

Internal guidelines for tailored storytelling at the SHAPE ENERGY multi-stakeholder workshops

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Contents

1. How to use these guidelines	2
2. Agenda setting and storytelling related activities	2
3. Activities in detail.....	5
3.1. Setting the scene and creating the necessary atmosphere.....	5
3.1.1. Energisers.....	5
3.1.2. Introducing storytelling, and the day’s agenda	6
3.1.3. Rules of the game	6
3.2. Inviting diversity.....	7
3.2.1. Forming of roundtables	7
3.2.2. Writing of individual stories.....	8
3.2.3. Reading out the individual stories, identifying key problems and sharing these.....	10
3.2.4. Discussing problems from the individual stories and choosing which to continue with.....	12
3.3. Envisioning solutions.....	14
3.3.1. Writing individual future stories	14
3.3.2. Reading out the individual future stories and identifying key solutions to problems.....	16
3.3.3. Writing the collaborative future stories	17
3.3.4. Carousel writing	18
4. Storytelling videos.....	19
5. Facilitation tips/what to do if something happens.....	19
6. Learning from the other workshops	21
7. Storyspines/templates from Riga workshop	22
8. Storyspines/templates from Cambridge workshop.....	28
9. Table cards for table moderators.....	32
10. Table cards for table participants (for groups with no pre-selected table moderator).....	35

1. How to use these guidelines

These guidelines were created after the collective training in Brussels in September 2017. They supplement the public deliverable which was circulated prior to that event, and which gives both the background to the storytelling method and overall details. These guidelines now detail the specific steps in order to develop your own tailored story spine(s) or story template(s) for use at your workshop.

OVERALL TASKS TO DO BEFORE THE WORKSHOP:

- Read these guidelines (important for both facilitators and table moderators).
- Identify up to 4 table moderators for the workshop (one per table of 8-10 participants). Preferably each SHAPE ENERGY partner provides these table moderators. If this is not feasible, then an attendee can be appointed table lead, but make sure to ask them in advance (if possible).
- Design your tailored story spine(s) or story template(s), as per the details in these guidelines.
- PILOT: train the table moderators by having a pilot of your specific storytelling activities if at all possible with all moderators present (plus potentially others). If you are not able to do a pilot with table moderators beforehand, we suggest that you at least ask them to read these guidelines and convene a brief meeting with them so that you can make sure that any remaining questions can be answered and that you are all on the same page during the workshop.
- Adapt (to your specific workshop), translate and print the table cards that come with these guidelines, if you feel they would be helpful (particularly for cases where participants are acting as table moderators).

In this document we include more elaborate facilitation background instructions for the different activities that can be used in the piloting before the actual workshop. However the table cards are shorter 'aide-memoires' designed to be used during the day by the table moderators.

2. Agenda setting and storytelling related activities

Four storytelling phases are proposed for the multi-stakeholder workshops: (i) setting the story scene, (ii) inviting diversity, (iii) envisioning (two rounds: individual and collaborative), and (iv) storytelling videos. Up to nine activities compose these phases (see figure 1). Each activity is discussed in more detail below, with the accompanying facilitation instructions.

Figure 1: Four storytelling phases and activities structure the multi-stakeholder workshops



As Figure 2 shows, during the course of the day, the participants will move from the individual, local and ‘here and now’ stories to a collaborative future vision story for the city.

Figure 2: The overarching aim is to move from multiple individual stories to a few collaborative future stories



Table 1 gives an example of an agenda that includes all activities. Your time slots will depend on your starting/ending times, and therefore how you adjust each activity to fit your overall agenda. Storytelling forms the guiding framework during the day. However, the exact format of the activities is flexible to allow for local context and participant make-up, and there is room to add activities that are helpful, e.g. to provide additional background knowledge or information to allow for further reflection (such as presentations or group discussions). Make sure to have at least one whole group (plenary) session (45-75 mins), to allow for the participant observation of group conversations to happen (see separate template for this).

Table 1: Agenda slots for the workshop (Including all activities)

Setting the scene <i>30-45 mins</i>	<ul style="list-style-type: none"> - <i>Coffee and networking</i> - Welcome, introduction to the SHAPE ENERGY project and who's in the room - Plenary discussion/short presentation with workshop co-host on local needs and rules of the game - Individual stories by facilitators - Presentation on why storytelling is used in SHAPE ENERGY/introduction to the activities
Inviting diversity: identifying problems <i>60-100 mins</i>	<p>Inviting diversity (total up to 100 minutes plus a possible coffee break, timings given here can be reduced see below table)</p> <ul style="list-style-type: none"> - up to 10 minutes: forming four roundtables - 15 minutes: writing individual stories - <i>Possibly coffee (to allow people to continue writing their story during the break)</i> - 10 minutes reading out individual stories - 20 minutes: identifying key problems - 35 minutes: collaboratively identifying the problems for the afternoon session - 10 minutes writing final sentences or paragraphs for envisioning session
Videos	During lunch or refreshment break, with 2-4 participants.
Other session(s)	e.g. Plenary discussion (make sure to have one such whole group activity to allow for participant observation)
Envisioning solutions <i>60-100 mins</i>	<p>Envisioning (total up to 100 minutes, again timings can be reduced with careful planning or by removing certain elements, see below table)</p> <ul style="list-style-type: none"> - up to 10 minutes: forming (new) groups - 15 minutes: writing individual futures around the problems from the morning - 30 minutes: reading out and highlighting conflicts, discussion - 45 minutes: writing one or two collaborative stories, and conflict highlighting or resolving
Envisioning solutions (extra activity)	20+ minutes carousel, visiting the other tables and adding thoughts, <i>over coffee</i>
Closing <i>10-30 mins</i>	<ul style="list-style-type: none"> - Wrap-up of the day, take home messages, collecting participant feedback - <i>Further networking, over refreshments</i>

If you cannot allocate a whole day to the workshop, or feel you won't be able to get participants to commit to that length, there are various ways you could reduce the storytelling sessions in length. For example:

- During the 'Inviting diversity' sections, instead of reading out all stories, make a selection of 2 or 3 stories and then have others mention what other types of problems they wrote in their own stories;
- Alternatively, ask everyone to read out their stories in turn and discuss at the end, instead of discussing all of them after each story was read out;

- Asking everyone to identify **one** key problem only (not several) that they heard in someone else's story;
- After a 10 min discussion, vote on the problems, in terms of which to carry forward, rather than trying to reach group consensus;
- In the 'Envisioning' activity, the individual story writing can be skipped, going directly into the collaborative writing, and the carousel can also be left out entirely.

The less time you allocate, the more carefully you will have to plan to keep things on track, and ensure all table moderators are very clear on the tasks.

TO DO BEFORE THE WORKSHOP:

- (After reading the full guidelines, and potentially in liaison with your co-host) draft the agenda and make a choice as to how long to allocate to each storytelling activity.

3. Activities in detail

In this section we provide further explanations of all activities. Included are the so-called 'background facilitation instructions' which can help when piloting the workshop set-up with the facilitator and table moderators in advance.

3.1. Setting the scene and creating the necessary atmosphere

Once performed, collaborative storytelling can be transformational. However, attendees at workshops or other collaborative meetings need to be willing to participate in the process. This willingness is dependent on the atmosphere of the event and how the activities are presented to them by facilitators. People first need to feel comfortable participating in storytelling exercises but secondly they also need to believe that there is something to gain by telling their story. Feeling comfortable is linked to many factors, which are captured in the 'rules of the game' listed further down in this section. And in order to believe there is something to be gained, the rationale behind the way the activities are designed, and the benefits of such an approach need to be highlighted – this can be done briefly but needs to be explicit.

3.1.1. Energisers

A very helpful way to create this good atmosphere and feeling of connection on the interpersonal level, are energisers both at the start of the workshop and after the lunchbreak, to get people's energy flowing again, and to prime them towards the afternoon activity: envisioning the future and solutions.

Examples of energisers: the speed date where people need to form pairs and in 2 minutes find out about something they share, from a hobby to a book they have both read, or something directly related to the topic of the workshop. After lunch you could ask the group to close their eyes, and imagine themselves at 70 years old, and look around them to see what the world looks like, and how a typical day looks for them, and what that means needs to happen, change etc. There are many other interesting energisers, see the websites below for some ideas:

- <http://www.funretrospectives.com/category/energizer/>
- <http://www.wilderdom.com/games/Icebreakers.html>

- <https://transitionnetwork.org/wp-content/uploads/2016/09/Visioning-a-post-Transition-future.pdf>

TO DO BEFORE THE WORKSHOP:

- Choose energisers to work with;
- Practice or pilot the energiser(s) if possible;
- Make sure you have a stopwatch, bell, whistle to remind people of time.

3.1.2. Introducing storytelling, and the day's agenda

In order to feel comfortable, people also need to see that **everyone participates**, including the workshop facilitators. One way of achieving this is by the facilitators presenting their own individual story/ies at the start of the activity, in a plenary session, or at the roundtables. This will create empathy but also a more level playing field.

The second precondition for a good atmosphere around storytelling is **understanding its use** and why it is chosen as an instrument. As well as setting out the overall aims of the event, and how these aims will be achieved during each session of the workshop, it is advisable to include a specific introduction on the why and what of storytelling in relation to SHAPE ENERGY. The PowerPoint presentation from the Brussels training is available to adapt and use as needed, and remember that materials from all workshops will be shared on CIRCABC (including from the first two workshops run in English).

The facilitator can present the agenda of the day very briefly and at set times indicate where we are on the agenda. Suggestion – hang a flip chart on the wall, so that participants at any given time can take a look and 'locate' in what part of the process they are.

TO DO BEFORE THE WORKSHOP:

- Write your own story/ies, work out when would be most appropriate to tell them, and rehearse how to read out, to be as engaging as possible.
- Develop your own introduction to the 'why' and 'what' of storytelling (can be brief) based on the PowerPoint provided by DW. This could be combined with your introduction to the format of the day.

3.1.3. Rules of the game

Below is a list of potential rules of the game that facilitators can use, based on their own assessment of the necessary approach at their workshop.

What you can/need to tell participants about logistics is (the ones in Italics are absolutely recommended to use in the workshop):

- Who people can talk to about comfort levels (if people are cold or warm, etc.).
- Explain where the toilets/fire exits are (if that is customary in the country).
- *Tell them the acoustics are vital for the day, there are a lot of people present who will be talking simultaneously, ask them to talk and discuss as quietly as practicable.*
- *Tell them it is important that they are there, really there here and now! and that therefore telephones and laptops are not needed, they should leave them in the bag. If people need to make a call that is all right but please do it outside.*

What you can/need to tell them about the objectives of the day in terms of process (the ones in *Italics* are absolutely recommended to use in the workshop):

- Express appreciation they are there, and tell them why it is important that they are there.
- Remind them that respect is key, and that if people feel at risk they need to tell you.
- Explain that all the stories they write and discussions they have will be input to this objective of the workshop: understanding the problems this city is dealing with and how SSH can help out and how the problems might also need to be put in more generic terms on the H2020 Research and Innovation Agenda etc. (also based on outcome of short discussion).
- *Tell them what atmosphere you want to create together, and that they are all responsible for that, they are your co-hosts, co-facilitators!*
- *Tell them that whatever information they share with you will be dealt with in careful and meaningful manner. Be clear on how their data will be used (including photos), and that, of course, if they would prefer not to feed into our outputs, please let the workshop coordinator know within 1 week of the event (or sooner, for example regarding information which might feed into blogpost/photos).*
- *Tell them today is not about fact finding or being right, winning, but about listening, learning, and that each voice and perspective needs to be heard, whether people agree with it or not. It is not about consensus, all voices are equal, all are experts, today is about collecting the diversity and alternatives!*

TO DO BEFORE THE WORKSHOP:

- Review the list of rules above and decide which ones to use in your workshop.

3.2. Inviting diversity

3.2.1. Forming of roundtables

Several roundtables (which could be one per energy topic, or if a decision is made to focus on fewer topics, then arranged according to facilitators' knowledge about the interests of participants) will be formed with a maximum of 8 to 10 people each. Each table will preferably represent a good mix of local government, business, academia and NGOs, and you may want to bear in mind existing relationships also in terms of either keeping people together or apart! The story spines to be used at each table can differ in terms of which end-users / type of action or topic is of interest to table participants, or the spines can be similar / the same across tables.

To do before the workshop:

- Prior to the workshops the facilitators will have prepared an overview of the local energy and SSH situation in relation to each of the four topics SHAPE ENERGY focuses on. Based on this local overview and possibly discussions with the co-host, the focus of the workshop will have been decided beforehand. *See the sections on defining the workshop 'hook' and objectives in ECIT's guide on implementing the workshops.*
- Facilitators and co-hosts will decide upon table groupings prior to the workshop. The facilitators should assess the positions of participants within their organisations (where relevant), and what

possible dependencies between participants exist. Identifying potentially hindering hierarchical or pre-existing professional relationships and, if necessary, addressing them in the group will help to create a level playing field and increase openness amongst participants. Consider this when allocating participants to groups.

- In the invitation or final pre-workshop email, attendees can be asked to come with a particular project, problem, or past experience in mind (picked depending on the topic), to help them ‘hit the ground running’ when writing their stories.

3.2.2. Writing of individual stories

This ‘writing individual stories’ session will start with a focus on the individual (disciplinary, sectoral) local city perspectives and invite participants **in their role as professionals** to describe their city experience in respect to the topic(s) identified prior to the workshop, in order to come up with more specific problems.

Each attendee will receive a piece of paper with the storytelling spine or template, and space for their individual story. The local needs overview of the energy and SSH situation, and in particular the *objectives* you set for your workshop, will have provided the necessary basis for drafting the prompts for each story in terms of *what you want participants to reflect on and share their experiences of*. This first storytelling exercise is about framing perspectives and discussing specific problems and goals/needs around a real and concrete issue to be solved in their city, based on the topic chosen for the workshop. It is important that the table moderators mention upfront that the focus is on issues and problems that SSH can address (rather than solely technological issues) and therefore this will affect which problems are chosen for further group work (in ‘envisioning solutions’ session).

Each participant will be asked to either complete a set of sentences in a story spine format, or write a story without given sentences as long as they provide information about certain issues listed in the text on top of the story template. They should do this from their specific (professional, disciplinary, sectoral) viewpoint. Participants will take up to 15 minutes in quietude to write their story at the beginning of the first roundtable session. The story does not need to end with ‘success’, but the story needs to be grounded in reality, discussed from that specific attendees’ perspective.

You can emphasise that the stories will provide descriptions of WHAT we want to learn more about the current situation through their story. We provide starting sentences, but people are free to use only the keywords of the story spine. If people prefer drawing over writing, that is fine too. Moreover, they need to try to be concrete, specific and concise. Short and snappy is good!

You may wish to schedule a coffee break after this story writing exercise to allow people to finish their writing during the break.

TO DO BEFORE THE WORKSHOP:

- Prepare the story spine or story template to be used in the ‘inviting diversity’ session, which may include a starting sentence or paragraph describing the topic of the workshop.
- Prepare a one slide explaining how people should write their story, and put it on the screen during this exercise!

Box 1: A template story spine for the individual story writing. Concrete examples from the workshops will become available as they run – see sections 7/8 also.

<p>TITLE: <i>What is the title of your story? Try to think of a newsletter type of heading</i></p>
<p>Name: Stakeholder type: <i>what kind of actor are you? NGO, citizen, researcher, local authority, business, other...</i></p>
<p>Everyday... Framing the story. <i>This part is written beforehand by the facilitators/hosts and based on the chosen topic. So this paragraph is the same for every story. It describes the problem (area) that probably most attendees will acknowledge to be a problem and that needs to be solved. This is the topic of the workshop and the reason the attendees are present at the workshop. Write this paragraph or sentence in such a way that the different professionals present can still feel invited to tackle it from multiple disciplines and perspectives.</i></p>
<p>This is because... Describing the cause of the problem. <i>Why do you think these problems exists? What underlying causes of the problems do you see?</i></p>
<p>As a consequence.... Describe the consequences of the problems. <i>What do you think are the impacts of these problems? For whom? Where? When?</i></p>
<p>Therefore... Describe the actions already undertaken (if any) to address the problem. <i>What's been done already? Who was involved in this and when?</i></p>
<p>What happened was... Describe the goals and outcomes of these actions. <i>What has been achieved in terms of solving the problems? Who has undertaken what actions, what concrete steps and roles have been taken? For each of those involved what are their interests, mandates and restrictions and how have these influenced the outcome?</i></p>

Facilitation instructions: Writing of individual stories	
Goal	Help people write a story and feel comfortable doing it. Deal with people who get stuck with writing, or who are so passionate about writing they can't stop.
Facilitator tasks	<p>In a plenary setting (all tables) take 3 minutes to explain to people:</p> <ul style="list-style-type: none"> • the story spine they need to follow, • what they need to write, how much, how, • that they are allowed to draw instead of writing, • that they need to put their name on it, • to please write clearly because you will collect the stories afterwards and people need to read them, • to be in-depth/specific, not generic because we really want the workshop to take a next step in understanding the problems the city faces etc., • but short and snappy is great!, • that title is something to choose at the end potentially, after the story is written. <p>At the tables: Keep track of time, in principle people have 10 minutes to write their stories! 5 minutes extra to help the really slow writers. Tell the writers after 5 minutes they have 5 minutes left.</p>
Material needed	<ul style="list-style-type: none"> - Enough copies of story spine / templates for everyone - Spare pens for writing

3.2.3. Reading out the individual stories, identifying key problems and sharing these

Each of the participants will read their story out loud to their group (around 1 minute per story), ensure there are no elaborations!

All participants are asked to take notes about the key problems they hear while they listen to the stories. You might want to steer participants towards writing these down as problems considering this will feed into the envisioning sessions. You can provide the attendees a note-taking sheet such as the one below to categorise the different problems listed in the stories (this could be on the reverse of the story writing sheet).

There are two options for this process:

- Option 1: after each individual story is read out, the facilitator asks the participants to name the 'key problems' from listening to the story. This has to be a quick round, no discussion, just quick tour de table. The designated facilitator/lead writes down these key problems on a flip chart.
- Option 2: have everyone read out their story and participants write down the key problems from the stories and discuss after all stories have been read out.

The choice for 1 or 2 depends on how much time is available (Option 1 likely takes more time).

Box 2: Template to categorise the problems from the stories

Story by	Key problem(s) mentioned
name	e.g. to be added..
1	
2	
3	
4	
5	
6	
7	
8	

Facilitation instructions: Reading out individual stories and identifying key problems	
Goal	<ul style="list-style-type: none"> - Learn about each other's stories, empathise with them and think about the why behind the stories - Distil key problems from the individual stories and share some of them
Facilitator tasks	<ul style="list-style-type: none"> • Ask everyone at the table to read out their story, • everyone has around 1 minute maximum, • ask them to read the story as it is and not elaborate, • keep track of time! Try to ensure no one goes over 1.5 minutes.. • ask each participant to write down the problems they hear being mentioned in each story.
Material needed	<ul style="list-style-type: none"> - Enough copies of template to make notes - Way of keeping time - Flip chart for each group

TO DO BEFORE THE WORKSHOP:

- Decide on option 1 or 2 (for reading out stories and identifying key problems).
- Design the problem note-taking template, if using.

3.2.4. Discussing problems from the individual stories and choosing which to continue with

In this last part of the ‘inviting diversity’ session, the discussion and identification of very specific or concrete problems related to the workshop topic to hone in on during the remainder of the day will be performed. The aim of this first main storytelling session (which could last up to 2 hours, including coffee) is to identify the impact of different problems and issues playing out at the local level on the daily practices of the participants, and identify those problems that need to be acted upon and discussed in more detail in the ‘envisioning solutions’ session.

Participants will share one or more of the problems they heard with the whole group, and the table moderator will note them on a flip chart. You may want to limit the number of problems each person shares (i.e. there is unlikely to be time for everyone to say everything they have written down).

The table moderator may, as they write them up, want to categorise and scale the problems mentioned to provide some order for the discussion, or to enable the grouping of related issues. This will be one of the most challenging elements of the workshop because you will be dealing with problems that reside in different dimensions (political, infrastructural, regulatory, cultural, social, technical etc.) and might be on different levels of concreteness, from more societal or systemic problems to problems on the concrete or even local level of homes or technologies.

Figure 3 below provides an example of a spider diagram that could be used, by drawing it beforehand on a flip chart sheet. Relations or interdependencies between problems can also be drawn on the sheet. These sheets will be important ‘notes’ on the workshop, alongside the stories. Each of the problems can also be discussed in terms of if and how SSH might address them.

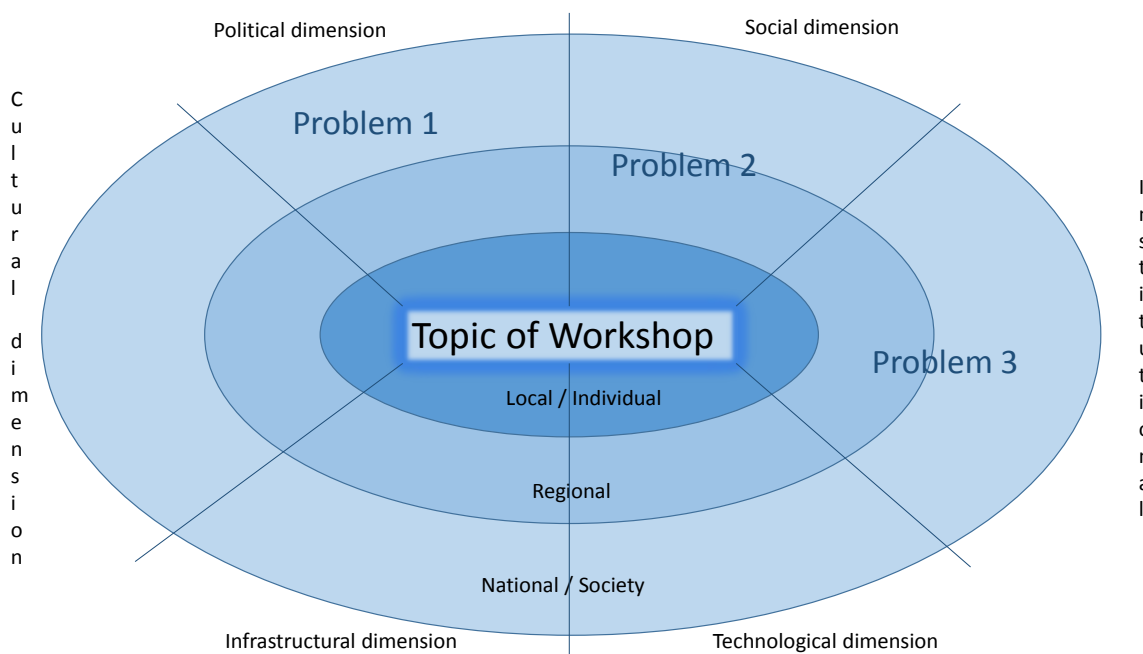


Figure 3: Categorising the problems associated with the workshop topic as they emerged from the stories

Once everyone has contributed to the list of problems, the group can then move on to choosing which problem(s) to continue with in the afternoon. One way of helping people prioritise could be to have the attendees think about which top three issues need SSH insights, or which issues would be useful for the present group to discuss. Then it's not about which is the most important problem, but which *is valuable in this context* (both the SHAPE ENERGY project, and local participant group). Aim for choosing one, but allow some subsidiary ones to be recorded if they seem vital. If needed, a voting principle can be organised where people put a mark next to three problems to flesh out. This will likely lead to 1-3 problems to take to the next storytelling session.

It is important that the final chosen problem is written clearly on a new sheet, and ideally, that each table reports back (briefly) to the whole group on what their problem is.

Facilitation card: Key problems discussion based on individual stories	
Goal	Distilling key problems from the individual stories and selecting key problem(s) to work on in the 'envisioning solutions' session
Facilitator tasks	<ul style="list-style-type: none"> • Do a quick tour de table, asking each person to contribute one or a small number of problems from their notes. Make sure they keep it quick and easy, not minutes but seconds per problem. • Note every problem on a flip chart, potentially using an ordering matrix, for example the spider diagram provided in this document. Ask the relevant attendee to help you out choosing the category. Highlight links between problems if present, by drawing a line between them. • Make sure that the discussion revolves around problems! Not generic issues, so beware of the wording. • After the tour de table, ask attendees if something vital is missing. • As a group, you now need to come up with (ideally) one problem to take forward to the later session. This should relate to SSH issues, perhaps be an issue which is often overlooked, and be useful to discuss with the particular group present. • You could organise voting, where everyone can put three marks behind the problems they find most interesting to flesh out in the afternoon (based on a selection e.g. in need of SSH research, or most relevant to discuss with the present group). • Discuss each of e.g. the top 3 voted problems in more detail, ask about problems behind the problems, needs, actions, actors etc. People will have a lot of information in their stories about this. • If someone feels unhappy about the chosen problems, allow them to discuss another one, but briefly, and allow them to continue the afternoon session with that problem. • Try to collectively write a sentence/paragraph describing the problem or discussing a future in which these problems were solved. This sentence or paragraph will be the starting sentence for the next round.
Material needed	<ul style="list-style-type: none"> - Flip chart, potentially with pre-prepared spider diagram - Flip chart / sheet to write up the chosen problem(s) or envisioned future(s) on

To do before the workshop:

- If you can pilot the workshop, make sure to test this part of the session! (Writing up the problems, and trying to find one problem that the group deems valuable to take further). Ensure table moderators feel comfortable with this part.

3.3. Envisioning solutions

This next step in the workshop (after a lunch/refreshment break, and potentially a plenary session) is to start working collaboratively at creating an outlook at the city level for how to tackle the problems identified in the morning, over the next 10-20 years. This includes how (energy-)SSH can help different stakeholders combat these problems, as part of improving their business models (or service delivery, for local authorities), as well as what priority areas for research should be.

The groups can be mixed up (either according to groups decided in advance or by allowing people to make a choice as to which problem to go to) to give people a chance to network, but if deemed preferable the groups could remain the same as the morning, this is up to the workshop facilitators to decide.

3.3.1. Writing individual future stories

A new story spine will be used in this second storytelling round (see Box 3).

You can emphasise that these stories will provide descriptions of WHAT we want to learn. Box 3 contains an example of a story spine with starting sentences, but participants are free to use only the keywords and adapt these sentences (or you can provide prompt questions only). If participants prefer drawing over writing, that is fine too. Again, they should try to be concrete, specific and concise.

IMPORTANT: when designing this second story spine also, keep in mind the priorities of your co-host, in terms of what they would like to learn to help them in their work in the next few years, and use this to design your starting sentences (they can look quite different to the below).

Box 3: Template for the individual future story writing

TITLE:
Name:
Stakeholder type: <i>what kind of actor are you? NGO, citizen, researcher, local authority, business, other...</i>
In 2017, the following problem was identified... <i>As per the earlier session, framing the story using the sentence revolving around the problem chosen.</i>
But I dream of a future city where.... <i>Describe what a normal day would look like from your (professional) perspective if the selected problem was solved.</i>
To solve this problem, from 2017 to 2027.... <i>Describe what actions took place, or what policies were designed, by whom, including your own. Also discuss any negotiations or conflicts that needed to be resolved and how this was done</i>

<p>And from 2027 to 2037.... <i>Describe what actions took place, or which policies were designed, by whom, including your own in this second time frame. Also discuss any negotiations or conflicts that needed to be resolved and how this was done.</i></p>
<p>SSH research proved particularly valuable to achieve the change ... <i>Describe what historians, sociologists, anthropologists, psychologists and other social science and humanities might have contributed with what kind of research and what kind of outcome.</i></p>
<p>This research was of great importance to... because... <i>Describe who (including yourself) benefitted from the research listed above, why and how.</i></p>
<p>As a final remark, it is important to know that.... <i>Describe anything that you would like to add.</i></p>

Facilitation instructions: writing future stories	
Goal	Enabling participants to write future stories discussing pathways to deal with the problems identified in the morning sessions, including roles and activities. Also focusing on SSH research needed in these pathways.
Facilitator tasks	<ul style="list-style-type: none"> • Explain in whole group setting the goal of this activity and how it relates to the morning sessions. Explain how this individual activity will feed into the collaborative writing later. Explain how people are allowed to write their story (same/similar slide as in the previous session). • Each individual participant is asked to envision solutions to the selected problem on their table (the final sentences which were written at the earlier session) to be tackled in the course of the next 10-20 years. • Per table: provide the starting sentences written earlier based on the selected problems. • Ask people to write their future story around the chosen problems for the table. Remind them to write about: <ul style="list-style-type: none"> ○ their own role; ○ what they need from SSH research, and policymaking to be best equipped to take an active role themselves; and ○ what SSH research and policymaking need to contribute in addition.
Material needed	<ul style="list-style-type: none"> - Enough future individual story spine sheets - Pens

TO DO BEFORE THE WORKSHOP:

- Design the story sheets for this session.
- Decide on whether to keep the groups the same in this session, mix the groups compared to the previous one, or allow participants to choose their groups.

3.3.2. Reading out the individual future stories and identifying key solutions to problems

As in the morning session these individual future stories will then be read out loud in the table groups. After each story has been read out, or in between stories depending on the time available, the group then collectively identifies any commonalities and/or diverging view as to how to solve the problem. Diverging views are allowed between the stories, it is an inclusive exercise. If big divergences between approaches, roles and activities exist, after all stories have been read out loud and people have all identified their key elements, then some time can be reserved for discussion to further increase the learning about differences in needs, mandates, visions, etc. If issues are solvable then do solve them, otherwise allow multiple stories to co-exist in the next round.

Facilitation instructions: Reading out future stories and identifying diverging or common solutions to problems, including roles and activities	
Goal	<ul style="list-style-type: none"> - Share the different future ideas about how to approach a problem, which actions to undertake and which roles are needed. - Identify potentially conflicting future perspectives. - Discuss these conflicting perspectives and see if they can be resolved and, if not, allow for alternative stories to co-exist.
Facilitator tasks	<ul style="list-style-type: none"> • Ask everyone to read their stories out loud. • 1 minute max per story. • People can write down what they hear as being key solutions to issues, roles and activities in the story. • Ask everyone at the table to assess the commonalities and differences between stories. • Make sure this first quick inventory is quick and easy, not minutes but seconds per issue. Either a quick tour de table after each story or take some more time to do this after all stories are read out. • Note everything on a sheet on the table or flip chart if available. • Try to organise/categorise the responses already where possible to see what elements the collaborative story could consist of. • Identify potentially conflicting solutions exist. • Allow for the existence of multiple solutions and problems that can be addressed, not working towards consensus on one problem or solution. Also try to avoid that the ‘couleur locale’ is removed and the insights become too generic.
Material needed	<ul style="list-style-type: none"> - Sheets for people to note their thoughts on other people’s stories (can be on the reverse of the story writing sheet) - Flip chart (possibly with pre-prepared headings)

TO DO BEFORE THE WORKSHOP:

- Create sheets for people to note their thoughts on other people’s future stories, if using.
- Decide on the time available for the reading out and identifying key solutions and therefore the best format: after each story or after all stories have been read out.

3.3.3. Writing the collaborative future stories

In the second half of the session, each table group, under guidance of the designated table moderator, will start writing one or if necessary a few collaborative stories, through each individual adding a sentence to the previous sentence, thus literally writing their voice into the collective story. Groups can discuss and amend the existing story over a few iterations to come to the final version. This collaborative story reconstruction aims to enable participants to work towards a specific interpretation of the future, increasing their mutual understanding. If the text is not sufficiently clear, the moderator then takes the lead in the writing up the final story, with the group reacting to the final version. It is written on a flip chart and put on the wall.

As there is a tendency toward consensus in this type of activity, you might want to explicitly note that conflict is also ok (as this is interesting too). The collaborative story is allowed to contain alternative futures and actions to that future.

Envisioning: Collaboratively writing a story	
Goal	Collaboratively write a final (set of) story(ies) everyone feels part of
Facilitator tasks	<ul style="list-style-type: none"> • Depending on the exact format, you may have already explained the exercise in whole group setting (plenary). • Ask the participants to keep the discussion of the individual future stories in mind, and have the flip chart sheet with those solutions listed available for them to look at. • Have a new flip chart sheet ready with the same story spine as for the individual future stories, written large. • If there was one overarching beginning sentence used for the individual future story writing, use that in this round. If multiple problems were worked on, take some time to make one paragraph which encompasses all these problems or issues and write this on top of the flip chart sheet story spine under title. If there is an impasse after 5 minutes, then allow the creation of a second story with a different starting sentence. • Express that it is allowed to have disagreements but preferably the story describes how these were tackled. • Ask each table attendee to sequentially write one sentence in the new story spine. • They can start writing in different sections, if they do not feel the need to contribute to one section, or jump about between sections. • More than one round is allowed. A maximum of 3 rounds recommended. • You may want to put a limit on the number of sentences per section.

	<ul style="list-style-type: none"> • Once 'completed', ask all to read the story and think about key solutions they think are missing and where these should be added, let them write that in the story. Take 5 minutes max for this. • If the story is not flowing well yet, ask the group to help out to make it a nicely flowing story. • If there is a great divergence of future pathways, allow for a diverging story to be written alongside the first one. Preferably in parallel. All can contribute to that story as well. Take 15 minutes max to address this if this happens.
Material needed	<ul style="list-style-type: none"> - Flip chart with key messages from individual future story writing available - Sentences of the collaborative story spine pre-written on a flip chart

TO DO BEFORE THE WORKSHOP:

- Pilot this session in particular!
- You may want to follow the webinar which was held on October 31st with those running early workshops, where the collaborative story writing was tested (<http://anglia.adobeconnect.com/phn2n25ddczh/> - from 9 mins onwards)

3.3.4. Carousel writing

Preferably the collaborative writing round taking place at each table is enriched with a walking tour, where the groups walk around to the other (three) tables and add their experiences and reflections to the other stories (e.g. using post-its). During this time the new group can add to the story, but not change the initial content. A maximum of 30-45 minutes is anticipated for this (10-15 minutes per table) but the session can be fairly flexible on timings. If this round is not possible, hang the sheets on the wall and invite people to read them before going home, in their own time, not as part of the workshop.

Facilitation Instruction: Carousel writing	
Goal	Walking tour. This round is by definition is not about aligning the stories but about learning about the alternative or other stories.
Facilitator tasks	<ul style="list-style-type: none"> • Ask the participants of your table to shift tables. • Welcome the new group. • Allow them 5 minutes to read the story/ies. • Ask them if they feel vital issues are missing from their table story/ies and ask them to write these down on post-its. • Discuss these for 5 minutes max. • Ask the group to tape their post-its on the flip chart sheet containing the story as annotations to the story. • Do this with the 3 other tables or as many as possible in the time.
Material needed	- Post-its at the table

TO DO BEFORE THE WORKSHOP:

- Decide if this session can take place given the time available.

4. Storytelling videos

During lunchtime or refreshment breaks, facilitators and assistants will work with a few workshop attendees to record one or more short storytelling videos per event. Storytelling videos are a more memorable way of communicating, which helps avoid the pitfalls of either overly technical, or overly generic / non-specific discussions. You can ask people to read out their stories as they are from the 'inviting diversity' session.

Facilitators need to identify interesting voices and perspectives from the sessions and ask these to be repeated on camera (if the participant is willing), for a 1.5 minute quick story. Similar videos were collected by SHAPE ENERGY partners at the eceee summer study 2017, showcasing interesting recommendations for either interdisciplinary working, inter-sectoral working or better uptake of SSH research in policy-making. See <https://shapeenergy.eu/index.php/videos/>.

As mentioned in the public guidelines, when organising double loop learning through storytelling, especially when potentially conflicting elements or painful relations are to be discussed, such as can be the case between disciplines, methodologies and between science and non-science stakeholders, the real time drawing of cartoons or cartoonlike reporting of the discussion can be very useful. In some cases (where local budget allows), the use of a cartoonist who draws out discussions when they happen may be included in the workshops.

5. Facilitation tips/what to do if something happens

Below is a list of more general situations and tips on how to react or handle them.

- **Phones can ring.** What you can do is thank (with a smiling face) the person for the demonstration of what we do not want today, and tell the group you discussed beforehand with this person that they would have their phone ring. Make a joke!
- **If someone mentions that they have a conflict with another attendee** and does not feel they can work at the table with them: try to explain that the voice/perspective of this person is essential to the day and objectives, and that today is about a future where such issues hopefully do not arise anymore, and that this persons' experience (including the conflict) is invaluable in designing a future story and activities to reach that future. If necessary the person can go to another table if they still feel uncomfortable.
- **Someone might state they do not feel comfortable sharing personal stuff** with strangers, that they did not come to the workshop for this type of activity, etc. This is the place to explain that for a workshop to be not only pleasant for the participants, but to ensure deeper understanding of the problems of the workshop, it is vital that people feel connected, have a basic feeling of trust with many of the participants, feel that they can be open, frank with each other. Explain that this type of exercise helps achieve that. However, if someone does not feel comfortable sharing personal things, they can try to find a common aspect related to their professional identity.
- **If someone is passionate about an issue and keeps going about it:** interrupt that person and thank him/her for the remark but that we have taken it on board and that we want others also to have sufficient time to tell their story.
- **If someone strongly disagrees with someone else's approach** to solving a problem or with a role and or activity: try to find out where this disagreement comes from, and if it can be resolved, for

example by adding trade-offs or negotiations in the story. If not solvable, allow for parallel stories to be written.

- **If someone does not read out a story** but reads something that is a policy advice or a recommendation or something else: thank this person but indicate that this is already one step ahead!
- **If you see people are not writing:** intervene as soon as possible, do not wait for someone to get stuck, start explaining what a sentence could look like to give them a start, share your own experience writing the story, but do all this while at the same time asking them to keep on writing. If the person is really lost, sit with him or her, and interview them for a few minutes and propose a story based on that, do it quietly so you do not disturb others. Acknowledge after everyone is finished how difficult this can be and why. Also explain again how this exercise is part of the goal and objectives of the workshop. Make sure to keep your voices low, take this person away from the table if necessary, or talk quietly to not disturb the rest.
- **If someone does not stop writing** (and there is no break after this activity) one strategy is to ask if the person knows what he/she wants to write down so that this person can be the first telling his/her story in the next activity (and then the facilitator helps to write it down on the spine in key words if that is ok with the participant).
- **If someone starts explaining why they wrote what they wrote:** intervene as soon as possible, say there will be more room to explain about some elements of the story in other activities that day, but that the whole day is not so much about convincing each other about the importance, truthfulness or justness of the story, but about hearing as many different voices and perspectives as possible, about not just sending but receiving and listening! Explain again how this exercise is part of the goal and objectives of the workshop and why it is foremost important to listen to the stories carefully and without judgement, that discussion will be focused on understanding, not solving for this part of the workshop. Re-iterate that time is limited and although it is regrettable, everyone therefore has 1 minute, but invite the person write more in their story. The stories will not be lost but be collected and analysed afterward. If possible, start with someone primed to go quickly (and end with the facilitators, so they can be quick or missed out if needs be).
- **If someone reacts to a problem identified by someone else stating they strongly disagree,** or disagrees with what the facilitators writes down: intervene as soon as possible, say there will be more room to explain about some elements of the story in other activities that day, but that the whole day is not so much about convincing each other about the importance, truthfulness or justness of the story, but about hearing as many different voices and perspectives as possible, so about sending but even more so receiving and listening! Explain again how this exercise is part of the goal and objectives of the workshop and why it is important to listen to the stories carefully and without judgement. Re-iterate that discussion will be focused on understanding, not solving in this part of the workshop. Remind everyone that time is limited and that although this is regrettable, everyone really does only have 1 minute, but the person is welcome to write more in his or her story. The stories will not be lost but collected and analysed afterwards.
- Write the problem identified that they disagree with down on the spine in key words if that is ok with the participant.
- **Someone might state they are not comfortable with the collaborative story,** it is not their story, and ask for the writing of an alternative future because they fundamentally oppose one of the

sentences in the story: Ask for time out to discuss the issue and emphasise that there needs to be room for alternative visions. Inventorise if there are more people who would like to work on an alternative future story line. If not, offer this person to help him/her so that he/she is not all alone in this. Multiple participants, in reaction to questions about alternative vision, can start putting pressure on keeping aligned, keeping to the one story: Intervene and allow for a quick discussion where all voices are equal, and if necessary set up the writing of an alternative vision.

- When doing the Carousel, **people might start an extensive discussion about one element.** Intervene and ask them to write it down on the post-it and put it on the flip charts.
- People might ask what we will do with this information. Tell them this will all feed into the SHAPE ENERGY analysis of future needs and pathways.

6. Learning from the other workshops

More ideas and tips will become available as all the pilots and the workshops run! The team are still considering the best way to make these accessible and share them without overloading everyone with information; they may be uploaded to the private SHAPE ENERGY webpage created for the purpose of sharing workshop resources. And of course there will be videos and blogposts from each workshop available via the main SHAPE ENERGY website.

Remember to arrange your call with Duneworks ahead of your workshop, and get in touch with DW, ECIT, ARU if any issues.

7. Storyspines/templates from Riga workshop



Shape Energy Workshop in Riga

10th of November 2017

For Riga, the decision was made to send the templates to participants in advance – partly as people would be completing them in their non-native language. Not all workshops will want to do this.

Dear workshop participant,

Thank you for having registered to this workshop focusing on the challenge of the multi-apartment buildings' renovation in Riga.

In order to prepare for the possible discussions, please fill in this sheet and bring it to the workshop. When filling it in, please keep in mind the focus point of the workshop: the refurbishment of multi-apartment buildings' in Riga and its key problems (see below).

You will have 2 minutes to read out your text to all the participants. Energy Cities will collect these papers.

Thank you in advance for your collaboration.

TITLE: *What is the title of your story? Try to think of a newsletter type of heading*

.....

.....

Name and organisation:

.....

Stakeholder type: what kind of actor are you? NGO, citizen, researcher, local authority, business...

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As a consequence....

Describe the consequences of the problem of multi-apartment building refurbishment

- What do you think are the impacts of this problem?
- For whom? Where? When?

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Therefore...

Describe the actions already undertaken (if any) to address the problem, with attention to who was involved in this and when.

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TITLE:

Name:

Organisation:

Stakeholder type: what kind of actor are you? NGO, citizen, researcher, local authority, business...

Common problem chosen.

But I dream of a future city where....

Describe how a normal day would look like from your (professional) perspective and with the selected problem being solved.

To solve this problem, from 2017 to 2030....

Describe what actions took place, or what policies were designed, by whom, including your own. Also discuss any negotiations or conflicts that needed to be resolved and how this was done.

SSH research proved particularly valuable to achieve the change ...

Describe what economists, sociologists, historians, anthropologists and other social science and humanities might have contributed with what kind of research and what kind of outcome.

This research was of great importance to... because...

Describe who (including yourself) benefitted from the research listed above, why and how.

As a final remark, it is important to know that....

Describe anything that you would like to add.

8. Storyspines/templates from Cambridge workshop



Pic of Cambridge, and
co-host logos

Each participant w
given this 4-page 'pack



In the final email before the event,
participants were asked to come with
a collaborative project in mind

Your story on collaborative working

NAME:

<p>Beginning: setting the scene</p> <p><i>What sparked the project? What was the focus/aim? How did you get involved? What job were you in? Who else was involved?</i></p>	<p>Middle: what happened</p> <p><i>How did the collaboration go? Did anything unexpected arise? Or problems that you foresaw? Did external factors change? Did something work really well?</i></p>	<p>End: outcomes and lessons</p> <p><i>What can this teach us about better collaborative working? Anything specific to the low-energy housing context? What questions does it raise about social, political, infrastructural or market dimensions?</i></p>
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Tried to
prime
for
context-
specific
learning

We asked for titles *after* they wrote the stories – but remember to ask them to read them out!

TITLE (*write this at the end*):

This was where participants noted their thoughts as they heard others' stories

	Name	What social, political, infrastructural or market-related <u>issues</u> are embedded within the stories you hear? Feel free to pick up on issues which are more implicit than explicit. Keywords are fine.
0	-	<i>e.g. Clear assignment of tasks and roles</i> <i>e.g. Leadership</i>
1		
2		
3		
4		
5		
6		
7		



Notes

[This sheet can be used for notes throughout the presentations, including your initial ideas for future collaborative projects.]

This page wasn't really used by anyone on the day, probably could remove in future

Envisioning solutions session, group story writing

[NB: This workshop session is a group discussion so there is no need to fill in the box. It is solely intended to help you think about the statements below.]

In order to respond to *[issue from earlier session]*

the following understandings were needed...

.. and, between 2018 and 2022, the following new or pilot projects were run...

However, problems / conflicts arose, for example...

And particular groups worked to address these by...

Ultimately, in working toward the zero carbon Cambridge 2050 target, the outcome of this work was...

The main way these statements were used was written up on 3 large on pre-prepared flipcharts for each group (2 sentences per flipchart to allow enough space)

9. Table cards for table moderators

These are short aide memoires for facilitators who have been prepared in advance for the activities. They would of course need to be adapted to the exact format/timing of each workshop (and potentially translated).

Table card: Writing of individual stories
<p>What and how people need to write their story was explained plenary by the facilitator already, but remind your table that:</p> <ul style="list-style-type: none"> - They need to put their name on it, - To use the spine but they can work with different starting sentences; - They are allowed to draw instead of writing; - The need to write clearly; - Ask them to be in-depth, but if possible short and snappy. <p>Keep track of time: 15 minutes total</p> <ul style="list-style-type: none"> - 10 minutes to write the stories! - Remind people after 5 minutes they have 5 minutes left - Allow 5 additional minutes for those in time distress (unless there is a break where people can continue writing)
Table Card: Reading out individual stories
<ul style="list-style-type: none"> - Ask everyone at the table to read out their story; - Make sure everyone has the note-taking template; - Ask everyone to note down key problems they hear in the stories. <p>Keep track of time: (10 minutes total)</p> <ul style="list-style-type: none"> - 1 minute per story

Table card: Key problems discussion
<ul style="list-style-type: none"> - Do a tour de table where everyone reports on the problems they heard in the stories; - Note everything on a sheet on the table or flip chart using the given matrix/spider diagram (if using matrix/spider diagram); - Ask the person mentioning the problem where it fits (dimension and scale, if using this categorisation); - After everyone had their turn ask if anything is missing on the sheet; - Get the group to identify where conflicting perspectives or problems exist; - Vote: everyone can put one mark behind three problems they find most interesting to flesh out in the afternoon (based on a selection e.g. in need of SSH research, or most relevant to discuss with the present group). - Discuss each problem in more detail, ask about problems behind the problems, needs, actions, actors etc. - Collectively write a sentence or paragraph discussing a future in which these problems were solved. This sentence or paragraph will be the starting sentence for the next round. - If one paragraph/sentence for all three does not work, make more (max 3). More than one issue can also be carried forward in the next session in case group does not agree on just one. <p>Keep track of time (75 minutes total):</p> <ul style="list-style-type: none"> - 10 minutes for the tour de table - 10 minutes for the voting - 45 minutes for the discussion - 10 minutes for the writing of the final sentence(s)/paragraph(s)

Table card: Envisioning-Writing future stories session

- Provide the starting sentences written in the morning based on the selected challenges;
- Ask people to write their future story around the chosen challenges for the table;
- Remind them to write about:
 - o their own role;
 - o what they need from SSH research and policymaking to be best equipped to take an active role themselves; and
 - o what SSH research and policymaking need to contribute in addition.

Keep track of time (10-15 minutes total):

- 10 minutes to write the story
- Remind people about time after 5 minutes
- Allow 5 additional minutes for those in time distress (unless there is a break where people can continue writing)

Table card: Reading out future stories and identifying diverging or common solutions, including roles and activities

- Ask everyone at the table to read out their story;
- Make sure everyone has the notetaking template;
- Ask everyone to note down key solution, actions, roles they hear in the stories;
- Do a tour de table where everyone reports on the solutions and roles and actions they heard in the stories;
- Note everything on a sheet on the table or flip chart using the given matrix/spider diagram;
- Ask the person mentioning the problem where it fits (dimension and scale);
- After everyone had their turn ask if anything is missing on the sheet;
- Get the group to identify where conflicting solutions or actions or roles exist;
- Allow for existence of multiple solutions and problems that can be addressed.

Keep track of time (30 minutes total):

- 1 minute per story
- 10 minutes for the tour de table.
- 10 minutes for the discussion

Table card: Collaboratively writing a story

- Have flip chart sheet(s) ready with the same story spine as for the individual future stories;
- Use the sentence(s) from the previous session as starting sentences. If more than one sentence was decided on, take 5 minutes max to see if you can make one paragraph which encompasses all these problems and write this on top of the flip chart. If there is an impasse, then allow the creation of a second story with a different starting sentence.
- Express that it is allowed to have disagreements but preferably the story describes how these were tackled;
- Ask each table attendee to sequentially write one sentence in the new storyspine;
- They can start writing in different sections;
- A maximum of 3 rounds is allowed;
- Put a limit on the number of sentences per section (8);
- Once all have written in all sections, ask all to read the story and think about key solutions they think are missing and where these should be added, let them write that in the story;
- If the story is not flowing well yet, ask the group to help out to make it a nicely flowing story;
- If there is a great divergence of future pathways, allow for a diverging story to be written alongside the first one. Preferably in parallel. All can contribute to that story as well.

Keep track of time (45 minutes total):

- If more than one sentence/paragraph: use 5 minutes to see if a merging can be created.
- Sequential writing: 5 minutes per round, max 3 rounds, 15 minutes max total
- Editing discussion round: 20 minutes
- 5 minutes for writing up of final story/ies

Table card: Carrousel writing

- Ask the participants of your table to shift tables;
- Welcome the new group;
- Let them read the story/ies;
- Ask them if they feel vital issues are missing from the your table story/ies and ask them to write these down on post-its;
- Discuss this;
- Ask the group to tape their post-its on the flip over sheet containing the story as annotations to the story;
- Do this exercise with the 3 other tables or as many as possible in the given time.

Keep track of time (45 minutes total):

- 5 minutes to read the story/ies
- Discussion 5 minutes
- Post-it adding: 5 minutes

10. Table cards for table participants (for groups with no pre-selected table moderator)

These are deliberately very short, so they could be read on the day and understood quickly. Not having someone chosen in advance to help lead each group should be a last resort, but may be needed in some cases. The cards would of course need to be adapted to the exact format of each workshop (and potentially translated).

Table card: Writing of individual stories

How to write your story has already been explained in plenary by the facilitator, so these are just a few reminders:

- Please put your names on the provided story sheets and write as clearly as possible;
- Use the provided spine or come up with your own starting sentences;
- You can draw instead of writing;
- If possible, do go in-depth, while also keeping it short and snappy 😊

Keep track of time: 10 minutes to write the stories!

Table Card: Reading out individual stories

- Everyone at the table should read out their story;
- Everyone to note down key problems they hear in others' stories.

Keep track of time: 10 minutes total = 1 minute per story

Table card: Key problems discussion

- Nominate one person as note-taker (on flipchart / large sheet);
- Do a tour de table where everyone reports a key problems they heard in others' stories;
- After everyone had their turn, discuss if anything is missing on the sheet, or if there are conflicts;
- Collectively identify one problem the group finds most interesting to flesh out in the afternoon (based on a selection e.g. in need of SSH research, or most relevant to discuss with the present group). This can be done by voting;
- Collectively write a sentence or paragraph discussing a future in which these problems were solved;
- Report back to the large group.

Keep track of time: 75 minutes total

Table card: Envisioning-Writing future stories session

- Look at the starting sentences written earlier;
- Everyone should write their own future story around the chosen challenge for the table, according to the template sheet given out.

Keep track of time: 10 minutes to write the story

Table card: Reading out future stories and identifying diverging or common solutions, including roles and activities

- Everyone at the table to read out their story;
- Everyone to note down key solution, actions, roles they hear in the stories;
- Nominate one person as note-taker (on flipchart / large sheet);

- Do a tour de table where everyone reports on the solutions and roles and actions they heard in the stories;
- After everyone had their turn, discuss if anything is missing on the sheet, or where conflicts exist;
- Allow for existence of multiple solutions and problems that can be addressed.

Keep track of time: 30 minutes total

Table card: Collaboratively writing a story

- Use the pre-prepared flip chart sheet(s) with the same story spine as for the individual future stories;
- Each table attendee should sequentially say out loud one sentence in the new story spine – a nominated lead writes it on the flipchart;
- You write in any section on any turn;
- A maximum of 3 rounds and a maximum of 8 sentences per section;
- Once you have all written in all sections, read the story and think about key solutions you think are missing and where these should be added, write these in the story;
- If the story is not flowing well yet, the group could spend a bit of time to make into a nicely flowing story;
- If there is a great divergence of future pathways, a diverging story can be written alongside the first one. Preferably in parallel. All can contribute to that story as well.

Keep track of time: 45 minutes total

Table card: Carousel writing

- Participants on each table can shift to other tables;
- If they feel vital issues are missing they can write these down on post-its to add, and discuss;

Keep track of time: 15 minutes per table