SETTING OUT FOR YOUR CO-PRODUCTION JOURNEY

Suggestions on how to take full advantage of the INTERLINK Collaborative Environment for your co-production processes.

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This document provides some guidelines on how to take advantage of the digital functionalities made available by the INTERLINK Collaborative Environment to guide and facilitate co-production processes. It helps coordinators envisage how the platform can help the internal activities of their team as well as the collaboration with external stakeholders.

The document is organised in terms of general questions users might have and suggestions and tips on what the Collaborative Environment can do for you. In several places of the document a clickable ⓘ icon will take you to the page in the online User Manual where you can find more detailed information on how to use the Collaborative Environment functionalities. Suggestions on potentially useful INTERLINKERs are also included, with direct links to the INTERLINKERs online catalogue.

At the end of the document, a specific section summarises all the major functionalities that are available in the system to help your work.

How can I use the Collaborative Environment to manage (and to be guided throughout) my co-production process?

Create a project and personalise it

You can create in the Collaborative Environment a co-production process that will help you to keep track of the different phases and tasks that you need to perform.

TIP: You can create a **new process** from one of the proposed models or you can decide to **clone** a co-production process you used previously and to start from there. You can even decide to start from an example included in the **catalogue of success stories**.

ⓘ How to create a new process

ⓘ (in preparation) How to clone a co-production process

ⓘ (in preparation) How to clone a co-production success story

TIP: However you create the structure of your co-production process, always remember that you will be able to **customise** it at any time: you can add or remove phases and tasks and you can rename nodes in the tree.

ⓘ How to customise the co-production schema

EXAMPLE: Take inspiration from the co-production models (Schemas) proposed by the platform. Those schemas help you recognize the importance of different phases and tasks in co-production that often go unnoticed. There are tasks that are very important for building a balanced and effective network of stakeholders, for the accountability of your processes, for understanding what activities facilitate the collaborative design of a public service, or for reflecting on the sustainability of the service in the long term. Choose the schema that more closely matches your scenario and start following the suggested steps. When you find steps that are not relevant for you, you can simply remove them from your workplan or you can replace them with descriptions of the tasks that you require.

Define tasks for the coordinating team and for the stakeholders' network

You can define co-production tasks to include activities only for your internal coordinating team (for example the initial creation of a stakeholder engagement plan). Other tasks can be specifically conceived for the collaboration of your network of stakeholders.

TIP: the platform allows you to **assign different access rights** to the shared resources associated with each task.

ⓘ How to assign access rights to a team for a specific phase or task or to the whole co-production process

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How can I use the Collaborative Environment to manage my network of stakeholders?

Invite participants to register

Once you have identified the stakeholders you want to invite to participate in your co-production process, you should ask them to register to the platform.

TIP: in case stakeholders have already participated in previous co-production initiatives they might already be registered.

(i) Tutorial for registration (English)

(i) Video tutorial for registration (Italian)

TIP: you may take advantage of knowledge INTERLINKERs that help you in mapping the stakeholders, in preparing a stakeholders' engagement plan, and in drafting communications. Sample INTERLINKERs:
- KIT for communication for stakeholders' engagement (link to dedicated folder)
- Stakeholder types guidelines (link to the catalogue)
- Stakeholders mapping canvas (link to the catalogue)
- Stakeholders identification analysis template (link to the catalogue)
- Stakeholder engagement plan for INTERLINK project (link to the catalogue)

Group participants in teams and organisations

You can create one or more organisations and one or more teams to group the stakeholders who will contribute to the co-production activities.

TIP: you might wish to create different organisations under which to group sets of teams in case you want to give more visibility to the participation of organisations.

TIP: dividing participants into different teams allows you to assign different access rights to different teams.

TIP: you can grant permission for a team to access the whole co-production process from the Overview section. You can select more specific access rights to portions of the co-production tree in the Guide section, by positioning yourself at the desired node of the tree.

(i) How to assign access rights to a team for a specific phase or task or to the whole co-production process

Flexibly extend teams

At any time teams can be extended with new members.

TIP: you can extend a team by adding a single email address of a registered user or by importing a file in CSV format listing the addresses for bulk upload.

ⓘ How to create teams from a CSV list of email addresses

TIP: people who are added to a team for a certain co-production process will receive a notification via email, also containing a direct link to the process for quick access.

TIP: in case you need to reuse the email addresses of your participants, for example for communications through other channels, you can export the list of team members to an external file in CSV format.

ⓘ How to export the email addresses of team members

How can I use the Collaborative Environment to engage other stakeholders in shared tasks?

Share documents

You can share material that is related to a task or that may be useful before, during and after your meetings.

TIP: useful materials can be, for example, background documents participants should read in advance, the agenda of the meeting, the list of participants, the minutes, the presentations.

TIP: there exist knowledge INTERLINKERs that provide background information about the INTERLINK project and about the pilots:
- INTERLINK project brochure (preview)
- Template for creation of customised pilot brochures (preview)

TIP: don't forget to ask participants to sign consent forms, whenever this is needed. Useful INTERLINKERs:
- Information sheet for INTERLINK project (preview)
- Information sheet template (preview)
- Consent form for INTERLINK project (preview)
- Consent form template (preview)

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Work together during meetings

You can ask for participants' ideas, opinions, and voting during meetings.

TIP: a shared online whiteboard can be populated by participants or by a moderator with ideas emerging during focused discussions. Sample INTERLINKER:
- Google Jamboard ([preview](#))

TIP: working on a shared document is another very simple way of working together synchronously. Sample INTERLINKERs:
- Google Docs ([preview](#))
- Collaborative Editor ([preview](#))
- Augmenter ([preview](#)).

TIP: a poll can be launched to evaluate or prioritise ideas. Sample INTERLINKERs:
- Loomio ([preview](#))
- Google Forms ([preview](#))
- Survey Editor ([preview](#))

TIP: there exist knowledge INTERLINKERs that may be of help in organising group activities. Sample INTERLINKERs:
- Focus Group guidelines ([preview](#))
- Focus Group Template on Co-production Investigation ([preview](#))
- Focus Group on problem exploration for new digital functionality ([preview](#))
- Collaborative problem refinement ([preview](#))

Work collaboratively in an asynchronous way

You can assign homework.

TIP: contributions can be asked in the form of documents to be collaboratively commented on or modified. Sample INTERLINKERs:
- Google Docs ([preview](#))
- Collaborative Editor ([preview](#))
- Augmenter ([preview](#)).

TIP: questionnaires, surveys, and interviews can be used to collect data or feedback. Sample INTERLINKERs:
- Survey Editor ([preview](#))
- Google Forms ([preview](#))
- Guidelines for interviews ([preview](#))
- Guidelines for online-surveys ([preview](#))
- Template for online survey ([preview](#))
- Template for semi structured interview ([preview](#))
- Template for structured interview ([preview](#))

Involve stakeholders not registered to the Collaborative Environment

Stakeholders who are not registered to the Collaborative Environment can still be involved in the co-production process through the use of INTERLINKERs that do not require registration, like for example Google Forms to send out a survey to a large number of people who participate as "informants" or to organise an e-voting session.

How can I use incentives and rewards to keep the co-producers aware of their contributions and motivate them?

Activate Incentives and Rewards in the Collaborative Environment

The Collaborative Environment has built-in functionalities that allow participants to claim on which tasks they have contributed, with the possibility for administrators to review and integrate this information. This information, together with data automatically collected by the system, is used to assign points to participants that might be converted into rewards.

TIP: This is an optional feature of the system, but you might consider activating it to experiment with innovative engagement strategies. Administrators of a co-production process can activate this functionality from the Overview section. Participants will be able to visualise personal profiles with a summary of their contributions.

ⓘ (in preparation) Manual for Incentives and Rewards in the Collaborative Environment

TIP: There are some configuration options that allow you to choose whether a Leaderboard should be shown or not. You might wish to activate the Leaderboard if you feel a bit of competition may be beneficial to keep participants engaged.

TIP: Make sure you communicate to your participants that the activities they perform in the Collaborative Environment will help them collect points and the (individual or collective) benefit which is connected.

ⓘ (in preparation) Guidelines for Incentives and Rewards in co-production processes

Need more advanced gamification functionalities?

The INTERLINKER catalogue includes reusable software components that may allow you to set up functionalities for extending your public services with user activity tracking, points assignment, and conversion into configured rewards.

TIP: there exist software INTERLINKERs you can integrate:
- ○ Loyalty module
- ○ Gamification Engine

Summary of the major functionalities made available by the Collaborative Environment v2

- **Login:** an authentication and authorization service implementing the Single Sign-On (SSO) property, with data protection regulation (GDPR) compliance and cross-border authentication (eIDAS)
- **Overview view:** a guided process to help co-production coordinators set up and configure a digital space to be shared with other participants
- **Organisations and Teams:** management of the stakeholder network, with the possibility of grouping participants into organisations and teams, assigning them different access rights to documents;
- **Facilitated team creation** from csv; export of email addresses
- **Notifications via email** sent when participants are added to teams and to co-production processes
- **Schemas:** visualisation of alternative models of the co-production process to help users identify which are the most appropriate steps to perform that fit their use case
- **Guide view:** creation of a co-production tree that guides the co-production team through the suggested phases and tasks to perform
- **INTERLINKERs:** recommendation of useful knowledge and software enablers that may support the execution of the co-production steps
- **Resource management:** in-platform opening and registry of use of knowledge and software resources, with document sharing and collaborative editing
- **Workplan:** support for setting a timeline and deadlines for tasks
- **In-app notifications** on recent events in the platform
- **Catalogue of co-production stories:** collection of co-production processes that have been created and populated with usable resources by other Public Administrations. Stories can be consulted for inspiration and cloned to quickly bootstrap new similar co-production processes
- **Mechanisms for incentives and rewards:** in-platform functionalities for user activity tracking and motivational support based on points computation, individual profile of contribution, and leaderboards (optional).
- **Online User Manual** (link)

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