

Manual: Capacity-Building Workshops in Just Transition Regions

Based on the experiences of the Polish Green Network in organising workshops and trainings in Polish Just Transition regions (2020-2022)



Photo: CEE Bankwatch Network

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INTRODUCTION

What is this and what was it created for?

This document aims to provide an easy-to-use and concise overview of some main questions you may have about organising capacity-building workshops in just transition regions, but can also be used wherever there is a need to organise such events.

PREPARING CAPACITY-BUILDING WORKSHOPS

What subject can you do capacity-building workshops on?

The workshops can be on any subject you think will be useful for the target audience you have selected for the activity and one that has the potential of pushing forward the just transition process.

Since 2020, the Polish Green Network (PGN) has organised a large variety of different workshops, both more general ones and ones focused on specific topics:

- ❖ general introductory workshops on just transition,
- ❖ introduction to European Funds or introduction to European Funds for just transition regions,
- ❖ energy efficiency,
- ❖ energy-efficient renovations of buildings,
- ❖ re-employment strategies,
- ❖ circular economy in regards to communal waste,
- ❖ funds available for small and medium enterprises,
- ❖ mine site reclamation and restoration,
- ❖ writing project proposals,
- ❖ establishing energy cooperatives as an opportunity to provide employment.

This is by no means an exhaustive list. To a large extent, the decision about what kind of topics you choose depend on a large variety of factors, such as:

- ❖ What group do you want to work with and target with your workshops?
- ❖ What knowledge are they lacking?
- ❖ What knowledge do they need to gain or develop?

- ❖ What might help to move the transformation process forward?

It is good **to begin with more general workshops**, during which information can be gathered about other needs and gaps in their knowledge.

We will look into more detail at how to answer these questions in the next parts of this manual.

USEFUL TIP: Take note of information you get during informal conversations

Based on the experiences of the PGN, a lot of information concerning needs for workshops are gained through informal conversations during various meetings on the ground. Thus, it is advised that you attend a lot of local events, make the most out of the 'coffee breaks', build up contacts, and make mental notes of what you hear during such meetings. It is good to write down these comments as soon as you can after such an event or meeting, so you can go back to your notes when you want to make a decision about organizing an event. Frequently, people will not admit during official meetings (even in surveys) that they are having problems with some issue or lack knowledge about it, but they will more readily mention this during an informal conversation.

What topics are most popular?

In Poland, the most popular events for most groups have been those that deal directly with accessing funding for projects, such as presentations of available funding opportunities and their requirements, project writing workshops, information meetings on funding available for specific stakeholders (e.g., municipalities, civic society, rural communities, SMEs, etc.) or for particular purposes.

However, any workshop can have a decent number of participants if the topic is relevant to the target audience and information about the event is provided to the right people. The most important aspect to take into account when selecting the subject of the workshop is its **relevance**, both for the workshop participants, but also for the just transition goals in the region.

Who can we organise the workshops for?

The workshops can be organized for any group that you feel relevant to achieving the just transition goals. PGN organized both events that had a very targeted audience and those which were open to anyone interested in the particular topic. These can include:

- ❖ Local and regional authorities in just transition regions,
- ❖ NGOs,
- ❖ Rural communities,
- ❖ Representatives of local and regional SMEs,
- ❖ Specific strata of the local community: young people, the elderly, women, etc.,
- ❖ Representatives of trade unions,

- ❖ Any other groups you think are worth targeting.

However, the audience is usually a combination of various people and consists of representatives of several groups mentioned above. But be aware, if you gather together local authorities, business representatives and employees you may get a fruitful discussion, but there is also a risk of less openness (for example, employees will be hesitant to speak freely in front of their employers). There is also always a risk of people disagreeing on key issues during the workshops and if there is such a danger, make sure the moderator is well prepared to handle this issue.

How to choose the best subject for particular workshops?

You need to listen to people's needs regarding the topics of the workshops. What is interesting for you does not necessarily have to be interesting for your target group. As mentioned above, the sky's the limit with choosing the final subject, but you always have to keep in mind that:

- ❖ It has to be adjusted to the local needs and the final audience,
- ❖ It should not be too technical but also avoid overgeneralization,
- ❖ While talking about EU-related topics, try to avoid unnecessary EU jargon,
- ❖ You can choose the subject of the first workshop that you plan to organize, but later on, the topics will most likely come from the participants themselves.

So do the initial research, talk to people, listen, brainstorm, and the ideas for the best subjects for particular workshops will come naturally.

Regardless of the subject of the workshop, familiarize yourself with the main challenges, prevailing issues and the overall situation of the region and people that will be your audience.

Useful tip: Think about the long-term goals of the region and how to overcome the challenges stopping the region from moving forward

It is good to prepare a theory of change analysis, even a short one, for the particular region. You should ask yourselves:

- ❖ *What challenges have you identified hampering the achievement of the goals the region wants to achieve?*
- ❖ *What is needed to overcome these challenges, especially what knowledge or skills?*
- ❖ *Who do you need to target with the identified activities?*
- ❖ *How can you get them interested in what you want to share with them?*

Mini-tip: Even when preparing a workshop on a general topic, like available EU funding, you can place your focus on more environmentally-friendly solutions and options (weaving this into the more general presentation), to plant the seed for such choices.

How to make sure you have enough participants in the workshop?

As long as the workshop is attended by representatives of the groups you want to reach, the number of participants should not be the most important success factor. From the experience of the PGN, attendance varies depending on the topic and the promotion of the workshops.

In order to reach as many people as possible, you should send a lot of emails to regional and municipal offices, preferably developing a working relationship and exchange with them, so that they send it out further. For example, PGN cooperates closely on events with the Agency of Regional Development in charge of the Eastern Wielkopolska just transition process. But remember that e-mails are not enough!

Already established **personal contacts and direct phone calls to specific people** can be the decisive factor in making sure the targeted participants attend the meeting. People frequently only glance through emails, especially if they do not know the person writing to them. Moreover, it is always worth cooperating with a network of local action groups, NGOs, and reaching out to local partners. For example, PGN while organizing a workshop for rural communities on water-related issues, reached out to a local mayor who helped a lot with promoting the event within the selected target group. In addition, ask people you know directly to reach out to their own contacts and to spread the information about the event.

It is also always good to have a local partner involved in the event organization as they know the situation and people on the ground much better than you do. For example, PGN did a meeting between energy/mining trade unions and local SMEs, but the Polish organization did not previously have much contact with local and regional enterprises. To solve this issue, they asked local chambers of commerce to reach out to the SMEs and invite them to the event. As a result, the companies received the invitation from someone they already know, raising the possibility of higher attendance during the event and achieving useful results during the meeting.

It is useful to keep a detailed list of such contacts, containing not only their numbers and emails, but some general information about each person (their field of activity, professional interests, scope of influence, etc.), so you and your colleagues can refer back to the list during later events. However, remember about **data protection regulations**: you can keep contact information regarding publicly available e-mail addresses or telephone numbers without any restrictions. For private contact information, you should send a request for processing data in accordance with the GDPR act and relevant country regulations.

What should you remember when organising such a meeting?

Experts and the moderator

Once you decide on the subject, choose suitable experts that will not only have expertise on the topic but also experience in conducting such workshops. They should know how to lead an engaging meeting and adjust it

accordingly to the subject and the audience. Depending on the capacity, availability and your preference, these can be either internal or external experts.

You can also have a moderator running the workshop itself, while the experts only present specific aspects of the subject. Both options are fine, as long as the workshop has a clear structure, and - if possible - a good balance between presentations and interactive workshop elements.

If you do decide to have a moderator or simply one of you will be running the meeting, choose someone who is experienced and assertive at moderating, as there is always a chance that the workshop will be attended by some disruptive person or people. Even a person who tends to go into a long-winded and extensive monologue that is barely related to the topic discussed can be a huge hassle for the efficient conducting of such a meeting, as we all probably know from experience! So, it's necessary to have someone there that can effectively cut him or her off!

Nonetheless, there are some topics (such as a general information meeting about available EU funding), which are not conducive for a workshop scenario and will mostly be based on presentations. Obviously, interactive workshops make it easier to keep the audience engaged and interested, while in the case of presentations, it can be hard to maintain focus for a long time on a difficult subject, so add some lighter elements in between the presentations, perhaps discussing a specific case study or example illustrating what is being discussed.

Additional material

A PowerPoint presentation is recommended but it should not be the focal point of the meeting. Make it rather short and to the point, relevant, interesting and memorable. Infographics, charts, images, etc. are generally recommended as people lose focus if there is too much text in a presentation. Remember to send it in a follow up email after the workshop together with some recommended materials. Such an e-mail is a great opportunity to share your publications, briefings, brochures, and anything else related to the main subject of your workshop.

It is also always good to hand out some more detailed material during the meeting itself (but also not overly technical, preferably a brochure with the most relevant information in an easy-to read format), so the participants can look through it during the meeting, when they get home or later whenever they need it.

A lot of the material for the workshop is frequently prepared by the expert, so make sure you have access to it ahead of time, so there are no surprises.

There is already a lot of material out there that you can use for a particular topic, but you might want or need to prepare something for a specific workshop that might need to be rewritten, shortened or translated into your local language, so research this and plan it ahead of time, perhaps in cooperation with the invited expert.

Length and timing

The meeting should last a few hours at most. Based on the experience of PGN, for a morning meeting the best time to finish is around 14:00. However, remember that planning morning meetings is only possible if you know

the majority of the participants will be delegated to the meeting and do not have to take a day off work to attend it.

If we are targeting people who will not be delegated to attend, we should think about organizing afternoon (starting at around 4 or 5 pm) or even weekend workshops, when most people are not at work. It is good to try and get some information about potential participants' availability ahead of time when planning for specific groups. The above comment about afternoon workshops is especially true when targeting NGOs, activists and generally civic society from smaller municipalities, as their local activities are usually something they do after work.

Translations

For workshops, it is generally not a good idea to have speakers that do not speak the national language as translation always leads to more issues with maintaining their focus and getting the message across. If this cannot be avoided, try to arrange good simultaneous translation, but bear in mind that this is usually quite costly. If there is to be a translated part of the meeting, try to have the presentations and relevant material translated ahead of the meeting, so it can be shared with the participants.

The venue

When choosing the venue, try to think about such aspects as: location, good accessibility, good working conditions, available equipment (projector, writing boards, etc.), its representativeness, and of course, the price. There are, however, frequently options of finding free venues, in public institutions or buildings, especially after you have been working in a region for a longer period of time and you have a more developed network of contacts and partners. These can be town council buildings, public libraries, NGO centres, EU institution buildings, schools or universities, etc.

In the experience of PGN, it's good to provide "neutral ground" for discussions. Officials from the municipality may not be happy to appear in a restaurant for a workshop during office hours, but citizens may not feel comfortable in the town hall, thus, libraries are always a good choice.

Catering

If the meeting is to be a few hours long, plan some coffee and snack breaks, and perhaps a lunch or other meal, depending on the length and timing of the workshop. Catering can also be quite a substantial cost, so plan accordingly. It can be hard to plan the catering, as frequently the number of people attending can be over- or under-estimated, but usually there is too much food, not too little.

In rural areas, finding vegan/vegetarian catering may be challenging, but PGN experience shows that it can also be an inspiration for local restaurants or catering companies, and they can sometimes come up with great menus!

TIP: Breaks are important for developing relationships and gathering information!

Coffee and lunch breaks are a great opportunity for some informal conversations, so don't hesitate to give people ample time to stretch their legs and talk to you or each other about relevant issues. It's very probable you will get the most important information of the day or establish better contact with someone who will have a huge impact on the future of the process during a chat over a cup of coffee!

What should you avoid?

First of all, avoid any last-minute planning and remember to arrange everything in advance. As you can see from this manual, such meetings require quite a lot of preparation and to make sure that everything is under control it is always better to start the process earlier. It is recommended that the planning of such an event begin **at least** two months in advance. For a new workshop or a subject you have less knowledge about, it is recommended you start much earlier, at least three months in advance.

TIP: Spend some time on developing the concept behind a workshop

Every workshop, especially one on a new topic, requires developing the concept behind it, before you even begin organising it. Hold a couple of internal brainstorming sessions over the course of even a few weeks, during which you can discuss a number of questions:

- ❖ *What exactly do you want to organise?*
- ❖ *What do you want to achieve through the workshop and how?*
- ❖ *Who do you want to target with it and how will you get these people to attend?*
- ❖ *What form is best for this type of workshop?*
- ❖ *What content should it include?*

A good idea for a workshop and a well-prepared plan behind it is often what decides about whether or not it will be successful. This will also allow you to later evaluate better whether you achieved your set goals!

While choosing an external expert, remember that it is not only about his/her knowledge but also about his/her presentation and social skills. Make sure to avoid picking someone without checking such aspects in advance. Similarly, agree possible fees and other conditions in advance. Avoid situations in which an expert comes by car but you don't have funding to reimburse such means of transport in your grant, so make sure you are clear about what you can cover and what you cannot.

Avoid using the same language and style of presentation regardless of the audience, that is, adapt the workshops to your target audience. While talking e.g., about EU funds try to avoid unnecessary EU jargon, which can bore and even irritate those that are not familiar with such technical vocabulary. Overuse of abbreviations seems to be one of the most common mistakes. Abbreviations are frequently used in very small circles and even people working in similar fields do not use the same ones or know them. It is better to explain something you think is obvious, then to leave people with more questions than they had before the meeting.

What are the main costs?

Usually, the renting of a venue and catering are the biggest costs of such workshops. If you decide to have external experts and a moderator, these are also additional costs, which vary a lot depending on the expert fees. Travel and hotel costs should also be taken into account for experts or the moderator, if need be, as frequently they need to travel to the workshops, especially if we are planning an event in a region at some distance from the capital. If necessary, translation services could also be an extra expenditure. Simultaneous translation can be extremely costly.

Checklist

We recommend using a checklist, like the one we have created (see attached: please feel free to modify and adapt it to each specific event), so that you can make sure you have prepared everything you should. It's also a good idea to regularly go over each of the positions on the list with a colleague to make sure all essential stuff has been done.

CHECKLIST

For Bankwatch's manual on capacity-building workshops

This checklist accompanies our publication with the aim to provide an easy-to-use and concise overview of some main questions you may have about organising capacity-building workshops in your respective countries and regions.

Choosing the topic

- ❖ Initial research
- ❖ Talk to a diverse group of people
- ❖ Listen
- ❖ Brainstorm all the ideas
- ❖ Regardless of the subject, familiarise yourself with the main challenges, prevailing issues and the overall situation of the region and people that will be your audience
- ❖ Prepare a theory of change analysis for the particular region

Reaching the target group

- ❖ Send a lot of emails to regional and municipal offices
- ❖ For those contacts that are already well-established, try to make direct phone calls
- ❖ Prepare a detailed list of all relevant contacts, containing not only their numbers and emails, but some general information about each person (their field of activity, professional interests, scope of influence, etc.)
- ❖ Check compliance of list with GDPR act

Finding experts and the moderator

- ❖ Book suitable experts and – if needed – a moderator (either internal or external) that will not only have expertise on the topic but also experience in conducting such workshops

Additional materials

- ❖ PowerPoint presentation but short, to the point, relevant, interesting and memorable with some infographics, charts, images, etc.

- ❖ Add some lighter elements in between the presentations, perhaps discussing a specific case study or example illustrating what is being discussed
- ❖ Send a follow up email after the workshop with the presentations and some recommended materials
- ❖ You can also hand out some more detailed material during the meeting itself
- ❖ Make sure you have all the materials in advance

Length and timing

- ❖ It should last a few hours and preferably finish at 14:00 (good to try and get some information about potential participants' availability ahead of time when planning for specific groups) if you target officials.
- ❖ CSO activists may prefer meeting after office hours or even on weekends.

Translations

- ❖ Try to choose experts who speak the national language, but if not possible arrange quality simultaneous translation.

The venue

- ❖ Try to think about such aspects as: location, good accessibility, good working conditions, available equipment (projector, writing boards, etc.), its representativeness, and of course, the price.
- ❖ Prioritise those venues that are free and publicly available, e.g., libraries, NGO centres, etc.

Catering

- ❖ Plan some coffee and snack breaks, and perhaps a lunch or other meal, depending on the length and timing of the workshop.
- ❖ Usually, less people come than have registered, so it is better to order food for less people than replied to your invitation. For example, with 25 confirmed it is safe to order ~20 meals (especially if you plan a buffet).

PRACTICAL CHECKLIST

(before and after the workshop)

Before:

- Partners identified and onboard
- Registration form prepared and double checked
- Invitation sent
 - Key stakeholders identified and invited
 - Wider audience/participants invited
- Invitation includes GDPR clause/data protection
- Invitation includes grantmakers' info/disclaimers if required
- Venue found and booked
- Catering found and booked
 - Catering is vegan/vegetarian or vegan option is provided
 - If only lunch after the event is planned – water/coffee from the beginning is arranged

On the eve of the event:

- Attendance list prepared (logos etc.) and printed
- Printed publications for dissemination selected and gathered
- Photo op – a photographer is booked or a colleague asked to take pics (if needed and if included in the GDPR clause)
- Streaming/recording is booked (if needed and if included in the GDPR clause)
- Transport of organisers, experts is arranged (tickets bought, reimbursement forms sent etc)
- Presentation is prepared
- Speakers' presentations are received and they work properly

- Computer, projector, screen, microphones arranged (if needed), internet connection
- Stationary arranged (paper, pens, flipchart, markers, post-its etc.)
 - Badges/tape for ad hoc badges (if needed)
 - Take your business cards if you use them

After the event:

- Thank you letter to participants sent + materials attached

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