UrbanCOOP

METHODOLOGY FOR THE PARTICIPATIVE MECHANISM AND STRATEGIC PLANNING

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1. Project aim

The aim of the UrbanCOOP project is to highlight a configuration of factors that enable a positive outcome of integrated urban development, through strategic cooperation, at a European level. By urban cooperation we mean that the partner organizations are able to co-create social and environmental value with their local communities and stakeholders, with a focus on citizens.
Involving stakeholders from diverse sectors, organizations, communities, and interest groups to ensure that their perspectives, knowledge, and needs are undertaken in decision-making processes, consultations, and collaborations related to the project's objectives, activities, and outcomes is fundamental for the overall success of the project. Stakeholder involvement aims to promote inclusivity, transparency, and collective decision-making, ultimately enhancing the effectiveness and sustainability of the project.

The UrbanCOOP team has developed an ad-hoc methodology to guide you in the compilation of the *Stakeholder Assessment* template. Understanding the methodology and its workflow is the key to complete the excel template file effectively and be able to identify the correct activities and their characteristics that can be implemented for building and managing the relationships with stakeholders., towards the ultimate goal of improving local policies. The methodology adopted to achieve the project's objective is the multi-cooperation: on the one hand mutual learning, indeed, is emerging as a way of talking about the 'how' of multi cooperation, particularly in contexts of rapid change, with countries increasingly recognising that they have much to learn from each other's experience. On the other, multi-cooperation leads to two concrete benefits: minimizing the negative (or maximizing the positive) spillover effects the actions taken by some countries have on others, and profiting of a wider provision of urban policies.

The improvement of policies supporting a balanced growth of local systems to the benefit of citizens and economic activities requires a top-down approach where different municipalities aggregate their knowledge and competence to set-up a series of interventions conceived in an integrated and coordinated manner, and a bottom-up approach, offering to different stakeholders the opportunity to fully participate in the process of designing territorial plans having the aim of creating favourable conditions for wider use of the goods and services offered to citizens.

2. The importance of stakeholder engagement in process design

Even if the policy responsible authorities are at the heart of the policy making process, they usually work closely with other organisations with a stake in the policy issue addressed. Some of these organisations may even implement part of the regional development policy. To reflect this ‘ecosystem’ in a project, specifically UrbanCOOP project, a stakeholder group must be created for each of the policy instruments addressed. By actively involving these organisations in the cooperation work, the project should also contribute to increasing their capacity. This involvement will be a determining factor in maximising the chances that policy improvements will be achieved by the end of the core phase. It is the responsibility of the partners listed in the application form to set up and coordinate their stakeholder group.

Beyond the participation of the policy responsible authority, any other organisation whose involvement is essential in light of the issue addressed by the project should participate as a stakeholder. The stakeholder group is also an opportunity to involve organisations which are still important for the development of the policy. The envisaged stakeholder group members have been identified at the application stage. Throughout a project’s lifetime, partners must report on the involvement of the different organisations. This is important as it enables the programme to monitor indicators related to organisational learning. It is the responsibility of each project partner to define the best way to involve the relevant stakeholders in the learning process. The approach may be different depending on a project’s features (e.g., topic addressed, specific objective to the achieved, nature of the organisation concerned, territorial level tackled).

By involving stakeholders in policy instruments improvement processes the likelihood of success and stakeholders´ acceptance increase; moreover, looking for needs rather than for specific solutions can help policy owners keeping more doors open, which, in turn, stimulates creativity and contribute to fulfil more effectively the real territorial requirements.

From a heuristic perspective, a stakeholder group is a more advanced metaphor than a network. A group suggest a form of institutionalization that networks do not have. In a typical network, problem- solving capacity is dispersed; while in a typical group, it is governed and brought to a more advanced synthesis. Based on the known evidence that most networks are often characterized by cooperation and coordination problems, which are caused by the lack of a dominant decision centre, network management can be a success if it promotes some minimally joint activities between actors. On the contrary, in a stakeholders group the power is – at least ideally – dispersed in such a way that no single actor can dominate, nor is management responsibility or the accountability for results exclusive to any particular stakeholder.

The key principles that are considered as crucial are: Continuity, Openness, Empowerment, and Spontaneity, and these are described as follows:

- **Continuity**: this principle is important since good collaboration builds on trust, which takes time to develop. In particular, if stakeholders feel that their opinions and needs are important and considered in the policy instruments improvement, then the relationship established tends to be more trustworthy productive, and long-term oriented. Reflecting on openness also awakens questions about how the process must be designed to cope with all the input an open process might generate
- **Openness**: the policy instruments improvement should be gathering of many perspectives and bringing enough power to achieve rapid progress is important. The open process also makes it possible to support the process of stakeholders-driven improvement, including stakeholders wherever and whoever they are. The open process is demonstrated by the continuous interactions among the involved stakeholders. This means that multiple stakeholders and perspectives should be one key characteristic and can be implemented with project-teams consisting of people from public body responsible for the policy.
- **Empowerment**: the engagement of stakeholders is fundamental in order to bring the process in a desired direction based on concrete needs and desires. The efficiency of the process is based on the creative power of stakeholders; hence, it becomes important to base improvement on stakeholder's needs and desires, as well as to motivate and empower the users to engage in these processes.
- **Spontaneity**: in order to succeed, it is important to inspire usage, meet personal desires, and both fit and contribute to societal and social needs. Here, it becomes important to have the ability to detect, aggregate, and analyse spontaneous stakeholders' reactions and ideas over time.

3. Involvement of stakeholders

A stakeholders group poses significant challenges in terms of the increased time and costs required to effectively engage stakeholder and integrate expert and informal knowledge. A considerable amount of time and resources must be invested in designing a process that effectively engages multiple players and communicates consistently with them throughout the process. Each meeting or online engagement also requires people to make the time to participate in their busy lives; success is highly dependent on the willingness of institutions to invest the time to be involved. It is sometimes a challenge to build engagement processes that involve a diverse group of people (academics, business people, non-profits, public servants, public utilities managers, etc…) with different expectations regarding pace and style of work and timelines. A dialogue to set common expectations needs to occur at the beginning and often it needs time to be invested in developing process literacy, a shared language and a co-designed process. The process may also have various degrees of success in finding people who are skilled at collaborating, comfort with ambiguity and willingness to take risks. Lastly, co-creative processes are often more iterative in nature — this means that process may start out with one set of goals but may have to pivot or shift as new information or circumstances occur. These aspects can potentially add more time and cost if the entire process is not managed for and planned in advance.

4. Research Design

To achieve UrbanCOOP's aim, the strategic participative mechanism is divided into two parts.

The first - Strategic participative methodology - entails that all partners of the project fill in the *Stakeholder Assessment* Template created and provided by the UNITO research team with all information regarding their activities and relationships with stakeholders to develop projects with sustainable outcomes throughout the duration from the second to part of the fifth semester the project.

Secondly, at the end of the data collection and discussion on the partners' experiences, UNITO research team will employ a qualitative comparative methodology named fuzzy-set qualitative comparative analysis (fsQCA), as proposed by Ragin (2009) and Woodside

(2012), grounded in the procedures of grounded theory outlined by Charmaz (2014) and Corbin and Strauss (1990). To perform the fsQCA, the research team will initially conduct a comprehensive review of the literature on Stakeholder Theory, Knowledge Management, Communication and Value Creation. Such a literature review will aim at identifying first a list of potential enabling factors (characteristics) for urban cooperation, whose extent of implementation and combination will be explored through fsQCA once the partners will have completed the *Stakeholder Assessment* Template.

Based on the literature analysis mentioned above, the research team identifies six key characteristics (or enabling factors) that will be examined using fsQCA: 1) *Planning; 2) Empowerment; 3) Engagement; 4) Communication; 5) Knowledge Exchange;* and *6) Digital Transformation.*

These six characteristics are described as follows (so please consider their meaning when you have to fill in the xls *Stakeholder Assessment* Template):

1. *Planning*. This variable focuses on evaluating the capacity and feasibility of planning innovative projects with stakeholders (do you have a strategic plan? Do you have a marketing plan that you share with them? Do you plan meetings and activities in advance?).
2. *Empowerment.* This variable assesses the tools and the activities implemented to educate and empower stakeholders so that they are aligned with the values of the project.
3. *Engagement.* The engagement variable measures the level of involvement and active participation of stakeholders with the municipality and other relevant stakeholders (i.e. relevant local and abroad Universities working with you for enhancing the value of your project).
4. *Communication.* This variable examines the transparency and effectiveness of information transfer among project partners, promoting open and effective communication channels (i.e. Have you established any new communication means for information exchange?).
5. *Knowledge exchange.* This variable evaluates the implementation of knowledge through effective sharing among project partners and their willingness to engage in knowledge exchange.
6. *Digital transformation.* This variable assesses the readiness and willingness to embrace innovation, facilitate its dissemination, and explore digital transformation

opportunities through public-private-public partnerships, outlining also the openness to partner when resources are not internally available.

The presence, the degree of implementation and the combination of these characteristics can contribute to urban cooperation to different extents. Based on the information gathered during the first phase of the methodology (when all partners fill in the *Stakeholder Assessment* Template) a number of cases will be produced by each partner. These cases will outline positive and negative experiences of urban cooperation depending on the presence and the degree of implementation of each of the identified six characteristics (or enabling factors). To explore the presence and the degree of implementation of each of the six enabling factors within each produced case, the research team will, first, rate each characteristic on a Likert scale from 1 to 5, where 1 indicates low presence of the enabling factor and 5 indicates high presences, based on the previously mentioned theoretical background. Secondly, the cases produced by the partners will be analyzed through content and thematic analysis by UNITO research team through a software named ATLAS.ti, which aims at facilitating content and thematic analysis by identifying keywords that reflect the presence and the degree of implementation of the six characteristics. The members of the UNITO research team will conduct content and thematic analysis on the cases separately and will then double check together to come to an agreed evaluation of each of the six characteristics (from 1 to 5 on a Likert scale). Eventually, the fsQCA 3.0 software will be employed to analyze all data gathered and calibrated and to study the configurations of enabling factors that effectively allow partners to reach a high level of urban cooperation.

4.1 Strategic participative methodology

The strategic participatory methodology employed by UrbanCOOP includes various essential steps to guarantee a comprehensive and meaningful analysis of stakeholders, the partner-stakeholder relationship dynamics in terms of implemented activities and their characteristics to manage an effective relationship and/or partnership with stakeholders.

The steps to analyze the partner-stakeholder relationships and how to fill in the .xls *Stakeholder Assessment* Template file are outlined below:

Step 1. Identify your Stakeholder group.

Begin by listing the stakeholder groups actively involved in the project and meticulously organize their relevant information within the designated official UrbanCOOP template. This action is critical to ensure that the main information is accessible and available to local team members.

Facilitate information sharing by including the organizations' details in terms of their names, for instance: in the stakeholder group named “Regional/National bodies” you can list a number of organizations that belong to this stakeholder group and each organization should be defined by its name and all the other required details. Feel free to add as many rows as per how many organizations fall into each category/stakeholder group.

To conduct a comprehensive and strategic mapping and analysis of all stakeholders, it is important to consider the involvement of broader stakeholder groups beyond those directly involved in project activities. Therefore, during the identification process, it is essential to include both primary and secondary stakeholders or direct and indirect interest groups.

We recommend you to set up meetings and/or roundtables with your stakeholder groups to discuss the establishment or advancements of the partnership with them and then track all the meetings with each stakeholder group (feel free to add files with the meeting minutes in a separate folder).

To establish well-structured meetings schedule we also recommend referring to the Project Calendar (accessible in the Drive folder), which allows you to make informed decisions about the frequency and timing of meetings with each stakeholder group.

Step 2. Start filling out the *Stakeholder Assessment* Template.

When you will begin filling out the *Stakeholder Assessment* Template, we recommend you to:

1. Include stakeholder groups that are both directly and indirectly involved in the project;
2. Remember that citizens and their representatives are a key stakeholder group and they are listed in the last line because you should devote an adequate amount of time and awareness to effectively mapping their characteristics and the relationship that you have with each group of citizens and representatives.

Step 3. Get ready for the Mapping.

We kindly request that you begin the mapping process by working on two/three stakeholder groups at a time (ideally, each semester). The initial three groups to be mapped and analyzed are the "European Union" "Governments" and “Regional/National Bodies”. For these first three groups, collect and organize the required information in the following columns: organization name, type of partnership, duration, key topics, priorities, key activities, and their characteristics. Each set composed by 2 or 3 stakeholder groups will be analyzed during the scheduled field visit every 6 months.
The UNITO research team will be available to address any specific questions regarding the compilation and management of the Template.

Step 4. Fill out the Template.
Fill out the *Stakeholder Assessment* Template on the Drive folder and wait for reviews and comments during each field visit. The field visits provide an opportunity to discuss the information you have provided.
Filling out the *Stakeholder Assessment* Template is an ongoing project activity. Select 2-3 stakeholder groups at a time (every semester) and engage in discussions with their representatives to complete all the columns of the excel file, **except for "Areas of improvement" and "Opportunities."**

During each field visit, partners will review the information gathered on the two/three stakeholder groups.

We kindly request that you remain updated on upcoming meetings by following the Regional Stakeholder Group on the Calendar.

- Before the first field visit, focus on mapping and analyzing the stakeholder groups "European Union," "Governments," and "Regional/National Bodies."
- Before the second field visit, concentrate on mapping and analyzing the stakeholder groups "Other Municipalities," "Suppliers," and "Private Sector/Professionals."
- Before the third field visit, prioritize mapping and analyzing the stakeholder groups "Employees" and "Knowledge Providers."
- Before the fourth field visit, emphasize mapping and analyzing the stakeholder groups "Financiers" and "Media."
- Before the fifth field visit, give attention to mapping and analyzing the stakeholder groups "Environmentalists" and "Local Communities (Citizens and their representatives)."

For the final partnership meeting, which occurs at the sixth and last semester, ensure that the "Areas for Improvement" and "Opportunities" sections have been filled in and completed.

Step 5. Review the *Stakeholder Assessment* Template.

During each field visit, the focus will be on sharing and discussing experiences and possible partnerships improvements among the project partners. It will be an occasion for optimizing everyone's work.

The collective discussion will lead to the conscious and careful compilation of the "Areas for Improvement" and "Opportunities" fields.

Step 6. Schedule a new meeting with the stakeholder group.

After each revision made during the field visit, it would be useful to schedule new meetings with your stakeholders to correct and modify the information in the *Stakeholder Assessment* Template or suggest improvements for establishing more effective partnerships.

Step 7. Start again with new stakeholders.

Use the insights shared during the group review to identify groups of stakeholders that are not included in the xls file (not compulsory but recommended) and improve your experience with the methodology by engaging those new stakeholders and filling the information regarding them with the same logic.

4.2 Qualitative comparative methodology fsQCA

fsQCA, as a distinctive qualitative research paradigm, employs fuzzy sets to capture degrees of membership in conditions (Ragin, 2009). This method adopts a configurational comparative approach, examining the combinations of characteristics (or initial variables – in our case the six identified enabling factors) that contribute to a specific outcome (Elliott, 2013) (in our case high level of urban cooperation). Unlike quantitative regression methods that focus on cause-effect relationships between independent and dependent variables, fsQCA explores a joint causal system allowing for interaction effects among each characteristic within a case. It embraces a "configurational way of thinking and theorizing"

the complex causality inherent in management and organizational phenomena (Misangyi et al., 2017, p. 259). By considering asymmetric linkages, fsQCA enables the exploration of all possible interactions between a set of initial variables and their corresponding outcome.
fsQCA's strength lies in its recognition of causality as intricate, intertwined, and holistic, emphasizing the combined effects of causal conditions. It embraces conjunctural causality, where distinct configurations of multiple causal attributes explain the observed outcome. Hence, fsQCA is particularly suitable for the UrbanCOOP project for several reasons. First, it is well-suited for a moderate number of cases that necessitate exploratory inquiries (Woodside, 2012). Second, it effectively addresses the implicit causal complexity of the constructed cases derived from interviews and other types of dialogues such as focus groups between the project partners and their stakeholders. Third, fsQCA allows for a nuanced understanding of the intricate relationships among characteristics in achieving the desired outcome.

5. Sample

The sample of this project entails the whole number of cases that will be produced by the partners after filling in the *Stakeholder Assessment* Template. The exact number of cases is unknown as of today because it depends on how many cooperative projects and/or interactions with stakeholders the partners will declare and describe to be involved in. The cases will be built based on the qualitative information that the partners will report in the *Stakeholder Assessment* Template. The qualitative information will be produced by the partners after interviewing and developing dialogues with their stakeholders on existing and/or potential projects of urban cooperation. The focus of the analysis will be on the processes and relationships between UrbanCOOP's partners and their key stakeholders, specifically those who are directly or indirectly associated with municipal practices in managing and organizing specific activities. The partners will provide detailed information for each case (ideally a case is a project of urban cooperation or a specific activity within a project), including the nature of the partnership with different stakeholder groups, a description of the company or organization involved, the country of operation, the timeline and duration of the project, as well as a comprehensive description of the project's objectives, the activities undertaken to achieve them and the activities’ characteristics (that will be evaluated through the Likert scale as mentioned above).

6. Data collection

To conduct the fsQCA analysis, the UNITO research team will employ a triangulation approach among literature, primary sources collected by UrbanCOOP partners and secondary sources (such as reports and documents describing the partners' projects and activities). As already mentioned, the literature review allowed UNITO research team to identify the 6 main enabling factors (or characteristics) to be explored in each case. Furthermore, to fill in the *Stakeholder Assessment* Template, each partner is required to conduct interviews or focus groups with their stakeholders to gather in depth information about the relational mechanisms driving the existing or potential partnership for sustainable value co-creation at a urban level. The partners will utilize their chosen method/s to gather information and perception from their stakeholders, which will serve as basis to be matched with secondary sources and build the cases for evaluation.

7. Data evaluation

A Likert scale ranging from 1 to 5 will be used to rate the degree of absence (1), low (2), medium (3), high (4), or full (5) presence, development, or implementation of each characteristic within each produced case. Each case will have a positive or negative outcome (=urban cooperation).

8. Initial characteristics (or enabling factors): description and evaluation

Based on the insights gathered from the literature review, the UNITO research team has identified six initial characteristics that serve as initial variables to be explored and evaluated to reach the outcome of urban cooperation. These characteristics include Planning, Empowerment, Engagement, Communication, Knowledge Exchange, and Digital Transformation.

To assess the presence and the degree of implementation of each characteristic within the cases, a Likert scale ranging from 1 to 5 will be utilized. This scale will enable the rating of each characteristic, with a score of 1 indicating absence, 2 indicating low presence, 3 indicating medium presence, 4 indicating high presence, and 5 indicating full presence, development, or implementation.

Focusing specifically on the first characteristic, "Planning," a higher rating (5) will be assigned if the partner exhibits great capacity and feasibility in engaging in innovative project planning with relevant stakeholders. Conversely, if the partner's capacity for planning is lacking, a lower rating (1) will be assigned.

The characteristic of "Empowerment" will assess the tools and activities implemented to educate and empower stakeholders to be aligned with the project's values and aims. The higher the level of commitment to stakeholder education and empowerment, the higher the rating for this characteristic (5).

The third characteristic, "Engagement," measures the level of involvement and active participation of stakeholders with the partner on a value-co creation project or one of its activities. If a significant level of partner-stakeholder engagement is detected, the rating will be close to 5 on the Likert scale.

The characteristic of "Communication" evaluates the transparency and effectiveness of information transfer between project partners and their stakeholders, promoting open and efficient communication channels. If partners have established effective communication channels, their evaluation will be high.

The "Knowledge Exchange" characteristic assesses the implementation of knowledge through effective sharing among project partners and their stakeholders and their willingness to engage in knowledge exchange.

The "Digital Transformation" characteristic evaluates the willingness and readiness to embrace innovation, facilitate its dissemination, and explore opportunities for digital transformation through public-private-public partnerships. This characteristic also highlights the openness to collaborate when internal resources are not available.

Table 1, below, presents a comprehensive overview of the Likert scale, providing detailed information on each characteristic and its corresponding rating scale.

Original Likert values	PLANNING	EMPOWERMENT	ENGAGEMENT (INTERNAL AND ESTERNAL)	COMMUNICATION (DIGITAL AND NON)	KNOWLEDGE EXCHANGE	DIGITAL TRANSFORMATION
1	No ability to plan	Lack of training activities for enhancing partners' knowledge and competences	Lack of engagement activities such as meetings, workshops, and roundtable	Poor information sharing and poor transparency	Lack of assets, lack of knowledge capabilities, lack of dynamic capabilities	Absence of partnerships, no digital contamination, no service innovation
2	Poor ability to plan	Scarce training activities for improving partners' knowledge and competences	Poor engagement activities such as meetings, workshops, and roundtable	Poor information sharing and scarce transparency	Poor assets, poor knowledge capabilities, and poor dynamic capabilities	Weak partnerships, low digital contamination, poor service innovation
3	Early implementation of planning	Training activities planned to reach a sufficient level of knowledge and competencies partners can use to cooperate	Discreet level of engagement activities such as meetings, workshops, and roundtables	Scarce information sharing and transparency	Not fully exploited assets, generic knowledge capability, poor dynamic capabilities	Infancy of partnerships, medium digital contamination, low innovation of services
4	Good ability to plan	Good level of training activities for improving partners' knowledge and competences	Good level of engagement activities such as meetings, workshops, and roundtables	Good information sharing and transparency	Presence of assets, well-developed generic knowledge capability, well-developed dynamic capabilities	Strong partnerships, initial digital contamination, initial innovation of services
5	High ability to plan	Good level of training activities for improving partners' outstanding knowledge and beneficial competencies	Very good level of engagement activities such as meetings, workshops, and roundtables	Outstanding information sharing and good (well-balanced) transparency	Fully exploited assets, well-developed critical knowledge capability, rich, dynamic capabilities	Strong partnerships, high digital contamination, full services innovation

Table 1. Original Likert Values

9. Outcome variable: Description and evaluation

The outcome of urban cooperation can be evaluated on a .3 Likert scale within each produced case.

If the outcome (=urban cooperation) is high (3) it means that the project partners have successfully implemented sustainable local or regional project(s) and activities with full consensus and participation of stakeholders and, in particular, citizens.

If the outcome (=urban cooperation) is medium (2) it means that the project partners are in the process of implementing sustainable local or regional project(s) and activities but they still have to gather full consensus and participation of all stakeholders and, in particular, citizens.

If the outcome (=urban cooperation) is low (1) it means that the project partners are lacking consensus among their stakeholder groups and, in particular, citizens, and struggle to successfully design and develop sustainable local or regional project(s) and activities.

10. Fuzzy set calibration

Before conducting the fsQCA analysis, a calibration process will be performed to transform the original Likert scale into a continuous range of values from 0 to 1 (Ragin, 2009; Woodside, 2010). Breakpoints will be identified to assign membership to specific cases. All degrees of the characteristics will be converted into continuous fuzzy set values (Fiss, 2011) using the direct calibration encoding method (Ragin, 2009). To simplify the analysis without losing the significance of the model, the degrees of our initial variables (characteristics) obtained through the Likert scale will be transformed into a final five-category scale: 0.95 (corresponding to 5: fully present/developed/implemented); 0.82 (corresponding to 4: highly present/developed/implemented); 0.5 (corresponding to 3: the point of maximum ambiguity where we considered equally likely to represent low or high development of that condition); 0.25 (corresponding to 2: low presence/development), and; 0.05 (corresponding to 1: not present/developed/implemented). The same direct calibration method will be adopted for the Urban COOP Project outcome. Projects exhibiting a high outcome will be rated as 0.95, projects with a medium outcome will be rated as 0.5, and projects with a low outcome will be rated as 0.05.

11. Advices about leading a session

If you convene a session, it is your responsibility to “hold the space” for your session. You hold the space by leading a discussion, by posting a “first question,” or by sharing information about your program. Be the shepherd – stay visible, be as involved as necessary, be a beacon of sanity that guides the group.

- Ask for help holding the space if you need it. You might, for example, put a session on the board and know that you are so passionate about the topic that it would be better if someone else, someone more objective, facilitates the discussion. Choose someone from your team, or another participant who is interested in the topic.
- Do not assume people in the room know more, or less, than you do. You never know who is going to be interested in your session.
- Do not feel that you have to “fill” up an hour of time. If what you have to say only takes 15 minutes and the group has finished interacting–then the session can end.

- Do not feel pressure to have everything take “only” an hour. If you start with a short presentation, and then a group conversation gets going, and your discussion needs to continue past an hour – find a way to make this happen. You might be able to keep talking for a while in the room you are in, or move to another part of the conference area, or post “Part 2” on the agenda.
- Be brave! Others are interested in making your session work!
- Do think about the ideas that you want to cover in your session, and how you want to cover them. But do not feel as though you need to prepare a great deal. (If you are over-prepared, your session might lose energy.)

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