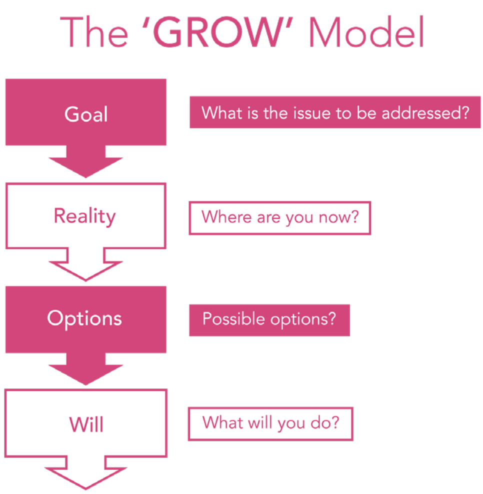
Chapter 15

How to design events with stakeholders and members of the public

The chances are that your pursuit of impact is likely to involve talking to more than one stakeholder at a time, and that these individuals may have quite differing perspectives. For many researchers, the prospect of having to negotiate and potentially mediate between conflicting parties is their worst nightmare. The good news is that even with the most challenging of groups, you can almost completely design conflict (and boredom) out of your meeting. There is no substitute for working with a professional facilitator to design and facilitate your workshop, but if you don't have the budget or time to hire someone, these suggestions will go a long way towards helping you design an event that delivers what everyone wants and is efficient and enjoyable.

A conceptual model for designing your event

The GROW model comes from the coaching literature and offers a useful conceptual framework within which to think about planning events. It suggests that we need to start by considering the goals of the event, then consider how far the current situation is from the goals you want to achieve, before considering options to get you from where you are now to your goal, and deciding on actions. Although this may sound like common sense, the questions in Box 8 can be a powerful way of checking that your event is action- orientated and contributes towards the goals of your research.



Box 8: Structuring a process, event or group conversation with GROW

First, think about the goals you have set for working with stakeholders and likely users of your research:

- What do you want to achieve together or change?
- How will you know if you've been successful?
- When do you want to have achieved your goal by?

Next, consider your current reality:

- What stage are you at in your research?
- What are you achieving at present in your research in relation to your goals?
- What action have you taken so far to try and reach your goals? What were the effects of this action?

Next, consider your options:

- What actions could you take to move forward?
- What strategies have worked before in similar circumstances?
- If no barriers or limitations existed, what would you do?
- Which step will give the best result?
- Advantages/disadvantages of this step?
- Which option will you work on first?

Finally, consider what you will do now, at the end of this workshop or meeting with stakeholders:

- What are you going to do?
- When are you going to do it?
- What help do you need?
- Who will you involve?
- What might prevent you from taking this step?
- How can you overcome this?

You can also use this model to structure the overall process within which your event will sit (e.g. a series of meetings and events or activities), and it can be used to structure open discussion during events to ensure it is action orientated and not a talking shop.

Process design

Before considering how to design a specific event, it is important to consider the context in which that event sits. There are two elements to this: the context in which your publics/stakeholders are operating; and your research context. If you have followed the second step in this book, based on the second principle (represent), you should know who is likely to be interested in your research, and what their interests are. You can then ask the following questions to help you design a process that helps you achieve impact from your research whilst meeting stakeholder needs:

- What outcomes do you want from the event?
- What are the outcomes that publics/stakeholders and likely users of your research want (based on your stakeholder analysis — see Chapter 14)?
- Where are the areas of overlap and synergy between your goals and the goals that you think stakeholders are likely to bring to your process? Can you emphasise and focus primarily on these?
- Are there any outcomes you want that stakeholders are likely to oppose, or that stakeholders want and you would not feel comfortable with or able to help deliver? Can you design additional meetings and workshops to negotiate goals with key stakeholders to avoid these clashing interests?
- How does your planned event link to the wider research project, and your funder's and organisation's goals? Can you combine or link your event with another event to make your process more efficient?
- How will you attract people to engage with your event?
- How will you keep people engaged with your research after your event?
- What steps will you need to put in place after your event to ensure you achieve your intended impacts?

Armed with the answers to these questions, you can now develop a process plan in which you organise a range of meetings, events or other activities around your event to ensure you achieve the impacts you want. Decide how many events of which type you need with which groups of stakeholders, and integrate this with your impact plan.

Event design

If you want an event to run smoothly, there are a large number of things you need to do beforehand. There are many important practicalities that are frequently overlooked by researchers when designing events. All it takes is for your venue to tell you that you're not allowed to stick anything up on the walls (as has happened to me on a number of occasions) and suddenly your event plan is in tatters if all your activities involved people writing on posters on the wall. So pay attention to these practicalities to avoid last minute stress:

- How many people do you expect to attend your event? Is your room sufficiently large to accommodate everyone, with extra room for people to move around to do group activities or contribute to material being developed on the walls of the room?
- With larger groups, it can be useful to split into smaller groups for certain activities to ensure everyone has a chance to discuss issues in depth:
  - Do you need to book break-out rooms or will the room be large enough for small groups to be able to work separately around the room without disturbing each other?
  - Do you want small groups to be facilitated or self- facilitating? Getting groups to nominate a facilitator to help steer discussion and capture notes may be efficient, but if they are facilitating properly, it means that you're unable to fully capture the views of that member of the group. Often, naturally more dominant group members may offer to facilitate and then abuse this position by not allowing others to talk or not fully capturing their points in the notes that are developed. This can lead to frustration amongst group members and biased outcomes. Therefore, although more costly and time-consuming, it may be worth assigning a facilitator to each group. Alternatively, to reduce costs, you can approach individuals you think might be effective facilitators in advance and ask them to arrive early to get guidance on good practice.
- For research projects operating in controversial areas or where there is conflict between stakeholders, you may need to take care to ensure the venue is considered 'neutral' territory. For example, don't accept a free room from a controversial organisation on one

side of a conflict.

- Consider how your choice of venue might influence power dynamics within the group you are inviting, for example, might hosting your event at the university intimidate some participants and increase discrepancies in power between those with more or less formal educational status?
- If you are planning to use facilitation techniques that involve putting flip-chart paper on walls, ensure that you have sought permission to do this, as some venues forbid you from sticking things on the walls. Even if you think a flip-chart stand will be sufficient, it is often useful to have the flexibility to be able to put things on the wall so participants can see a record of what has been discussed so far, and build on it in subsequent tasks.
- Is the venue able to provide lunch to participants in a timely manner? Booking a sit-down lunch can lead to unexpected delays, extending your lunch break and taking up valuable workshop time. A buffet lunch may give you the option to reduce time for the lunch break and act as a useful buffer if you're running behind schedule.

- Is the venue fully accessible to everyone you've invited—consider both distance and other accessibility issues, such as whether it is accessible by wheelchair and public transport.
- Have you booked your event at an appropriate time for your target audience? Weekdays will be better for some types of participant, while evenings or weekends may be better for others — you may have to devise two similar events to reach different audiences. Consider the time of year you've booked your event — might winter weather prevent some people from reaching you if you choose a remote location? Are there other key events happening the same day? Is it a particularly busy time of year for some of the professions you're targeting (tax returns due or farmers in lambing season)?
- Do you have all the equipment you're likely to need to carry out your facilitation plan (see below for more information about how to develop an effective facilitation plan)? Even if it's not part of your facilitation plan, it can be useful to travel with Post- it notes and sticky dots, in case you need to give everyone the opportunity to write down their thoughts on a particular issue, or if you need to rank or prioritise anything by getting people to stick dots next to ideas they prefer (more anonymous and easier to record than voting).

Developing an event (facilitation) plan

A facilitation plan is a bit like a detailed recipe for your workshop, which should be self-explanatory and easy to understand for everyone who is helping you facilitate (including you when you're stressed!). Although this may be based around an agenda with timings that match the items on the participants' agenda, it will need to be significantly expanded to provide more details to help you manage the day. In a good facilitation plan you should:

- **Assign a time-keeper** from the team to keep an eye on timings and remind others in your facilitation team when it is time to move on. Provide detailed timings for each agenda item — if you need to do a number of activities to achieve a particular agenda item, list each of these activities and estimate timings. Consider removing timings (or keeping them to a minimum) on the participants' agenda to avoid people noticing if you're running late, so you can easily adapt the programme to catch up time without people worrying they'll be going home late or missing lunch.

- **Assign members of your facilitation team to each activity** in your facilitation plan. Where possible, include a lead and a support facilitator — the support facilitator can help record points, get extra materials when they run out and generally help keep everything running smoothly so that the lead facilitator can focus on the participants.
- **Set clear aims** for your event, and then tailor your techniques to the aims and the interests/needs of participants. For details of techniques you may wish to choose from, keep reading.
- **Make time for introductions** at the start of your event (unless the group size is too large for this) and create time at the end of the day after participants have left for your facilitation team to debrief.
- To ensure your event leads to some practical outcomes, it is worth programming in an **action planning** session at the end of your event where you identify actions that have arisen as a result of your workshop, so you can assign deadlines and responsibilities and follow these up later.
- It can be useful to **start your event with 'opening out and exploring' techniques, followed by 'analysing' and then 'closing down and deciding' techniques** to structure your dialogue as inclusively as possible towards a practical outcome (Box 9).
- It is useful to **include a 'buffer' session in your timings,** such as a long lunch that can be cut short if necessary, or a session that could be cut out if time is running short. This will prevent people feeling rushed, and allow you to spend enough time on the important aspects of the workshop. I usually identify a session in the afternoon that could be shortened or completely removed without significantly compromising the workshop, in case I'm running short of time or need to create time for a new session in response to a problem.
- **Create an equipment list,** making sure you have all the equipment you need for every activity (don't assume the venue will have anything you can use to stick paper on walls).
- **Trial and test your methods.** If you've not tried a particular facilitation technique/method before, it's never a good idea to try things out for the first time with stakeholders — use it in a research meeting or in class with students first to check you know how it works properly and adapt it accordingly.

Engagement techniques

There are many techniques available to facilitate two-way engagement between researchers and stakeholders as part of the research process (Box 9). I typically start a workshop with opening up and exploratory techniques, before moving on to analysing and deciding techniques. However, you may want to have a separate workshop at the start of your research that is focused entirely on opening up and exploring to understand the research priorities of your stakeholders and adapt your research accordingly. Below I've listed some of the techniques I use most often in my own research. Having these in your mind can be incredibly useful if a technique isn't working for some reason and you need a plan B.

Box 9: Types of engagement technique

- Opening up and exploring dialogue and gathering information with stakeholders about issues linked to your research (goals in the GROW model – see page 169)
- Analysing issues in greater depth with stakeholders, getting feedback on preliminary findings (reality and then options in the GROW model)
- Closing down and deciding on options and actions based on research findings (will in the GROW model)

Opening up and exploratory techniques:

- **Brainstorming** techniques can help rapidly identify initial ideas from a group. By getting participants to think quickly and express their ideas in short phrases, the technique encourages participants to suspend the normal criteria they would use to filter out ideas that may not appear immediately relevant or acceptable. As such, many of the ideas may not be useable, but there may be a number of new and creative ideas that would not have been expressed otherwise, which can be further developed later in an event.
- In a **metaplan**, participants are given a fixed number of Post-it notes (usually between two and five depending on the size of the group, with fewer Post-its being given out in larger groups) and are asked to write one idea per Post-it. Participants then take their Post-its and place them on flip-chart paper on the wall, grouping identical, similar or linked ideas together. The facilitator then summarises each group, checks the participants are happy with the grouping (making changes where necessary) and circles and names each group. In the space of 10 minutes it is possible for everyone to have given their views and you have a summary of the key issues that can be used to structure other group activities.
- **Venn diagrams** can be used for a similar purpose, helping participants identify key issues, and overlaps or connections between them.
- There are a variety of ways to get participants to list ideas or information, for example, via responses to requests for information on social media platforms or online discussion boards, or in group work by creating ‘stations’ around the room where participants can list information or ideas on a particular topic. Stations may, for example, be based around themes that emerged from a brainstorm or metaplan (above). These groups may be facilitated or all participants may simply approach each station and contribute individually in their own time.
- In the **carousel** technique, participants are assigned to groups (with the same number of groups as there are stations) and given a fixed time to contribute to one station before being rotated on to the next. If each group is given its own coloured pen, it is possible for participants to see which ideas were contributed by previous groups. When a group reaches a new station, they are given time to read the contributions of the previous group(s) or these are briefly summarised by the station’s facilitator. They can then query or build upon previous work, listing their own ideas beneath the ideas expressed by previous groups. As the activity continues, it

becomes increasingly difficult for groups to add new points, so the time per station can be decreased. Finally, to reduce the time that might otherwise be taken for stations to 'report back' to the wider group, participants can be directed back to their original station to read what other groups have added to their points. Although not fully comprehensive, this gives everyone a good idea of what has been contributed to all stations. For those who want a fuller picture, the materials can be left on the walls to be viewed during subsequent breaks.

Analysing techniques that enable stakeholders to critically evaluate ideas with you include, for example:

- **Categorisation** techniques where participants are asked to sort or group ideas into themes, based on pre-set criteria or based on similarity, for example, the grouping stage of a metaplan, or putting ideas on cards and asking participants to sort the cards into different piles on the basis of their categorisation
- **Mind-mapping** techniques (also known as concept mapping, spray diagrams, and spider diagrams) can be a useful way to quickly capture and link ideas with stakeholders.
- **Problem tree analysis** (also known as cause-effect mapping) is similar to mind-mapping but is a simpler tool (which is also more limited in the way it can be used). It may be useful in settings where the complexity of a mind-map may be considered intimidating for some participants, or where you purposely want to keep the analysis simple and brief. Rather than looking at how all issues are linked to one another, problem tree analysis uses the metaphor of a tree to help visualise links between the root causes and solutions to a problem. A simple picture of a tree is drawn on a large piece of paper, with the problem written on the tree trunk. Participants are then asked to draw roots, writing the root causes of the problem along each root. Some root causes may lead to other root causes, so an element of linking may be done between roots, but this should not get too complex. All these roots lead to the bottom of the tree trunk and at the top of the trunk, branches are drawn, along which potential solutions are written (again with the potential to link branches to other branches to show how one solution may be **dependent** upon another solution being first implemented). If you want, you can cut out circles of coloured paper to signify fruit, which can be used to represent anticipated impacts or outcomes of implementing solutions.
- **SWOT analysis** encourages people to think systematically about the strengths, weaknesses, opportunities and threats as they

pertain to the issues being researched.

- For issues that have a strong temporal dimension or for project planning with stakeholders, **timelines** can be used to help structure discussion in relation to historical or planned/hoped for future events. There are various ways to do this, for example, flip-chart paper may be placed end-to-end along a wall with a horizontal line along the middle of the paper, marking 'NOW' and specific years and/or historic or known future events to help people orientate themselves along the timeline. Participants may then write comments or stick Post-it notes at various points in the past or future, vertically stacking ideas that occur at the same time.

Closing down and deciding techniques:

- **Prioritisation** differs from ranking by enabling participants to express the strength of their feeling towards a particular option rather than simply saying "yes" or "no" (as in voting) or ranking an idea as better or worse than another idea. Prioritisation exercises also enable you to identify options that are considered to be particularly popular (or not) by participants, which you may then want to explore in greater detail. In prioritisation exercises, participants are given some form of counter that they can assign to different options (e.g. sticky dots or, if working outside, stones, but if you don't have anything to hand, people can simply be asked to assign crosses with pens to options). Normally, participants would each be given a fixed number of counters (at a minimum this should be the same number as the number of options) — this prevents certain participants assigning more counters than other participants to the options they prefer, biasing the outcome. If using sticky dots, it is possible to get people to assign different coloured dots to express their preferences according to different criteria (e.g. use red dots to say how cost-effective they think an idea would be and green dots to express how easily they think the idea would work). It is then possible to see at a glance which ideas are preferred, and it is relatively quick and easy to total the number of counters assigned to all options, and if desired, create a ranked list.
- **Multi-Criteria Evaluation** (also known as Multi-Criteria Analysis or Multi-Criteria Decision Modelling) is a decision-support tool for exploring issues and making decisions that involve multiple dimensions or criteria. It allows economic, social and environmental criteria, including competing priorities, to be systematically evaluated by groups of people. Both quantitative

and qualitative data can be incorporated to understand the relative value placed on different dimensions of decision options. Broadly, the process involves context or problem definition, representation of evaluation criteria and management options, and evaluation. When applied in a participatory manner with stakeholders, this may involve any of a number of discrete stages, for example:

- o Establishing context and identifying participants: stakeholder mapping/analysis techniques may be used to systematically consider which stakeholders should be involved in the multi-criteria evaluation
- o Defining criteria: criteria are defined that capture stakeholders' interests via facilitated discussion and literature
- o Defining the options that the group is choosing between o Scoring options against criteria: the likely performance of each option is scored against each criterion
- o Multi-criteria evaluation: algorithms are used to combine scores and ranks into a weighted value that describes the overall preference towards each option. This may be done either using free software or by hand, adding up scores assigned to each option, and then multiplying scores by agreed amounts for certain criteria (e.g. by 1.5 or 2 depending on whether they are considered to be slightly or much more important than other criteria) and recalculating the scores for each option
- o Discussing the results: this is a decision-support tool so outcomes may be deliberated with participants or amongst decision-makers to assess the degree of consensus, negotiate compromise and manage trade-offs.

I've focused on prioritisation methods in this last section because alternatives like voting and ranking can be problematic in my experience. In most group settings, it can be difficult to ensure anonymity in voting, which may bias results, and there is little room to explore reasons for people's voting preferences. Alternatively, ideas can be ranked. However, getting consensus amongst participants for a particular ranking can be challenging, although the discussions that this stimulates may be revealing. It is also not possible to differentiate between options that are particularly popular or unpopular — this may be important if only one or a few ideas are considered viable, as a ranking may imply that mid-ranked options are viable or somewhat preferred.

At the end of your event you will be left with a mountain of flip-chart paper and Post-it notes. It is always a good idea to photograph everything before you remove it from the walls, in case things get lost or damaged in transit back to your office. I often put sticky tape across flip-chart paper that people have stuck Post-it notes on, to avoid finding a pile of Post-it notes at the bottom of your bag, disconnected from the paper they had been linked to. Be careful to label your folded bits of flip-chart paper so you know which session in your workshop they came from, so it is easier to write up later. Deciphering handwriting and typing this all up yourself can be very time-consuming, so I usually try and get my virtual assistant to do this for me (see Chapter 11). It is important to try and get a report sent to participants as soon as possible after the workshop, even if you don't have time to write much around the tables and photographs that capture the outcomes of the workshop. Make sure you send an accompanying note to anyone who has committed to an action at the end of your workshop. If you don't do this, then there is a danger that people will feel like they have been at a 'talking shop' and it may become hard to re-engage with these people in future work.