

Interreg
Alpine Space



"SMARTVillages" 
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VADEMECUM

Build your own Digital Exchange Platform for SmartVillages Community

Work package: WP T2
Activity A.T2.1
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Link to DEP :

<https://smartvillages.informatika.uni-mb.si/>



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Authors: Guillaume Doukhan^a, Claire Belet^a

^a ADRETS, Association pour le Développement en Réseau des Territoires et des Services

That guide aims at providing and documenting some methodological and technical elements towards groups wanting to create their own digital exchange platform. Those platforms could be at different territorial scales and could concern quite different topics. But that guide is based on the experience of the Smart Villages DEP structuration process.

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INTRODUCTION

Co-creation paradigm

“ Co-creation is about value creation in which all stakeholders should be involved. In the past our social, business and civic systems saw end-user at the end of the value chain having no particular influence on the value creation supply and demand. Today a particular shift takes place in which individuals, not institutions are the center of value creation.”

Smart Villages project, WPT3, 2018, University of Ljubljana

That guide wants to document present experience of DEP constitution, and how that platform can be one of the components to shift to a co-creation process. It relies on :

- WPT1 learnings and deliverables, mainly about regional stakeholder groups identification and initialization
- WPT3 foreseen methods with co-creation as a target
- WPT4 is integrated in the reflexion because a territorial platform linked with experiences implies at one time a political dimension
- WPT2 experience, still running, feeds a lot of elements with first meetings, specifications of the platform, research on similar platforms, and first uses by the partners.

Concepts :

We take the co-creation process (From Closed to Cooperative to Collaborative to Co-creative) explained in WPT3 first works as a basis for conceptual framework and we'll mainly rely on further elements :

- Cooperative dimension : Idea management
- Collaborative dimension : Digital platform obviously, Communities of interest and Peer to peer
- Co-creative dimension : Alliance, Open Source and Commons

Methods used :

We chose to rely on different methods for the conception of the platform, to ensure its adoption by all foreseen members :

- **Design thinking** to imagine the platform and its functionalities : what does the end user need, and how to take its feedbacks into account
- **Agility** development cycles with different sprints . To ensure end user feedbacks the proposed platform has been released quite quickly, and first feedbacks allowed first evolutions. It will be enhancing all along the project
- **Usability workshop**. In the France meeting of the project, we'll try to use User profiles or User personae, to really get feedbacks on the usability of the platform
- **Training / Webinar**. The DEP must be as simple as possible and should offer functionalities that can be explored autonomously. Participative and digital training sessions (webinars) will be proposed additionally to ease user assimilation of the platform functionalities

PROPOSAL FOR KICK-OFF PHASES :

1 st phase – Pre-definition :

Some questions to know your Smart Villages readiness and progression :

That will allow you to know if it is time to build a DEP

- Do you yet have a coordinated group of stakeholders ? If no, you should first identify some key actors of the territory or the topics you want to address, don't play alone !
- Do you yet know which topics, which projects you want to address ? If no, make that part ~~one of the first works~~ of the priority of your stakeholders group, in order to clarify the rationale of the group and the platform
- Have you completed a territory assessment to measure its level of smartness ? That can also be one of the priority of your stakeholders group, and that can give you some key informations to bring new members in, and to clarify goals and topics to work on

Define the goals / rationale of the DEP :

Defining the goals of the platform will orientate the DEP in an adapted way for your specific context, what do you need as a group of stakeholders, as a territory ?

- Know each other with description of stakeholders, map...
- “Central station” to get access to all informations
- Distance work platform to think together, exchange and discuss, whatever the distances are
- Documents sharing platform to structure, qualify and share documents, practices, ...
- Collaboration platform that makes available facilitating tools such as date finder, project management tool, collaborative writing...
- Open or closed platform to allow global visibility and / or communities of interest spaces and / or peer to peer communication and exchange ?

Rely on existing experiences and material

You are reading that guide, that's a very good beginning to take into account previous experiences ! More seriously look at your territory to see who is yet working on the topics you are focusing, which networks of actors are running. You can do so through :

- Existing local events
- Local digital social networks or local groups on social networks
- Thematic physical local networks
- Existing commons created by / for the territory : territorial collaborative wiki such as <http://www.wiki-brest.net>
- Specific open source / open data events like “ Opérations libres” <http://www.operation-libre.org> aiming at opening datas on a territory

Define the targets of the DEP

Defining the targets that will allow you to adapt the technical level of the DEP, the security policy of the platform,... adopting a real end user friendly approach.

Ask those questions : Which stakeholders could use the DEP ? We encourage to include most different ones, as public stakeholders, companies, NGOs, citizens in a quadruple helix way.

For each foreseen stakeholder what are their levels of relevance and influence ; motivation and orientation (See WPT1 deliverables on that purpose)

And finally you could use the following table to qualify future DEP users, that can give you information on needed functionalities, needed phasis of training, and needed architecture in terms of number of users and sub-spaces dedicated to specific communities.

Organization	Core team or community of interest group use of the DEP	Number of persons involved in your organization	Digital skills (Internet use, browser use, broadband connection at home/ work, ...)	Collaborative skills (digital collaborative tools ? Used to participative meetings ?...)

Figure 1 : proposal of a DEP users qualification table

2nd phase : Integration of stakeholders and co-creation of the DEP

As a beginning for that second phase 3 advices :

- Begin small
- Begin in-person
- Begin simple

Physical meeting to know each other

The first action to elaborate the DEP together should not be online, but it could be a first meeting just aiming at knowing each other projects and wishes.

- Integrate as much stakeholders as possible
- Propose different dates, it can be done with a first use of digital collaboration tool, like Doodle or Framadate
- Ease the creation of communities of interest to get first natural collaboration relations, sharing points of interest of each participant



- Conviviality : something to drink / eat, a moment to know each other and discuss in an informal way

- That first time could be also a first irreversible experience of collaboration, for example with global ideas brainstorming on the DEP and its aims.



Presentation of proposals

As DEP and perhaps project leader, it is not mandatory to define precisely all the platform details and functionalities. It is better to prepare some concrete proposals so that people can go further and answer it. For that purpose, keep in mind following elements :

- DEP must have a clearly enounced **a clear statement illustrating the** common goal
- DEP must bring added value for each stakeholder
- DEP must rely on identified territory-ies
- As a leader, you have to ease the understanding of the platform , **particularly** regarding technical architecture management, **preventing partners fears and misunderstandings**. ~~propose something simple and you can manage to reassure partners.~~ If other stakeholders are interested in managing technical part, you can integrate them in further time

Here is a quick and educational video on Leader and followers :

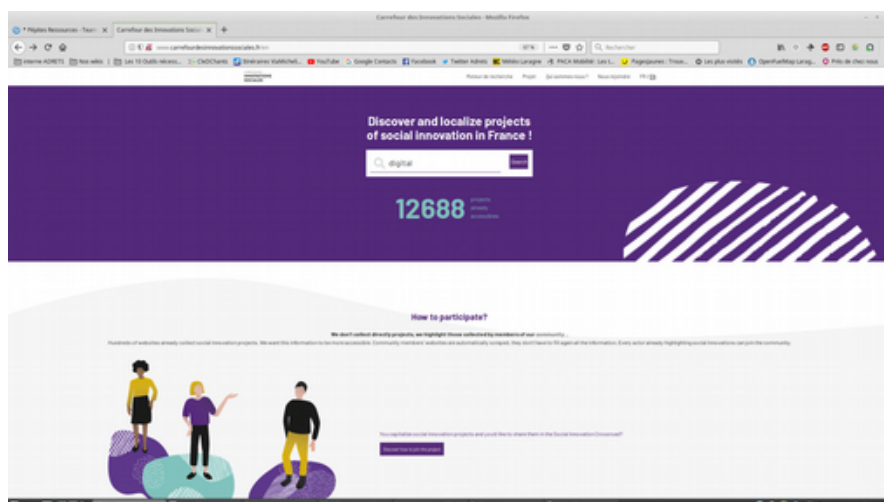
https://www.youtube.com/watch?v=fW8amMCVAJQ_88265_13335



Show examples

To understand what could be a DEP, people will probably need to see existing platforms, so be proactive to show some of them, either platforms opened to the public or platforms for internal purpose only, like the SmartVillages Digital Exchange Platform, examples of Smart Villages websites, and if possible DEP from your own country. Here are 2 examples :

Social Innovations Crossroad (FR)

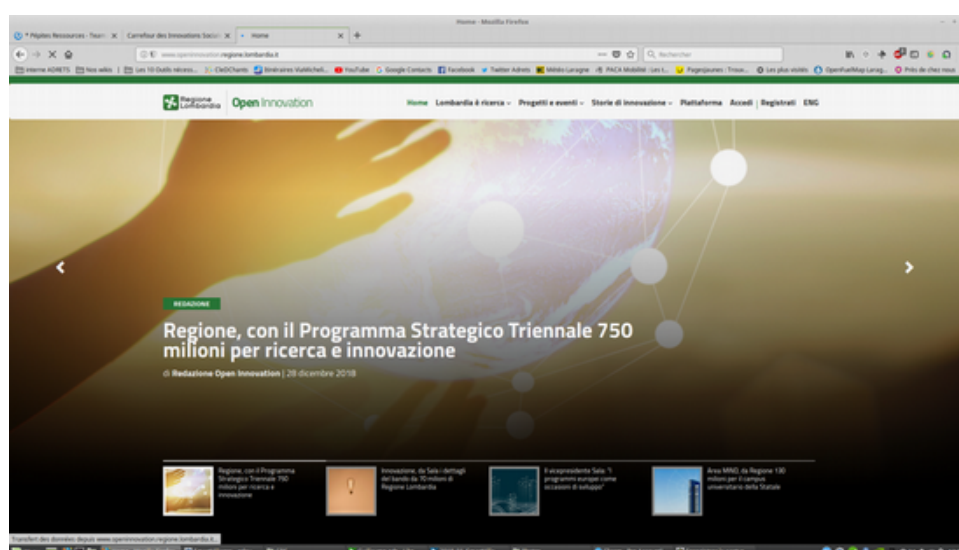


Hundreds of websites already collect social innovation projects. We want this information to be more accessible. Community members' websites are automatically scraped, they don't have to fill again the information. Every actor highlighting social innovations can join the community.

- 12.000 best practices online
- Open source software framework

<http://www.carrefourdesinnovationssociales.fr/en>

Regional Open Innovation Platform (regione Lombardia)



Open Innovation 2.0 : “Government, industry, academia and civil society work together to co-create the future and drive structural changes far beyond the scope of what any one organization or person could do alone.” EU, DG Connect

- 9000 participants

- Open Source software framework

WWW.OPENINNOVATION.REGIONE.LOMBARDIA.IT

Time for feedbacks

Now you have given stakeholders all the material to understand what could be the DEP and what are your first proposals, it's time to collect their feedbacks, you can use for that purpose the classical but efficient method of metaplan : collect ideas of all participants on postits and structure them around different topics for example :

- Functionalities needed on the platform
- Who can access the DEP
- Training / Testing process ...



Adapt content and tools to feedbacks

Now you have to really take into account stakeholders' feedbacks. If you do so, it assures the quality of the collaborative process and builds trust among the community strengthened. If not, you can risk suspicion and negative attitudes on DEP progression afterwards. So if some of the ideas appears to be unfeasible at the end, it is ok, but just explain why to everyone.

Now it's time to enter the operational phase, building quickly a first version of the DEP the actors can try and react on.

TECHNICAL ADVICE

Now you have collected all DEP requirements, you can now decide on the architecture of the DEP, depending on the goals, constitution of the group, needed functionalities, individual and collective digital skills...

Here are some proposals based on Smart Villages reflexions and choices.

Complex complete DEP for a big group

For a big group that needs to collaborate and share information to other partners, and even to wider public, a quite structured DEP is needed. Its first functions will be :

- Central station to retrieve and share every tool used by the group
- Communication and information (documents, articles, photos) to get all the members of the team up to date.
- Discussion and brainstorming tools (forum, collaborative writing...)
- Communication to share results and experiences with a wider public

For those purposes, in Smart Villages we have chosen Wordpress as a basis, that can be completed with plug-ins and external tools(indicated with a link on a dedicated webpage). It allows naturally documents sharing, articles and pages publication, and discussions through a forum.

You could have chosen a wiki-based solution, that can also go through the same functions with easier collaborative writing functionalities, but poorer lookout and ergonomoy.

If you need very evolved collaborative functions (code sharing, project management with kanban, mailings...) you could use a solution based on an application store like Cloudrion.

Simple DEP for collaboration in a small group

For a small group with no communication to a wider public , you can begin with very simple tools allowing just needed functions you collected inside the group. It can be articulated around a simple **Pad** (very simple collaborative writing page, different free softwares exist : Etherpad on <https://framapad.org/en/>, Cryptpad on <https://cryptpad.fr/>) where you store all links to resources and tools of the DEP, that could be :

- List of participants of the group
- A calendar (Google calendar or better its opensource alternative Nextcloud based calendar for example on <http://framagenda.org>)
- A project management tool to handle tasks (Trello or better its opensource alternative Wekan) <https://wekan.github.io/>
- A documents sharing tool (Google Drive or its open source alternative NextCloud)
- ...

Integrating collection of territories and best practices

Self-Assessment : You can use the self-assessment tool developed in the Smart Villages project, it is open source, so you can use it directly on Smart Villages DEP or integrate it in your own website, or even upgrade it or change parameters to adapt to your own context and integrate it.

Best practices collection : There are two ways to see best practices collection. First way is to collect your ***own best practices***, related to your territory or a specific topic. In that case, you can either use our developments based upon Wordpress, or use YesWiki database engine (Bazar) that can allow you to quickly create a structured collection of experiences.

Second is to collect ***existing practices databases***, and choose experiences that fit to your context to identify and reuse them. For that purpose you can either integrate them using a software solution framework like the one of the Social Innovation Crossroads, that allows you to get real time updated data. Or simply export interesting best practices files from the Smart Villages database and other databases, mixing them and displaying them on your own tools through a PDF or more evolved display tools.

FIRST STEPS / ADVICES TO GIVE LIFE TO YOUR NEWLY BORN DEP

These following ideas rely on general experiences and observations but are to be developed inside the WPT3 toolkit. They are here very linked to the DEP itself, but could apply to the more global context of a Smart Villages project / group of actors.

Feeding the platform

- Propose first information contents : an empty platform won't be a very good start point. Ideally you can do that during a physical meeting with core team of the smart village
- Propose first simple collaboration actions to all stakeholders. It's very important they feel able to help and complete first actions. For example, don't ask them to fill a big best practice or experience file with dozens of fields, but you can ask them just to give ideas of experiences that could be collected. And gradually you will be able to get results with more complicated or engaging tasks

Animating the group :

- At least at the beginning, the group will need a facilitator to mobilise people, remind rules of use of the DEP, organize meetings...
- Organization of regular physical meetings and / or video calls meetings are mandatory in parallel of the online animation
- Giving information updated on the DEP. It is important to give at least recurrent or preferably real-time information over DEP progress, thanks to newsletter, a picture in the townhall, or any communication mean that can reach all the stakeholders
- Push a collective alert on using and collaborating on the platform (global mail reminder if you see activity is too limited, calls to specific contribution in the meetings, and then dedicated mails or phone calls if needed to key actors)

“ Humanizing” the DEP

- Don't forget human dimension. Each stakeholder comes with its own expectations, and history. You can be inspired by the four agreements in your facilitation : https://en.wikipedia.org/wiki/Don_Miguel_Ruiz#The_Four_Agreements
- It also implies that you would need some moderation policy, mainly if your DEP is opened to wider public. Which contents have to be moderated ? By who ? ...
- Last point is not to forget political dimension. Try to involve policy makers from the beginning !

Building commons !

- Share among all the partners all collected data, all results
- Search with them the best formats, structure of those elements that would allow them to reuse it

Your platform is open source so it can be reused, document it, it will ease its dissemination
Your data can be specifically put under Open Data with appropriate licences (for example Creative Commons), that would allow anyone to reuse it.

Those actions will ensure a long term potential for the platform and its content, and beyond that the Smart villages project and community.