



# How to **set up** a project?

This document can be used as a general guide to set up projects on your platform for maximum success. In our work with local governments, we noticed there was a need for a new methodology to organise projects in an optimal way. We therefore designed a workflow, based both on academic research and the real-life experience of our customers.

Step by step, we will guide you **from the conception of your project to its execution**. We hope that this framework will increase the success rate of each one of your projects on the CitizenLab platform.

# From concept to designed project: the lifecycle of your project on the platform

## STEP 1

### Visualise the ideal project

What does the ideal project look like?



## STEP 2

### Determine the goals of your participation project

What do you want to achieve?



## STEP 3

### Determine the right method

How are you going to do it?



## STEP 4

### Implement your project on the platform

How do you implement your project on the platform?



## STEP 5

### Do the check!

Does your project include all the ingredients to be successful?

# Visualise the ideal project

So you have an idea of a project in mind to put on the platform? As a first step, think about the features your project needs before you start designing it. Fill in the answers to the following questions to get a clear idea of all the **necessary requirements** to ensure your project's success. Try to fulfill **as many of these requirements as possible** before you start to set up your project. The ideal project would have a positive answer to each one of these questions!

	Yes	No	Not yet	I don't know
<p><b>Timeline</b></p> <p>A clear timeline sets the right expectations from the start (a clear timeline with multiple phases enables you to involve/engage your citizens in different ways and it helps you communicate with your citizens how their inputs will be processed and when they'll be invited to participate)</p>				
<p><b>Does your participation project have a logical process, with a defined beginning, middle and end?</b></p>				
<p><b>Time &amp; resources</b></p> <p>Enough investment is needed upfront to get to the desired results</p>				
<p><b>Are there enough time and resources (financial and human) set aside for your participation project?</b></p>				
<p><b>Stake</b></p> <p>A participation project has to carry meaning and relevance for people to participate in a qualitative manner</p>				
<p><b>Are there enough time and resources (financial and human) set aside for your participation project?</b></p>				
<p><b>Responsive</b></p> <p>Participants need to receive feedback for a qualitative participation process</p>				
<p><b>Is there a strategy in place to be provide your residents with feedback on their input?</b></p>				

# Visualise the ideal project

	Yes	No	Not yet	I don't know
<p><b>Transparency</b></p> <p>Participants need to be well informed about the participation project and what they can expect from it</p>				
<p><b>Have you compiled the background information to share with your users so that they can participate in a confident and informed way?</b></p>				
<p><b>Outreach</b></p> <p>The public need to be aware that a participation process is taking place, and be encouraged to engage</p>				
<p><b>Is there a communication strategy in place?</b></p>				
<p><b>Commitment</b></p> <p>Public officials need to be committed to take the result of the participation project into account, so that participants feel that their input matters</p>				
<p><b>Is there enough commitment from responsible public officials to take the results of the process into account?</b></p>				
<p><b>Offline and online</b></p> <p>It is worthwhile organising offline events together with online meetings, to maximise information, relevance and impact</p>				
<p><b>Is there a parallel offline process to your project and are you going to communicate about it online as well? Are your online and offline activities coordinated?</b></p>				

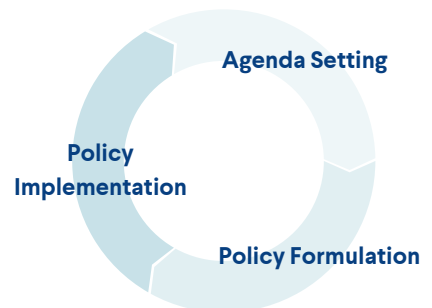


# Determine the goal

At this point, it is important to determine the end **goals** of your project. You want to define as closely as possible what you want to achieve with your participation process. This can be a short term (days/ weeks/months) or a long term goal (years). When the goal is determined, it's important to understand where the project is situated in the policy cycle and in the decision-making process. As a general rule, the earlier participants are involved, the more participants will be eager to participate with qualitative input.

**What is/are the goal(s) of your project?**

At this point, you want to determine where in the **policy cycle** your project is situated. This way you can set expectations, be transparent with participants about what the exact value of their input will be and how their participation will be put to use. With your project you can involve participants at multiple steps of the policy cycle. The earlier and the further along in the process, the more impact their input can have.



**Where is your project situated in the policy cycle?**

# Determine the goal

With your project you want to gather relevant input to achieve your goal. The type of information you need is determined by the phase you are at in **the decision making process**. With your project you can gather different types of input in different phases. The earlier you involve citizens and the more types of input you gather, the more impactful your project will be.

There are 4 different stages:



# Determine the right participation method

Given the stage you are at in the decision making process, the platform offers different participation methods, ideally suited to your needs. We strongly recommend that you use one of these methods in your project to get a satisfying result. You can read more about each method and it's different uses in the following pages.



Note that a project will often start at one stage of the decision making process and will finish at another. You can combine **different methods within one project** by designing **different project phases**. On a higher level, you can also put **different projects under the umbrella of a project folder** to get all the input you want to receive

Which **participation method** would you use to reach your goal?



# How to use which participation method?



## 1. Information

Participation is all about transparency, about giving the right information on the right moment. During specific phases in your project you don't want interaction and just need time to set-up a next phase, analyse, prepare feedback, draft a report. Use this method to let your audience know what you are up to, even if there is no possibility to participate at the moment.



## 2. Ideation

This method allows you to gather input by using an idea form or by letting people add their idea on a map. You can combine the different participation features in this method (input idea, collect comments on and/or collect votes) to shape your project:

- **Collect ideas** (*Idea Box, Discussion Forum*)
- **Collect comments** on ideas, designs, questions or plans (*Option Analysis, Discussion Forum, Q&A*)
- **Collect votes** on (prefigured) ideas, designs, plans, images (*Option Analysis*)

### Idea box

Collect ideas on a certain topic, plan, neighbourhood, ... using a customizable idea form, of which you can make specific parts mandatory or optional.

**Pro:** Informative, general and low barrier for participation

**Con:** Without clear conditions or framework, input can be too random. There is no guarantee of great ideas or usefulness of the input

### Option Analysis

Put different options/priorities to the test by letting people debate, comment and/or vote on it, and eventually show how you come to a conclusion. Here you combine comment and vote collection.

**Pro:** You can test the validity and possible efficiency of your options before they are implemented

**Con:** Participants cannot deliver their own solutions or suggestions.

### Discussion Forum

Create a safe and interactive space for your community to discuss and debate pertinent issues. This method favours an open discussion by collecting comments on (a) fixed idea(s). Add your issues as 'ideas' and make people comment on them.

**Pro:** This is an efficient tool to receive qualitative, individual and specific feedback on certain ideas.

**Con:** Qualitative feedback can be overwhelming, there is no clear direction. This can make the analysis or reporting more difficult.





### Basic Q&A

Ask questions in the form of ideas and collect answers in the comments.

**Pro:** Get simple, straightforward, personal information from participants

**Con:** The quality of the input is not guaranteed because open questions can lead to open answers. Analysing input can therefore be trickier.



### 3. Poll

You can organise a poll where people can participate in a short multiple-choice questionnaire:

Yes/no polling

Closed single - or multiple choice questions

**Pro:** A straightforward and easy method to set priorities and gather information. Clear outcome.

**Con:** No room for qualitative feedback or nuances in the answers.



### 4. Participatory Budgeting

Participatory budgeting is part of the gamification of citizen participation. With participatory budgeting you give participants a fixed amount of fictional money, which they can divide among initiatives, ideas, ... as if they are the party that's investing. You can also use this method if the organisation has a specific amount of money to distribute over a list of projects/ideas.

**Pro:** Interesting, creative and playful method to gather priorities and preferences

**Con:** If not communicated properly, the project can create the false expectation that people decide on actual money spending.



### 5. Online workshop

An online workshop allows you to organise live video meetings and facilitate simultaneous group discussions and debates. You can collect input, participants can cast their votes and reach consensus, as they would in an offline participation process.

**Pro:** You can get more in-depth information and engagement from participants. Holding workshops online also helps you overcome a participation barrier - more people will be able to join.

**Con:** To be truly impactful, you will probably need to limit the number of attendees.





## 6. Survey

You can create an advanced questionnaire (Typeform or Google Forms) and embed it in your project or project timeline phase. This is a one-direction participation between the government and its respondents. . The answers to the questionnaires are not visible to others.

**Pro:** Get extensive information from participants with a variety of question input possibilities and functionalities

**Con:** Top-down, one dimensional participation, with little room for qualitative input and no transparency of information for the other participants. The analysis of longer questionnaires can be time consuming.



## 7. Volunteering

Have people offer help (or register) to make an action happen that was defined by your organisation.




## STEP 4

# Implement your project on the platform

Now that you can clearly visualise your ideal project and that your methods and objectives are clear, you can start designing the project on the platform! Go to the platform and create your project. You can design different phases for each project, according to your needs and preferred methods.

Create a project

From a template 

From scratch 



# Checklist to finetune your project

Before you launch your project, use this checklist to check you are ready to go. Try to tick off as many boxes as possible!

## 1. Timeline

- Each project has at least 3 timeline phases
- Project titles and timeline phases have actionable titles
- Timeline descriptions are clear and concise and explain what participants can expect per phase

## 2. Time and Resources

- The platform is supported and led by a participation workgroup
- Each project(folder) has at least one dedicated project manager A project manager should be able to update the project, provide feedback or moderate the project when needed and move ideas from one phase to the other.

## 3. Stake

- The political decision, priority or ambition that is at the origin of this project is copy-pasted in the project description (or, if too long, pdf attached)
- The name of the decision maker and project managers (+picture) are shown in the project It is clearly explained what the relevance is of this project

## 4. Responsive

- There is room in the project for feedback (A timeline phase in the future / giving official updates / sending out e-mails / ...)
- You agreed on 'moderation rules' for moderator or project managers
- The built-in statuses and topics of the platform are checked and you assessed if you need them to organise feedback

## 5. Transparency

- Enough informative posts are provided
- Insightful attachments, pdf documents and images are shared
- Project admins update project and timeline descriptions with up-to-date information
- You have clearly explained how participation input will be used
- You have clearly explained what the added value of participation is

## 6. Outreach

- Communication efforts are in place
- Exciting visuals are implemented
- Participants are incentivised to participate

## 7. Commitment

- The responsible public official is committed to follow up on what's happening in the process
- The responsible public official is committed to take the input into account

## 8. Offline and Online

- Offline meetings and gatherings are clearly communicated online
- Input gathered during an offline event is uploaded in the project

