name and surname of the local organizer].