



The PSLifestyle Citizen Science Labs Manual

A step-by-step approach to implementing citizen science lab meetings

Author: Arlind Xhelili



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Main author(s)	Arlind Xhelili
Contributors	Leon Johaness Reuss, Rosalyn Old, Rosa Strube, Luca E. Sander, (CSCP), Cristina Galletti (GreenApes)
Reviewers	Sari Laine, Ramona Pulli (Sitra), Santeri Posio (Solita)
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Abstract

The **PSLifestyle Citizen Science Lab Manual** provides a **step-by-step overview** of the necessary **activities that one could consider** in the **planning and implementation of citizen science labs meetings** in the project's pilot countries (i.e., Portugal, Germany, Finland, Estonia, Slovenia, Italy, Greece and Turkey). Besides such an overview, the Manual brings together a **compilation of facilitation tools and techniques examples** that help to enable effective citizen engagement and productive exchanges within the lab meetings. Lastly, the Manual provides **guidance on how citizen lab meetings could be conducted in a virtual environment** as a response to potential limitations to in-person meetings. The **Manual is part of a series of documents**, namely the Citizen Science Labs Governance Framework and the Participant Recruitment and Engagement Strategy, that in conjunction will support the effective materialisation of the PSLifestyle citizen science labs – the project's approach to citizen engagement.

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What is this Manual about?

The **PSLifestyle Citizen Science Labs (CSLs) Manual** has been brought together for the purpose of **guiding and supporting the practical planning and implementation of citizen science lab meetings** in the pilot regions of the PSLifestyle project. It is an extension of the **Citizen Science Labs Governance Framework** that, as reflected in the name, provides the overarching vision and framework of the project's citizen science labs. These two documents are complemented by a **Participant Recruitment and Engagement Strategy** that defines a strategic outreach approach to maximise citizens' participation in the citizen science labs. **Figure 1** visualises the relationship between these key three documents that support the materialisation of the project's citizen science labs.

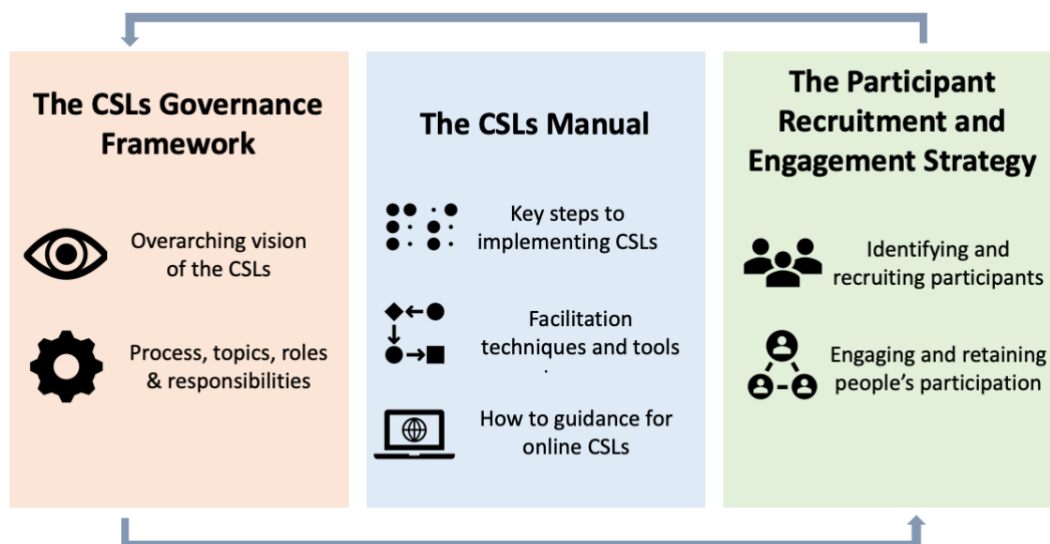


Figure 1: Key materials for the PSLifestyle Citizen Science Labs

The PSLifestyle CSLs Manual provides a step-by-step guidance that supports the PSLifestyle local implementers to effectively engage with citizens. More specifically it showcases:

1. the necessary activities / steps to account for when planning and conducting effective citizen science lab meetings and engaging with citizens;
2. examples of facilitation tools and techniques that would enable effective citizen engagement and productive exchanges; and
3. guidance on how citizen lab meetings could be transformed into virtual settings as a response to limitations to in-person meetings.

How to read the Manual

The Manual to a large degree **provides an overview of the activities / steps to consider**, when planning and implementing a lab meeting (in-person or online), including resources of facilitation techniques which local implementers can take forward as they see it best fit.

Even though the activities / steps are presented in the form of a list, their undertaking should be **performed in parallel or iteratively**. Before implementing the Manual in practice, it is highly advisable to **read the Manual from beginning to the end**. This would allow one to familiarise with the content of the Manual and **form a plan on how to approach the process**.

The Manual distinguishes between in-person and online meetings. Nonetheless, due to similarities in planning, **most the activities / steps will apply to both formats**. These are presented in **black**. Beyond these, there are certain activities / steps that are distinct and apply to in-person meetings only, which are presented in **blue**. Then there are certain activities which apply for online meetings solely, presented in **pink**. Furthermore, throughout the different activity clusters, hints and tips are provided in the form of highlights – in **orange**.

The Manual leaves **enough flexibility** for local implementers to **tailor and adapt** activities according to their needs and local contexts. The **flexible character of the Manual** enables its **broader utilisation** by other practitioners, **beyond the PSLifestyle project** also.

Snapshot 1: PSLifestyle – Co-creating a positive and sustainable lifestyle tool for and with European Citizens

The European Union Horizon funded '**PSLifestyle**' project aims to help **close the gap** between climate awareness and individual action, and to **increase citizen participation** in sustainability topics. It does this by **engaging citizens through a digital tool** to collect, monitor and analyse their environment and consumption data as well as co-research, co-develop, and uptake everyday life solutions for climate change.

The project will build a data-driven movement with and for citizens to enable more sustainable lifestyles across Europe. The ambition of the project is to **engage a total of four million European citizens** – with a particular focus on eight European countries: Estonia, Finland, Greece, Germany, Italy, Portugal, Slovenia and Turkey – in data collection and data sharing through the **PSLifestyle tool**.

The web-based application will be based on the **carbon footprint calculator 'Lifestyle Test'**, set up by the project lead partner Sitra in 2017. In the PSLifestyle project, an improved version of the online tool will be further developed and contextualised to align with the citizens' local realities in the target regions. This will be done by co-creating a **localised version of the tool** through **citizen science labs** to understand the local **capabilities, opportunities, and motivations** of the citizens in engaging in more sustainable lifestyles. The PSLifestyle project will also work with other societal catalysts, including policymakers, businesses, civil society organizations (CSOs), and academia to design solutions based on citizen data. After the co-development process in citizen science labs, the project will focus on the **wider deployment of the tool and on expansion** into other European countries.

Snapshot 2: The PS Lifestyle Citizen Science Labs (CSLs)

The PSLifestyle CSLs are a combination of **two participatory governance approaches**, namely, **living labs and citizen science**, that aim at **ensuring and enabling citizens' involvement** in shaping our **socio-economic and political frameworks** through **co-creation and data collection / provision**. Such methodological approach helps to **increase the transparency, credibility and legitimacy of solutions** that might impact citizens' lives.

The PSLifestyle CLSs will bring together European citizens to **co-create and shape visions of good life** – within environmental boundaries as well as **design solutions for making those visions a reality**.

Throughout six meetings, together with members of their community / city, citizens participating in the CSLs will have the opportunity to:

- **collect and provide information** through speaking and exchanging about **challenges** they face in their neighbourhood/cities/regions in general and for more sustainable living throughout 4 key areas such as food, mobility, housing and general consumption;
- **co-design solutions and every day actions** that hold potential for overcoming those challenges and increase our share of sustainable living;
- **exchange on barriers** that could **inhibit the uptake of those solutions** as well as on **opportunities** that could **accelerate their wider roll out**; and
- **build future pathways / recommendations** of social, economic, political and other nature to key actors that could support making the visions of good life, within environmental boundaries a reality.

The CSLs Governance Framework provides a more detailed overview of the project's citizen science labs.

Snapshot 3: 5 Principles of Citizen Science Labs (by consulting literature on the field. These have been summarised under Footnote 1)

While applications of citizen science labs will vary by design to consider the contexts of the project's target regions, all CSLs have a few key principles in common that are closely connected and build on each other.

- **Reflection of real life.** A first key pillar of the PSLifestyle CSLs already hides in its name. While lab experiments usually refer to research done in optimal yet often artificial conditions, citizen science labs seek to bridge between the research methods used in labs and the complex, natural real-world context. This context is part of the experience of any service, product and innovation. Thus, to design viable solutions to certain challenges, the real-life context is taken into account right from the beginning.
- **Bridging between methods.** Tying onto the first principle, citizen science labs rely on a broad spectrum of research and innovation methods. This follows on the one side from the adaption when bringing lab experimentation into the real life and ever-unique contexts that the labs are being tailored to, to best fit their purpose; and on the other side, from the different topics that will guide the exchange of information and co-creation with the lab participants.
- **Active user engagement.** A third aspect that logically follows and ties onto the ones before is the realization that to understand the contexts and design innovation for the real-world contexts, CSL participants should not simply be observed as study subjects but engaged as active study contributors. Through this participatory process participants are seen as domain experts and have recommendation and guidance power which in turn spurs ownership and self-efficacy and differentiates this from other forms of citizen engagement.
- **Transdisciplinary outlook.** Citizen science labs' ultimate goal is the value creation covering the diverse needs and desires of all stakeholders within the context frame. To achieve this overarching goal the CSLs necessarily draw upon the heterogeneous insights of many domain experts. While the PSLifestyle's CSLs primary target group are people, the CSLs intermittently will work with other key stakeholder representatives also such as policy makers, businesses, CSOs as well as researchers. Only through the participation of all these groups and the proactive call for various perspectives can innovation be designed for and validated by the specific contexts unique to the realities at hand.
- **Added value.** The fifth principle ties onto the engagement of multiple stakeholder groups and the value creation covering diverse needs and desires. By design, the CSLs should lead to value creation that serve the needs of citizens and key stakeholders in the present as well as those in the future and thus has an inherent claim towards scoping pathways for good life for all, within environmental boundaries.

Planning and running CSLs

Following the brief introduction and context setting, let's have a look at the key activities / steps one needs to account for the effective planning and running of CSL meetings. These are organised into three major categories and within each you will find **sub-categories** and a **checklist of actions** to implement as well as **highlights** (sporadically) capturing some noteworthy or inspiring guidance.

1. **Before the meeting** – key elements to think about when planning for a CSL meeting
2. **During the meeting** – time to implement and materialise our plans
3. **After the meeting** – following up and maintaining momentum

1 What happens before the meeting?

Before the CSL meeting takes place, there are some key **organisational elements that need to be pinned down** to ensure the aims will be reached and the meeting will be fruitful and successful. For example, during this stage, we want to define as well as refine what we want to focus on and why, how to communicate with our target group, where do we want to have the meeting, how we want to run it, who is the team delivering and what are their roles and responsibilities.

To ensure a holistic and structured overview, the **steps of before the meeting** are clustered in four categories, namely:

1. Designing a CSL meeting
2. Communicating with participants
3. Arranging logistics; and
4. Making final preparations

¹ Evans, P., Schuurman, D., Ståhlbröst, A., & Vervoor, K. (2017). U4IoT Living Lab Methodology Handbook. User engagement for large scale pilots in the Internet of Things (U4IoT) Consortium 2017-2019. European Network of Living Labs.

Ståhlbröst, A. & Holst, M. (2012). The Living Lab Methodology Handbook. Social Informatics at Luleå University of Technology and CDT – Centre for Distance-spanning Technology, Sweden.

1.1 Designing a CSL meeting

Achieving an effective and productive exchange with citizens as well as jointly co-create solutions is largely dependent on **how a meeting is designed and thought through**. From refining the focus to preparing the facilitation and supporting materials, the following activities will support you in designing an effective meeting and avoid missing key points.

Key activities to consider

- ✓ **Refining and specifying the focus of each lab meeting.** The overarching scope and objectives of the CSLs and sub-meetings within are already predefined during the ideation of the CSLs (during the proposal development stage) as well as in the CSLs governance framework. Nonetheless, as part of the preparatory steps of each lab meeting, it is important to **further specify and refine the focus of the meeting to avoid any ambiguity** which can then **impact the overall planning**. The adjusting and refining of the focus are ideally done while considering the local context and the reality of your participants (i.e., needs, challenges, opportunities, people's topical interests and similar).

i *The refining and specifying of the lab meetings ideally will happen in collaboration with the lab iteration coordinators. Please see the Governance Framework for an overview of the responsible organisations.*

- ✓ **Pin down the date of the meeting.** Identifying a suitable date for conducting the lab meetings will help not only to have a more precise communication with your participants, but also act as a deadline before which all preparatory work needs to happen. **Communicate these dates** to your participants **as early as possible and no less than 6 weeks before the meeting takes place** in the **various communication channels**.

i *Please refer to the CSLs Governance Framework for the overarching timeline of the lab iterations and meetings within.*

- ✓ **Define the delivery approach.** Depending on the identified focus and goals of the particular lab meeting (outcome of the preceding steps) think about the various approaches that are most suitable to reach the objective and generate the necessary content. In here, consider the:
 - **Format of the meeting.** Ideally CSL meetings will take place **in person**, however, the **Covid-19 restrictions are uncertain** and therefore one needs to consider the **online setting** as well. **The format** of the CSL meeting **will influence its duration** and potentially **the facilitative delivery approach**.

i Please follow the developments and regulations in your country and region and consider which option is the best depending on those. To avoid planning under ambiguity, please make a decision on the format at least 1-month before the date of the meeting.

- **Number and type of sessions.** A good meeting has **specific or dedicated sessions for each goal or objective**, the length of which are specified according to their aim and expected content to be covered. A CSL meeting minimally should have a 1). welcome and introduction, 2). one further interactive session and 3). closing, including feedback session.
- **Choose the facilitation methods.** Depending on the **type of the particular session**, think about what would be the most **suitable facilitation techniques** to deliver those as well as to **ensure interactivity** among the participants themselves and facilitators also.

i The section on **Facilitation tools and techniques** provides an overview of resources once could consult when thinking about and selecting the most suitable facilitation methods. Before each meeting, please consult the lab iteration coordinator for further guidance.

- ✓ **Prepare the agenda.** Building upon the results of the preceding steps, it is time to create a **preliminary agenda** that will support you to have a **first overview of the big picture** and the proceedings of the meeting as well as **identify any potential gaps or inconsistencies**. Keep **revising and refining the agenda** as you go to achieve an optimal plan that will support you in reaching the goals.

i When preparing the agenda, please consult the lab iteration coordinator for further guidance. The aim is to ensure consistency of the lab meetings across the pilot regions.

- ✓ **Assign roles and responsibilities.** As you plan the CSL meeting, you will be able to identify a number of **roles and responsibilities** that would need to be **fulfilled to ensure the meeting will run well**. Some key roles to consider are those of the main moderator, group discussion moderators, note takers, events and logistics manager, photographer and social media communicator. These do not need to be different people and responsibilities could be combined.
- ✓ **Prepare the consent form.** The consent form (including **data privacy & photo release clauses**) is necessary not only to assure participants about how their privacy is maintained, but also enable the project to process and make use of the generated input as well as allow the visual documentation and dissemination of the session (e.g., taking photos).

i A consent form template is provided in the section **Templates**, with further guidance on how to fill it out.

- ✓ **Prepare the supporting and facilitation materials.** At the end of this cluster of activities it is time to prepare and bring together the key working materials. Depending on the format of the meeting, different steps are recommended.

Materials for an in-person meeting

- ✓ **Directions to the venue.** Bring together a **direction document** that explains how to get to the venue **via different modes** such as walking, biking and/or public transport.
- ✓ **Prepare the facilitation materials** that will support the effective exchange with participants. The facilitation materials are prepared by **looking at each session of the agenda and the chosen facilitation techniques**. An example could be creating presentation slides or preparing the facilitation templates in pinboard papers or flipcharts.
- ✓ **Prepare the feedback form** to collect participants' impressions of the meeting. This could be **in the form of a questionnaire** covering aspects related to the 1). objectives and topics of discussion; 2). the delivery approach; 3). logistics and catering; 4). interaction with organisers; and 4). suggestions for next steps. Please note, the feedback could be completed by participants on the spot or this could be done later on online.

Materials for an online meeting

For an **online setting**, the **preparation of the supporting and facilitation material** is still a key step, however, with a **slightly different composition**. In this context, it is recommendable to:

- ✓ **Bring together a technical guideline** that onboards participants to the chosen conference tools. Such a document could cover 1). how to download and/or update the latest version of the conference tool; 2). how to join the meeting (app and/or browser; 3). connecting to audio and video); 4). key functions one has access to as a participant; and 5). virtual behaviour etiquette. Don't forget to provide a contact person for IT related questions.
- ✓ **Prepare the facilitation materials.** The process of preparing the facilitation materials is the same as for in person meetings, with the only differentiation of digital platforms being used for the implementation of the facilitation techniques.

- ✓ **Prepare a (digital) scrapbook** that could support participants in capturing highlights and key discussion points on their own initiative. The scrapbook could be designed to reflect and mirror the content of the agenda and different sessions within as well as include key questions that would guide participants in their note-taking. Participants could choose to work with the scrapbook online or print it depending on their preferred working approach.
- ✓ **Prepare the feedback form** to collect participants' impressions of the meeting. This could be in the form of a digital questionnaire covering aspects related to the 1). objectives and topics of discussion; 2). the delivery approach; 3). interaction with organisers; and 4). suggestions for next steps. Please note, the feedback could be completed by participants on the spot or this could be done later on online.



*Please see the section on **Online platforms and resources** for an overview of potential digital tools that one could use for the preparation of materials for an online meeting.*

Highlights (designing a meeting)

- ★ The CSL meetings are not compensated and voluntary, therefore, ideally these are **scheduled on a timeframe that will not overlap so much with participants' day to day activities** (e.g., work). For example, on a Saturday or Sunday and/or after working hours (applicable to both **in-person** and **online** meetings)
- ★ It is very easy to get caught up and aim to reserve as much time as possible for the generation of insights and learnings. However, this could lead to citizens being exhausted. Therefore, try to **plan for a good number of shorter coffee or comfort breaks in-between sessions** (applicable to both **in-person** and **online** meetings) **and a longer lunch / food break**. The lunch break could be at the beginning, middle or after the meeting itself (applicable to **in-person** meetings only).
- ★ **Online meetings** are recommended to be with shorter **sessions** to avoid digital fatigue and loss of interest from participants' side (applicable to **online** meetings only).
- ★ To warm participants into the meeting and to one another, it is recommended to **start the meeting with an ice-breaker**. This approach will ensure participants have a softer start as opposed to starting the meeting directly with content. (applicable to both **in-person** and **online** meetings)
- ★ Nowadays, the majority of people can find their way with digital platforms, nonetheless, even the best of us could run into potential technological problems that we might need support with. Therefore, in case the meeting is taking place

online, it is recommended to have a **dedicated person who will support participants in case they encounter any IT difficulty and/or have any IT related questions** (applicable to **online** meetings only).

- ★ Social interaction and networking might be one of the key reasons for people to join the CSLs. However, online meetings might make such opportunities more difficult. Therefore, to avoid missing opportunities and increasing the chances of participants to join and continue the engagement with us in the section on **Online platforms and resources** we provide some suggestions of videoconferencing tools that are great for socializing and networking occasions (applicable to **online** meetings only).

1.2 Communication with the CSLs participants

Simultaneously to undertaking the planning of the meeting, start **communicating with your participants**. The participant engagement starts before, peaks during and continues after the meeting itself.

i Please refer to the **Participant Recruitment and Engagement Strategy** for a more detailed overview on how to approach, attract, bring citizens to a lab meeting as well as retain their interest and engagement. In this Manual we describe only the organisational steps related to bringing citizens to a CSL meeting.

Key activities to consider

- ✓ **Create a citizen / participant registry** to keep track of citizens that have been directly approached, shown interest and/or have joined past lab meetings. Ideally, shortly before the session, there is a solid pool of citizens who have confirmed their participation. Maintain and update this registry periodically and especially before and after a lab meeting.
- ✓ **Share organisational details in a timely manner.** Citizens are interested and want to join? – that is a great achievement! Keeping citizens updated and informed with key organisational details in a timely manner will support in maintaining their interest and ensuring they join on the day of the meeting. Moreover, it will show that we respect and appreciate their time and availability. Minimally **two rounds of targeted communication (usually via e-mail)** to those who have confirmed their participation and/or have shown strong interest are recommendable.
 - The **first round** would focus on sharing practical information (date, time, venue, directions for an **in-person** meeting or date, time, link and

conference details and technical guideline for an **online** meeting) and is sent 2-weeks before the meeting.

- The **second round** focuses on reminding citizens about the meeting and additional final details (as seen above) and is usually sent 3-5 days before the CSL meeting.

Highlights (communicating with participants)

- ★ **Don't ghost your participants.** Throughout the preparation phase, it is normal for citizens to have questions, doubts and/or ideas that they will share or would like to share with you. It is very important to **keep the communication channels** (especially those listed as contact throughout the various notices) **open and respond to their enquiries in a timely manner**. Show and share your participants' enthusiasm!

1.3 Arranging logistics

Even though misperceived as less important than content related preparations, **logistical arrangements determine the success of a meeting** mainly by contributing towards **creating a comfortable lab environment for the participants**. Depending on whether the meeting will be in person or online, there are some distinct steps to consider.

Key activities to consider (in-person meeting)

- ✓ **Choose and book the venue.** The venue of the citizen science labs should be minimally **selected and booked 1-month in advance** to avoid any last-minute surprises. The venue is ideally **located centrally and available and accessible to all citizen groups**, while being logistically fit to host a meeting of this kind. Before booking the venue, it is recommendable to visit the place and see if it meets the necessary requirements.



Please refer to the CSLs Governance Framework and Participant Recruitment Strategy for further details on characteristics of a good venue location.

- ✓ **Arrange catering.** Food is such an integral part of our daily lives and a great enticer of social interaction and relationship building. At the same time, food is driven by cultural preferences also. Therefore, it is important to ensure that during the labs we **offer participants catering and nutritional sustenance**, however, one that takes into account the **diverse diets and preferences**. To avoid any potential

insensitivity, the catering is ideally vegetarian and/or vegan, with **limited or no allergic ingredients** (to the extent possible). It is advisable to always **have a description of all the ingredients** either next to the specific dishes or available at all times for citizens to consult. And of course, relying **on locally produced** ingredients is preferable!

Key activities to consider (online meeting)

- ✓ **Select the online conference platform.** There are multiple online conference platforms to choose from, however, **Zoom and Teams are the most suitable options** for such co-creative and collaborative meetings. Other conference tools are also available. Feel free to look and **compare the platforms** according to their functionality and ease of use and **select the one that matches your needs the best.**



*In the section on **Online platforms and resources** an overview of different videoconferencing platforms is provided. Please note the list is not exhaustive.*

1.4 Final preparations

The before the meeting cluster of activities culminates with making the final preparations step that aims at providing a structured approach to **confirming and increasing the confidence** of the organising team that **everything has been planned and prepared properly.**

Key activities to consider

- ✓ **Develop an internal working agenda.** To ensure that the meeting will proceed smoothly, based on the overarching agenda, it is recommendable to develop an internal working agenda that will support the organising team to have a full **understanding of the meeting's proceedings.** This internal working agenda could describe the 1). flow of each session (incl. dedicated blocked time for each activity); 2). what are the specific techniques that will be used and how; and 3). who are the people involved and what are their responsibilities.
- ✓ **Team briefing.** Based on the internal working agenda have a briefing **meeting with the team members** involved and **go through the proceedings** of the meetings and **confirm the role of each person involved.** This is a good time to confirm their confidence and conformity with their roles and clarify any doubts or questions as well as make any final revisions.

Specific in-person meeting activities

- ✓ **Collect the materials.** A day before the meeting **collect all the necessary materials and either bring them to the venue already or have them ready at hand.** Use this opportunity to **double check if something is missing.** Some of the materials to consider are: participants registration list, consent forms, copies of the overarching and working agenda, name badges, facilitation material (as described in **Designing a CSL meeting**), facilitation toolkit (i.e., markers, sticky notes etc.), feedback form, camera.
- ✓ **Arrange the room and check equipment.** On the day of the meeting, early in advance, **go to the venue and prepare the room(s)** i.e., arrange the table, seats, place working material on the tables, arrange flipcharts or pinboards. While doing so, **check the technical equipment** and double check their functionality and if needed make last fixes.

Specific online meeting activities

- ✓ **Collect the materials.** Similarly, to a physical meeting, a day before the meeting, if not done before, **collect all the necessary materials and have them ready at hand.** Use this opportunity to **double check if something is missing.** Some of the materials to consider are: participants registration list, consent forms, copies of the overarching and working agenda, facilitation materials (as described in **Designing a CSL meeting**, however, in this case a majority of them will be in digital platforms, therefore one needs to collect the links), facilitation feedback form link.
- ✓ **Organise a test run with everyone involved.** Before the meeting (one day before or 1-2 hours before the meeting on the day) it's always advisable to have a test run with everyone involved, do a **technical check and make sure there will be no technical difficulties**, especially among the organising team. This will give you the opportunity to make any last fixes, if needed.

2 What happens during the meeting?

Planning and preparation all set, covered and you've made it to this section?! Congratulations! – a large bulk of the hard work is done and now it is time to run the session and materialise the plans. Even more important, during the meeting the **overarching aim is to ensure citizens / participants find the meeting insightful, there is a collaborative exchange between them**, while in the process we **generate the necessary results**.

Key activities to consider

- ✓ **Welcome participants.** First impressions last and guide the rest of our experiences– therefore it is important to **welcome participants warmly** and make them feel appreciated already from the start.



Depending on the format of your meeting that are some distinct steps. For the latter, please have a look at the respective activities below.

- ✓ **Run the session.** You are now ready and set to run the meeting. **Follow your plans, preparations as well as defined flow and the success is guaranteed.** Nonetheless, do not forget to **be flexible**. The citizen science labs are all about engaging citizens and allowing them to freely express themselves. As such, **if something does not go according to plan, do not worry as long as you can facilitate and capture the exchange.**
- ✓ **Engage participants.** Even though participants manage to join, **opening up and participating in the exchange will vary among the group**, with some wanting to share their thoughts more than others. **Receiving input from and equally engaging all participants** is important to **ensure diversity** in the collected learnings, but also for ensuring that **everyone feels respected and appreciated**. **Box 1** provides some key principles of good engagement that could support you in successfully interacting with all citizens.
- ✓ **Share as we go.** We are doing important work and we of course want to share some of our experience with the world. **Don't forget to take some photos and post those in the local social media channels.** This is one the easiest steps to forget; therefore, it is advisable to allocate this responsibility to one member of the organising team. In addition, once the meeting is over **share key highlights and communicate about the meeting** on your own and project channels.
- ✓ **Let's learn together.** Towards the end of the meeting, **take approx. 15 minutes to allow for a quick feedback round/activity with the participants.** This enables citizens to feel appreciated and valued. Some potential examples could be:
 - What is your main take-away from today's event?
 - Which session did you find to be the most helpful?
 - Which session could be extended/ shortened in the next meeting?

Welcoming participants (in-person meeting)

- ✓ Have a **dedicated person that will be greeting the participants as they arrive.** This is a good time to have the participants sign the **participants lists and consent form**. Take your time to clarify any question participants might have on the consent form and its implications.



*A template for the participants' list is provided in under the section on **Templates**.*

Welcoming participants (online meeting)

- ✓ **Participants list and consent form.** Online meetings naturally, make the signing of participants list and consent forms slightly more difficult. Therefore, obtaining these forms could happen in two stages:
 - **When sending participants, the key organisational details**, ask them to register for the lab meeting via a dedicated registration link (either from the conference and/or any other form). The registration link could also act as a method to obtain participants' consent approval.
 - **On the day of the meeting**, it is advisable to cross check the attendance and complete the participants overview, as well as highlight that by participating in the meeting participants agree to using the information generated during the meeting as well as any photo that might be taken during the meeting.

Highlights (for during the meeting cluster)

- ★ During the meeting **be flexible and receptive** to the way situations develop / unfold, including among participants as much as possible. Such approach will keep the exchanges flowing and participants motivated to share their input. Of course, while still exploring the relevant CSLs topics.
- ★ **Don't forget to have fun!** Participants might feel nervousness or stress, which can contribute to feeling less prone to engage. Therefore, have fun and consider the meeting as an opportunity to interact and exchange with fellow citizens.

Box 1: Ensuring equal engagement among the participants during the CSLs

- **Mainstream inclusion and diversity in the design and running of your activities.** That means that every time you make a decision, plan something or carry out an action, try to consider how citizens with different needs could be affected, and try to choose options that minimise barriers and maximise the ability of a diversity of people to participate, whether in a physical or online setting.
- **Create an environment that supports all participants to feel comfortable and able to contribute.** Sometimes that means you might have to take specific steps to ensure that quieter participants have opportunities to contribute e.g., asking specifically for contributions from people who haven't already inputted. Choosing a range of activities that require different types of input can gather contributions in a range of ways to suit different people e.g., speaking, writing, drawing or mapping.
- **Value your participants' experiences and perspectives.** Knowledge of a topic comes in many forms, and so participants may have contributions which come from a range of aspects of background, experience, learning and other sources. Making sure that participants feel valued for their contributions, whichever format they may take (and even if they don't match your own ideas), is key to bringing diverse perspectives together in the labs.

3 What happens after the meeting?

3.1 Retaining participants' interest and continuing engagement

The PSLifestyle Citizen Science Labs are comprised of three lab iterations and six meetings within. Therefore, **building a long-term relationship with participants** is crucial for the success of the CSLs and citizen engagement. Having **continuous communication** with participants **contributes to keeping them engaged and motivated** to continue their journey with the project.



In this section of the Manual, key procedural steps to be undertaken immediately after the meeting are provided, while for a more detailed overview of how to retain participants interest and continuing the engagement, please refer to the PSLifestyle Participant Recruitment and Engagement Strategy.

Key activities to consider

- ✓ **Keep the motivation high.** Soon after the meeting is over, e.g., after one week, we would advise to **send a thank you e-mail** reinforcing again the appreciation for their participation. Use this opportunity to share some **key outcomes of the meeting**, including **action points** and **next steps** i.e., when the **next meeting** is taking place, **relevant documents** and **engagement channels** i.e., social media, PSLifestyle tool link. Make it fun and create a sense of community by sending a **joint photo**.
- ✓ **More detailed feedback.** The thank you e-mail is a great opportunity to approach citizens with a more **detailed feedback form** and hear their perspective on how the meeting went and how it can be improved. Try to balance and avoid overlaps with the feedback session during the meeting.

3.2 Internal check-in and lessons learned

Equally important as learning from participants is to learn from one another i.e., organising team. Therefore, shortly after the meeting **have a debriefing meeting with the team** and discuss about: 1). what went well; 2). what could be improved; as well as 3). conformity with the roles and allocated responsibilities. Conducting citizen science labs and general citizen engagement processes is a continuous learning process with opportunities to improve before, during and after the meeting.

3.3 Meeting outputs

Besides the first meeting, the planning of subsequent **CSL meetings will be dependent and follow on the outcomes of the preceding meeting(s)**. Therefore, it is important to capture the outputs of each meeting as best as possible. Besides, capturing the outputs of the meeting, will ensure the **appropriate documentation, recording and archiving of CSL proceedings**.

Key activities to consider

- ✓ **Organise notes and transcribe discussions.** Structuring the discussion outcomes would enable to have a **holistic overview of the exchange** as well as **discover any points that was brought up and one might have missed** during the meeting. The transcription and organisation of notes should follow the **structure of the agenda and the respective sessions in an Excel format**.

- ✓ **Prepare the meeting report.** On basis of the notes and transcriptions take your time to write the meeting report, which is a more **detailed description** of how the meeting went and **contributes towards the main project deliverable of each lab iteration**. It is advisable to **produce the report as soon as the meeting is over to avoid forgetting any crucial detail**.



Please see the **reporting template** for further guidance on how such report should be produced.

- ✓ **Organise the documents and archive them.** Once all the proceedings related to the meeting(s) have taken place, **capture the documents and archive them** in the project folders. The archiving should be done **by lab iteration and respective meetings while archiving only the final documents**. Archiving will support tracking of proceedings at a later stage if necessary as well as for project reporting.

Highlights (during the meeting cluster)

- ★ Throughout the lab iterations ideally the participants continue their journey with us from beginning to the end, however, it is expected that their participation will fluctuate, some will decide to stop the journey and others will join the meetings and/or some might not participate regularly. The **meeting outputs are great tool to onboard new participants and/or keep everyone up to date with the progresses throughout each lab iteration**. Take the time and the opportunity to share these materials with new participants well in advance before the upcoming meetings.
- ★ At each subsequent meeting, besides the first one, it is advisable to **dedicate / block some minutes in the agenda to provide a recap of what happened in the preceding meetings** so everyone participating is on the same page and feel free to contribute to the exchanges while possessing all information.

Quick recap

This checklist will support you to **maintain an overview of all the activities / steps** that need to take place for a successful organization and implementation of a CSL meeting. Please refer to **the respective sections for a detailed elaboration on each activity**.

Activity	Responsible	Status	Comments
Before the meeting			
Refine and specify the focus of the meeting			
Set the date of the meeting			
Select the format of the meeting (in-person or online)			
Think about the number and type of sessions			
Think about and select the facilitation methods			
Prepare the agenda (preliminary and then refine/revise and finalise)			
Assign roles and responsibilities (who does what during the meeting)			
Prepare the consent forms.			
Prepare the supporting and facilitating materials			
Create a citizen / participant registry and maintain it			
Share organisational details (first round)			
Send a reminder email			
Keep track of questions or feedback/comments from participants			
Choose and book the venue (for in person meetings only)			
Arrange catering (for in-person meetings only)			

Select the online conference platform (for online meetings only)			
Develop an internal working agenda			
Have a briefing meeting with all organising team members (including potential speakers)			
Collect materials and bring them to the venue or have them at hand			
Check technical equipment / have a test run with everyone involved			
During the meeting			
Welcome participants			
Have participants sign the participants' list and consent forms (in-person meetings only). Please see the distinct steps for an online meeting.			
Run the meeting and engage with participants			
Share what is happening on social media			
Once the meeting is over, share key highlights and communicate about it on your own and project channels			
After the meeting			
Send a thank you e-mail			
Send participants the feedback from /survey (both, this and the preceding step could be done in one go)			
Have a debriefing with the team			
Organise the notes and transcribe the discussions			
Prepare the meeting report			
Organise the documents and archive them			

Resources and materials

Toolbox

Facilitation tools and techniques

The art of facilitation tools and techniques is quite comprehensive with a number of existing handbooks and databases bringing together an array of techniques and methodologies for practitioners to consider. Since more than one tool or technique could be utilised for the same purpose, instead of listing single techniques examples, the table below summarises some key existing resources (reports and databases) one could consult when thinking about and selecting the most suitable facilitation technique. These resources cover facilitation methods from **energisers and icebreakers**, to **content and input generation** and **feedback collection**.

i As indicated in the previous sections, before each lab iteration and specific meeting, lab coordinators will work closely together with the local implementers, especially on the design the lab meeting cluster of activities, and jointly agree on the specific. The question of facilitation tools and techniques will be addressed during this process also.

Reports
A Summary of Teaching & Facilitation Methodologies
Facilitation tools for meetings and workshops
Foresight The Manual
Group Facilitation Techniques and Methods
NESTA - DIY Toolkit
Databases
SessionLab
Seeds of change
Learning for sustainability
Involve

Online platforms and resources

The Covid-19 pandemic and its toll on our working routines, have spurred the **transition towards digital working environments and the tools available for such processes**. There are multiple existing options and the tables below aims at providing some examples of tools for different purposes (**hosting a meeting and/or replacing physical flipcharts**), without being exhaustive.

i Please feel free to consider other options you think are most suited depending on their functionalities and features.

Videoconferencing tools	Brief description
<u>Zoom</u>	<p>Participants don't need to have an account and can join from any device. To join a meeting from the phone one needs to have the Zoom app downloaded.</p> <p>Key functions and features: break out groups, large number of participant thumbnail videos in one screen, integrated polls option, screen sharing and reactions.</p> <p>Pricing and Features & Tutorial</p>
<u>Microsoft Teams</u>	<p>Participants don't need to have an account and can join from any device. To join a meeting from the phone one needs to have the Teams app downloaded.</p> <p>Key functions and features: break out groups, moderate number of participant thumbnail videos in one screen, screen sharing and reactions.</p> <p>Pricing and Features & Tutorial</p>

Virtual environment tools	Brief description	Pricing & features
<u>Gather.town</u>	<p>Gather enables meeting with participants in a virtual environment, allowing for more natural and engaging online experiences.</p> <p>Gather is an excellent tool for socialising events, to get to know participants or to engage in complicated</p>	<p>Free to use for up to 25 users. Participants don't need to have an account.</p> <p>Pricing and Features</p> <p>Tutorial</p>

	group exercises that require quick switching between breakout groups.	
<u>Wonder</u>	<p>Similar to Gather, Wonder uses a more professional user interface to allow for a fluent and uncomplicated switching between breakout rooms for collaborative and engaging work.</p> <p>Wonder is optimised to have a more natural environment for group exercises and collaboration compared to static formats like Zoom, while reducing the interface to the most crucial elements.</p>	<p>Wonder is free to use. The company plans to introduce usage-based pricing. Participants don't need to have an account.</p> <p><u>Tutorial</u></p>

Replacing flipchart tools	Brief description	Pricing & features
<u>Google Jamboard</u>	Google Jamboard can be set up and used by everyone with a Google account and facilitates an easy-to-use replacement of flipcharts or whiteboards for collaborative working.	<p>Free to use. Participants need to have a Google account</p> <p><u>Tutorial</u></p>
<u>Miro</u>	Miro enables collaborative work on digital whiteboards with a more versatile set of features and pre-sets compared to Jamboard.	<p>Free version available with limited features. Participants don't need to have an account.</p> <p><u>Pricing and Features</u></p> <p><u>Tutorial</u></p> <p><u>Tutorial Miro Academy</u></p> <p><u>Templates</u></p>

Presentation apps	Applications for editing presentations like Google Slides or Microsoft PowerPoint Office Online allow to have a similar experience when inviting an invitation link to participants.	<p>Google Slides is free for private use but <u>requires a license</u> for commercial application.</p> <p>Google Slides requires participants to have a Google account.</p> <p>Tutorial</p> <p>Microsoft PowerPoint requires a <u>license</u>.</p> <p>Participants don't need to have an account for Microsoft PowerPoint Office Online.</p> <p>Tutorial</p>
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Collecting feedback tools	Brief description	Pricing & features
Survey Monkey	With Survey Monkey you can for example gather online feedback on your meeting by sending the link to participants.	The Basic Plan is free of charge: you are able to create an unlimited number of surveys, have 10 questions and receive up to 40 responses.
Slido	Slido can be used during a meeting to collect questions from participants and have live polls.	The Basic Plan is free of charge and allows you to run 5 polls per event. If you would like to conduct more extensive surveys you have to purchase the Engage Plan for example.
Mentimeter	With Mentimeter you can conduct polls, create word clouds or collect questions	The Mentimeter Free version allows two questions and 5 quizzes per presentation



Participants' list

PSLifestyle pilot region:

Date of the CSL meeting:

First, last name	Age	Gender	Profession	E-mail	Signature



CONSENT FORM

Project acronym	PSLifestyle
Project full name	Co-creating positive and sustainable lifestyle tool with and for European citizens
Study title	Citizen science labs
Principal investigator	[Name, credentials, institutional affiliation]
Co-investigator	[Name, credentials, institutional affiliation]
Study duration	04/2022-03/2023
Project duration	42 months (10/2021 – 03/2025)
Funding and grant agreement	PSLifestyle has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No. 101037342

INTRODUCTION

You are invited to take part in a research activity within the PSLifestyle project in the form of citizen science lab meetings. Please read this document carefully before deciding whether you will continue your participation or not. We encourage you to ask all the questions you may have; it is important that you understand all the proceedings, including possible risks and benefits. This informed consent document may include words that you may not understand. If this is the case, please ask the project representative to fully explain the meaning of the word or piece of information you may not accurately understand. At all times, we assure the compliance with current EU General Data Protection Regulation (GDPR).

PURPOSE OF THE PROJECT AND CITIZEN SCIENCE LABS

The 'PSLifestyle' project aims to help close the gap between climate awareness and individual action, and to increase citizens' participation in sustainability topics through the PSLifestyle online tool. It will do so by engaging citizens 1). in the collection, monitoring and analysis of their consumption data and their impact on the environment; and 2). In the co-research, co-development and implementation of everyday life solutions for a good life, within environmental boundaries. The ambition of the project is to engage a total of four million European citizens – with a particular focus on eight European

countries: Estonia, Finland, Greece, Germany, Italy, Portugal, Slovenia and Turkey- in data collection and data sharing through the PSLifestyle online tool.

The aim of the citizen science labs is to support the improvement of the PSLifestyle online tool by further developing and contextualising it to align with the citizens' local realities in the pilot countries. This will be done by understanding the local capabilities, opportunities and motivations of citizens to engage in more sustainable lifestyles.

PROCEDURES, BENEFITS & RISKS

For the study, it is envisioned for you to participate in 6 meetings, each lasting approx. 4 to 5 hours, within which you will be asked to write down personal thoughts and participate in group discussions and exchange on questions related to everyday living across key areas such as housing, mobility, food and general consumption.

During the study you will have the opportunity to co-create and shape visions of good life within environmental boundaries as well as design solutions for making those visions a reality. In addition, you will have the opportunity to co-create the features and functionalities of the PSLifestyle online tool also.

The research presents little or no risk to the participants, which is comparable to the risk encountered during an ordinary office work.

CONFIDENTIALITY AND ANONIMITY

During the meetings, you will be asked to sign the participants' list which collects information related to you (first, last name, age, gender, profession as well as e-mail). These will be used to contact you in the future for project purposes and create an overview of the research sample. These will be stored securely on the PSLifestyle project cloud server and will be destroyed at the end of the project.

During the meeting, the discussions will be noted down and transcribed digitally afterwards. The transcriptions will be stored without any reference to you. These will be stored securely on the PSLifestyle project cloud server and will be destroyed at the end of the project.

The collected data will be used for research and project purposes only and always while protecting the identity of participants.

CONFIRMATION

You can participate in this project activity by signing this consent to authorize us to use the data you provide and treat them as confidential and anonymous. I hereby declare:

- I am 18 years or older and am competent to provide consent. I am 16–18 years, emancipated minor and am competent to provide consent. I am a parent / legal representative of a minor and am competent to provide consent on their behalf.
- I am fully informed about the aims of the project and this particular activity and I understand that there is no compulsion to participate in the project activity. I understand that I / my child may withdraw my / the participation at any stage;
- I understand the document providing information about this research and this consent form. All my questions have been answered to my satisfaction;
- I understand and agree that the data and input (e.g., collected through this meeting) is used for scientific purposes; I have no objection that my / my child's data is published in scientific and official project outputs in a way that does not reveal my / their identity;
- I confirm that irrevocably and for an unlimited period of time and space all rights for any use and publication of the video material and/or photographic material produced by the PSLifestyle project partners during the PSLifestyle Citizen Science Lab meetings in INSERT PILOT CITY/REGION NAME HERE will be transferred from me / my child to the project partners and may only be used within the scope of the public presentation of the project partners and the PSLifestyle project. I waive any payment of fees in any form and make no claims whatsoever. Naming of the people photographed are at the discretion of the PSLifestyle project partners.

I have received a copy of this agreement. This consent form is made pursuant to the relevant national, European data protection laws and regulations and personal data treatment obligations.

Name and surname of participant: _____

Place, date, and signature of participant: _____

Statement of investigator's responsibility:

I have explained to the potential participant the aims and objectives of this project as well as the procedures to attend and any possible risks or inconveniences. I have offered to answer any questions and fully answered such questions.

I believe that the participant understands my explanation and has freely given informed consent.

Name and surname of the researcher: _____

Place, date, and signature of the researcher: _____



CSL Meeting Reporting Template

Date	
Place	
Format (in-person, online)	
Organising partner(s)	
Report writer	

SUMMARY OF THE CSL MEETING

In this section, please provide a summary of the CSL meeting and related discussions. The summary can be structured following the meeting's agenda and capturing the main highlights and outcomes of each session. Please be as elaborate as possible.



Please refer to the notes and transcriptions of each session while writing this section.

KEY ACTION POINTS

Please provide a brief overview of the action points stemming from the meeting and please indicate, if possible, the responsible organisation and person for each item. Please add new rows as necessary.

Action point(s)	Follow up by

ORGANISATIONAL LEARNINGS

Please provide a brief description of the key learnings related to the planning and implementation of the CSL meeting: what went well, what needs to be improved for the upcoming meetings etc. Also please reflect on the support that was provided to you and to what extent it was useful to you. Please add new rows as necessary.

Learnings

CHECKLIST OF RETURNING MATERIALS

This is a guiding list indicating all the materials and resources that need to be shared after the conclusion of the CSL meeting to complete the reporting process.

Material	Provides	Not provided
Agenda		
Participants' list		
Consent forms		
Photos taken during the meeting		
Photos of the filled-out facilitation materials		
Transcriptions of the input in the facilitation materials		
Summary of the feedback results		

Project partners



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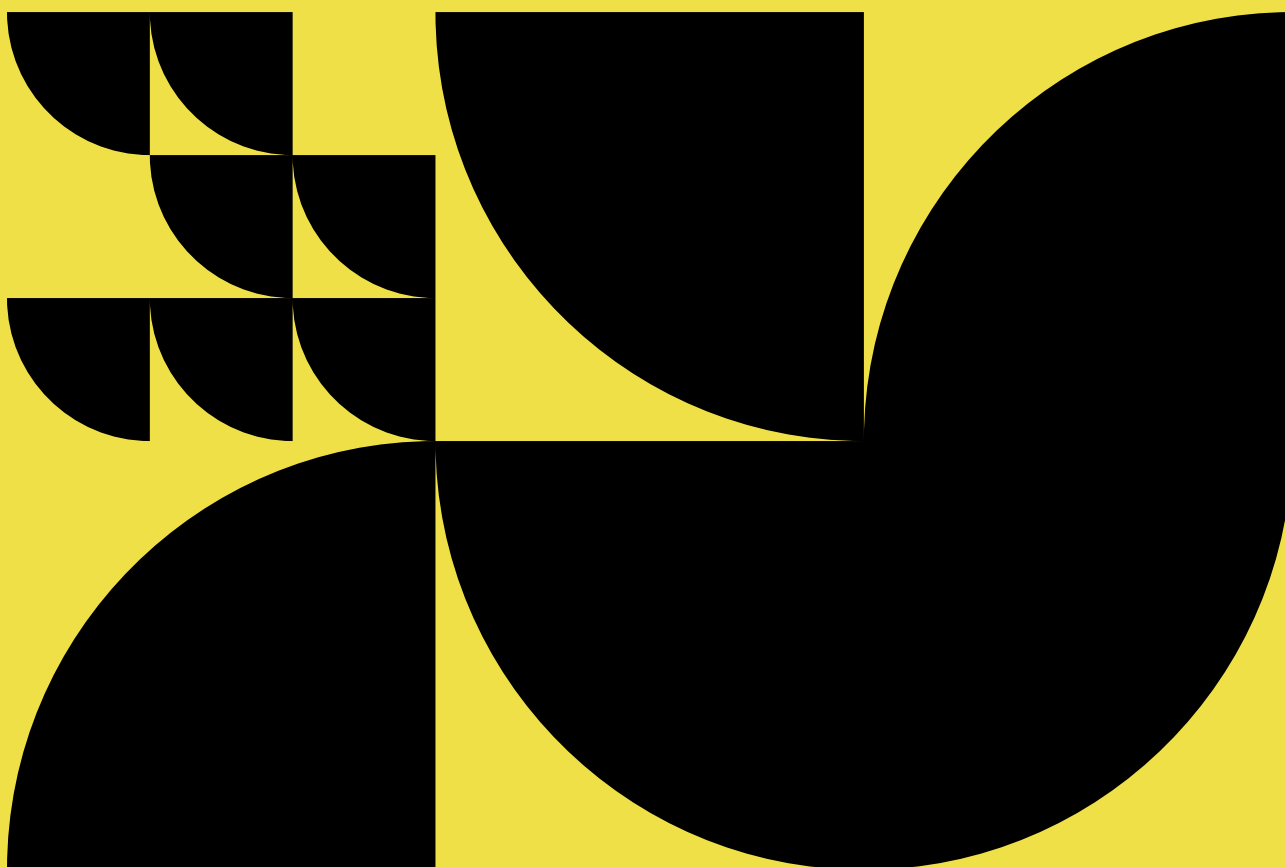
Contact us

info@pslifestyle.eu

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