

# Gender STI

## ***Methodological Handbook on the GENDER STI Co-Design Labs***

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## LIST OF ABBREVIATIONS

DoA	Description of Action – Annex I of the Grant Agreement
EC	European Commission
ERA	European Research Area
EU	European Union
H2020	Horizon 2020
MS	Member States
RIA	Research and Innovation Action
R&I	Research and Innovation
STI	Science, Technology and Innovation
WP	Work Package
LAB	Gender in STI Co-Design Lab(s)
IC	Innovation Camp Method
DT	Design Thinking

## EXECUTIVE SUMMARY

This deliverable describes how the GENDER STI Co-Design Labs (hereafter LABs) integrate the design thinking of the GENDER STI project to address its general and specific objectives of aligning the gender balance in STI and the application of the gender perspective in bilateral agreements between the EU Member States (MS), Associated Countries (AC), and third countries. It describes the methods, participatory steps, roles, responsibilities and tools that will be adopted to define targeted policy recommendations, launch pilot actions and support the emergence of an international community of practitioners that have the same societal aims and want to collaborate in their implementation. The core method at the basis of the LABs is the Societal Innovation Camp Methodology, with its inclusive, agile, iterative, non-linear, incremental, entrepreneurial and pioneering discovery mindset.

The document outlines in detail the methodology with its guiding principles timeline, tasks and tools that will be used in the preparation, implementation and follow up of the Gender STI LABs. Its structure focuses on why, how, who, and when, and it is based on the following sections:

- Section 1: Purpose and challenges of the Gender STI LABs. The overall and specific objectives of the project and work package and the core challenges that will be addressed through the LABs. This section focuses on the big picture of the Gender STI Co-design Labs, giving an overview of the whole process and steps and its integration with the design thinking steps of the project.
- Section 2: The steps of the Gender STI Co-design Labs. A step-by-step description of each phase of a LAB: preparation, implementation and follow-up.
- Section 3: Organisation, roles and responsibilities. This section describes the key roles of the teams involved in the Lab: The Challenge Owner/Holder; the Facilitator(s); the Reporter/scribe; the local organiser/convenor and participants.
- Section 4: Logistics, tools and practicalities. A description of how the space and tools are used to run the LAB process (digital and/or physical).
- Section 5: A summary of the main steps, processes and outcomes of the LABs.

The methodological handbook supports the organisation and replicability of the Gender STI Co-Design Labs. It is in line with the guiding principles of the overarching Innovation Camp method that will be applied to co-design and achieve societal, scalable, and sustainable solutions.

The approach of this document is practical and hands-on. It is a work in progress, based on the implementation and improvement of existing and validated iterative processes, by integrating new technologies and methods, and streamlining processes to reinforce the possibility to reaching long-term outcomes and impacts.

While the deliverable covers in a comprehensive way all the possible facets of supporting the complex nature and global scope of the Gender STI project, the process will also be influenced by how the methods will be applied and adapted within the project. The emergence of Covid 19 restrictions will be an opportunity to innovate further and adapt the tools and processes by combining asynchronous tasks and synchronous workshops (online or face to face) performed in different time zones by the global consortium and all the other stakeholders.

# 1 PURPOSE AND CHALLENGES OF THE GENDER STI LABS

The Gender STI project addresses the challenge to integrate the gender perspective in science, technology and innovation (STI) in dialogues between Europe and third countries, as part of the European Research Area (ERA) strategy to advance gender equality in Research and Innovation (R&I).

Gender STI innovatively contributes to solving complex problems associated with the integration of the gender perspective in STI dialogues, by adopting a design thinking human-centric problem-solving approach. Gender STI investigates how gender equality is taken into consideration at different levels of international cooperation dialogues in the area of STI, between the EU Member States and Associated Countries, and a selected set of 10 third countries, including Canada, the United States, Mexico, Brazil, Chile, Argentina, South Africa, India, South Korea and China.

The investigation is conducted along with the **three objectives of the Gender Equality Strategy in EU R&I**, as indicated in the ERA Communication 2012 Priority 4 on Gender equality and gender mainstreaming in research:

1. **Gender equality in scientific careers at all levels**
2. **Gender balance in decision-making bodies and positions**
3. **Integration of the gender dimension in research and innovation content (sex and gender analysis)**

These three strategic objectives also form the **core challenges addressed in the Gender STI Co-design Labs** and will drive the scope, challenges and process of the LABs.

The project will deploy a **series of Co-Design Lab workshops** to create the environment to **co-design and prototype solutions regarding gender inequalities in STI dialogues**. As a result, the project will create the **Gender STI Community of Practice** that will help to scale up the experience of gender equality in STI at a European and international level, and the **European Observatory on Gender in STI**, which is unique of its kind in Europe and will serve as a hub for gender equality in STI dialogues, incorporating all knowledge and materials resulting from the project. These actionable insights will feed the process to formulate recommendations to enhance the integration of gender equality in STI dialogues with third countries.

## 1.1 The overall picture of the Gender STI Co-design Labs

The LABs are part of the overall iterative design thinking process of the project and they therefore work across the whole project. The LABs base their input on what happens in the other WPs and feed the emerging output into the WPs that run concurrently, with retrospectives and feedback to adjust the strategy and process further.

The Gender STI project covers the following design thinking stages through the Societal Innovation Camp process:

1. **Explore and identify (Empathize).** Develop knowledge about what project stakeholders do, say, think, and feel, through direct observation of what they do, how they think, and what they want. Typical questions are 'what motivates or discourages stakeholders?' or 'where do they experience frustration?' This phase aims to gather enough observations that you can begin to empathize with project stakeholders and their perspectives.

2. **Define.** Combine all stakeholders' observations to map where users' problems exist, drawing more clearly the stakeholders, highlighting opportunities for innovation. To do this, observations are carried out drawing across stakeholders/users' current experiences so as to find out if there are common needs, challenges and burning issues.

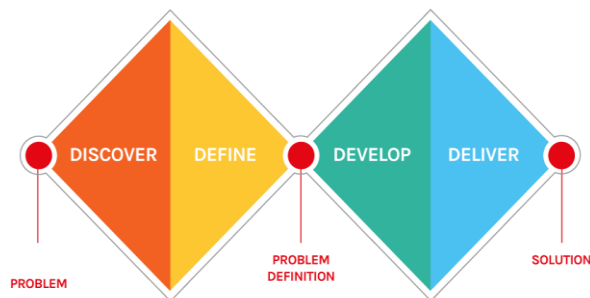


Figure 1: Design thinking double diamond

3. **Ideate.** This stage envisages a freely discuss and brainstorm on a wide range of creative ideas that address the unmet user needs identified in the definition phase. In this phase it is important to give participants total freedom; no idea is too far-fetched, and quantity supersedes quality. Bring and animate participants together to sketch out many different ideas. Then, have them share ideas with one another, mixing and remixing, building on others' ideas.
4. **Prototype.** This stage envisages to co-create representations for a subset of participants' ideas. This phase aims to understand what components of the proposed ideas work, and which do not. In this phase, it will be possible to begin to weigh the impact versus feasibility of proposal ideas through feedback on prototypes (understanding prototype as a solution for a problem around a topic). Change is based on rapid iterations and circular feedback where every prototype is adapted and improved through tests with people and users.
5. **Test.** In this stage some questions will be used so participants can ask themselves 'Does this solution meet users' needs?' and 'Has it improved how we feel, think, or perform our tasks?'
6. **Implement (Validate);** the final stage beyond each LAB will be the validation and implementation of the prototype to verify that it achieves the project goals.

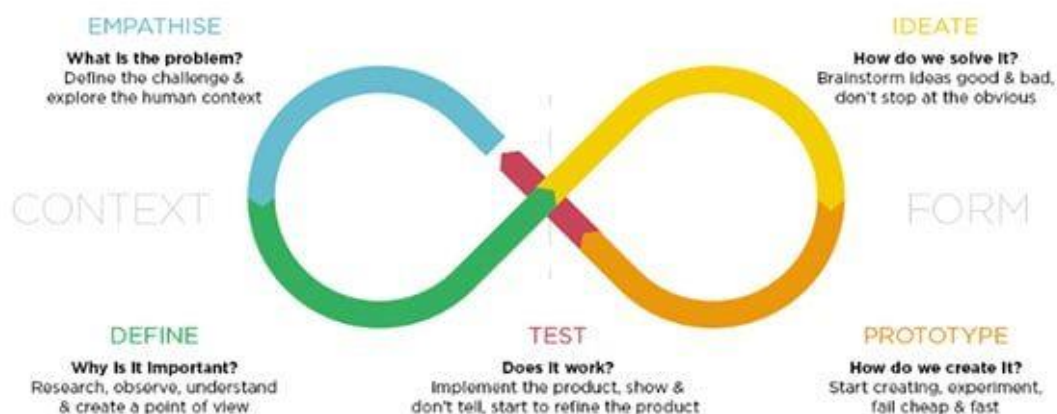


Figure 2: Design Thinking Iterative Helix

The steps of the design thinking method described above are distributed in the initial divergent phase and convergent phase of the workshops.

An overview of the whole GENDER STI process and its integration with the project's design thinking steps is described in the diagram below.

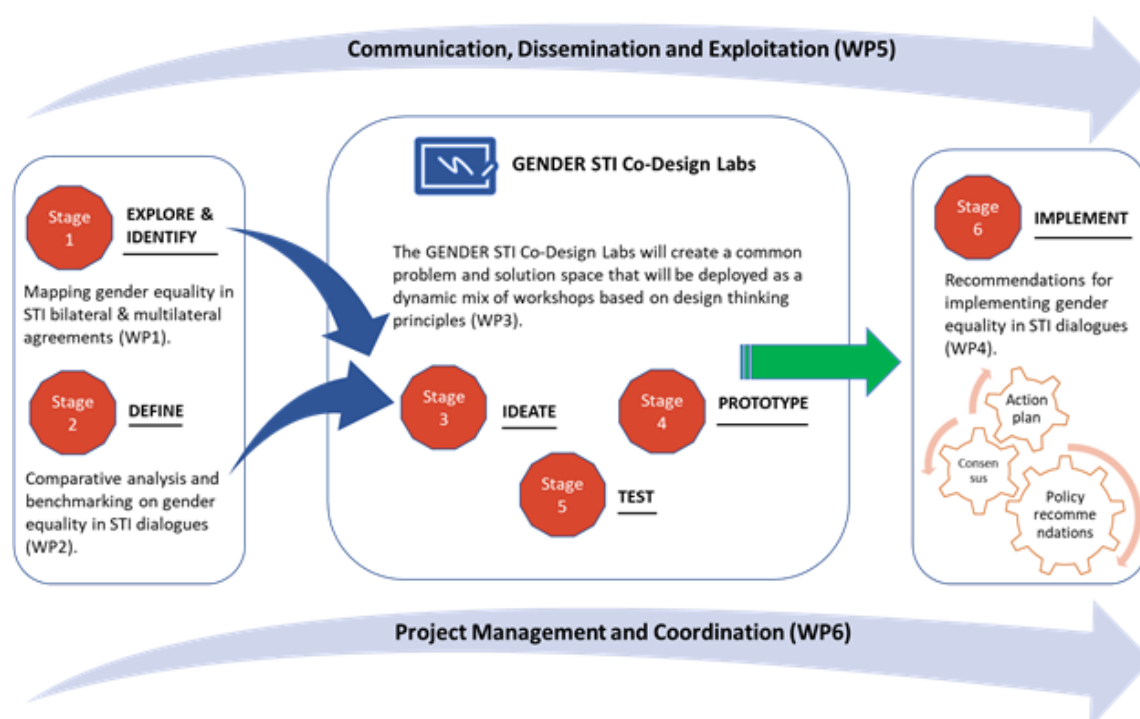


Figure 3: Gender STI design thinking process

While WP1 concentrates on the 1st stage **of exploring and identifying** by mapping gender equality in STI bilateral and multilateral agreements, the 2nd stage helps to **define the context** through comparative analysis and benchmarking on gender equality in STI dialogues.

The work emerging from the 1st and 2nd stages helps to determine the **challenges and identify the core stakeholders** that can be involved in the LABs. The three objectives of the Gender Equality Strategy in EU R&I indicated above will be the basis for the challenges of the Gender STI Co-design Labs forming WP3. Here, through the application of the **Innovation Camp method** adopted by the EC JRC we will focus on three more stages of the design thinking process: the 3rd stage to **ideate**, the 4th stage to **prototype** and the 5th to **test** the emerging roadmap of viable actions and recommendations.

The Gender STI Co-Design Labs create a common problem and solution space that will be deployed as a dynamic mix of workshops based on the Innovation Camp (IC) methodology and synchronous and asynchronous tasks between the participating co-designers, representing institutions, business, R&I, civil society (the quadruple helix stakeholders).

## 1.2 The core process of the Gender STI Co-design Labs: The Innovation Camp

The objectives of WP3 that guide the Gender STI Co-design Labs as described in the DoA are the following:

- Develop a **participatory research strategy** based on **design thinking research methods** through an iterative and incremental process including inspiration, ideation, prototyping and testing.
- Provide **insights, tools and methods for effective knowledge exchange** in the design thinking process between the GENDER STI consortium and stakeholders.



- Organize **three Co-Design Lab workshops** (2 in the EU and 1 in a selected third country) that will create the environment to develop joint solutions for common challenges regarding gender inequalities in STI.
- Build the **European Observatory on Gender in STI** including networking spaces and access to all available knowledge on gender equality in STI dialogues with third countries.

These objectives will be achieved by applying participatory processes, facilitation techniques, experience in the design of communities of practice and the Innovation Camp Methodology in the GENDER STI Co-design LABS.

### **1.2.1 The Innovation Camp for GENDER STI LABS**

The Innovation Camp is the backbone of the entire participatory process. It guides the definition of objectives, the choice of challenges and intervention scenarios up to the monitoring of prototypes of actions and ideas in the short, medium and long term.

#### *What is the Innovation Camp?*

The Innovation Camp is an instrument for addressing societal challenges powerfully and effectively. It combines a proactive way of thinking & working with a concrete process to develop breakthrough ideas and insights, aiming to produce real-world impact.

Participants from diverse countries and disciplines work together to discover and leverage in-and-out-of-the-box opportunities for creating breakthroughs in the process of collaborative solution-seeking. This increases our possibilities, opens new thinking, goes beyond the ordinary, and expands our insights into how to tackle societal innovation issues. The Innovation Camp methodology has been adopted and is promoted by the Committee of the Regions and EC Joint Research Centre to generate scalable societal innovations through an entrepreneurial discovery process, a series of facilitated meetings, and sets of design thinking methods.

#### *How does it work?*

During an Innovation Camp, multidisciplinary groups develop new ideas and perspectives on real-world challenges brought to the camp by cities, regions, business organisations, universities, NGO's and other stakeholders. The work process is designed to support self-organising groups working in creative and open environments. After the Camp, prototypes of promising ideas, actions, policies and recommendations are tested and improved at locations where the issues occur. This supports an open, co-creative innovation process in the real world. At the Camps, participants from diverse backgrounds, countries and ages work together in largely self-organising groups. The LAB based on the innovation camp method has a thorough preparation, and a follow-up phase, and has a working process based on five stages that will also be described in more detail in the implementation section below:

- Exploring the Challenges
- Exploring the Opportunities (deepen the understanding)
- Generating & enriching ideas
- Prototyping promising ideas
- Thinking forward (Reflect, Renew, Present)

The lightly facilitated work process is designed to continuously frame and reframe the issues, problems, and assumptions relevant to a challenge. This leads to creating a range of new perspectives – new lenses through which the issues can be better understood and societal-entrepreneurial ways of dealing with them.



Prototyping takes place both during the Camp, and afterwards. The **prototyping** period *after* the Camp is an integral part of the process.

The term **prototyping** in the LABs is based on the original concept of what a prototype is: the word prototype derives from the Greek πρωτότυπον prototypon, "primitive form", neutral of πρωτότυπος *prototypos*, "original, primitive", from πρώτος protos, "first" and τύπος typos, "impression". Therefore, a prototype is not necessarily a tangible object such as an engine or a software, but, as in the GENDER STI LABs could relate to a policy, strategy, service or recommendation that requires a "proof of concept". Something that is like a draft, not yet perfect and therefore open to more contributions and continuous improvements emerging from real-life tests and retrospectives.

Follow-through takes place at diverse and relevant locations, with direct stakeholder engagement. Living labs and (urban) test-beds may be part of this co-creation process. This leads to more robust prototypes, to practical experiments, pilots and – with sufficient commitment – plans for fast-track realization.

#### *Why does it work?*

The Innovation Camp is a human-centred process, which begins when key people commit to take the results further. Supported self-organization drives the process and allows diverse partners to co-create new possibilities. Cross-disciplinary creativity, collective intelligence and prototyping are cornerstones of the Innovation Camp process. The focus on follow-through and stakeholder involvement makes it different from many other camp formulas, participative processes and hackathons.

There are dozens of innovative instruments and diverse methodologies for social renewal, and hundreds of workshops take place every year, often producing promising results. But many fail to move beyond the output of the events themselves to create lasting effect in society. The Innovation Camp has shown that this can be done, even when dealing with complicated and complex issues.

Focus on the need for concrete outcomes and societal impact after the Camp builds forward momentum. Thorough attention to the whole process – the preparation, the face -to- face and virtual interaction, the prototyping period and the follow through at diverse locations – contributes to success.

The Innovation Camp has been adopted by the European Committee of the Regions and the European Joint Research Centre (JRC). It has been co-developed by the New Club of Paris, Finland's Aalto University, and through a team of core facilitators from I2SI ([www.futour.it](http://www.futour.it)). Since 2010 it has been run over 40 times, in different forms, in Finland, Sweden, South Africa, Spain, Serbia, The Netherlands, Slovakia, Bulgaria, Belgium, Italy, Greece and Japan. The Innovation Camp is still evolving in different forms, used in different contexts and for different challenges, strategic and local. The Innovation Camp is nowadays used as a word, describing an innovative, inclusive, open process dealing with societal challenges, often on a global scale (see annex 1).

### **1.3 Interdisciplinary approach of the Gender STI Co-design Labs**

GENDER STI adopts an interdisciplinary approach to investigate how gender equality is taken into consideration at different levels of bilateral and multilateral dialogues in STI and to co-design solutions for common challenges regarding gender inequalities in STI. In the case of the Co-design Labs, working with people from many disciplines, cultures and value systems can be very challenging as it can generate misunderstandings, reduce the curiosity and attention, exclude and ultimately cause the withdrawal of people from the Labs.

The Innovation Camp Method adopted in the Gender STI Co-design Labs is a thriving environment for interdisciplinary and multidisciplinary teams and open dialogue among partners, as its key principle is to apply the power of facilitation to involve the greatest diversity and perspective of experiences, wisdom and knowledge through the quadruple helix stakeholders. The support of the facilitators guarantees that there are shared methods, frameworks and guiding principles that give structure to the thinking and brainstorming process. Thus, the Gender STI Labs are designed to ensure every participant is heard and people learn from each other, change their mind, influence and are influenced in their way of thinking and sensing the challenges that are being discussed, raising their ownership of the process and commitment in achieving greater outcomes and impact. A safe environment is a powerful motivational aspect to create an atmosphere where multicultural and interdisciplinary teams such as the ones of the Gender STI Co-design Labs can openly express their views or even conflicts or differences that are transformed into opportunities to make change happen.

The risk of not having any format or facilitation in a meeting typically turns discussions into debates. In debate-style conversations, whoever speaks up will be heard. This style works well for people who have an easy time with this kind of format but does not work for all. Often, debate-style requires over-talking people, and some people are more likely to do that than others such as extroverted people. However, to avoid the pitfall of excluding ideas and voices that are essential in an interdisciplinary project, the adoption of a facilitated co-design process is essential.

The Gender STI Co-design Labs provide all participants with a checklist on behaviours that contribute or hinder group work. This kind of lists have been developed after years of experience by the GENDER STI team. Furthermore, to foster the highest inclusivity of perspectives several facilitation approaches are applied, including a thorough use of sociocratic word rounds where everyone speaks, one by one. In these rounds the facilitator picks one person in the circle to start — typically with a specific question or prompt. Then everyone in the circle speaks until everyone has spoken. Another round can begin, or the facilitator gives a new prompt. Through these rounds people initially understand the topic or challenge being discussed, they then explore it further by collecting reactions, and ideas to formulate possible objections until these are clarified and people can find an assent on the common grounds for a decision on how to move next. Such method is an excellent way to support everyone to be heard by giving equal voice, opportunity and ultimately more effectiveness to the working teams in the Gender STI Codesign Labs.

### **1.4 Gendered guiding principles in the Gender STI Co-design Labs**

The gender dimension is an integral part of the GENDER STI research and innovation action and is explicitly taken into account in the project's content. The GENDER STI consortium shares the vision of the [Ljubljana](#) and [Marseille](#) Declarations, as well as of the [Gendered Innovations 2 Expert Group](#) to address gender bias and stimulate gender-responsible science and technology, and is fully committed to improve the relevance of gender in the research and innovation actions by adopting a critical perspective to the gender dimension in all phases of the project.

The initial work of the Co-design Labs based on the project investigation and collection of existing disaggregated data on women in science and innovation in the world and in mapping national gender equality policies in the different countries involved in GENDER

STI. Particular attention will be paid to the perception and acceptance of gender issues in various national contexts, potentially related with intersectional issues. Another important step is the mapping of existing initiatives and actions, which may feed the design of the prototypes like, among others, GENDERACTION, GENDER-NET Plus, the GEAR tool or the STIP Compass.

The design thinking methodology alongside a gender-sensitive approach applied to the project will ensure that gender differences that arise in the course of the project will be addressed along the project work plan. These potential differences include social, cultural and behavioural attitudes, knowledge and preferences of prototype solutions that are appropriate for women, men and gender-diverse individuals, and may influence the development of the project. Furthermore, there is still a need for action in the area of intersectionality when considering the development of prototypes in the Co-design Labs.

Thus, the gendered process is the cornerstone and main guiding principle of all the activities performed in the Gender STI Codesign Labs, in which the participation of men also will be encouraged.

Nonetheless, there is still a great gap in the awareness of people and stakeholder with reference to gendered processes. It is not yet a mainstream topic and this can generate confusion, lack of interest, scepticism and ultimately the difficulty to create outcomes that have societal impacts. As one can see in this handbook, throughout the steps of the Lab the gendered process is the main criteria that shapes every dimension of the activities including the choice of contents and challenges, the adoption of inclusive practices, the transparent processes and open collaborative platforms, participatory methods, circular and open facilitation styles, balanced representativeness of participants.

The magnet and pillar of the Labs are the challenges that serve to identify and engage different gender participants and develop coherent prototypes. The careful choice, formulation and reformulation of challenges is performed so as to be in line with state of the art gendered issues in STI at the international level and to develop prototypes that can be strategic, addressing broad policy aspects and also tactical, suggesting practical and concrete solutions to gendered issues.

## 1.5 COVID 19 as challenge and opportunity to increase the impact of the LABs

The GENDER STI proposal envisaged the organisation of a training and three Co-Design LABs in face-to-face meetings where people would physically meet and work together on the core challenges identified in the Gender Equality Strategy in the EU within the international scope of the project and its focus on bilateral agreements.

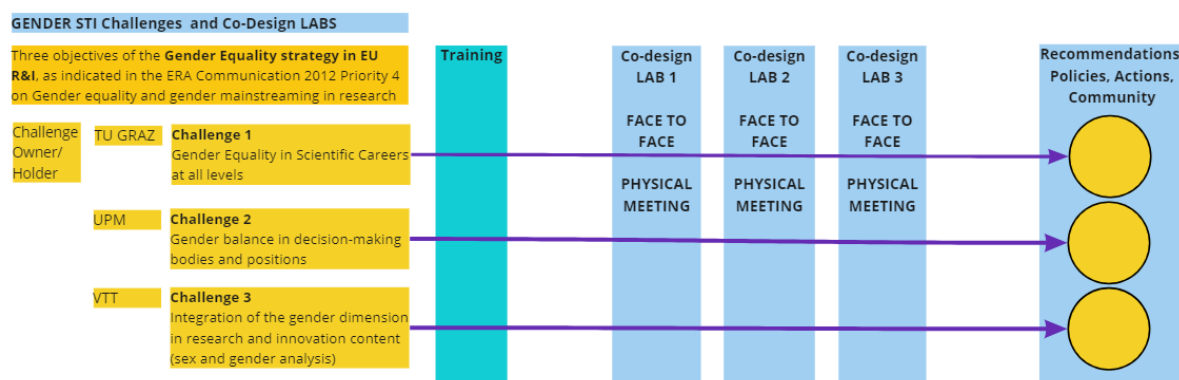
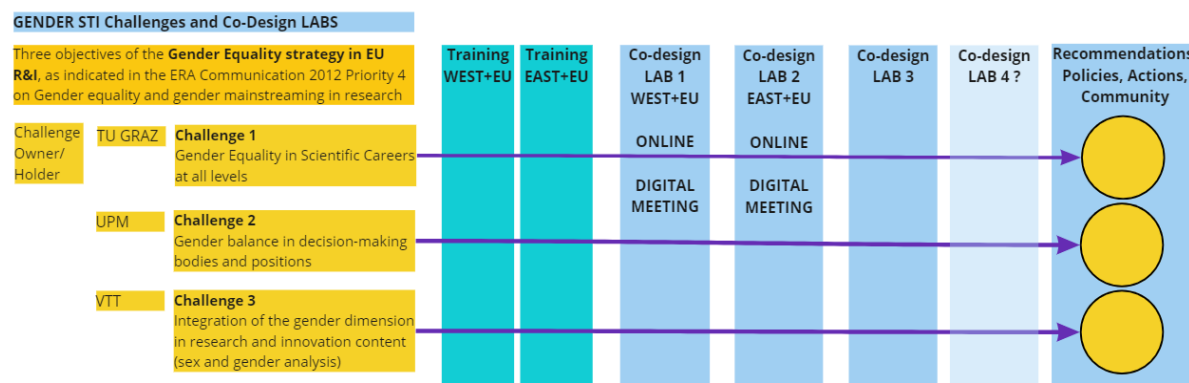


Figure 4: The face-to-face Co-Design Labs as envisaged in the proposal

While the three challenges and scope remain the same, we have redesigned the First LAB process and timing as activities will be performed online instead of in physical co-presence, due to the Covid-19 restrictions. Consequently, two online LABs will be performed in two time zones and include in both cases partners from the EU with coordination and support functions: one for the partners of the western hemisphere (EU+West) and one for the ones from the eastern hemisphere (EU+East). The EU+West zone includes partners from Europe, Canada, the United States, Mexico, Brazil, Chile, Argentina, while the EU+East one has partners from Europe, South Africa, India, South Korea and China.



**Figure 5: The online Co-Design Labs**

As for the kick-off meetings, this duplication of tasks implies performing in parallel the training and the first two LABs of the East and West. This is both a challenge and an excellent opportunity, as it can make it easier for people to be involved and apply innovative participatory blended processes to support the long-term outcome and impact. So, the first two labs will be performed in parallel and online.

Depending on travel restrictions due to the Covid-19 pandemic, other LABs may either be performed face to face or online through a second round of East and West LABs.

As we will see below, the effectiveness of digital synchronous and asynchronous interaction and the ease with which external stakeholders can participate and contribute to the GENDER STI Community of Practice may transform the Covid-19 challenge into a powerful collaborative opportunity.

## 2 THE PHASES OF THE GENDER STI CO-DESIGN LABS

Every LAB, as in the Innovation Camps includes the preparation, implementation and the follow-up phase. The diagram below shows how the phases relate to each other and how the LABs generate prototypes of actions and policy recommendations that are assessed through Go-No go steps.

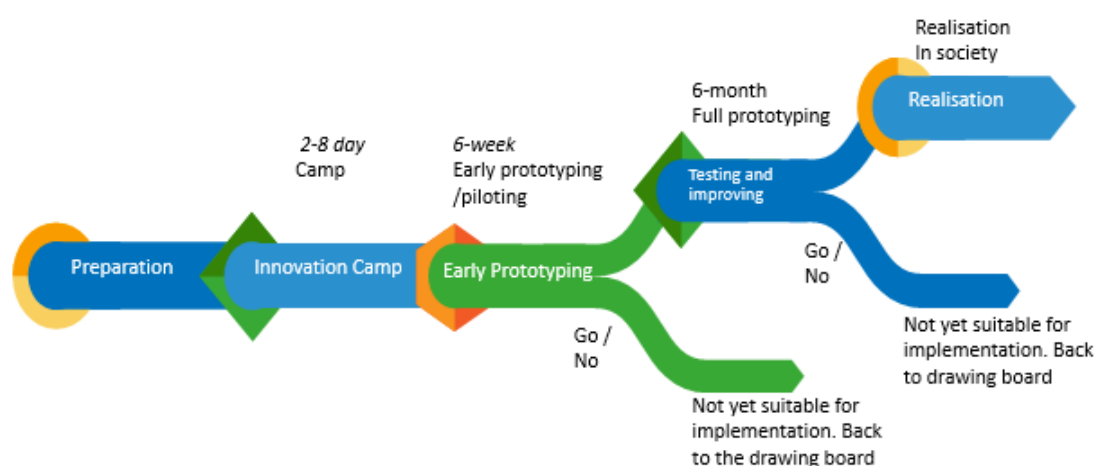


Figure 6: The three phases of the LAB's INNOVATION CAMP

Proper prior planning is required for successful participatory processes, and the follow-up and conditions for impact need to be envisaged and, ideally, planned right from the inception phase. Where will ideas that take-off during a LAB land once it is over? How can we create the commitment and conditions for the outcomes and impact to take place in the medium and long term?

### 2.1 Preparation phase

The preparation phase of each LAB is the equivalent of creating the foundations for a building and envisaging its functions, size, architecture, maintenance. A good preparation phase will anticipate and address potential problems, define the LAB's purpose and challenges more clearly, identify the most suitable participants, and prepare the whole team for the adventurous co-creation journey.

The preparation includes a clear definition of each GENDER STI challenge and the identification of the quadruple helix stakeholders that should be involved. It also includes the description of the *training of trainers* and of the logistic preparation and tools for online and/or face-to-face workshops.

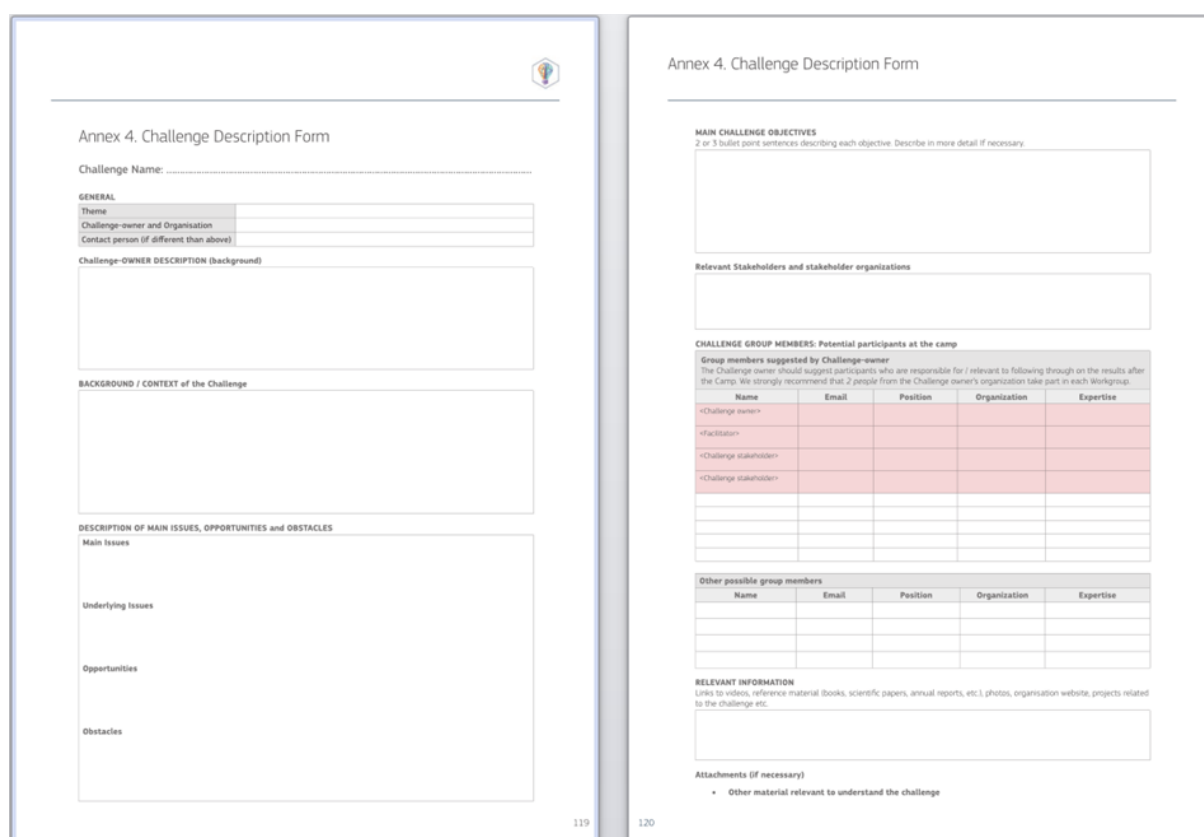
#### 2.1.1 Framing the Challenge

The main magnet of the whole IC-based LAB process is the description and framing of the challenges to be addressed. What is the challenge? Why should it be addressed? What could the implications, opportunities and impacts be? Who can help us to explore, reframe and address the challenge in the most suitable ways? Who can support the implementation and possible systemic changes needed to address the challenge?

These questions, among others, are the basis for the inception of the LABs and recur throughout the framing and reframing process.

Framing the challenges to be addressed with first ideas, background information and a map of the quadruple helix stakeholders that should be included in the process is performed by the Challenge Owner/Holder. We will describe more in detail the challenge owner below but, essentially, it is the organisation or person that has a clear interest in the potential societal outcomes and impact of the challenge that is addressed. For these reasons the Challenge Owner/Holder normally supports and funds the process through the implementation of the LAB. A strong challenge and Challenge Owner/Holder is an important precondition for the success and implementation of the emerging outcomes. The framing of the challenge by the challenge owner/holder also includes selecting a scribe/rapporteur that can help to summarise, analyse, and synthesise the key emerging points and make the report emerging from the work of the challenge group.

The primary tool for describing the challenge, stakeholders and background information is the Challenge Description Form (see Annex 2).



Annex 4. Challenge Description Form

Challenge Name: .....

**GENERAL**

Theme

Challenge-owner and Organisation

Contact person (if different than above)

Challenge-OWNER DESCRIPTION (background)

BACKGROUND / CONTEXT of the Challenge

DESCRIPTION OF MAIN ISSUES, OPPORTUNITIES and OBSTACLES

Main Issues

Underlying Issues

Opportunities

Obstacles

119

Annex 4. Challenge Description Form

**MAIN CHALLENGE OBJECTIVES**  
2 or 3 bullet point sentences describing each objective. Describe in more detail if necessary.

Relevant Stakeholders and stakeholder organizations

**CHALLENGE GROUP MEMBERS: Potential participants at the camp**

**Group members suggested by Challenge-owner**  
The Challenge owner should suggest participants who are responsible for / relevant to following through on the results after the Camp. We strongly recommend that 2 people from the Challenge owner's organization take part in each workshop.

Name	Email	Position	Organization	Expertise
<Challenge owner>				
<Facilitator>				
<Challenge stakeholder>				
<Challenge stakeholder>				

**Other possible group members**

Name	Email	Position	Organization	Expertise

**RELEVANT INFORMATION**  
Links to videos, reference material (books, scientific papers, annual reports, etc.), photos, organisation website, projects related to the challenge etc.

Attachments (if necessary)

- Other material relevant to understand the challenge

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**Figure 7: The Challenge Description Form**

The Challenge Description Form is a two-to-three-page document that includes the following sections:

- CHALLENGE NAME: .....
- GENERAL INFORMATION
  - Theme:
  - Challenge-owner and Organisation:
  - Contact person (if different than above):
- Challenge-OWNER DESCRIPTION (background)
- BACKGROUND / CONTEXT of the Challenge
- DESCRIPTION OF MAIN ISSUES, OPPORTUNITIES and OBSTACLES
  - Main Issues
  - Underlying Issues
  - Opportunities

- Obstacles
- MAIN CHALLENGE OBJECTIVES
  - Two or three bullet point sentences describing each objective. Describe in more detail if necessary.
- RELEVANT STAKEHOLDERS AND STAKEHOLDER ORGANIZATIONS (MACRO DESCRIPTION)
- CHALLENGE GROUP MEMBERS: Potential participants at the camp (Connect to the stakeholder map to include them).
  - Group members suggested by Challenge-owner. The Challenge owner should suggest participants responsible for / relevant to following through on the results after the Camp. This will include the following information:
    - Name
    - Email
    - Position
    - Organization
    - Expertise
  - Other possible group members: name, email, position, organisation, expertise
- RELEVANT INFORMATION
  - Links to videos, reference material (books, scientific papers, annual reports, etc.), photos, organisation website, projects related to the challenge etc.
- ATTACHMENTS (if necessary)
- Other material relevant to understand the challenge.

The challenge description form is generated in the preparation phase. Once it is ready it is sent to the participants to help them to understand the background of the challenge and come prepared for the LABs. The challenge can be reframed as the context and challenge changes.

The framing of the challenges and function of challenge owner/holder in GENDER STI is performed by the European partners. This will also guarantee a good coordination between the online LABs that will take place in the East time zone and the ones in the West time zone.

When creating the challenge forms, it is important to ensure that they are aligned with the overarching policy challenges defined by the EC in the Gender Equality Strategy 2020-2025, to facilitate an easier implementation of emerging outcomes and impacts in the follow-up phase.

### **2.1.2 Stakeholder Mapping**

The framing of the challenges also includes creating a map of stakeholders that need to be involved in the GENDER STI Labs. This map can be initially filled by each challenge owner/holder and is then enriched by all other partners and stakeholders that join the GENDER STI Community of Practice.

The map is created on a shared table, including the following information.

- Target Challenge
- Name, surname, organisation and contact details
- Quadruple helix typology: e.g., institution, business, research, civil society
- Stakeholder Impact (high to low).

Participants are the lifeblood of the LABs as they both contribute with ideas, energy and time to make change happen, define viable ideas and recommendations and shape the future of gender equality in STI.



As the diversity of perspectives, background, gender, values, age, and nationality enriches the generation of ideas and solutions, the identification of a good mix of stakeholders enriches and gives much added value to the LABs.

The LABs involve quadruple helix stakeholders that are strongly connected to the purpose of the project and the challenges. In the Innovation Camp method and in all quadruple helix activities, these include four main categories of stakeholders that are complementary to each other:

- **Public administration:** if relevant at different government levels, agencies, e.g. for regional development, business advice, public procurement offices, incubators, etc.
- **Research and Education:** public and private research bodies, universities, education and training, science and technology parks, technology transfer offices, etc.
- **Business:** manufacturing and services, primary sectors, financial sector, creative industries, social sector, large firms, SMEs, young entrepreneurs, students with business ideas, cluster and business organisations,
- **Civil society / Users:** NGOs and citizens' initiatives related to societal challenges for which innovative solutions would be helpful, consumers associations, talents, etc.

The GENDER STI target audience (hereafter the GENDER STI stakeholders), as described in Deliverable 5.1, includes the following key actors that will be distributed across the quadruple helix categories:

- STI policy makers in the EU, MS, AC and third countries.
- Scientific and research community.
- ERA-related groups on gender equality in STI and international cooperation:
- NCP networks in the EU and third country partners. Industry leaders and innovators.
- NGOs, agencies, associations, visionary individuals and organizations that advocate for higher R&I quality through gender equality.

The labs are based on the entrepreneurial discovery process as they kick-start consultation in the quadruple helix and detect potential boundary spanners between different stakeholders/interest groups and new innovative social entrepreneurs. This approach injects new needs and characteristics in the LABs by taking in consideration also the principles of Inclusive Design such as the virtuous Tornado, by including "vital few" stakeholders that are on the edges of policy design and implementation and are used to deal with diversity and complexity (Treviranus 2020).

There are normally three to four Challenge teams in a LAB, each with a balance of representatives from the quadruple helix. Each Challenge team involves about 10-12 participants as well as the Challenge Owner/Holder, reporter and facilitator. This is because a LAB team is a generative, constitutional one that really needs to work, explore and learn together. This is also why participants' quality and diversity are more important than the quantity of participants in every LAB. It is a little like cooking: the ingredients' quality is as important as the recipe and the experience of the cook in influencing the outcome.

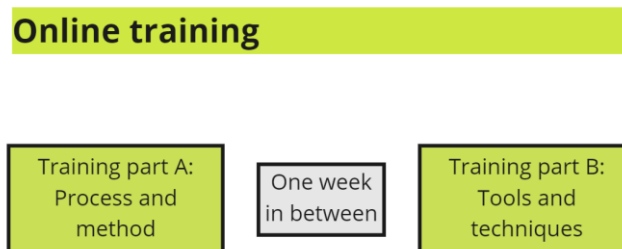
### ***2.1.3 Training of trainers and setting up of the collaborative space for the LABs***

The training phase will take place in May-June 2021. It includes the core team involved in running the LAB and helps everyone to get a full understanding of the process, participatory methods, facilitation, digital tools, roles, responsibilities and tasks during the LAB so that they can all train others in the process and technology. The training was planned to last one day divided into two half-day steps during the kick-off meeting in physical presence, but has had to be postponed and transformed into a digital format lasting four half days to

involve both the EU+West and the EU+East partners and stakeholders. During the training, the Observatory and Community of Practice will also be introduced as part of the co-design process through learning-by-doing simulation activities.

The first part of the training (A) for each time zone will focus on the process, method and collaborative tools:

- Understanding the process and method, challenges etc.
- Participants: selection, involvement and engagement into the process and Community of Practice.
- Collaborative tools: Basecamp as the communication hub and virtual office for the team and challenges.



**Figure 8: Steps in the training of trainers for the LAB**

The second part of the training (part B) focuses on the tools, techniques and simulation of a session:

- Digital tools: VideoFacilitator for the digital venues, MIRO as canvas for co-creation in the LABS.
- Simulation of facilitated sessions on the establishment of the Community of Practice of GENDER STI.
- Follow-up.

The training activities will also activate the collaborative space on Basecamp (see the section on digital tools below) that will become the place where all the organisation and communication will take place, and will then become the online base for the asynchronous working groups during the LABs and in the follow-up phases.

The LABs are a continuous learning process. The initial part of the LABs will also be dedicated to brief training sessions where the participants can get first-hand experience and improve their skills with the digital tools.

### **2.1.4 Involvement of participants in the LABs and Community of Practice**

Once the participants are selected, they are then invited and informed about the purpose, challenges, the process, the agenda and commitments, the benefits and advantages of attending.

As each camp involves about 30 to 40 participants, suggestions, recommendations and word of mouth will also be used to explain the value of participation. Participants should be informed well in advance about the LABs; at least two to three months beforehand to get as close as possible to the ideal mix of minds and hearts, and optimal preparation.

In the invitation to the LABs, it is essential to highlight that the Camp is an adventure, a leap beyond the status quo, and a collaborative journey that takes the time and effort needed to achieve worthwhile results. Participants will be invited to join a collective process

to discover ways, methods and tools to overcome the inertia, fear and cynicism often experienced in ordinary working life.

Niccolò Machiavelli advised in his 16<sup>th</sup>-century political treatise *The Prince*, "*There is nothing more difficult to take in hand, more perilous to conduct, or more uncertain in its success than to take the lead in the introduction of a new order of things*". While we know how hard it may be to establish a balance and equality of opportunities for women involved in science, technology and innovation, in GENDER STI we do have the tools, mindset, methods and people to induce this in a positive way, and overcome the resistance to change.

The Mahatma Gandhi said "*Be the change you want to see in the world*", and Margaret Mead tells us: "*Never doubt that a small group of thoughtful, committed individuals can change the world; in fact it's the only thing that ever has*". These quotes will guide the participants that will join the adventure and community of practice and us..

The method, team and participants can mobilise enough critical mass together to transform the emerging promising ideas into viable prototypes of policies, actions, recommendations. There is an empowering awareness of this that emerges among all participants as the process flows.

The good track record of previous LABs based on the Innovation Camp method demonstrate that the Camp is not a meeting or event, but an exceptional initiative that can connect visions and transform them into actions.

The invitation letter will include:

- PURPOSE. The purpose of the LAB and benefits of belonging to a global community of change agents that will keep learning, improving and mobilising more people.
- OUTCOME. A description of the challenges, possible outcomes, and the stakeholders involved.
- PROCESS. How the LABs are organised, and goes through the steps of the LAB process including preparations, what is expected of participants, scheduling issues, commitment to blended activities, the digital tools and the continuous learning process.

One way to see the whole process is to be part of a **Community of Practice** that learns how to make change happen. It is therefore, an enriching opportunity with a strong sense of purpose. The GENDER STI Community of Practice is a transversal challenge crossing all three other challenges.



Figure 9: The key elements of the GENDER STI Community of Practice

Communities of Practice are groups of people who share a concern or a passion for something they do and learn how to do it better as they regularly interact (Wenger<sup>1</sup> et al 1998, 2000, 2002). In all cases, the key elements are:

- **The domain:** members are brought together by a learning need they share (regardless of whether this shared learning need is explicit or not, or whether learning is the motivation for their coming together or a by-product of it). The domain in the case of GENDER STI is the analysis of the gender dimension in bilateral and multilateral agreements in science, technology and innovation. The challenges of GENDER STI cover the three main ERA Strategy objectives transversally.
- **The community:** their collective learning becomes a bond among them over time (experienced in various ways and thus not a source of homogeneity). The community includes all the stakeholders that have the challenge at their heart and want to make a change in how gender in STI is approached: these include all the GENDER STI stakeholder's target audience as indicated above: e.g., policy makers in Europe and third countries, researchers, the business world, academia, civil society (including the GENDER STI quadruple helix participants in the LABs).
- **The practice:** their interactions produce resources that affect their practice (regardless of whether they engage in actual practice together or separately). The practice occurs both at work and in society, and will also emerge through the strong participatory design principles of the LABs with the support of each partner of the GENDER STI consortium.

As with any change process the commitment required to attend the LAB may be a barrier to some and a way to self-select the ones that are really passionate and interested in making this change happen, as it will be through these partisans that GENDER STI will have a great impact.

In the first two labs that will be held online and all partners will be involved, both as an alignment and strengthening of the GENDER STI team and principles, and also involve some other passionate *change-makers*. More external stakeholders will be involved in the following one(s), broadening the engagement and number of *change-agents* in the Community of Practice.

As a result of the Co-Design Labs and the follow-up phase, the Gender STI Community of Practice will be created to foster gender STI dialogues and gender equality across European and third countries involved in the project. This community of practice will help to share information, protocols, agreements, processes and best practices to move forward together on gender equality in STI dialogues. GENDER STI intends to scale up the experience of the networks of gender in STI at the European and international level, thereby generating further long-term outcomes and impact.

### 2.1.5 Logistics and organisation of the LABs

Organising the camps in physical presence requires the selection of venues that have specific characteristics. Similarly, running online workshops requires using digital platforms, facilitation tools and skills to make the experience engaging, efficient and effective.

#### *Physical, face to face LAB.*

While with Covid 19 the digital workshops have become the norm we briefly outline some important logistic features that should be considered when organising a face-to-face

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<sup>1</sup> Etienne Wenger is one of the major experts in analysing the core elements that help to generate and maintain a community of practice. For more information see the books in the references and <https://wenger-trayner.com/introduction-to-communities-of-practice/>

innovation camp. A camp is not a conference. People actually work together, they make drawings, diagrams, cut and paste ideas and present them. To do so the spaces need to be comfortable, and ideally not in a city centre, but close to nature with some garden or open-air space for specific activities such as team-building tasks or breakout groups. All the spaces and furniture should be as flexible as possible with chairs and tables that can be arranged and rearranged, walls or large movable panels where paper sheets can be placed with masking tape and moved accordingly. There should be a plenary room that can comfortably accommodate all the participants. This room is used for the opening and closing every day and if necessary, can host one of the challenges working groups.

Each working group should also have walls and/or panels where to present their visualisation of ideas with posters and sticky notes, as well as furniture that is easy to move and rearrange according to tasks. A right room size for a group of 15 participants is about 60-80 square metres. Having more space also allows for side activities and brings oxygen and energy to participants. Crammed small rooms have the opposite effect. The lead facilitator and facilitation team will give specific instructions and overlook the space's selection and preparation with the local organiser and convenor.

#### *Online space for digital/remote LAB.*

In digital online events things are very different, as now everyone can see each other's face on the screens. While in physical co-presence events we can use all our 5 senses to interact with the other participants, in online digital ones only two main senses can be applied and enriched: sight and hearing. This means that we need to compensate for the other three senses by strengthening these two. Digital facilitation can offer great advantages as it reinforces the ability of participants to perform activities together, synchronously at the same time and in the same digital environment as well as asynchronously, at their own convenience.

Taking this into account, as indicated in the implementation, we have envisaged a new combined approach for the LABs that will explore more effective ways to achieve the results.

The digital facilitation tools support the creation of spaces, plenary rooms, breakout rooms, icebreaker activities, times for networking, repositories, co-creation canvases and collaborative spaces just as they do at events with physical presence. Digital workshops can be more demanding in terms of time and effort for organisers: but the required dry runs, simulations, matching of the right techniques and tools, and the support for asynchronous work, generate better and more tangible results. There can also be great savings in terms of external costs such as travel, subsistence and accommodation, the cost of the venue and audio-visual equipment as well as catering services. Participation via digital means saves a lot of time for participants, as one does not have to travel or adapt to different time zones. You can participate from your computer in the office or from home just by opening a link. Moreover, when the digital gap is overcome this means increasing the inclusion of participants who could otherwise not afford the time or cost of travel and accommodation.

At the same time, organising online events requires almost twice as much time in preparation for the facilitation and design teams with rehearsals, dry runs, simulated workshops, and training the participants to use the new tools well enough to ensure that both the methodology and all technical/digital issues can be addressed. In terms of facilitation, there is also a need for at least one person dedicated to the technical aspects who remains full-time in the main plenary space online, and can help participants who may have technical, audio-video problems or other issues. Despite all these hurdles the vast majority of digitally facilitated workshops performed since the beginning of Covid 19 have demonstrated that - with professional facilitation and strong support from the partners - the effectiveness of online LABs increases the engagement and motivation of participants, and the overall impact and sustainability of the process.



## 2.2 The Implementation of the LAB

In this section, we describe the main steps in the participatory methodology of a LAB and how it is performed in both physical, face to face settings, and in online distributed digital sessions.

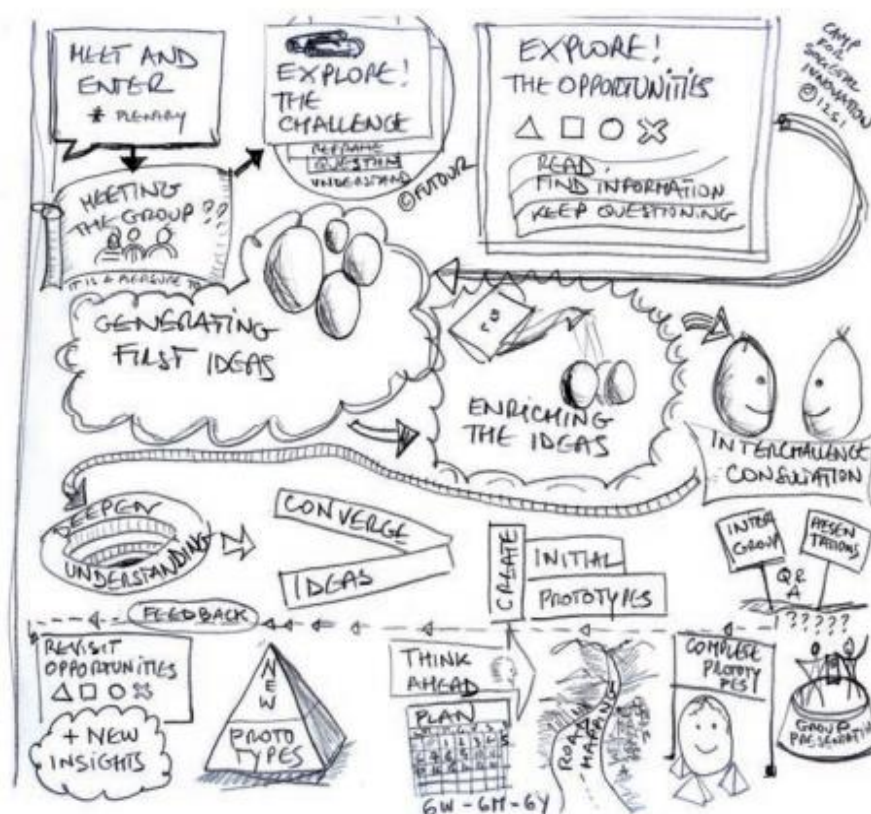


Figure 10: Core steps of the LAB's Innovation Camp

After the preparation phase the LAB based on the IC method has a working process based on five stages:

- Exploring the Challenges
- Exploring the Opportunities (deepen the understanding)
- Generating & enriching ideas
- Prototyping promising ideas
- Thinking forward (Reflect, Renew, Present)

After the opening plenary session, where the purpose and process of the LAB is described, the participants then breakout into challenge groups. Each challenge group follows the above steps by using a societal innovation canvas that accompanies and guides the participants in an iterative, non-linear discovery process leading to the roadmap that guides the implementation of outcomes and impact of pilot actions and recommendations. The main steps remain the same for both the face-to-face and online LABs, but in the online version, as we will see, there can be more synchronous and asynchronous tasks that further enrich the process.

## 2.2.1 Canvas and flow of the LAB

The canvas is divided into nine quadrants, and the process starts from the top one in the left quadrant and is driven towards the one at the bottom of the right corner.











I2SI Societal Innovation Canvas Model			Project Name:		Participants:		
<b>Explore</b> 			<b>Ideate &amp; Design</b> 		<b>Build Prototype</b> 		
<b>Challenge</b>  <i>The Challenge, its owner and supporters</i>	<b>Context</b>	<b>Opportunities</b>	<b>Deepen Understanding</b>  <i>What if? What could work? Who benefits? Why?</i>		<b>Basic concepts?</b> <b>Big Picture?</b> <b>Look and feel?</b>		
<b>Learning (capture insights)</b>							
<b>Desired Outcomes / User Benefits</b> 			<b>Key message</b> 		<b>Constraints</b> 		
<i>Desired outcomes &amp; user benefits after it is successfully realized</i>			<i>Your elevator pitch with the value proposition</i>		<i>Identify limits and conditions that influence realization/delivery</i>		
<b>Stakeholders &amp; Resources</b> 			<b>Risks, Assumptions &amp; the Unknown</b> 		<b>Roadmap of Activities</b> 		
<i>Stakeholders / 3<sup>rd</sup> Parties</i> <i>Who is needed to realize the proposal?</i>			<b>Risks</b>		<b>6 weeks</b>		
<i>Who must buy-in?</i> <i>What do they need?</i> <i>How do they interact?</i>			<i>What might go wrong? Why?</i>		<b>6 months</b>		
<b>Resources</b>			<b>Assumptions</b>		<b>6 years</b>		
			<i>What assumptions is this proposal based on?</i>		<b>Who? Where? Milestones? Effect?</b>		
							

Figure 11: The Canvas in the LAB's Innovation Camp

Let's describe the purpose and outcomes and process for each quadrant in the LAB Canvas as based on the Innovation Camp methodology:

- Explore.** The exploration quadrant is the opening one where participants meet each other, explore the challenge with the challenge owner, start reframing the challenge and exploring other perspectives to it by deepening the knowledge and understanding. Nothing is taken for granted, the challenge itself may be challenged and reframed. They also start thinking of the change they want to see and possible opportunities. This phase normally includes background readings, finding more information about the issue also externally, interviewing experts.
- Ideate and design:** in this step participants deepen their understanding on the topic, continue to increase the group awareness of diverse perspectives and opportunities and ask questions that may trigger new ideas and more information: *What if? What could work? Who benefits? Why?*
- Build and prototype:** having collected information and discovered new opportunities and perspectives on what has been done, what could be done and how not to reinvent the wheel, in this step the participants start making drafts of possible solutions and prototypes of pilot actions, policy recommendations. A prototype is not perfect, it is the equivalent of a minimum viable product/service (MVP/S) or of an initial Proof of Concept (PoC) when designing. Here participants ask questions such as: *What is the basic concept of the prototype? What is the big picture? What is the look and feel?* Initial prototypes are then tested and validated with both the participants of the challenge and with participants from other challenges through "inter-challenge consultations".



- **Desired outcomes / User benefits:** as people start addressing the challenge a vision of the desired outcomes, of the change that needs to happen and possible user benefits starts to emerge. This vision is then adapted and improved as the LAB proceeds. The question that participants reflect on in this section is *what are the desired outcomes and user benefits after it is fully realised?*
- **Key message:** the key message is the societal value proposition that can emerge from the challenge. This key message and possible elevator pitch is continuously fine-tuned during the LAB and represents the first information provided to others when describing what the challenge group is addressing, the mission, vision, impact and change it can achieve.
- **Constraints:** as the first draft of the prototypes of policy recommendations, and pilot actions start to emerge participants begin to identify the limits and conditions that influence their realisation and delivery. This helps to adapt and improve the prototypes by adding specific measures, understanding what has worked and has not worked in the past and look for more solutions.
- **Stakeholders and Resources:** the outcomes and impact of the LAB depends on the scalability of the proposals of pilot actions and recommendations emerging from the prototypes. The identification of stakeholders and third parties addresses the following questions: *Who is needed to realise the proposals? Who must buy-in? What do they need? How do they interact?* The other elements to consider are the resources needed to transform the prototypes in specific actions lines: these may be tangible, in-kind, funding mechanisms, donations, crowdfunding and synergies with existing economic allocations.
- **Risks, Assumptions and the Unknown:** As for the possible constraints this quadrant helps participants to reflect on the possible risks, assumptions and other unknown factors that may influence the design and implementation of the proposals. The risk reflects on questions such as: *What might go wrong? Why?* The assumptions reflect on *what is this proposal based on?* And help to identify assumptions, preconditions and other relevant factors. This quadrant also has some space for the parking lot: a space where other *open and unanswered questions or concerns* can be collected for further discovery activities.
- **Roadmap of Activities:** The final quadrant is a roadmap that collects all the concrete tasks needed for creating results after the LAB. These describe the actions in the short (6 weeks), medium (6 months) and long term (6 years) reflecting on the following questions: *Who? Where? Milestones? Effect: what change are we going to make?*

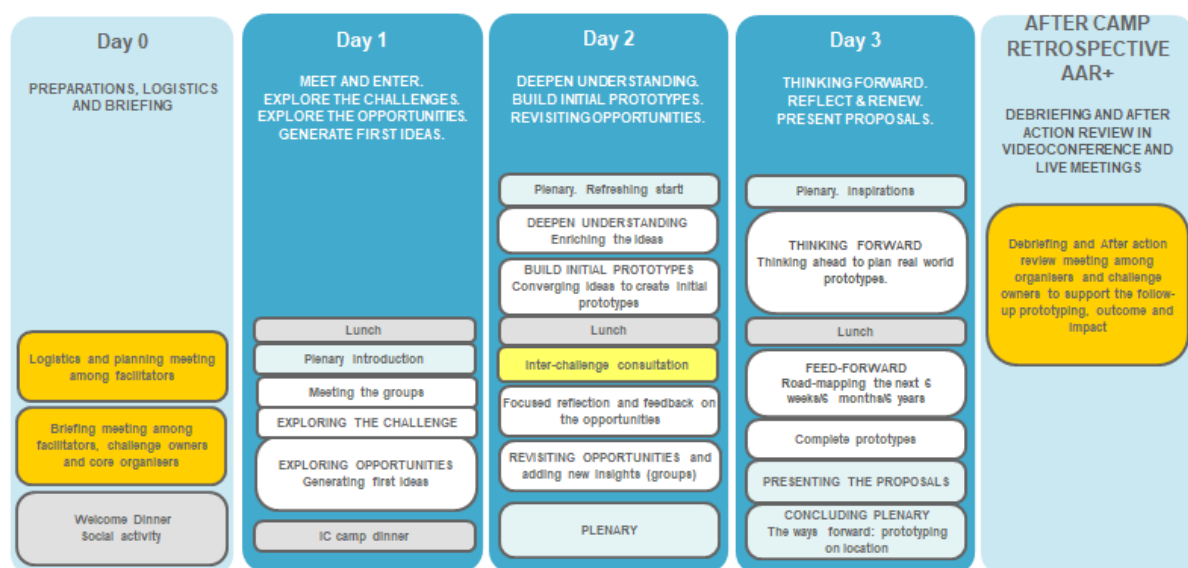
Each element of the canvas serves as a guide. The process that will be adopted is circular and iterative, so some parts of the canvas will be used and adapted by participants as they move from the challenge to the definition of proposals.

### 2.2.2 Schedule for the face to face, physical LAB

The face-to-face LAB normally takes about 3 to 4 full days to support the discovery process. In GENDER STI we have envisaged LABs that last two and a half days to cover the entire process and the diverse steps of the canvas.

Before the face-to-face event, participants receive information about the challenges and the process, and are given the possibility to get in contact to start knowing more about each other and network. They are also given questions to reflect on, so as to come prepared and already explore some perspectives of the challenge. As collaboration and trust are key elements to the success of the process, participants normally have dinners and lunches together.

The face-to-face LAB starts with a brief opening plenary session where the purpose and process of the event is described, followed by a brief description of the main challenges and of the support team taking care of each challenge group.



**Figure 12: Two-and-a-half-day Innovation Camp's LAB schedule**

Then participants start working in half-day sessions where the process of the camp and canvas become the main elements to work on.

Both for the online and face to face LABs, every day, there is an opening and a closing plenary session where participants are informed about the progress, next steps and share emerging insights. The opening plenaries, the initial part of the first session and lunch breaks are also used for icebreaker activities that can further help to bind the participants, create more trust, motivation, useful feedback and improved communication.

At the end of each day or activity there is a brief retrospective meeting with the organising team (challenge owners, facilitators, reporters) to understand what has been achieved, discuss emerging problems and suggest improvements.

### 2.2.3 The online LAB

This section describes the actual stakeholder engagement and co-creation activities that will be performed in synchronous and asynchronous phases of the online LABs.

What are the **synchronous and asynchronous** activities that participants can do in the LAB? Let's look at an example of what characterises the asynchronous activities and the synchronous ones:

- Asynchronous activities are the ones that can be done at different times and in different spaces: people can individually read, comment, study, explore the information or perform specific assignments.
- Synchronous activities are the ones where more people meet and work together at the same time and in a similar space (physical or online).

The organisation of the online LAB is based on synchronous and asynchronous tasks where participants meet, share assignments and work in small groups to deepen the knowledge, create draft solutions, test them and provide feedback to each other also on collaborative online tools. The two-and-a-half-day workshop has been redesigned into blocks of half day workshops where people meet in plenary sessions and breakout sessions that are anticipated by some asynchronous preparatory work, providing information, some first

questions and issues to investigate as well as the challenge description as a means to start exploring and reflecting on the challenge.

We have envisaged a process where there will be two parallel consecutive LABs that allow people to be present and work together even if they are in different time zones. The concept of the *chronotope* (places in time) and the exploration of linear, disruptive and visionary approaches that can now all take place simultaneously when designing and facilitating online co-creation workshops with people connected from multiple time zones is now the norm (Aaltonen and Martinez, 2021). Compared to physical, face to face workshop, the use of space and tools is mediated through digital platforms and applications.

The facilitators' and participants' role is that of strengthening their competences with such tools and in their optimal combination to distribute the change and learning process that is desired over a longer time span. With good design, facilitation, tools and a trained team the leverage effect of the online workshops can be tremendous.

Nevertheless, it must be said that organising online workshops is not easier than in presence. Normally the planning and organisation takes almost twice as much time as one has to check the tools, techniques, prepare participants, ensure good infrastructure, do dry runs to ensure that all the process is well-tuned and that each step and digital tool is coherently fitting in. When all things are planned and performed in a professional way, the digital systems allow much greater engagement, more inclusion also from people who would not be able to travel to the physical venue, continuity of tasks and better follow-up.

The GENDER STI project will also apply the principles of *BA, MA, WA, KATA*: four Japanese words chosen for their power to defamiliarize – to invite us to reconsider what we thought of as known ground in a different way. The ground is problem exploration and innovation in small groups – now, of course, with Covid-19, taking place online, an environment with its own affordances and limitations. The four words – which revolve around experiencing **space, rhythm, harmony, and form** – lead us to forgo ordinary vocabulary about methodology and explore poetic language instead. This brings us afresh to such questions as: *What is the actual nature of courageous collaboration? Where will we find the wellspring of co-created co-owned futures? How do we get there using virtual technologies? And what must we have in order to succeed?* (Kune and Quillien, forthcoming 2021).

As described in section 2.3 above on Covid 19 as a challenge and opportunity, to increase the impact of the labs, the first two labs will be run in parallel to ensure that all global partners and stakeholders can be involved. The flow will have an EU core team attending both the LABs in the EAST and the ones in the WEST, with other partners from the EU attending at least one of the LABs so as to ensure a good balance of participants, and give room to some other external stakeholders that partners have identified as relevant contributors to the LABs and the Community of Practice.

The two first round LABs, EAST and WEST, occur after the training of trainers and capacity building for the partners planned in the end of spring 2021, and both follow exactly the same process based on the canvas described above, distributed between activities that happen asynchronously and synchronously. The first parallel LABs will start at the beginning of September and end in the middle of November 2021. The Gantt below describes the steps and timing of the LABs.

GANTT OF THE LABS	September 2021					October				November				December			
Activities over the weeks	1	2	3	4	5	1	2	3	4	1	2	3	4	1	4	3	4
1st asynchronous phase (two weeks)																	
1st Synchronous meeting (4 hours)																	
2nd Asynchronous phase (one week)																	
2nd synchronous meeting (3-4 hours)																	
3rd Asynchronous phase (one week)																	
3rd synchronous meeting (3-4 hours)																	
4th Asynchronous phase (one to two week(s))																	
4th synchronous meeting (3-4 hours)																	
5th Asynchronous phase (six weeks)																	
5th synchronous meeting (3-4 hours)																	

Figure 13: GANTT of the first series of digital labs

To ensure better support from the team there may be a one week of time difference between the two LABs.

The online LAB activities alternate ten synchronous and asynchronous tasks, as follows:

- 1st asynchronous phase (two weeks): Informing participants about the challenge, providing them with background information, and inviting them to join the collaborative space. Envisage a webinar.
- 1st synchronous meeting** (4 hours including technical checks): Opening the LAB. Meet and enter; join the challenge group; explore the challenges.
- 2nd Asynchronous phase (one week): Explore the opportunities and generate first ideas.
- 2nd synchronous meeting** (3-4 hours). Deepen the understanding of ideas and opportunities. Build initial prototypes and revisit opportunities.
- 3rd Asynchronous phase (one week). Develop prototypes and explore, aspects, needs and background.

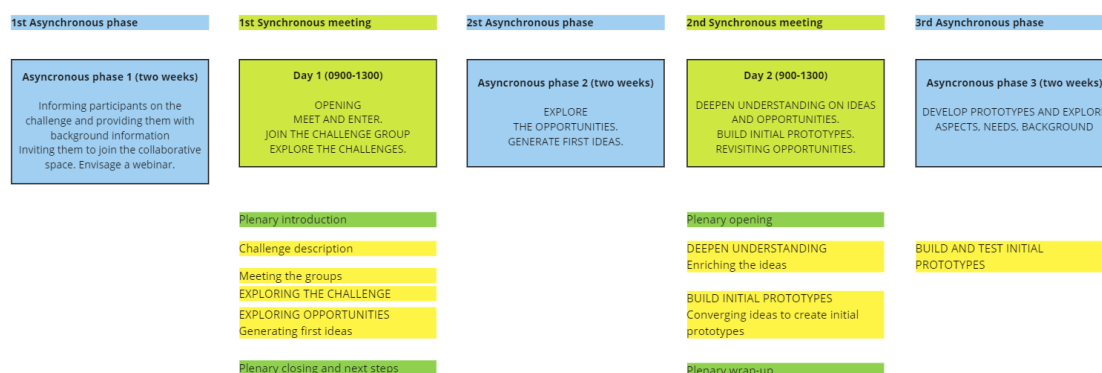
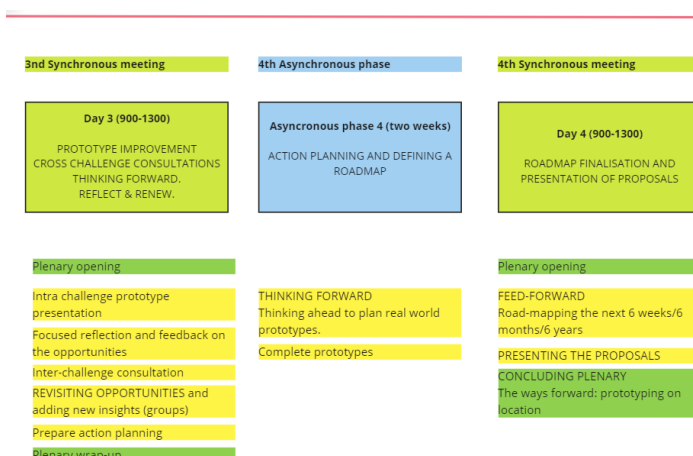


Figure 14: First part of the online LAB activities

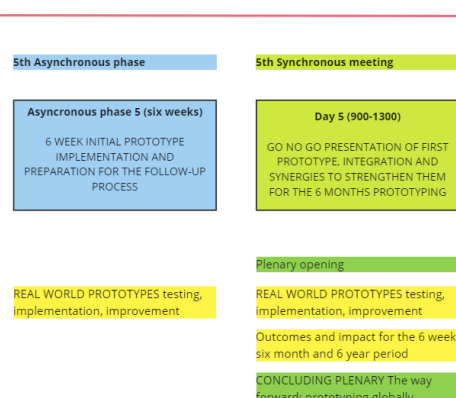
- 3rd synchronous meeting** (3-4 hours). Prototype improvement; cross challenge consultations; thinking forward; reflecting and renewing the proposals.
- 4th Asynchronous phase (one to two week(s)). Action planning and defining a roadmap in prototyping groups.
- 4th synchronous meeting** (3-4 hours). Finalisation of the roadmap and presentation of proposals.



**Figure 15: Second part of the online LAB activities**

After the 4th synchronous meeting, specific follow-up activities will support the experimentation and piloting of the initial prototypes. The successful ones will also be monitored and will remain in contact with the Observatory and Community of Practice.

9. 5th Asynchronous phase (six weeks). Six-week initial prototype implementation and preparation for the follow-up process.
10. **5th synchronous meeting** (3-4 hours). Go, no-go presentation of first prototypes of proposals. Integration and synergies to strengthen them for the 6 months of prototyping.

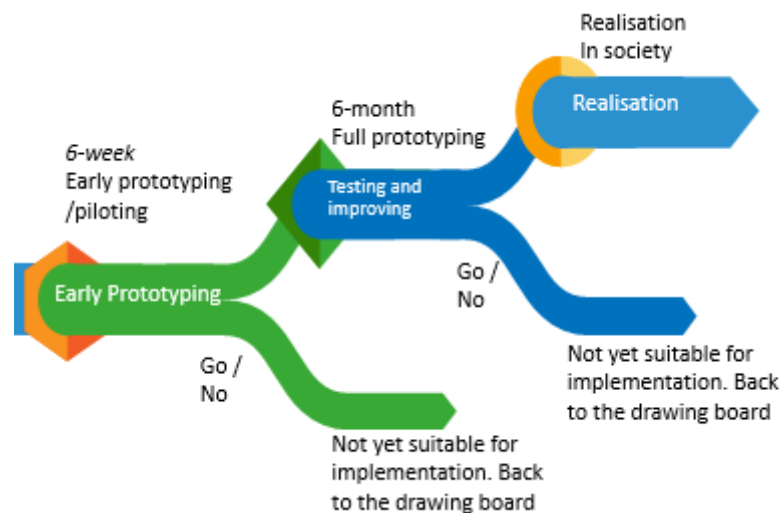


**Figure 16: Follow-up part of the online LAB activities**

These fifth asynchronous and synchronous meetings are the beginning of the follow-up phase also described below.

## 2.3 The Follow-up prototyping phase

The follow-up phase is the moment of truth where the real stakeholders and power holding structures (civil servants, policy decision-makers), have to commit to the change. This phase is critical for the success and impact of the process. Emerging prototypes and ideas need to be tested in practice, improved, and protected so that they can grow and withstand all potential threats, including possible cynicism, resistance to change, idleness and scepticism.



**Figure 17: The Follow-up prototyping steps in the Innovation Camp**

The follow-up phase supports the transformation of the initial prototypes of proposals and policy recommendations emerging from the IC-based LABs into viable options for implementation. According to the IC method, the process goes through three Go / No go stages:

- Early prototyping /piloting for 6 weeks. This is a period of initial prototyping, where the promising ideas are validated. After 6 weeks, the ideas go through a Go / No go gate and if they are not yet suitable for implementation, they go back to the drawing board. If they are mature enough and have enough support, they go into the next step of Testing and Improving.
- Testing and Improving the prototypes /pilots for 6 months. This period of 6 months is where the most promising and interesting ideas gain further support and commitment from the real stakeholders, decision-makers and potential end-users. As the planning and implementation of an Innovation Camp takes about 3 months, when one adds these 6 months of testing and improving the emerging prototypes to this, the whole time required to move from the initial challenge to a plan – ready to pilot – is equivalent to the time needed for a baby to be delivered. The results of this phase will still need to be supported, protected, and taken care of because emerging prototypes, are not yet perfect, but have the potential to produce a great impact. After this 6 month full prototyping, there is another Go / No go gate where the prototypes may either be sent back to the drawing board (as not yet suitable for implementation), or continue to be improved and start the process of being realised in society.
- The final step, that of realisation in society, is more long term, as many societal changes take time to be implemented and actually produce an impact in society. However, the advantages of this method is that it challenges users – and especially societal decision-makers – to commit to a much faster realisation process. Whereas in conventional implementation processes, initial outcomes may be noticed after

two or three years, while others take longer - depending on the societal context, culture, circumstances and preconditions – with this methodology we strive to achieve initial outcomes in 18-24 months and full societal impact within 6 years.

Thus, the follow-up of the GENDER STI Co-Design LABs is the continuation of the iterative, non-linear, continuous improvements and entrepreneurial discovery process that is started when the challenges are defined, continued during the LAB, and further refined and actualized through the prototyping process.

In the LAB, the follow-up prototyping phase starts after the presentation of the initial prototypes and proposals.

Every prototype of an idea, solution and recommendation that emerges from the Co-Design Lab undergoes a first phase of improvement that lasts for 6 weeks and results in a go-no-go decision that may lead to further iterations and improvements in the next phase of validation.

The prototyping follow-up brings the GENDER STI partners and other participants from the Co-Design Lab into a blended and iterative prototyping phase to test, validate and demonstrate the key approaches and to develop common solutions for common challenges regarding gender inequalities in STI.

Each challenge group will work on the Basecamp platform and more detailed prototypes can have a dedicated Basecamp space (for the description of Basecamp, see also the chapter 5 on digital participatory tools). Participants will define tasks to design and to launch at least 8 prototypes of ideas, solutions and recommendations per lab. The 6 week follow up will include online meetings every two weeks via webinars or conference calls with the GENDER STI partners and other stakeholders involved in each prototype, with the following steps:

- A “Prototype kick-off” with the allocation of tasks to be done through parallel work from each member and the cocreation of ideas that is iteratively improved in the 6 week prototyping.
- A “weekly stand-up” and “prototype weekly”, short Scrum-like meeting based on: (i) What has been accomplished since the last meeting? (ii) What needs to be done before the next meeting? and (iii) Which are the barriers and obstacles standing in the way of next steps?
- A “sprint planning” retrospective meeting to present the results to other challenge owners and decide together if the prototype can go ahead into the validation phase.

The prototypes accepted from the 6 weeks follow up will be used to transform ideas into recommendations for actions and policies and to define an action plan for implementing recommendations on gender equality in STI dialogues with third countries (WP4).



### 3 ORGANISATION, ROLES AND RESPONSIBILITIES

The LAB is serving the participants to co-design solutions and is based on a series of roles and responsibilities that are performed in organisational activities at the central level and within the challenge groups. The diagram below describes the main central roles and responsibilities (camp convener, challenge owners, lead facilitator) and the challenge team roles (facilitator, scribe, challenge owner/holder).

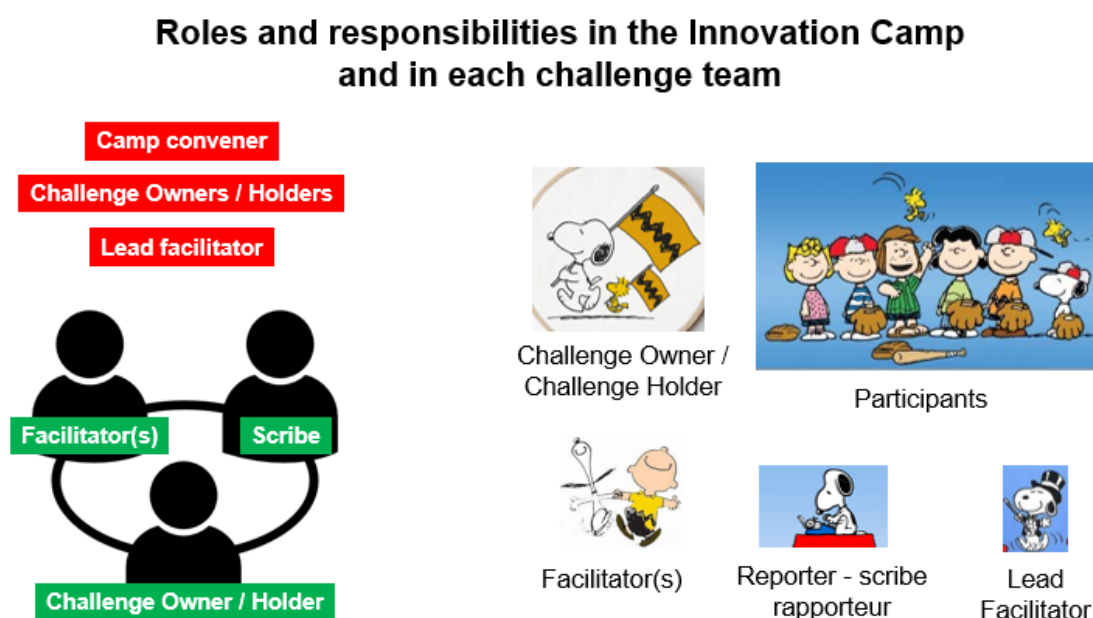


Figure 18: The roles and responsibilities in the LAB for each challenge team

#### 3.1 The participants / stakeholders

Participants are representatives of the quadruple helix that can address, influence and shape the challenges so as to propose prototypes of solutions, recommendations and specific actions. The participants' quality, diversity and experience will influence the process, its ideas, prototypes, and proposals. In the previous chapter we have described how the stakeholder mapping process is a determining factor in the preparation of the LAB. Participants become the resource for the challenge owner and holder, they can be the first ones to test out the prototypes and provide feedback. They can become the promoters and multipliers of the results and are all going to be involved in the community of practice.

For the participants to be involved there is a need for a strong initial support, from the initial awareness-raising to the follow-up. The challenge owners and organisers need to reflect well on what can be the benefit of participating for the stakeholders and clarify how their ideas will be used to make a change and have an impact on the future of gender in STI.

As the first proposals emerge, the participants will be invited to take ownership of the process and carry specific actions and prototypes. For the trust mechanism to be also sustained after the LAB, it will be important to develop innovative prototypes of proposals so as to gain the support from policy-makers that can implement them.

## **3.2 The Core Planning Team**

The core planning team manages the contents, the process and practical organisational aspects of the LABs. It helps to define the challenges, adapt them, reframe them and transform the prototypes into proposals of new actions, policy recommendations and holds the space for the emergence of the Community of Practice.

### **3.2.1 The Challenge Owner**

The Challenge Owner is the main proposer and expert on the challenge, with the power and influence to make changes happen on the basis of emerging proposals and recommendations. This role is equivalent to the one of the client that commissions the work; in societal innovation LABs, this is often a public, policy-making organisation. Examples of societal challenge owners have been in the past represented by for instance national and regional ministers, municipal councillors, the European Commission, University rectors, development agencies, NGO foundations, Civil protection directors, to name but a few. In the diagram above the challenge owner is the character with the big flag that wants to raise awareness on a specific issue so as to promote changes and improvements in policies and actions. In general, the Challenge Owners are informed and endorse the process but given their very busy commitments can only attend the opening and closing sessions. For this purpose, they delegate the constant presence in the lab to the Challenge holders that keep informing them and allow the Challenge Owners to provide asynchronous feedback. The presence and support of the Challenge Owner as decision-maker is key to the success of the follow-up and implementation as they will feel the ownership of both the challenges and of the emerging results. For a brief description of the challenge owner/holder role and guidelines see also how it has been described in the Innovation Camp handbook (see Annex 3).

### **3.2.2 The Challenge Holder**

The Challenge Holder is a deputy of the Challenge Owner that can describe and hold the challenge on its behalf. It can support and organise its framing, reframing and prototyping process throughout the LABs. This role in societal LABs is often performed by deputies to the ministers, rectors, directors that can attend the LABs on their behalf and keep informing them on emerging new ideas, opportunities and new perspectives that can improve the quality of the solutions. The role of the challenge holder is as important as that of the challenge owner. They usually are the 'co-pilots' of the Challenge Owners, and have much influence over the outputs and their implementation. They need to be open, flexible also and feel the value of the non-linear, iterative and open discovery process of the LABs.

### **3.2.3 The Lead Facilitator**

The Lead Facilitator is the process organiser that supports the implementation of the LAB process by including and moderating the participants' work of according to the steps and tasks of the workshops. The lead facilitator prepares and trains the Challenge Owners/Holders, the team of facilitators and reporters and coaches them throughout the process. It is a role that requires much experience in managing change, knowing the dynamics of the process, and adapting to emerging circumstances. The lead facilitator during the process is overlooking and intervening in support to specific groups, taking care of the timing and steps, moderating the plenary sessions, facilitating the convergence of the emerging proposals and the retrospective sessions of the coordination teams for each challenge.

### 3.2.4 The Local Organiser

The local organiser is the coordinator of the team in charge of the logistic organisation of local workshops and events taking place on the basis of specifications of the lead facilitator. This role is very important to create the right environment for collaboration and requires people with a great experience in the organisation of events: selection of the venue, the actual production of the event in terms of audio-visual equipment, arrangement of the space and breakout rooms in the different stages of the LAB and of the registration, accreditation, welcome coffee, lunch breaks, networking dinners, recording of the event, documentation for the participants and so on.

When organising the online LABs this role is performed by the main hosts of the event and facilitators as they have to consider how to create environments that welcome collaboration and co-creation with digital systems and facilitation techniques.

## 3.3 The Challenge Teams

Each challenge team is composed of three prominent roles: the facilitator, the reporter/scribe and challenge owner/holder. Every challenge involves eight to 12 participants from the quadruple helix GENDER STI stakeholders.

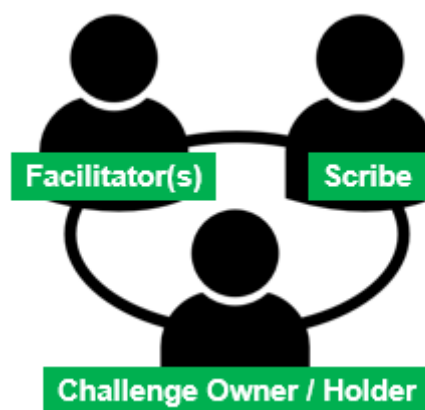


Figure 19: The core team in each Challenge during the LAB

### 3.3.1 The facilitator

Each challenge team has a facilitator supporting the process, the time keeping, mediating potential conflicts and liaising between the challenge owner, scribe and lead facilitator to align and adapt the activities according to the context.

While the lead facilitator's role is equivalent to that of the director of the orchestra for the whole process, the facilitator of each challenge is like a sub-director of the process. She or he is responsible for ensuring that, at the pace perceived as right for the group, the participants in the challenge follow the steps in the canvas, from the exploration of the challenge to the creation of the roadmap. This role requires people who have experience in facilitation, helping people to discuss so that they propose solutions and make decisions. It also requires the facilitator to feel totally at ease with several participatory techniques, especially with those applied in the LAB, and to master all digital facilitation tools and techniques.

### 3.3.2 The Reporter / Scribe

The reporter and scribe support the challenge holder and owner in collecting, analysing and summarizing the emerging ideas and prototypes.

This function is fundamental to keep track of the ideas that emerge and to reorganise them in a clear format for follow-up activities. Its role is similar to the one taken by the person in charge of writing the scientific diary during an experiment. It helps to keep track of how ideas and solutions emerged from the discussion and to reorganise the content in a way that can be understood by participants that contributed to the design of ideas and proposals and for the ones that will be included in later phases of the process. It is the person organising and facilitating the management of emerging knowledge. The role is to highlight the main points emerging from the discussion, specific decisions taken and to share with the participants the results. The scribe also supports and helps coordinate the teams from each challenge that will write specific reports based on the prototyping phase (including draft actions and recommendations). These are written directly by the participants who take ownership of each specific prototype of ideas and proposals.

**Figure 20: The Report format for the results of the challenge groups in the LAB**

The Report format for the results of the challenge groups in the LAB is a two-three-page document that includes the following sections (see Annex 4):

- Challenge Name: .....
  - Name of the Challenge:
  - Challenge Owner:
  - Facilitator:
  - Date:
  - Rapporteur:
- Note to the Rapporteur: Please use as many visuals as possible in this report. These may include drawings, illustrations and PowerPoint presentations made by the group, and photographs of the wall-space where the group worked (including post-its and papers hung on the walls, or flip-over pages prepared by the group).
- Name of the Proposal

- Description of Proposed Actions [Action orientation is extremely important]
- What will this achieve? What is the societal impact?
- Who is Responsible?
- Who will be involved? (In Society? In the Challenge team?)
- Description of the best ideas
- 1st Steps: What must happen in the next 6 weeks?
  - Who should do what?
- Prototyping: What must happen in the next 6 months?
  - Who should do what?
- Impact in 6 Years
- Other relevant information
- Suggestions for improving the effectiveness of the Camp.

While the challenge description form describes the main challenges and issues to be addressed in the LAB, the Report format organises the steps to transform the challenges into solutions and proposals.

A useful checklist for the preparation and follow-up of a LAB has also been added as a practical tool (see Annex 5).

## 4 PARTICIPATORY TOOLS

The LABs will adopt innovative digital participatory tools as much as possible due to Covid 19 restrictions. The GENDER STI partners will be trainers for the team in the use of both practical hands-on tools and processes.

### ***4.1 Technologies and participatory digital tools***

For the workshop activities that will be performed remotely, we propose a series of digital facilitation tools. These tools that the facilitators master, have been used when facilitating from distance also before the current pandemic situation.

We strongly believe that virtual facilitation can bring important results as it allows easier participation, the possibility of working asynchronously before, during and after each workshop and synchronously during the workshops. The objective of the service is also to empower the participants and build their capacity to work and co-create in remote settings.

A brief description of the most relevant digital facilitation tools that might be used in the LABs are included in Annex 6.

### ***4.2 Experience design for an effective use of the tools***

The experience of using the digital tools will be designed so as to use them in an integrated and functional way, according to the agile principle of simplicity, so as to create an enjoyable practical experience for all users.

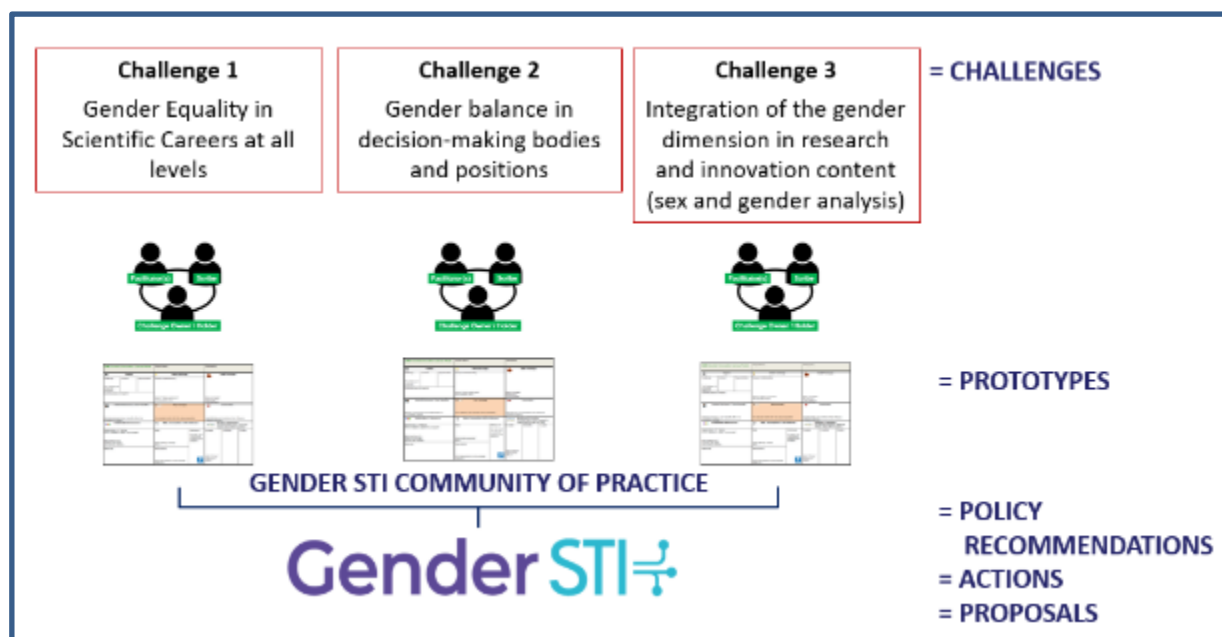
- The main tool for video conferences and meetings will be VideoFacilitator as it gives people total freedom to move between breakout rooms.
- The main collaborative space is Basecamp where all the communications, attribution of tasks and documents relating to the LABs training, preparation, implementation and follow-up will be hosted. Basecamp will also be the base for all challenge groups during the LABs and for the emerging community of practice.
- Miro will be the main canvas where people will explore, ideate, prototype, add images, links, ideas and transform them into proposals.
- The google workspace tools and cloud storage will be used to collaboratively write the main documents relating to the LABs, from the invitations, to the challenge descriptions written by challenge owners, to the reports of the emerging prototypes written by the reporters and final reports.

All these tools have been used many times in digital co-creation labs. We have also described more tools (see Annex 6) that can be used in specific circumstances such as Zoom for some videoconferences, GroupMap for high-level decision making, Mentimeter for rapid polls with participants. The list of tools is not exhaustive and will be adapted on the basis of emerging requirements and ideas.

## 5 THE LAB IN A NUTSHELL

The Gender STI project initially planned to organise three Co-Design Labs lasting 2.5 days between month 12 and month 30. These were planned to be held in face-to-face circumstances: two in Europe (tentatively in Brussels) and one in America (tentatively in Canada or Mexico) or Asia. Additional Co-Design Labs can be replicated by local partners in the selected third countries.

As we have seen in the document the first co-design LAB will be performed online due to the Covid 19 restrictions. It will be scheduled between September and November 2021 and will be carried out in two rounds of LABs to involve participants from the Western and Eastern hemisphere.



**Figure 21: Outcomes and outputs of the LABs**

The GENDER STI Co-Design Labs facilitated workshops will implement, through a discovery process, design thinking methods to reach evidence-based outcomes. Each Co-Design Lab process includes three steps:

- Step 1: Before the LAB the thematic challenges to be analysed in the Co-Design labs will be identified as well as the selection of challenges and challenge owners and choice/invitation of stakeholders and experts who can contribute to addressing the challenges by participating in the Co-Design Labs. Tentatively, the challenges owners will be UPM, TU Graz, VTT and INMARK.
- Step 2: Carrying out the Co-Design Labs. Each LAB covers the thematic challenges and is chaired by the GENDER STI partners playing the role of challenge owner. The co-design labs will generate initial prototypes of policy recommendations, actions and proposals and will involve its participants in the community of practice.
- Step 3: After the lab, the follow-through continues and during subsequent weeks, prototypes of promising ideas are tested and improved and can be built up on by the respective organisations with the networking contributions of the LAB participants and will create the basis for the recommendations in WP4.



## 6 CONCLUSIONS

The Gender Co-Design Labs are a powerful process to support changes and improvements in implementing the gender perspective in international bilateral and multilateral agreements in STI. Change, especially on crucial issues such as gender balance, is difficult to achieve in conventional ways. The LABs are accelerators of this change.

For change to happen there is a need for new energies, new ideas, and the creation of a safe space where ideas can thrive, be discussed, improved, tested and eventually implemented. The Gender STI are safe agora's where problems and solutions can be created together. They are also a launch pad where, through the support of the GENDER STI team, participants are directly involved in proposing policy recommendations and generating a community of practice where they can implement pilot projects and actions in line with the objectives of the GENDER STI project.

The deliverable describes the overall process, team, responsibilities for preparing, running and following-up on the organisation of the GENDER STI LABs. The requirement to redesign all workshop activities for the online digital format has brought further innovations to the Innovation Camp method. In this way, activities are distributed over a more extended period of time and take advantage of synchronous and asynchronous tasks to strengthen the community of practice, the awareness of possibility, and effectiveness of each working team.

## ANNEX 1 – TRACK RECORD OF INNOVATION CAMPS

<p><b>2012 Helsinki (Finland)</b></p> <ul style="list-style-type: none"> <li>• Theme: Inclusive society</li> <li>• 7 challenges, 100 participants   8 days</li> </ul> <p><b>2013 Malmo (Sweden)</b></p> <ul style="list-style-type: none"> <li>• Theme: Societal innovations for sustainable urban development</li> <li>• 10 challenges, 120 participants   4 days</li> </ul> <p><b>2014 Johannesburg (South Africa)</b></p> <ul style="list-style-type: none"> <li>• 3 challenges, 30 participants   3 days</li> </ul> <p><b>2015 Espoo (Finland)</b></p> <ul style="list-style-type: none"> <li>• Theme: Connecting smart citizens in Open Innovation practice (project for the new underground line of Helsinki).</li> <li>• 6 challenges, 80 participants   3 days</li> </ul> <p><b>2016 Beginning of the collaboration with the Committee of the Regions (CoR) and the Joint Research Centre (JRC)</b></p> <p><b>2016 Amsterdam (The Netherlands)</b></p> <ul style="list-style-type: none"> <li>• Theme: Open Innovation 2.0 and European Urban Agenda (within the framework of the Dutch EU Presidency)</li> <li>• 4 challenges, 50 participants   3 days</li> </ul> <p><b>2016 Bratislava (Slovakia)</b></p> <ul style="list-style-type: none"> <li>• Theme: Connections and Investments for a Collaborative Europe</li> <li>• 4 challenges, 50 participants   2,5 days</li> </ul> <p><b>2016 Gabrovo (Bulgaria)</b></p> <ul style="list-style-type: none"> <li>• Theme: Overcoming the distances and divisions in innovation in Europe.</li> <li>• 3 challenges, 130 participants   2 days</li> </ul> <p><b>2016 Lapland (Finland)</b></p> <ul style="list-style-type: none"> <li>• Theme: Arctic Innovation</li> <li>• 3 challenges, 40 participants   3 days</li> </ul> <p><b>2017 Sofia (Bulgaria)</b></p> <ul style="list-style-type: none"> <li>• Theme: Develop innovative public services through Open Innovation 2.0 and citizen involvement</li> <li>• 3 challenges, 35 participants   3 days</li> </ul> <p><b>2017 Barcelona (Spain)</b></p> <ul style="list-style-type: none"> <li>• Theme: Smart Specialisation Strategy of the region through the Quadruple Helix (the</li> </ul>	<p><b>2017 Brussels (Belgium)</b></p> <ul style="list-style-type: none"> <li>• Theme: Energy innovation and Inter Regional Smart Specialisation Strategies.</li> <li>• 3 challenges, 50 participants, 2 days</li> </ul> <p><b>2017 Belgrade (Serbia)</b></p> <ul style="list-style-type: none"> <li>• Theme: ICT Strategy of Serbia.</li> <li>• 4 challenges, 60 participants   2 days</li> </ul> <p>From the above dates there have been 30 more innovation camps, among which coordinated by FUTOUR:</p> <p><b>2018</b></p> <ul style="list-style-type: none"> <li>• <b>Cattolica (Italy).</b> Theme: Sustainable management of productive activities and integrated coastal management. 3 challenges, 30 participants, six half-day meetings.</li> <li>• <b>Tuscany Region (Italy).</b> Theme: improve the communication in the management of structural funds. 4 challenges, 50 participants, one day and a half.</li> <li>• <b>Emilia-Romagna Region (Italy).</b> Theme: Creation of a Community of Practice on participatory policy making. 3 challenges, 40 participants, 8 half-day meetings.</li> </ul> <p><b>2019</b></p> <ul style="list-style-type: none"> <li>• <b>Asturias (Spain) through the EC Joint Research Centre and the regional development agency IDEPA.</b> Theme: Development of Circular Economy through the industrial actors and trade unions. 2 challenges, 40 participants, 2 days.</li> <li>• <b>SviluppUmbria – Development Agency of the Umbria Region (Perugia, Italy).</b> Theme: Setting up of the regional Living Lab and the Open Innovation programme with the territory stakeholders. 7 challenges, 70 participants, 4 days distributed over more months.</li> <li>• <b>School of Public Administration of Catalonia (EAPC) (Spain) and the EC Joint Research Centre.</b> Theme: Integration of young sons and daughters of migrants and overcoming the risk of fundamentalism.</li> <li>• <b>Po River basin Authority (Italy) and the Joint Research Centre of the European Commission.</b> Theme: create communities that are resilient to flood risks due to climate change. 4 challenges, 70 participants, 2 days.</li> </ul> <p><b>2017 Thessaloniki (Greece)</b></p>
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<p>involvement of institutions, the private sector, research and civil society).</p> <ul style="list-style-type: none"> <li>4 challenges: 100 participants   2,5 days</li> </ul> <p><b>2017 Thessaloniki (Greece)</b></p> <ul style="list-style-type: none"> <li>Theme: Resilience of the economy, defence, regional development and management of migration flows.</li> <li>4 challenges, 50 participants   3 days</li> </ul>	<ul style="list-style-type: none"> <li>Theme: Resilience of the economy, defence, regional development and management of migration flows.</li> <li>4 challenges, 50 participants   3 days</li> </ul> <p><b>2020 Niš (Serbia)</b></p> <ul style="list-style-type: none"> <li>Theme: Urban planning and resilience to climate change</li> <li>4 challenges, 50 participants   3 days, Online</li> </ul>
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## ANNEX 2 - CHALLENGE DESCRIPTION FORM

### CHALLENGE DESCRIPTION FORM

**Challenge Name:** .....

#### GENERAL INFORMATION

**Theme:**

**Challenge-owner and Organisation:**

**Contact person (if different than above):**

---

#### Challenge-OWNER DESCRIPTION (background)

---

#### BACKGROUND / CONTEXT of the Challenge

---

#### DESCRIPTION OF MAIN ISSUES, OPPORTUNITIES and OBSTACLES

##### Main Issues

- ...
- ...
- ...

##### Underlying Issues

- ...
- ...
- ...

##### Opportunities

- ...
- ...
- ...

##### Obstacles

- ...
- ...
- ...

### MAIN CHALLENGE OBJECTIVES

2 or 3 bullet point sentences describing each objective. Describe in more detail If necessary.

- ...
- ...
- ...

### RELEVANT STAKEHOLDERS AND STAKEHOLDER ORGANIZATIONS (MACRO DESCRIPTION)

### CHALLENGE GROUP MEMBERS: Potential participants at the camp (Connect to the stakeholder map to include them)

#### Group members suggested by Challenge-owner

The Challenge owner should suggest participants who are responsible for / relevant to following through on the results after the Camp.

Name	Email	Position	Organization	Expertise
<Challenge owner>				
<Facilitator>				
<Challenge stakeholder>				
<Challenge stakeholder>				

#### Other possible group members

Name	Email	Position	Organization	Expertise

### **RELEVANT INFORMATION**

**Links to videos, reference material (books, scientific papers, annual reports, etc.), photos, organisation website, projects related to the challenge etc.**

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### **ATTACHMENTS (if necessary)**

- **Other material relevant to understand the challenge**



## ANNEX 3 - CHALLENGE OWNER GUIDELINES

The challenge owner guidelines below are taken adapted from Rissola, G., Kune, H. and Martinez, P (2017) *The Innovation Camp Handbook's* ANNEX 10: Challenge-Owner (or Challenge-Holder) Guidelines (an Example).

### Challenge-Owner Guidelines

#### [name of the Innovation Camp, e.g.: **GENDER STI Co-Creation LAB**]

In this document, we present information about the [TITLE OF THE INNOVATION CAMP] and some guidelines to help Challenge Owners and their direct stakeholders get maximum benefit from the camp.

#### Innovation Camp Format

The Innovation Camp format consists of 4 periods:

1. *Preparation*: from [four months starting from month and year XYZ to month and year XYZ];
  - Participants can orient themselves to the issues and the context of the challenge
2. *LAB/Camp in [Venue, duration in days and dates]*;
  - Groups of diverse participants actively address challenges, in order to rethink and reframe the issues and problems, and come up with promising new perspectives for building solutions.
  - The outputs of the 2-day Camp are new perspectives for thinking about and addressing the challenge, and plans for testing and improving these ideas in practice.
3. *Prototyping period: 6 weeks in [Month and Month]*;
  - Challenge Owners test the best ideas and promising solutions (the Camp output) in real-life situations with direct stakeholders; ideas and promising solutions are tested and improved in an iterative innovation process.
4. *Follow-through: 6 months from [Month and year to Month and Year]*;
  - Challenge-Owners develop the improved ideas further in interaction with direct stakeholders and potential end-users during the next 6 months.

#### Characteristics of a good Challenge

- The Challenge has an organisation and/or group responsible for resolving it, and a responsible person who acts as Challenger Owner.
- The Challenge Owner has a clear interest in the potential societal outcomes and impact.
- The issues behind the Challenge are complex: there is no clear 'solution' to a well-defined 'problem'. For this reason, the expected outcome is more than *one* solution to *one* problem.
- The Challenge is in an emerging phase – or is ready for reframing/redefining – with various possible paths for moving forward.
- The Challenge has broader societal implications and is not focused on one specific target group.

### Characteristics of a good Camp result

In the Camp, groups work to develop new perspectives for thinking about and addressing the Challenge, and plans for testing and improving these ideas in practice.

Promising ideas can be both inside and outside 'the box'. What was once seen as crazy or impossible once, may be possible tomorrow.

We are looking for new perspectives that have not been considered before, or else have been dismissed because they seemed impossible, impractical or irrelevant at the time.

Facilitations should encourage participants to develop results that are:

- *Sustainable*: they are designed to have a lasting effect, not just as a quick-fix or one-time temporary solution
- *Scalable*: they are designed to work not only here, in this case, but also can be scaled to other similar situations elsewhere
- *Societal*: they have a broader, systemic effect in society
- *Feasible*: they are capable of being implemented

At the Camp, we encourage participants to think about all of the following:

- *Outputs* – the results of the Camp, after 2 days
- *Outcomes* (after 2 years) – what we see in the real world after 18-24 months, once the Camp results have been improved and implemented
- *Impact* (after 6 years) – what has changed in the real world after 5-6 year

### What the Challenge Owner can expect as the result of an innovation Camp

The Camp is about creating deeper understanding of the issues and problems underlying societal challenges.

This means exploring and understanding the context of societal challenges in such a way that a richer understanding of the issues can emerge, and lead to new insights about how to move forward. It asks people not to accept things as given, not to follow dominant logics, not to accept assumptions or take things for granted. It is about asking questions, and not accepting the early or easy answers.

An Innovation Camp creates conditions in which participants – and Challenge Owner – can frame and reframe challenges, issues and problems in the light of other points of view and different perspectives.

Once the reframing process has started, and promising ideas have emerged, the rapid prototyping process can turn these into prototypes for possible action. These prototypes can then be tested, improved, retested, and once again make better – in direct interaction with their intended users.

Participants are stimulated to think beyond *output* – the results of the camp after 2 days and 6 weeks –

- to *outcomes* – improved quality of work (and life) that can be experienced in practice after 1-2 years – and
- to societal *impact* after 5 or 10 years.

*An Innovation Camps does not deliver solutions to complicated or complex issues in a 2-day camp.*

It *does* build better understanding of how these issues work in their societal context – and how they may more effectively be addressed.

Reframing problems, enriching understanding, fast prototyping, thinking in outcomes, preparing for action: these are key Camp processes that define what Challenge Owners and participants can expect from the Camp.

### The role of the Challenge Owner at the Camp

The Challenge Owner should be committed to:

- Participating in all phases of the Innovation Camp work process
- Provide a brief description of the Challenge at least 4 weeks before the Camp
- Provide sufficient background documentation about the context of the challenge at least 2 weeks before the start of the camp
- Designate a *Challenge Holder* to be present throughout the Innovation Camp
- Work on the follow-through: be prepared to test good ideas, new perspectives and promising solutions developed at the Camp during the following 6 weeks and 6 months

### Participants from the Challenge context

At least one *Challenge Holder* (from the same organization as the Challenge Owner, or else from another relevant organization) should take part in the camp.

- Up to 3 direct stakeholders from the Challenge context may take part in the challenge-group.
- The rest of the challenge-group will consist of a diverse group of participants from other places (and other countries), all of whom have some personal expertise in dealing with aspects of the challenge. This diversity guarantees that many different perspectives can be brought to bear on the issues.
- Direct stakeholders could be members of the organization bringing the challenge in, or else politicians, civil servants, citizens, business people, and members of NGO's who are related to the context.
- Other stakeholders in the Challenge context are welcome to take part in the Camp. They can participate as members of groups addressing other challenges. In this way, they gain deeper a understanding of how to address similar issues in an innovative way. They enhance the overall integration of themes, and help build a possible synthesis of impulses for realizing systemic change after the Camp.

### *Before the Camp*

To make the most of the camp, the Challenge Owner should:

- Complete the Challenge Description Form, which explains:
  - The challenge itself (and sufficient background information);
  - The context of the challenge (local characteristics, main stakeholders, anticipated problems);

- Some insights gained from what has already been tried, what was successful or wasn't (and why);
  - Some links to more documentation (written reports, presentations, relevant video clips etc).
- Indicate what kind of expertise is essential – and what kind of people are needed – to have in the challenge-group, in order to reach a sustainable result.
- Indicate a few names of relevant potential participants for the challenge-group: people who could contribute greatly to reaching a sustainable result.

#### *During the Camp*

- Ideally, the Challenge Owner should take part in the entire Camp.
- If this is not possible, his/her direct representative – we call this person the *Challenge Holder* – should participate.
- The Challenge Owner – or Challenge Holder – should present a brief introduction to the Challenge on the first day, when first meeting with the group addressing the Challenge. This introduction should be short – about 10-15 minutes – and describe the Challenge, the context in which the challenge occurs, the main questions which the Challenge Owner wants to group to address. Insights from ongoing attempts to resolve the Challenge are also welcome. The introduction should also indicate what the Challenge Owner is hoping for as a result of the Camp.
- He/she should be ready to accept diverse ways that the group wants to reframe the challenge, issues, and problems.
- He/she has an open mind and is ready to take part in the group discussions as *one of the groups*, not it's leader.
- He/she is willing to ready to learn from and support the group's insights and new perspectives.
- He/she should be open to surprises, and be able to have fun working at the Camp!
- The Challenge Owner should be present at the final presentation of the results, even if he/she cannot attend the entire Camp.

#### *During the 6-week prototyping period (6 weeks in MONTH and MONTH)*

- To take the results of the camp – interesting ideas, promising perspectives, possible solutions – and test them in real-life situations;
- Ideally, to communicate at defined moments with other group members, who are working on similar issues in their own workplaces, about the prototyping experience; using this collective/distributed intelligence to improve the prototypes and continue to test these in practice.

#### *During the 6-month improvement period (6 months from DATE to DATE)*

- Further improve the prototypes based, ideally on the collective experience of group members.
- Communicate with group participants and the central partner organization of the Camp about work-in-progress, tentative results and learning about the innovation process.

#### *After the follow-through process – in the period after [indicate dates]*

- Communicate with group participants and the central partner organization of the Camp about ongoing experiences and results.

## ANNEX 4 - REPORT FORMAT FOR THE RESULTS OF GROUPS AT THE LABS

### REPORT FORMAT FOR RESULTS OF GROUPS

**Challenge Name: .....**

*Name of the Challenge:*

*Challenge Owner:*

*Facilitator:*

*Date:*

*Rapporteur:*

***Note to the Rapporteur:***

*Please use as many visuals as possible in this report. These may include drawings, illustrations and PowerPoint presentations made by the group, and photographs of the wall-space where the group worked (including post-its and papers hung on the walls, or flip-over pages prepared by the group).*

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**Name of the Proposal**

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**Description of Proposed Actions** [Action orientation is extremely important]

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**What will this achieve? What is the societal impact?**

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**Who is Responsible?**

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**Who will be involved?** (*In Society? In the Challenge team?*)

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### Description of the best ideas

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### 1<sup>st</sup> Steps: What must happen in the next 6 weeks?

*Who should do what?*

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### Prototyping: What must happen in the next 6 months?

*Who should do what?*

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### Impact in 6 Years

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### Other relevant information

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### Suggestions for improving the effectiveness of the Camp



## ANNEX 5 - CHECKLIST FOR THE PREPARATION AND FOLLOW UP OF A LAB

### Checklist for preparation and follow up

As a tool for the preparation process, we have made a practical checklist.

#### *Preparation (1): 2-3 months before*

- Clear objectives of the workshop(s)
  - Purpose, Outcome and Process (POP) at the macro and micro level (see the communication and programme)
  - Transparency, accountability and trust: making it clear to «the client» that participation is not manipulation and that if it is poorly done, it will not work and will backlash.
  - Challenge description – each topic and challenge, including its fences, need to be addressed very clearly from the beginning.
  - What is at stake and margin for real empowered decision-making? There has to be something at stake for the participatory process, and while the participatory process is ongoing, any other decision or action related to the topic at stake should be suspended until possible solutions emerge
- Make an assessment to understand, for each dimension, the position of the internal or external client organising the process: eg, empowerment, duration, facilitation style, methods, etc
- Programme, agenda and storyboard of each «act»
  - Facilitation team (one, many, preparation and ability to deal with complex issues)
- Participants, stakeholders and experts.
  - Typology-background of participants to be involved (high decision level power – executive – low decision-making power – mix)
  - Number of participants to be involved (very large e.g. >=500 to small 6-10 people)
  - Communication and information
  - POP (Purpose, Process and Outcome) to inform and involve the participants: background information, save the date, programme.
  - Desk research, interviews and outreach to prepare background material to have informed participants to make more conscious choices.
- Logistics:
  - Venue inspection to choose the ideal place in terms of accessibility, flexibility of spaces and furniture, possibility to use walls, having a plenary and breakout spaces or separate rooms. This ideally depends also from the method but in some cases the method has to be adapted to the space circumstances.
  - Plans of the rooms, of the electricity plugs, of the windows, walls, neighbouring rooms, catering spaces and services, lighting, audio-visual equipment, wifi, furniture.

#### *Preparation (2): one week before the participatory policy-making workshop(s)*

##### One week before

- Check again the purpose and objectives with the «client» and adapt the process accordingly.
  - Ensure a committed pitch from «the client» (*il committente*) on the Purpose, Outcome and Process (POP) of each topic to be addressed.
  - Clarify what is at stake and the margin for real empowered decision-making.
- Information and communication to participants

- Ensure the presence of informed participants. Send an information kit, on the context, scenarios, background, options (documents, videos, podcasts...).
- Participants' confirmation and definition of possible ways to distribute them heterogeneously according to the challenges, gender mix, level of expertise, role, objectives.
- Activation of a platform for a community of practice and blended learning on the policy co-creation to support the follow-up activities.
- Final polishing and check on programme, steps, timing and storyboard of each «act» with Client, organisers, facilitators, rapporteurs, challenge owners and experts.
- Final video conferences and meetings between facilitators and local organisers.

*Preparation (3): one day before the participatory policy-making workshop(s)*

- Logistics
  - Final venue set-up and check of spaces, facilities, audio-visuals, visual and stationery with the facilitation team (one, many, preparation and ability to deal with complex issues).
    - Handouts and registration material.
    - PCs for rapporteurs
    - Registration desk and supporting secretariat.
- Briefing with the organising team, coordinator, challenge owners, facilitators, rapporteurs.
  - Running through the programme with a simulation.
  - Final update on participants and profiles. The possible reshuffling of participants between groups to ensure a good balance.
  - Taking ownership of the space for each facilitator based on her or his facilitation style and skills, within the framework of the chosen process
- Reporting
  - Clarify what has to be reported and identify rapporteurs. The function and experience of the rapporteur depends on the complexity of the issues that are dealt with. The higher the complexity the more skilled and also experienced on the topics discussed should the rapporteurs be. This is because the report will be the basis for follow-up activities because words fly, and written text remains (*verba volant, scripta manent*). This may also include the documentation of the process with photos and videos.

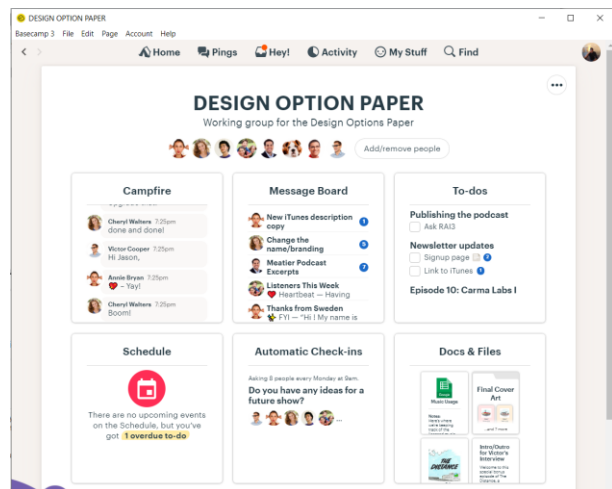
*Preparation (4): Retrospectives and alignment during the participatory policy-making workshop(s)*

- Briefing
  - Just before the launch the organising team and facilitators make a quick check-in to align if there are changes and to share any particular issues.
- Fine tuning or U-turns while running the process
  - There may be a need to make a quick adaptation to the process and method. This means that the facilitators and coordinators need to liaise frequently. If a problem emerges, a solution can thus be found in real time.
- End of day retrospective.
  - Whatever the duration in days of the workshop it is a good practice to make an end of day debriefing with a retrospective on what was planned, what went well and what could be improved. This is an excellent learning process for the team and can also be used at the very end of the process to plan future improvements, and next steps.

## ANNEX 6 – DIGITAL FACILITATION PLATFORMS

### **Basecamp – The base for collaboration among remote teams in the LAB**

Basecamp is a real-time communication tool that helps teams stay in touch, share information, organise plans, schedule activities and be all on the same page. With Basecamp partners and stakeholders can communicate better and require fewer meetings. Users can sign in anywhere, anytime, either through a web browser or through apps compatible with a large number of mobile devices. Basecamp will be used to inform, involve, engage and support the collaboration of the participants as in a community of practice working together towards a common objective. It will also help participants to get to know each other and find areas of interest where they can innovate and co-create new opportunities together.



*Basecamp is used to organise the internal activity of the core team and as support to inform and engage the internal and external stakeholders in preparation, implementation and follow-up. It is a digital place and collaborative tool that will help everyone to be all on the same page, have at a glance all the tasks, communications and shared documents and extend them to key stakeholders if deemed useful by the project coordinators.*

Basecamp will be the home base for the LABs activities of the GENDER STI team. There will be three levels of use:

- GENDER STI Partners: coordination of all activities related to the training, organisation, preparation of the LABs and of the related reports. This space will also help to organise tasks, documents and tools such as the stakeholder map.
- LAB camp: for every LAB the participants will be hosted in a dedicated Basecamp space where participants of every challenge can receive updated information, share ideas and common announcements.
- Challenge groups. Every LAB has three main challenge groups in specific Basecamp spaces. They will generate prototypes of actions, proposals and policy recommendations that will be nurtured in the challenge group with the definition of tasks, comments and links to a shared space.
- Community of Practice space. Basecamp can also host one space for all participants to all the LABs where they can be updated and engaged in the Community of Practice growth and activities.

**VideoFacilitator - Agile platform for participatory remote meetings**

VideoFacilitator has been designed by agile facilitators to simplify the activities for its users. The online meetings with the Videofacilitator platform allow up to 100 participants to interact in multiple breakout spaces. Only people invited can attend the online workshops through a direct link. The platform provides a plenary hall in which all the participants see each other and can interact and offers the possibility of creating and adapting thematic breakout rooms where participants can autonomously move to meet in smaller groups. A facilitator will guide the participants in the various subgroups to allow them to familiarize themselves with the tool. The breakout rooms can be pre-designed so as to have a link that enables participants to start working on other digital tools. Although the tool is extremely user-friendly participants receive a user handbook to learn all the features of VideoFacilitator. VideoFacilitator shows its best workhorse capacity when it is used for interactive workshops in combination with other brainstorming/visualisation tools. The greatest versatility is achieved by using a computer. If one wants to use it as a simple video conferencing platform, then also a tablet or smartphone will work very effectively. FUTOUR is the service partner of VideoFacilitator and is contributing to its co-design through constant feedback and suggestions for services, tools.



*VideoFacilitator will be the main platform for the facilitation of digital participatory workshops.*

**Zoom**

Zoom allows meetings and webinars with varying levels of interaction. It has the possibility to set up automatic breakout rooms on the go for random groups of participants or also for specific groups with selected participants. One may also create thematic groups where participants can autonomously move to. In the case of more structured top-down conferences where participants can be distributed at random, Zoom can be an effective tool for most conventional meetings and workshops, while in the case of thematic participatory workshops with a high level of interaction among participants VideoFacilitator is a preferable option.



*The Zoom platform is being used for meetings, sessions and workshops of the project. INMARK and FUTOUR have a license for 100 users.*

**Streaming live session with Streamyard**

StreamYard is a live streaming studio. With StreamYard it is possible to stream live or record an interactive webinar with 10 speakers at the same time. StreamYard allows the moderators and panellists to receive and show live questions from the audience. The streaming can be shown live or uploaded to Youtube, Instagram, Linkedin and Facebook at the same time.

*Streamyard can be used in sessions where there is no need for a strong interaction between the participants (broadcasting). It may be used to record and broadcast the conferences, if needed.*

**Smart polling with Mentimeter**

Mentimeter is an online, real-time, smart polling voting system. A voting system that is based on the use of the participants' smartphones/tablets and allows to see the voting results processed in real-time. The tool works by constructing a presentation in advance that contains a set of questions that are submitted to the participants during meetings; they then respond using their own devices (smartphones, tablets or computers). The system provides for the construction of interactive presentations to which open questions, closed questions, multiple-choice questions, surveys, scales, etc. are matched, which are "solved" in real time. Then the results are shown to the participants in the form of graphs, word cloud, and spatial distribution. An interactive and fun experience, where opinions and ideas are viewed live and which allow participants to think incrementally with respect to the emerging priorities.

*The smart polling system can be used both in the informative meetings and in the participatory workshops to interact with the participants, collect ideas, carry out surveys and evaluate specific proposals.*

**GroupMap**

GroupMap ([www.groupmap.com](http://www.groupmap.com)) is a decision support tool that can be used in digitally facilitated remote workshops and in face-to-face ones. It allows brainstorming, grouping, voting, prioritisation of ideas through a series of possible maps and processes<sup>2</sup>. The facilitators can define with the partners a specific challenge that should be dealt with by the participating stakeholders and come up with robust solutions that are immediately reported back.

*GroupMap allows for a very advanced level of decision-making support. It can be used to elaborate the criteria and strategic priorities with the working groups and key stakeholders.*

**Visual and digital facilitation with Jamboard and MIRO**

The online engagement activities will be supported by tools to stimulate co-design and the collection of live feedback, including for example, shared virtual canvases like Miro and Jamboard. The canvases allow multiple participants to interact simultaneously on a single canvas and use post-it, draw, insert images, and so on.

Both MIRO and Jamboard may be used to visualise, organise and structure the information that may emerge from the online participatory meetings. They are the digital stationery that we can use to write sticky notes, stick ideas to the posters and walls, give a framework and flow to the decision making process through structured canvases, as in the EASW, the Innovation Camp and Design Thinking methods (see the section on Methods).

**Jamboard**

(<https://gsuite.google.com/products/jamboard/>) is Google Workshpace's digital whiteboard that offers a rich collaborative experience for teams. It's possible to create a Jam, edit it from a personal device, and share it with others. Everybody can collaborate on the Jam anytime, anywhere. Jamboard is simple as a whiteboard, but smarter, it's possible to import images from a Google search, and automatically the work is saved in the cloud; use the handwriting and shape recognition tool for easier reading and drawing with the stylus (easier with tablet). Jamboard allows users to insert

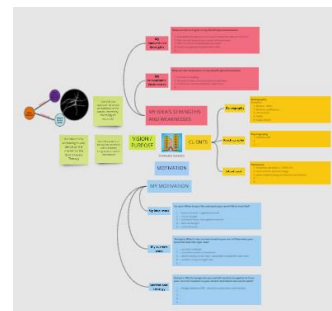


<sup>2</sup> There are over 60 brainstorming templates in GroupMap, and one can design specific ones to deal with the challenge at hand. GroupMap templates include Agile Retrospectives, SWOT, Urgent Import Matrix, Perceptual Maps, Stakeholder Analysis, Risk Assessment, Mind Maps, the Business Model Canvas and many more.



post-its to answer questions in real-time (Jamboard supports up to 16 touchpoints at a time on a single device).

**MIRO** ([www.miro.com](http://www.miro.com)). Miro is a very versatile and powerful visualisation and co-creation tool. It has many more functionalities and tools than Jamboard. The canvas of Miro is just an unlimited large sheet where all the concepts and ideas, as with sticky notes, can be moved, clustered, edited, highlighted, connected. One can also vote the ideas and set priorities, create links and add reference information with images. To use the tool to its maximum capacity we envisage warm-up exercises and ice-breakers with the participants where they can learn all the tips, tricks and tools.



*Miro will be the main tool for co-creation within the LAB. A dedicated set of canvases based on the Societal Innovation Canvas will be designed, including tasks that will be performed when participants are meeting at the same time (synchronous online or in presence) or working separately and at different times (asynchronous). It is a very versatile tool that requires just a little practice at the beginning. It will also be used to connect images, links to documents, videos or papers, stimulating the creativity of participants in an enjoyable way.*

### **Collaborative documents**

For the facilitation of online workshops we also envisage the use of a set of practical collaborative tools through the Google Workspace platform. This fosters the interaction and improves the communication between participants through Drive, Docs, spreadsheets Digital Forms by creating and sharing in real-time new contents. Using Docs it is possible to write and format texts, but also to modify and comment in real-time the work done by others. In addition, a space is made available in the cloud where participants can create, manage, store and share their files (text, photos, videos ...) and synchronize them on digital devices.

*Through the shared canvases of google, workspaces may be used in all sessions in which large working groups have to elaborate proposals in a structured way, through individual brainstorming and collective summaries. In particular, they can be used in participatory workshops on Vision and Action in combination with other digital tools. The collaborative documents will be used especially in the definition of the challenges and in the co-writing of the challenge reports at the completion of the LABs.*



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