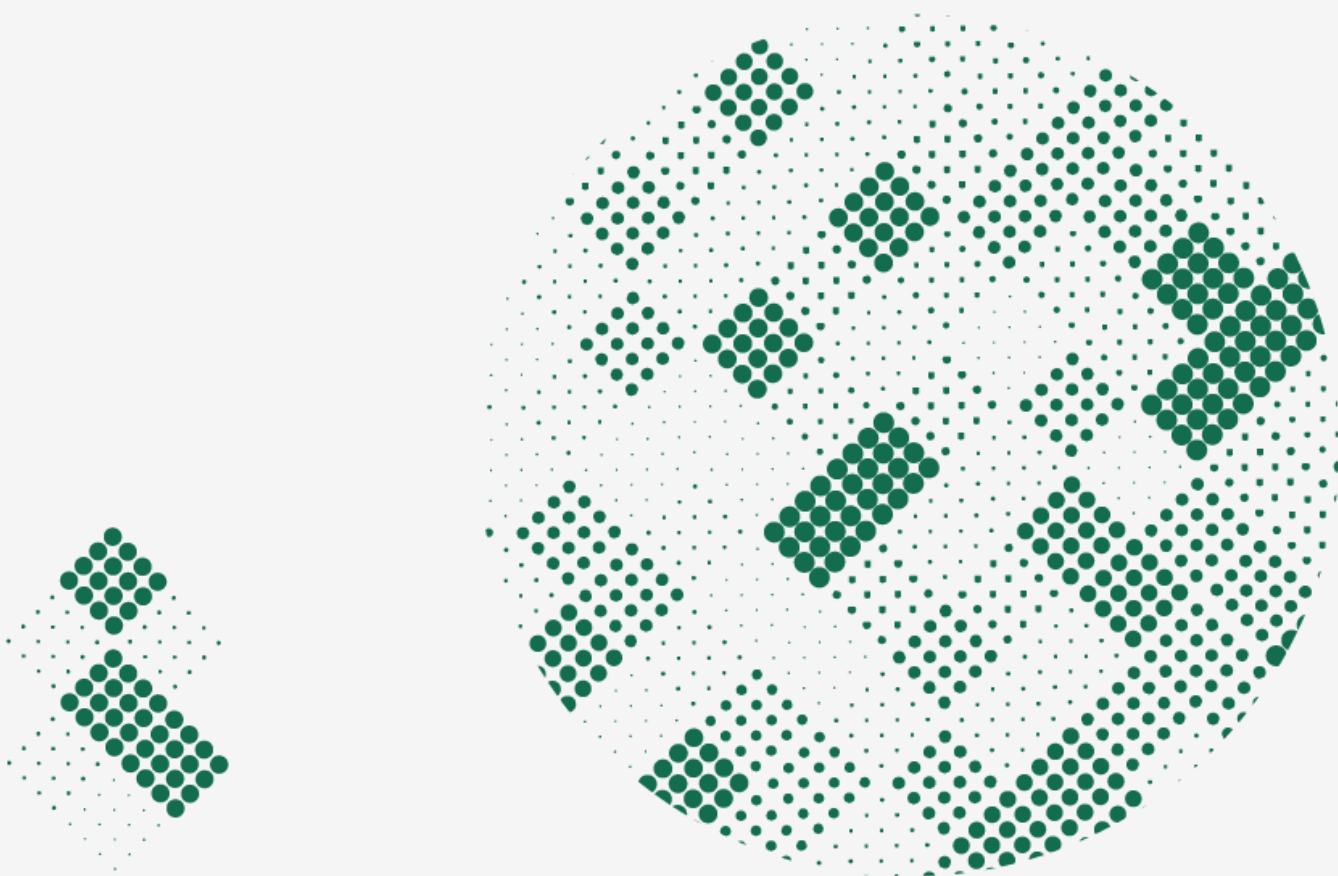




RESPONSIBLE
RESEARCH AND
INNOVATION IN
TERRITORIES

Deliverable 4.1

CITIZEN REVIEW PANEL MANUAL



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101006439



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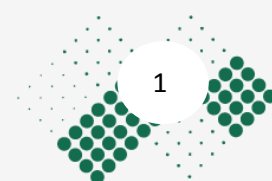
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Deliverable 4.1

Citizen Review Panel Manual

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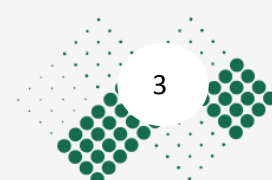
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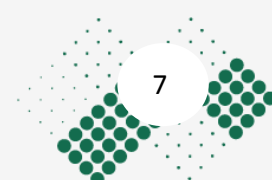
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1 List of acronyms / abbreviations used in this document

AIRR – Anticipation, Inclusiveness, Reflexivity, Responsiveness

POPD – Protection of Personal Data

RRI - Responsible Research and Innovation

R&I – Research and innovation



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101006439



2 About the project

The project “Leveraging Leadership for Responsible Research and Innovation in Territories” (RRI-LEADERS) explores the relevance of responsible research and innovation (RRI) to territorial governance in four European territories, representing different cultural and socio-economic backgrounds, different scope of territorial oversight, different institutional and decision-making infrastructures, different R&I landscapes and different dynamics among territorial actors.

The objectives of RRI-LEADERS are:

- to facilitate the adoption of RRI principles within territorial governance;
- to promote innovative, inclusive and responsive multi-actor approach to the development of policies on issues related to science and innovation; and
- to provide an evolutionary perspective on the future of RRI in territorial policy and governance.

The central goal of RRI-LEADERS is to elaborate future-oriented strategy and action plans, or territorial outlooks, for the future potential of RRI as a guiding framework in territorial R&I governance. Outlooks will be developed through a multi-stage co-creation process, which will mobilise quadruple-helix stakeholders, i.e. academia, policymakers, industry and civil society, from the participating territories.

RRI-LEADERS involves four different territories: Sofia (Bulgaria), Thalwil (Switzerland), Western Macedonia (Greece) and Sabadell (Spain), representing a diverse range of opportunities and implications for responsible research and innovation (RRI), which will enable to carry out a thorough assessment of the RRI relevance to territorial governance. The involved territories will thus act as demonstrators for the potential of RRI on sub-national level. The accumulated knowledge will be used to chart a detailed outlook for the future potential of RRI as a guiding framework in territorial governance of R&I and will aim to provide an evolutionary perspective on RRI for the Horizon Europe programme.

The project adopts the dominant understanding of RRI, as defined by von Schomberg (2011): “A transparent, interactive process by which societal actors and innovators become mutually responsive to each other with a view to the (ethical) acceptability, sustainability and societal desirability of the innovation process and its marketable products.” It diverges only slightly from this definition in that it does not promote the separation of innovators from the rest of the societal actors, and instead seeks to include societal actors as co-creators in the innovation processes, and enable leadership in the development of policies with a future outlook. In doing so, RRI-LEADERS interpretation of RRI, draws heavily on the extension of the RRI framework proposed by Stilgoe, Owen and Macnaghten (2013), who emphasise the prospective notion of responsibility by introducing four dimensions of RRI – *anticipation*, *inclusiveness*, *responsiveness* and *reflexivity*, largely known as the AIRR dimensions. RRI-LEADERS integrates these four dimensions into its methodological design and operational implementation.

RRI-LEADERS attempts to leverage leadership through three complementary tiers of planned intervention around RRI. For each of these tiers the RRI-LEADERS exemplifies leadership as a proactive, shared and responsible taking of action towards setting ambitions for change and societal transformations, driving collaboration and agreement across societal actors, and striving for excellence and lasting impact in the pursuit of these ambitions. The three tiers of leadership intervention are interlinked into an operational progression, whereby each tier supports and enables the others as the project progresses:

1. Leveraging leadership in understanding of RRI proliferation and opportunities in the four territories.



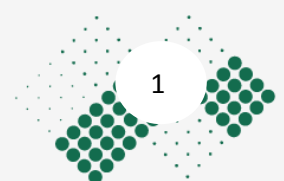


2. Leveraging leadership in examining RRI construct relevance to territorial applications and its transformative potential.
3. Leveraging leadership in the reaffirming of the RRI concept with a view of providing tighter integration of territorial aspects into a renewed RRI construct.

Website of RRI-LEADERS: www.rri-leaders.eu



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101006439



3 Preface

3.1 Setting the Scene

This manual presents the methodological guidelines necessary to conduct a Citizen Review Panel. The manual contains guidelines on the whole process, including descriptions of the method, the recruitment process, practical arrangements, and use of the outcome.

The Citizen Review Panels make up the final stage of the RRI-LEADERS co-creation process. The purpose is to involve non-organised and non-institutionalised citizens in contributing to and finalising the Transformative Outlooks, by having them review and validate the objectives and actions developed in the Transformative Outlooks.

The Citizen Review Panels will last one full day and will involve 20 participants from within each territory, representing a diverse mix of citizens in terms of demographic criteria. During group work, citizens will assess the acceptability of the actions in the Transformative Outlook and suggest improvements. The results will be summarised in the Transformative Outlook and serve as an input in the policymaking process.

Each panel will be hosted by the territorial partner, with the methodological partner providing support and facilitating the panels. Adjustments of the methodology to match more closely the territorial contexts can be made under coordination by DBT.

3.2 Methodology

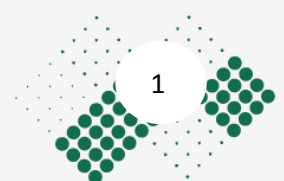
The manual builds on a deliberative approach (Elstub & Escobar, 2019), advocating for the meaningful engagement of citizens in deliberations about policy processes. The RRI-LEADERS project addresses a broad range of policies at a regional and municipal level, affecting the daily lives of citizens. To collect as much knowledge, experiences, and expertise as possible on the impact of the proposed transformation of the policy areas, inclusiveness of citizens in the development of the Transformative Outlooks is essential. In this way, the ambition of the RRI-LEADERS project is to ensure that not only policymakers, stakeholders, and experts are engaged in the intended transformation, but citizens are represented in the policy debate to share their values, opinions, tacit knowledge, and lived experiences. Furthermore, the consultation of citizens creates the possibility to obtain a common-sense view on the policy area in focus which is not biased by particular interests.

Both citizens and policymakers will learn from this deliberative process. On the one hand, the Citizen Review Panels are designed to give the territorial policymakers an opportunity to receive feedback directly from citizens, creating a better understanding of public concerns, priorities, and solutions. On the other hand, involving citizens in a deliberative process will build capacity among the public by knowledge sharing with citizens on territorial policy and strategy. In addition, the involvement of citizens can help increase the legitimacy, public support, and understanding of the proposed actions and potentially inspire citizens to implement changes in their own neighbourhoods and communities.



3.3 Timeline

- Nov. 2022: Citizen Review Panel manual finalised.
- Jan. 2023: Preparation of recruitment plan.
- Feb. 2023: Recruitment of citizens.
Practical preparations.
Preparation of information material.
- Apr. 2023: Selection of citizens for the panel.
Sending out information material to citizens.
- May 2023: Citizen Review Panel.
Reviewing and analysing results.
- Jun. 2023: Stakeholder workshop
- Sep. 2023: Transformative Outlooks finalised.
Feedback to participants.



4 Method for the Citizen Review Panel

The Citizen Review Panels make up the final stage of the RRI-LEADERS co-creation process. The purpose is to involve non-organised and non-institutionalised citizens in contributing to and finalising the Transformative Outlooks, by having them review and validate the objectives and actions developed. The Citizen Review Panels are divided into four sessions: 1) Acceptability of actions, 2) Improvement of actions, 3) Writing of statement, and 4) Prioritization. Below is an outline of the four sessions. A synthesis of the four sessions will be included in the Transformative Outlook. After the Citizen Review Panel, a workshop will be held with stakeholders and experts to find solutions to how the citizens' comments and suggestions will be integrated in the Transformative Outlook.

4.1 Outline of the four sessions

Below is an outline of the four sessions of the Citizen Review Panel. A detailed moderation script can be found in Appendix A.

1 Acceptability of actions	In the first session, citizens assess the level of acceptability of all actions for each of the objectives in the Transformative Outlook based on predefined criteria. Citizens are organised in groups of 5, and going through all actions one by one, the groups will first deliberate briefly on an action followed by an individual assessment of the level of acceptability. After the individual assessment, citizens take turn presenting their views to the group. The process is repeated for all actions. When all the actions have been assessed, the groups decide which actions they would like to improve (around 4-5 actions).
2 Improvement of actions	The second session is the main session of the panel. The groups will go through their chosen actions one by one to make suggestions on how to improve the actions as well as suggest additional actions. The citizens finish the work on each action by individually assessing the action anew, based on the suggested changes.
3 Writing of statement	In the third session, each group writes a statement considering whether the objectives and actions proposed by the territory adequately address the overall challenges in the policy area. The statements are read aloud in plenary to the other groups.
4 Prioritization	In the final session, the citizens will prioritize between all the original actions and suggestions for new actions based on the following question: Which actions do you find to be the most important? The improvements made to the original actions during the group work should not be added, since the groups might have worked on different aspects of the same actions. The purpose is to provide policymakers with information on the importance ascribed to the actions by the citizens. This exercise will happen in plenary, and each citizen will have five votes. Citizens can either choose to place the votes on five different actions, or they can choose to place several votes on a few actions, if some actions are more important to them.



4.2 How to Assess Acceptability of Actions

To assess the level of acceptability of an action, citizens will give the action a red, yellow, or green colour based on three predefined criteria. Each citizen will have in front of them a list of the three criteria and the colour code (see appendix B) together with a list of all actions to be assessed, where they can make their individual assessment (see appendix C). In the middle of the table, the table moderator places a template, featuring an objective and group of actions together with room for notes (see appendix D). An action is read out loud, and the group has some time to discuss the action. The purpose of the discussion is to exchange a few perspectives and to ensure that all citizens understand the action – not to form a common opinion. After the brief discussion, each citizen assesses the action on their individual paper. If an action is given a red or yellow colour, the citizen must provide a reason for this. Citizens then take turn presenting their assessment and reasons behind. A notetaker selected among the citizens notes down the reasons in a few keywords on the template, and the citizen places a sticker (red/yellow/green) in accordance with their assessment on the group template. The group moves on to the next action and repeats the sequence until all actions are assessed. If the citizens find it difficult to assess one of the criteria for an action, the table moderator can make the group do a short brainstorm to help citizens form an opinion.




The three criteria:

1. Do you think this action will help reach the objective?
2. Do you think the possible negative effects of the action are acceptable? (e.g., on people, environment, or health)
3. Do you think the action addresses the needs of the citizens and/or intended target group(s)?

The meaning of the rating colours:

- Red: No, it is far from acceptable in its current form.
- Yellow: Yes, it is acceptable to some extent but has some problems.
- Green: Yes, it is acceptable in its current form.

Below is an example of how a citizen could rate one action:

	Criteria 1	Criteria 2	Criteria 3
Objective 1: [Insert title]			
Action 1.1: [Insert title]			
Notes			

4.3 Information Material

A meticulously prepared information material is crucial for a successful Citizen Review Panel. Citizens are invited to the panels, not as experts, but in their capacity as citizens. The purpose of the information material is therefore to give an overall introduction to the policy area(s), objectives, and actions. This should equip citizens with the knowledge necessary to take part in the discussions and place citizens on an equal footing.

Besides writing the information material, a number of steps should be completed before sending out the material, including collection of feedback, translation and testing of the information material.

1. Write information material:

The writing of the information material should begin when you start the practical preparations (in February), as this can be a demanding task.

The information material should contain an introduction to the policy area(s) and actions and be supported by graphic material. The material should be around 5 pages, including illustrations.

Below are some guidelines for the overall content structure of the information material. However, to correspond to the local context and the territorial policy area, the information material will be different from territory to territory. The lead partners in this process will be the territorial partners, while the methodology partners will provide support.

Description of policy area(s): When introducing the policy area(s), the purpose is to provide citizens with the necessary knowledge to work on the objectives and actions. Your description may include the following reflections: Why is this policy area important? What is your vision for the policy area? What are the main future challenges and prospects facing the territory? How will the expected development affect the average citizens?

Description of objectives and actions: For the objectives and actions, please explain the purpose (overall, what do you want to achieve), expected outcome (specifically, which changes do you expect to see), advantages (positive implications), and disadvantages (negative implications).

2. Collect feedback on information material:

The material should be written in English and be discussed with the methodological partner and DBT.

We strongly recommend sending the information material to 2-3 experts to ensure that the content is fairly balanced. Their opinions should be considered in finalising the information material.

3. Translate the information material:

After the content has been finalised, the material should be translated to the local language.

4. Test the information material:

It is important that the information is written in a language that is understandable to non-experts. When the material has been developed, it should therefore be tested on a few people. This could be on a family member or a non-academic within your own organisation. Ask your test person to point out phrases and explanations that are either too technical, redundant, or need further clarification.



5. Send out the information material to the citizens:

1-2 weeks before the Citizen Review Panel, the information material should be sent to all citizens who have confirmed their participation in the panel.

4.4 Facilitation Guide

Rules for Good Dialogue and Deliberation

It is vital that the citizens feel respected and are comfortable with engaging in the dialogue at the Citizen Review Panel. You should therefore encourage the deliberation process by making sure that participants are familiar with the rules for good dialogue.

Rules for a good discussion at the tables:

- Think as a citizen/member of the community
- Treat everyone with respect
- Listen carefully to what others have to say and ask about details
- Do not interrupt each other
- Take part in the discussion
- Keep comments brief and to the point
- The table moderator as well as the main facilitator are neutral and do not participate in the debate

The rules should be announced in plenary by the head facilitator, and after this it is the responsibility of the table moderators to make sure the rules are followed at each table. It is important to make sure that the participants feel free to speak and express their views in the dialogue at the table. A copy of the rules should be placed on each table to remind everybody to follow them (see appendix I).

5 Recruitment of Participants

Recruitment of citizens is an important aspect of organising a Citizen Review Panel. A successful recruitment will allow you to select a diverse panel, enabling multiple perspectives on your policy area, improving the output of the panels. The different territorial contexts mean that the recruitment process will be different in each territory. Therefore, this manual suggests various approaches to recruitment that can be tailored to the territorial context.

5.1 Recruitment process

Recruitment of participants for an engagement activity can be a challenging task, and it is important to allocate sufficient time and resources. Below is an outline of the different steps of the recruitment process.

Recruitment process		
Step 1	Plan your recruitment strategy	Jan. 2023
Step 2	Recruit citizens for the panel: <ul style="list-style-type: none"> - Collect applications (1st round) 	Feb. 2023
Step 3	Review applications: <ul style="list-style-type: none"> - Select citizens and send out confirmation letters - Identify missing citizen profiles 	Apr. 2023
Step 4	Plan and initiate targeted recruitment: <ul style="list-style-type: none"> - Collect applications (2nd round) 	Apr. 2023
→	Citizen Review Panel	May 2023

5.1.1 Step 1: Plan your Recruitment Strategy

The preparations for recruitment of citizens should begin 4-5 months before the Citizen Review Panel. The first step is to set up an information page. On the information page, citizens can learn more about the event. Make sure to explicitly state that no professional experience or prior knowledge on the subject is needed to take part in the Citizen Review Panel, that participation is free and expenses for transportation and food will be covered by the organiser, and that there is only a limited number of seats available for the Citizen Review Panel which means that applying for participation does not guarantee a seat in the panel.

The recruitment categories (see table below) should be tailored to the territorial context, and it should be considered how the citizens can apply for participation (telephone, email, online platform). Furthermore, you should plan which recruitment methods to use (see table below). These considerations should be written in the recruitment plan (see appendix J).



5.1.2 Step 2: Recruit Citizens for the Panel

The recruitment of citizens should begin 2-3 months before the Citizen Review Panel. To assemble 20 participants for a panel, you will need to reach out to a fairly large number of citizens. Citizens interested in participating should apply for participation by filling in a short application form (see appendix K for an example). The application form should be tailored to the territorial context. Besides including the recruitment criteria, a few lines on personal motivation or a territory specific question can be included, if this is considered relevant for the selection of citizens.

Ideally, to recruit a group of 20 citizens you should expect to collect 100 applications. This number of applications allows you to select a panel of 20 diverse citizens.

5.1.3 Step 3: Review Applications

The deadline for application should be 1.5 month in advance. After the deadline, the applications should be reviewed, attempts should be made to assemble a diverse panel, and confirmations should be sent to the selected citizens (see appendix L for a confirmation letter).

You should expect an overrepresentation of specific citizen profiles among the applications, making it difficult to assemble a diverse panel. Therefore, it is highly probable that more than one round of recruitment will be needed to recruit enough citizens. In the first round, the goal is to reach as many citizens as possible. In a second round, particular citizen profiles can be targeted.

You should expect to receive cancellations and no-shows from citizens. Therefore, to reach a panel of 20 citizens, 25-30 citizens should be selected for participation.

5.1.4 Step 4: Plan and Initiate Targeted Recruitment

Immediately after reviewing the applications, you should start planning and initiating your targeted recruitment. Citizens applying during this round of recruitment can be invited for the panel whenever a missing citizen profile has been matched.

When confirmation letters have been sent to participants and their participation confirmed, you should send an email to the citizens who have applied for participation and have not been selected. A rejection letter is provided in appendix M.

5.2 Recruitment Criteria

To ensure a diverse group of participants, citizens must be recruited based on five criteria, including age, gender, geographical zone, educational level, and occupation. All the recruitment criteria should be used to recruit citizens. For each criterion, a number of categories should be defined and tailored to the territorial context.

Criteria	Categories	Distribution
Age	18-29, 30-39, 40-49, 50-59, 60-69, 70+.	At least three citizens from each group.
Gender	Male, female, and non-binary.	As balanced as possible.



Geographical zone	The territorial scope of RRI-LEADERS requires the categories of the geographical zone to be tailored to the specific territory. When developing the categories, consider which types of residential areas are represented in the territory. A possible categorisation could be: Major city, suburb, town, and rural zone of living.	In the case of four categories, at least 4-5 citizens from each group.
Educational level	The categories of educational levels can be tailored to best fit the territory. A possible categorisation could be: Primary or lower secondary education, general upper secondary education, vocational education or training, bachelor's degree or equivalent, master's degree or higher.	In the case of five categories, at least 3-4 citizens from each group.
Occupation	The occupational categories can be tailored to the specific territory. A possible categorisation could be: Employee, self-employed/employer, student, retired, unemployed, other.	As balanced as possible, but with more people in the Employee category.

5.3 Citizen Profiles

Citizens should be ordinary people; no expertise is required. To ensure the most diverse group of citizens, be aware of combining the categories elaborated above in different ways across age, gender, geographical zone, educational level, and occupation. Below is an example of 10 different citizen profiles that can be used to recruit a diverse panel. The specific profiles are not mandatory but should illustrate the point of diversity.

Citizen profile 1 Age: 18-29 Gender: Female Geographical zone: Suburb Educational level: Bachelor's degree or equivalent Occupation: Employee	Citizen profile 6 Age: 18-29 Gender: Male Geographical zone: Major city Educational level: General upper secondary education Occupation: Self-employed/employer
Citizen profile 2 Age: 30-39 Gender: Female Geographical zone: Town Educational level: Vocational education or training Occupation: Student	Citizen profile 7 Age: 30-39 Gender: Male Geographical zone: Rural Educational level: Bachelor's degree or equivalent Occupation: Employee
Citizen profile 3 Age: 40-49 Gender: Female Geographical zone: Rural Educational level: Master's degree or higher Occupation: Unemployed	Citizen profile 8 Age: 40-49 Gender: Male Geographical zone: Town Educational level: Primary or lower secondary education



	Occupation: Other
Citizen profile 4 Age: 50-59 Gender: Female Geographical zone: Suburb Educational level: General upper secondary education Occupation: Self-employed/employer	Citizen profile 9 Age: 50-59 Gender: Male Geographical zone: Major city Educational level: Vocational education or training Occupation: Employee
Citizen profile 5 Age: 60-69 Gender: Female Geographical zone: Major city Educational level: Primary or lower secondary education Occupation: Employee	Citizen profile 10 Age: 70+ Gender: Male Geographical zone: Suburb Educational level: Master's degree or higher Occupation: Retired

5.4 Recruitment Methods

Different methods can be used and combined to recruit citizens for the Citizen Review Panel. Most likely, all territorial partners will end up using different methods, since the recruitment will depend on the options available in each territory, including access to different tools, resources, and national regulations. Therefore, the choice of method(s) should depend on which methods you expect to be most effective to assemble a diverse panel. The examples below serve as inspiration, but can be adjusted or substituted with other methods, if necessary.

Most likely, you will need to use different methods to reach a diverse group of citizens. Some citizens will be easiest to recruit on social media, while other citizens are best reached through an interest group or by telephone. Your recruitment methods can be adapted along the way. If certain citizen profiles are not represented on your list of citizens who have applied for participation, your recruitment strategy can be adjusted to meet the citizens where you believe the chances to reach them are the highest.

Remember to set up the information page in advance. Most of the recruitment methods directs citizens to this page to learn more about the event and the application process. Some methods encourage physical application letters (see appendix N for an example).

5.4.1 The Snowball-Method

The snowball method is based on network. Ask a number of people (it could be from your own network) to each invite 1-2 from their own network, who will then do the same. In this way, the sample group should grow like a rolling snowball. Please note that people from your own network are not eligible to participate in the Citizen Review Panel. Only your networks' network (and their network, etc.) can participate. Take some time to plan through which people the snowball is set in motion. People tend to recruit other people similar to themselves. To recruit a diverse group of citizens, different citizen profiles must be targeted when setting the snowball in motion. Make sure to provide a link to the information page so that citizens interested in participation can read more about the event and the application process.

5.4.2 Face-to-Face Recruitment

With face-to-face recruitment, citizens are directly addressed on a specific location. Examples of locations are public parks, train stations, marketplaces, educational institutions, sports associations, activity centres,



etc. To ensure a diverse group of citizens, different geographical areas of the territory can be targeted. In a second or third round of recruitment, this method can also be used to recruit citizens with profiles missing from your list of applications, as these profiles can be targeted. For instance, if you are looking for a male aged 18-29 with a bachelor's degree, an educational institution or a public park in a major city can be a location with a higher chance of meeting that specific citizen profile. This method has the advantage that you can interact with citizens and explain more about the event. Make sure to bring application letters (see appendix N). You can also bring your application form (appendix K), if some citizens are ready to apply right away.

5.4.3 Advertising

Advertising can be used on different media, including newspapers, radio, online media, and social media. This can be an expensive method. The benefit is that you can potentially reach a broad number of citizens. Write a short text and link to the information page.

5.4.4 Database-Based Recruitment

If your institution has a database available, either from previous recruitment or other situations, this can be used to recruit participants. To use this method, be aware that the citizens in the database must have agreed to be invited for events. The benefit of using this method is that you already have an established contact and contact details available. Be aware only to recruit ordinary citizens and not experts. Based on the information available, application letters (see appendix N) can be sent either through email or to physical addresses. Sending physical letters has the advantage that it seems more legitimate, and people feel more specially selected. However, it is more expensive than emails. If you choose to send an email, write a short text and link to the information page.

5.4.5 Social Media Recruitment

Use your social media channels (Facebook, LinkedIn, Twitter, Instagram, etc.) to recruit citizens. Write a short teaser and link to the information page where citizens can read more about the event. Pictures is a good tool to visual attraction. You can choose to pay to have the post promoted. This will also allow you to target specific groups if you need to recruit particular citizen profiles.

5.4.6 Recruitment through Membership Organisations

Membership organisations can be used to reach citizens, either through newsletters, social media, or other channels available. Examples of member organisations are labour unions, sports clubs and other leisure associations, and interest groups. Typically, to make the organisations interested in promoting the event, they will need a return of investment. This could be by offering a lecture, a workshop, participation in some kind of event, or access to resources that could benefit the members. Potentially, this can be a way of reaching a lot of citizens, if the right organisations are chosen. Be aware that some organisations will have a vested interest in the chosen policy area and should be avoided to prevent a skewed result. Decide the recruitment channel together with the membership organisation and make sure to link to the information page.

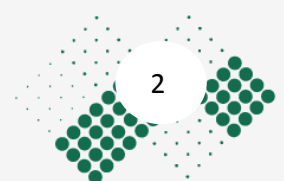
5.4.7 Sending out Application Letters

To send out application letters (see appendix N), emails or physical addresses can be obtained from a national central registration office or from a market research company. Using this method, a large representative set of names can be selected in line with the recruitment criteria. This method is the best method to obtain a representative panel. However, it can be quite expensive. Be prepared, that only a

small number of the people receiving a letter will apply for the event, and therefore letters must be sent to around 2000 citizens. Outweigh the extra costs of sending out physical letters against increasing legitimacy.

5.4.8 Recruitment by Telephone

If a national telephone register is available, citizens can be contacted by telephone. Have a speech ready and consider the time you are calling on. The benefit of this method is that it allows for a more open dialogue. Consider in advance, how you will help citizens learn more about the event or apply immediately if they show interest in participating.



6 Practical Arrangements

The practical preparations for the Citizen Review Panel should begin in February. The preparations include booking a suitable venue and catering, finding the staff needed, and preparing materials and seating plans for the panel.

6.1 Venue and Facilities

When locating a suitable venue for the Citizen Review Panel, some practical matters should be considered. The venue should feature:

- Large open space with enough room for staff and 20 citizens to be seated at round tables.
- 4 round tables hosting 5 citizens and 1 table moderator (round tables allow for more inclusive and relaxed dialogues, therefore this is an important element).
- Comfortable chairs. Hard plastic chairs might be painful for some participants after several hours. Remember that some participants might be elderly, and some might have physical disabilities. Therefore, consider padded chairs and check accessibility, e.g. for wheelchairs.
- Wardrobe facilities.
- A buffet from where the citizens can obtain food and drinks.
- Toilets.
- Outdoor facilities for those wanting to smoke or in need of fresh air.
- A projector.

6.2 Seating Plan

There should be 4 tables with 5 citizens and a table moderator at each table. Different citizen profiles should be seated at each table. It is therefore necessary to make a seating plan prior to the Citizen Review Panel in order to mix up participants as much as possible. This gives citizens an opportunity to talk to people from other parts of the territory as well as to people with backgrounds different to their own; and by mixing them up there is a good chance that the debate will reflect different experiences and points of views. It will also ensure that citizens have reflected on other points of views during the co-generation of knowledge.

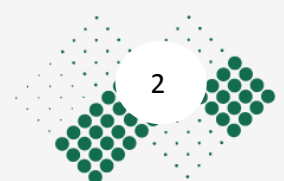
Minorities and marginalised groups: The spirit of the project is that citizens mingle and engage in a dialogue with people who have a different background than their own. However, if you think that participants belonging to a minority or marginalised group might struggle to engage in a free and open dialogue with the other participants, you can use different methods to include them in the debate. One way could be to seat two citizens from the same marginalised group together at the same table in order for them to support each other and feel more comfortable. Another way could be to also deliver the information material as an audio file for people who have difficulties reading, or to offer interpretation to people who do not speak the language well.

6.3 Materials Needed

The following is a list of materials needed to conduct the Citizen Review Panel:



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- PowerPoint presentation.
- Table numbers to put on the tables.
- Name tags for citizens (including table number).
- Name tags for staff: Make sure these are different from citizen name tags – (e.g. another colour).
- A sign for the entrance (if necessary).
- Attendance list with room for citizens to sign.
- Copies of the information material, in case some citizens need one.
- Stickers (red, yellow, green) for each table.
- Pens for each citizen and table moderator.

Besides the above-mentioned materials, several documents should be printed and be ready to distribute at the appropriate time:

- Moderation scripts, one for each table moderator and head facilitator (Appendix A).
- Colour code and criteria, one for each citizen (Appendix B).
- Template 1: Objectives and actions, one for each citizen (Appendix C).
- Template 2: Acceptability of actions, one for each objective at each table (Appendix D).
- Template 3: Improvement of actions, five for each table + extra copies (Appendix E)
- Template 4: Suggestions for new actions, one for each table (Appendix F).
- Template 5: Writing of statement, one for each table (Appendix G).
- Template 6: Prioritization of actions, one copy with room for original and new actions (Appendix H).
- Rules for good dialogue and deliberation, one for each table (Appendix I).
- Informed consent form, extra copies if citizens forget to bring their form (Appendix P).

6.4 Photos

Photos should be taken throughout the day to use for reporting and dissemination, including a group photo. To do this, citizens must give their consent in the informed consent form (see appendix P). If some citizens do not give their consent, this should be communicated to the person responsible for taking pictures. It is possible to discretely indicate on the name tags, with a small symbol or a sticker, if some citizens do not want their pictures taken.

6.5 Staff Needed

Staff needed to conduct the Citizen Review Panel:

- 1 head facilitator.
- 4 table moderators.
- Catering staff.

Head facilitator: The head facilitator's main responsibility is to make sure that the Citizen Review Panel proceeds according to the method described and that everybody in the room feels welcome and understands what to do. S/he should have an overview of all tasks and will instruct everyone in the room about what exactly to do every time a new session begins. The head facilitator can be someone from the territorial or methodological partner organisation.

During the Citizen Review Panel, citizens may need to clarify certain facts in order to have a fruitful deliberation. To answer these questions, the head facilitator should work as a knowledge person: If a



citizen has a question that cannot be answered by others in his/her group, the table moderator can contact the head facilitator. The head facilitator will then come to the table and answer the question. S/he should be aware that they must base the answer on facts (rather than opinion) as far as possible, referring only to the manual and information material. The head facilitator should have read and understood the information material and manual and be able to answer questions relating directly to its content. S/he does not have to be able to answer questions outside the scope of this and – if such questions are asked – should not answer that kind of question anyway.

IMPORTANT: It is very important that the head facilitator makes sure that all other staff know what to do. This should be done at a training day where all staff run through every procedure of the Citizen Review Panel. When instructing the staff, relevant chapters and scripts from this manual should be handed out to them, e.g., the table moderator should know the templates and the relevant scripts.

Table moderator: There will be one table moderator at each table. Their job is to function as a neutral moderator of the deliberations at the table. The table moderator's main role is to make sure that the citizens focus on the assigned task and that all citizens at the table have a say. They should also keep track of time.

IMPORTANT: It is important that the table moderators understand and accept that they are not there to state their own opinions, but to help citizens state theirs.

Make sure to engage some additional moderators who can step in in case of illness. The table moderator at each table can be employees of the territorial partner organisation, the methodological partner organisation, volunteers from various organisations, or graduate students.

Catering staff: Following the programme, you need to serve food and/or drinks at least five times: Morning coffee & tea, two coffee breaks, lunch, and some kind of take away food at the end of the day. You need staff for this, which could be someone already working at the venue.

6.6 Transport and Accommodation

It is important to explain in detail to the citizens how to get to the venue. In some cases, it can be necessary for you to organise different things, so that it is easy and affordable for the citizens to participate in the panel. You can consider some of the following things:

- Organising transport by bus from central meeting points.
- Providing free parking space for private cars.
- Refunding transport expenses.

6.7 Catering

Food and beverages are essential to the success of the Citizen Review Panel. The participants should have access to a varied and changing buffet throughout the whole day, so that they have the necessary energy to deliberate. Some participants may have personal needs concerning the food. There might be people suffering from allergies (lacteous, gluten, etc.), vegetarians, and citizens with religious limitations on food. To meet special needs, citizens should be given the opportunity to declare these needs when they are invited to participate in the Citizen Review Panel. The all-day accessible buffet should consist of:

- Light breakfast



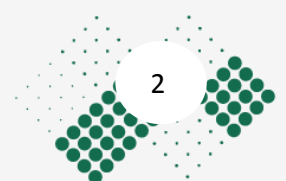


- Lunch
- Fruits, snacks and sweets, coffee, tea, soft drinks, and water available all day
- Take away food when the Citizen Review Panel closes

Dining facilities such as plates, glasses, cutlery, etc. should be in place. Often personnel at the venue will take care of the catering. Make sure that there are also personnel that can help clearing the tables during the day.



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7 Finalising the Transformative Outlook

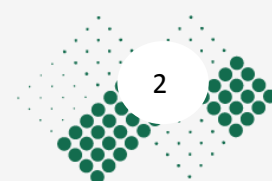
7.1 Reviewing and Analysing Results

After conducting the Citizen Review Panel, a synthesis of the findings should be written in the Transformative Outlook. The synthesis should include reflections on the acceptability of actions and reasons provided, improvements of actions and suggested changes as well as the overall message in the statements written by the citizens. Furthermore, a list of the top five actions prioritized by the citizens should be included.

Following the Citizen Review Panel, a workshop should be held with stakeholders previously involved in the co-creation process to find solutions to how the citizens' comments and suggestions will be integrated in the Transformative Outlook. The stakeholder workshop should be held about one month after the Citizen Review Panel.

7.2 Feedback to Participants

At the beginning of the event, and again before closing the Citizen Review Panel, the citizens should be informed on how their work will be used in the further process. Decide how and when you want to give the feedback to the citizens. This might be in an email informing citizen about the publication of the Transformative Outlook, in an email notifying citizen when the stakeholders have worked on the outcome of the Citizen Review Panel, or in an email telling citizens that the Transformative Outlook is handed over to policymakers.



8 Data Management

Deliverable 7.1 *Protection of Personal Data (POPD)* describes in detail the data management plan of RRI-LEADERS in regard to data processing to ensure a responsible use of data. Moreover, project partners should abide by relevant national legislation and regulations regarding personal data usage. In the following, some of the POPD procedures from D7.1 are highlighted.

Collecting personal data is the ultimate responsibility of each project partner tasked with the overall organisation of the Citizen Review Panel, including securely storing all documents and other physical data carriers obtained in connection with the Citizen Review Panel. The Data Protection Officer appointed by each partner will ensure that access to the data is only possible with the use of his/her username and password, and in accordance with the institutional code of conduct. Moreover, personal data should be destroyed after the obligation, stemming from the Grant Agreement or the national legislation, expires, whichever comes first.

The minimum requirement that needs to be fulfilled prior to the Citizen Review Panels is the informed consent procedure outlined below.

8.1 Informed Consent Procedure

When citizens apply for participation in the Citizen Review Panel, they must give their consent to processing of their personal data (see appendix K for an example). This will allow you to collect the necessary data to assemble a diverse panel.

The personal data that will be collected should be limited to name, contact details (e-mail or phone number), age, gender, geographical zone, educational level, and occupation. It is possible to ask citizens about their personal motivation or ask a territory specific question if this is considered relevant to assemble a diverse panel. No sensitive data such as ethnic or racial origin, political views, religion, or sexual orientation will be collected.

After selecting the citizens that will take part in the Citizen Review Panel, the citizens must consent to the processing of their personal data in connection with the panel. The partners in charge of the Citizen Review Panel shall send the confirmation letter (appendix L) together with the information sheet (appendix O) and informed consent form (appendix P). The purpose of sending out the information sheet and informed consent form prior to the panel is to allow citizens sufficient time to read through the documents. When the citizens arrive at the Citizen Review Panel you should collect the informed consent forms with their signatures.

All data collected during the Citizen Review Panel should be collected anonymously and it should not be possible to associate a particular participant to specific information in the resultant analyses. Making collected data anonymous will prevent potential misuse of the data or the findings.

The following procedure will be implemented upon signing the informed consent form:

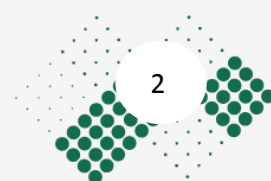
- 1) Before requesting consent, the partner makes sure that the citizen has been acquainted with the information sheet and gives him/her a chance to receive additional information.



- 2) The (additional) information provided shall be clear and sufficient time shall be allocated in order to be understood.
- 3) The partner shall make it clear that citizens are free to withdraw at any time.
- 4) Citizens shall be informed that their personal data collected will be used only for the purposes of the project and will not be made available to third parties.
- 5) Participants shall be also made aware that the information collected will be processed confidentially and data will be made anonymous.

The materials which must be kept on file by the partner in charge of the Citizen Review Panel include:

- The information sheets.
- The signed informed consent forms.
- The recruitment plan.
- Attendance lists with signatures.



9 Organisation of stakeholder workshop

9.1 Method for the stakeholder workshop

The objective of the stakeholder workshop is to realise the input made by the citizens at the Citizen Review Panel. The citizen input can be expressed in different ways, ranging from comments and critiques to suggestions for new actions. The task of the stakeholders is to transform all the input into realisable actions. This might entail altering the original actions in the Transformative Outlook or suggesting new actions. It might also require modifying actions suggested by citizens to make them realisable. However, it should be made clear to the stakeholders that their task is to realise the input made by the citizens, not to suggest actions that they themselves find useful.

As preparation for the workshop, action sheets should be prepared. An action sheet summarises the input made by the citizens during the Citizen Review Panel. There are two types of action sheets. *Action sheet 1: Improvement of existing actions* summarises all the input made by the citizens to one of the actions, including assessment of acceptability, suggestions for improvement, and new assessment of acceptability. In appendix R, a template for this action sheet is provided. Please note that if more groups have worked on the same action, an action sheet should be filled in for each group and compiled. For instance, if three groups have worked on the same action, three action sheets should be prepared and put together so that one stakeholder group will deal with all action sheets that affects the same action at once. *Action sheet 2: New actions* should feature one new action proposed by a group. In appendix S, a template for this action sheet is provided.

15 stakeholders should participate in the workshop, organised in three groups of five. The stakeholders can be new to the project or may have been previously involved, and they should represent the Quadruple Helix. During the workshop, the stakeholders will go through an action sheet one by one (both types of action sheets should be displayed together) and provide their professional opinion on how to alter the actions in the Transformative Outlook to best reflect the input by the citizens. The stakeholders can also choose to suggest new actions if this will better reflect the input by the citizens. The input by the stakeholders should be collected in a template (see appendix T). In appendix Q, a moderation script is provided.

9.2 Data management

The data management follows the informed consent procedure described for the Citizen Review Panel. The stakeholders must therefore be provided with an information sheet (see appendix U) and informed consent form (see appendix V) prior to the workshop that should be signed upon arrival. If you plan to take photos at the workshop, stakeholders must consent to this too. The materials which must be kept on file by the partner in charge of the workshop include: The information sheets, the signed informed consent forms, and attendance list with signatures.

Stakeholders must also give their consent to registering their contact information as preparation for the workshop. The following text can be used:



To organise the stakeholder workshop, we will collect information about your name, e-mail address, and [other information you may need to collect]. We collect these data to organise the workshop and to be able to provide you with practical information. The information will be deleted when all administration has been finalised at the end of the project in 2023. You can withdraw your consent at any time.

If you are willing to participate in the stakeholder workshop, please confirm the following statement:

☐ I confirm that I have read, consent, and agree to the above-mentioned processing of my personal data.

9.3 Staff needed

Head facilitator: A head facilitator is needed to make sure that the workshop proceeds according to the method described. S/he should have an overview of all tasks and will instruct everyone in the room about what exactly to do. The head facilitator can be someone from the territorial or methodological partner organisation.

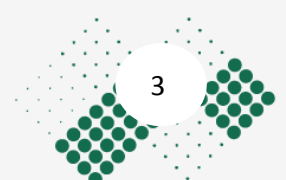
Table moderator, if necessary: Consider whether to have a table moderator at each table. Since the participants are all professional stakeholders, this may not be necessary. If you choose to appoint table moderators, make sure that they understand that they are not there to state their own opinions, but to guide the stakeholders through the process. The table moderator can be employees of the territorial or methodological partner organisation.

Catering staff: Some refreshments should be served during the workshop. Make sure to arrange a person to take care of this.



10 References

- Elstub, S., & Escobar, O. (2019). Defining and Typologising Democratic Innovations. In *Handbook of Democratic Innovation and Governance* (pp. 11-31). Massachusetts: Edward Elgar Publishing.
- Stilgoe, J., Owen, R., & Macnaghten, P. (2013). Developing a framework for responsible innovation. *Research Policy*, pp. 1568-1580.
- von Schomberg, R. (2011). Prospects for technology assessment in a framework of responsible research and innovation. In M. Dusseldorp, & R. Beecroft, *Technikfolgen Abschätzen Lehren: Bildungspotenziale Transdisziplinärer*. Wiesbaden: Vs Verlag, Methoden.



11 Appendix A: Moderation script

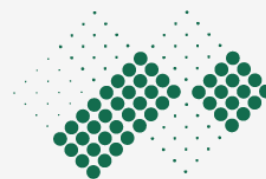
Time	Title	Description	Notes	Materials
9.00-9.30	Arrival and registration	<p>Citizens arrive, receive name tags, sign the attendance list and hand in a signed copy of the informed consent form.</p> <p>Coffee and/or light breakfast.</p>	<p>Just before the welcome, citizens are asked to find their allocated table. Citizens will be seated in four groups of five, each group moderated by a table moderator.</p>	<p>Name tags with table number.</p> <p>Attendance list.</p> <p>Informed consent form (extra copies).</p>
9.30-9.50	Welcome and introduction - plenary	<p>Head facilitator makes an introduction (20 min, plenary).</p> <p>The introduction includes:</p> <ul style="list-style-type: none"> • Welcoming of participants. • Presentation of agenda, head facilitator and table moderators. • The RRI-LEADERS project and co-creation process. • Purpose of the Citizen Review Panel, outcome of the work, and feedback process. • The “citizen role”, including Rules for good dialogue and deliberation. 		



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9.50-10.00	Participant introductions - groups	<p>Introduction round (10 min, groups).</p> <p>At each table, all citizens take turns in saying their name and why they signed up.</p>	After the introduction, the table moderator places a copy of the Rules for good dialogue and deliberation in the middle of the table.	Rules for good dialogue and deliberation (one for each table).
10.00-10.15	Presentation of policy area(s) - plenary	<p>Territorial partner makes a presentation (15 min, plenary).</p> <p>The presentation includes:</p> <ul style="list-style-type: none"> • Presentation of policy area(s), objectives, and actions. • Questions from citizens. 	Maximum 2 policy areas (if more, choose or see if a merge is possible).	



10.15-11.30	Acceptability of actions - plenary and groups	<p>General talk on policy area (10 min, groups).</p> <p>Citizens can ask questions and discuss the following:</p> <ul style="list-style-type: none"> • What are your thoughts about this policy area? • Did you notice something in the information material or the introduction that you did not understand or that made you curious? • Which information did you find most important? • Which information did you find least important? • What are your experiences within this policy area? <p>Head facilitator explains the task ahead (5 min, plenary).</p> <p>Head facilitator explains the assessment process, including the sequence repeated for each action and the criteria and colour code (see description above under the section “How to Assess Acceptability of Actions”).</p> <p>Acceptability of actions (60 min, groups).</p> <p>Citizens assess the level of acceptability of all the actions within the policy area. The actions are assessed one by one based on the predefined criteria. The table moderator should give each citizen the list of the colour code and criteria together with <i>Template 1: Objectives and actions</i>. <i>Template 2: Acceptability of actions</i> should be placed in the middle of the table. A volunteer among the citizens in the group should be found to take notes in Template 2.</p> <p>The following sequence is repeated for each action:</p> <ol style="list-style-type: none"> a) An action is read out loud at the table. The group discusses the action. The purpose of the discussion is to exchange a few perspectives and to ensure that all understand the action – 	<p>Citizens assess each action by giving the colour red, yellow, or green based on a list of criteria.</p> <p>If the citizens find it difficult to assess one of the criteria</p>	<p>List of Colour code and criteria (one for each citizen).</p> <p>Template 1: Objectives and actions (one for each citizen).</p> <p>Template 2: Acceptability of actions (one for each objective at each table).</p> <p>Stickers: red/yellow/green (distributed to all tables).</p> <p>Pens (one for each citizen and table moderator).</p>
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		<p>not to form a common opinion.</p> <p>b) Citizens make an individual assessment of the action by making a note in their individual template. The table moderator should remind citizens to prepare a brief explanation if they give an action a red or yellow colour.</p> <p>c) Citizens take turn presenting their assessment and reasons behind and places the corresponding sticker (red/yellow/green) for each criterion on the group template. The notetaker notes down a few keywords in the group template for each explanation given.</p>	<p>for an action, the table moderator can make the group do a short brainstorm to help citizens form an opinion.</p>	
11.30-11.45	Coffee break			



11.45-12.45	Improvement of actions - plenary and groups	<p>Head facilitator explains the task ahead (5 min, plenary).</p> <p>Improvement of actions (55 min, groups). The group should first decide which 4-5 actions they want to work on in the two improvement sessions (before and after lunch). Approximately two actions should be completed before lunch. As a guiding principle, the group should start working on the actions with mostly yellow colours, as these are the least critical and will be an easier starting point. Actions with only green colours can be set aside, since they are seen as acceptable by the citizens. If there is time, citizens can work on the red actions afterwards.</p> <p>The following sequence is repeated for each action:</p> <ol style="list-style-type: none"> The group decides which action to work on. The table moderator places a copy of <i>Template 3: Improvement of actions</i> in the middle of the table. The group discusses how the action can be improved. The following question should be answered: 1) What do you suggest to improve the assessment? (This can both be specific suggestions and more general statements that need to be taken into consideration). This is noted on the template. Citizens each rate the action again in Template 3 by placing a sticker (red/yellow/green) for each criterion. The new assessment should be based on the following question: If the suggested changes were made, what would the new assessment be? <p>The group moves on to the next action and repeats the sequence.</p>		Template 3: Improvement of actions (five for each table + extra copies).
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12.45-13.30	Lunch break	In the beginning of the break, the table moderator should hang the improved actions on a wall for the other groups to look at them during the break.		
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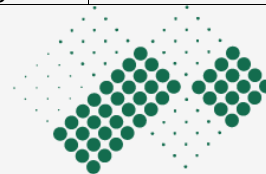
13.30-15.15	Improvement of actions continued - groups	<p>Improvement of actions (85 min, groups).</p> <p>Groups continue working with the actions and suggestions for improvement. Approximately three actions should be completed during this timeslot.</p> <p>The same sequence is repeated for each action:</p> <ul style="list-style-type: none"> a) The group decides which action to work on. b) The table moderator places a copy of <i>Template 3: Improvement of actions</i> in the middle of the table. c) The group discusses how the action can be improved. The following question should be answered: 1) What do you suggest to improve the assessment? (This can both be specific suggestions and more general statements that need to be taken into consideration). This is noted in the template. d) Citizens each rate the action again in Template 3 by placing a sticker (red/yellow/green) for each criterion. The new assessment should be based on the following question: If the suggested changes were made, what would the new assessment be? <p>The group moves on to the next action and repeats the sequence.</p> <p>Suggestions for alternative actions (20 min, groups).</p> <p>Citizens have a chance to suggest alternative actions. If necessary, the table moderator can choose to shorten or prolong this part, depending on the progress with improving the actions. The suggestions are noted in <i>Template 4: Suggestions for new actions</i>.</p>	Table moderator can add a short break if necessary.	Template 4: Suggestions for new actions (one for each table).
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15.15-15.30	Coffee break	In the beginning of the break, the table moderator should hang the improved actions and suggestions for new actions on a wall for the other groups to look at them during the break.		
15.30-16.15	Final statement - plenary and groups	<p>Head facilitator explains the task ahead (5 min, plenary).</p> <p>Work on statements (40 min, groups).</p> <p>Groups write a statement addressing the following question: Do the actions solve the overall challenges in the policy area? The table moderator should place <i>Template 5: Writing of statement</i> in the middle of the table, and a citizen from the group writes the statement in the template. The table moderator should ensure that the group answers the question and gives reasons for their statement.</p> <p>Moreover, the table moderator makes sure that someone presents the statement in plenary (a citizen, or the table moderator in case of no volunteers).</p>		Template 5: Writing of statement (one for each table).
16.15-16.40	Presentation of statements - plenary	<p>Presentation of statement (25 min, plenary).</p> <p>Each group have 5 minutes to present their statement in plenary.</p>		



16.40-16.50	Prioritization - plenary and groups	<p>Head facilitator explains the task ahead (5 min, plenary).</p> <p>Voting on priorities (5 min, plenary).</p> <p>Citizens are asked to vote among all the original and new actions based on the following question: Which actions do you find to be the most important? The purpose is to make a prioritised list of actions for policymakers to understand which actions the citizens find most important.</p> <p>Each citizen has five votes and will vote by placing stickers on a common template. Citizens can choose to place their votes on five different actions, or they can choose to place several votes on a few actions if some actions are very important to them. The voting should not be discussed among citizens.</p> <p>Use <i>Template 6: Prioritization</i> for the voting process. The template should feature all the original actions and suggestions for new actions. If the groups have suggested new actions, their table moderator makes sure to add these suggestions to the prioritization template (this can be done while citizens present their statements in plenary). The template should be hung on a wall (or similar) to make it visible and accessible to all citizens. Consider how to best organise the voting. If you have a printer available, you can print more prioritization templates to avoid bottlenecks in the voting process. You can also consider displaying the actions on a big screen for citizens to be able to read them before going to the prioritization template to vote.</p> <p>The improvements made to the original actions during the group work should not be added to the prioritization template, since the groups might have worked on different aspects of the same actions. Explain to citizens that they should therefore consider the actions on a more overall level. However, if you are concerned that citizens might get</p>		<p>Template 6: Prioritization (one copy with room for original and new actions).</p> <p>Stickers.</p>
-------------	--	--	--	---






		the impression that their suggestions are not taken seriously, you may also communicate to citizens the improvements made to the actions during the day as an orientation they can take into account when prioritizing the actions. Please consider carefully how to organise this.		
16.50-17.00	Thank you for today - plenary	<p>Head facilitator wraps up the day (10 min, plenary).</p> <p>The wrap up should include:</p> <ul style="list-style-type: none"> • Thanking citizens for their input and for taking the time. • The next step in the process/what will happen after today/how the outcome will be used. • How to follow the process/results. • Questions. 		



12 Appendix B: Colour Code and Criteria

Colour code:

	Red	No, it is far from acceptable in its current form.
	Yellow	Yes, it is acceptable to some extent but has some problems.
	Green	Yes, it is acceptable in its current form.

The three criteria:

Criteria 1	Criteria 2	Criteria 3
Do you think this action will help reach the objective?	Do you think the possible negative effects of the action are acceptable? (e.g., on people, environment, or health)	Do you think the action addresses the needs of the citizens and/or intended target group(s)?

13 Appendix C: Template 1: Objectives and Actions

Objectives and Actions:

Here you can note down your individual assessment, before sharing it with the group.

	C1	C2	C3
Objective 1:			
Action 1.1:			
Action 1.2:			
Action 1.3:			

	C1	C2	C3
Objective 2:			
Action 2.1:			
Action 2.2:			
Action 2.3:			

	C1	C2	C3
Objective 3:			
Action 3.1:			
Action 3.2:			
Action 3.3:			

	C1	C2	C3
Objective 4:			
Action 4.1:			
Action 4.2:			
Action 4.3:			



14 Appendix D: Template 2: Acceptability of Actions

SESSION 1: ACCEPTABILITY OF ACTIONS

Group number:

Taking turns, each group member should briefly present their individual assessment and reasons behind. The presentation should finish by the placing of a sticker (red/yellow/green) for each criterion. The notetaker should note down a few keywords for each explanation.

	Criteria 1 – Do you think this action will help reach the objective?	Criteria 2 – Do you think the possible negative effects of the action are acceptable? (e.g., on people, environment, or health)	Criteria 3 – Do you think the action addresses the needs of the citizens and/or intended target group(s)?
Objective 1: [Insert title]			
Action 1.1: [Insert title]			
Notes			
Action 1.2: [Insert title]			
Notes			
Action 1.3: [Insert title]			
Notes			

15 Appendix E: Template 3: Improvement of Actions

SESSION 2.1: IMPROVEMENT OF ACTIONS

Group number:

Action:	Objective No.:
<div>1. What do you suggest to improve the assessment? (This can both be specific suggestions and more general statements that need to be taken into consideration).</div>	

2. If the suggested changes were made, what would the new assessment be?

	Criteria 1 – Do you think this action will help reach the objective?	Criteria 2 – Do you think the possible negative effects of the action are acceptable? (e.g., on people, environment, or health)	Criteria 3 – Do you think the action addresses the needs of the citizens and/or intended target group(s)?
New assessment			



16 Appendix F: Template 4: Suggestions for New Actions

SESSION 2.2: SUGGESTIONS FOR NEW ACTIONS

Group number:

Please note down suggestions for new actions proposed by the group.

17 Appendix G: Template 5: Writing of Statement

SESSION 3: WRITING OF STATEMENT

Group number:

Please write down a final statement made by the group, answering the following question:
Do you find that the objectives and actions solve the overall challenges in the policy area? Please elaborate.

18 Appendix H: Template 6: Prioritization of Actions

SESSION 4: PRIORITIZATION

Instructions

Which actions do you find to be the most important?

- Each person has five votes.
- The five votes can either be placed on different actions, or several votes can be placed on the same action(s).

	Votes
Objective 1: [Insert title]	
Action 1.1: [Insert title]	
Action 1.2: [Insert title]	
Action 1.3: [Insert title]	

	Votes
Objective 2: [Insert title]	
Action 2.1: [Insert title]	
Action 2.2: [Insert title]	
Action 2.3: [Insert title]	

	Votes
Objective 3: [Insert title]	
Action 3.1: [Insert title]	
Action 3.2: [Insert title]	
Action 3.3: [Insert title]	



19 Appendix I: Rules for Good Dialogue and Deliberation

Rules for a good discussion at the tables:

- Think as a citizen/member of the community
- Treat everyone with respect
- Listen carefully to what others have to say and ask about details
- Do not interrupt each other
- Take part in the discussion
- Keep comments brief and to the point
- The table moderator as well as the main facilitator are neutral and do not participate in the debate



20 Appendix J: Recruitment plan

Recruitment plan

Territorial partner:

Instructions: Please write the name of your organisation.

Timeline:

Instructions: Please insert a timeline with relevant deadlines for the whole recruitment process.

Recruitment Criteria:

Instructions: Please specify your choice of categories for each criterion in the table below together with the number of participants expected within each category. The table below should be adapted to your territorial context.

Criteria	Categories	Number of participants
Age	18-29	<i>Please specify</i>
	30-39	<i>Please specify</i>
	40-49	<i>Please specify</i>
	50-59	<i>Please specify</i>
	60-69	<i>Please specify</i>
	70+	<i>Please specify</i>
Gender	Male	<i>Please specify</i>
	female	<i>Please specify</i>
	non-binary	<i>Please specify</i>
Geographical zone	<i>Please specify</i>	<i>Please specify</i>
Educational level	<i>Please specify</i>	<i>Please specify</i>
Occupation	<i>Please specify</i>	<i>Please specify</i>

Recruitment methods:

Instructions: Please describe which recruitment methods you intend to use. The description should consider the different citizen profiles and how you want to reach them.



**Application process:**

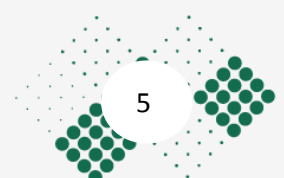
Instructions: Please describe how you want citizens to apply for participation in the Citizen Review Panel. Where will they find information about the event? How do they apply (telephone, email, inline platform)? How will you collect informed consent to store their information?

Challenges in the recruitment process:

Instructions: Please reflect on the following questions: What will be the biggest challenge in recruiting a group of diverse citizens? How do you plan to manage this challenge?



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21 Appendix K: Application Form

Application form: Citizen Review Panel			
NB: Please note that the application form should be adapted to the territorial context.			
Name			
<i>Please write your full name.</i>			
Email address			
<i>Please provide your email address to receive information about the Citizen Review Panel.</i>			
Age		Gender	Geographical zone
<input type="checkbox"/> 18-29 <input type="checkbox"/> 50-59 <input type="checkbox"/> 30-39 <input type="checkbox"/> 60-69 <input type="checkbox"/> 40-49 <input type="checkbox"/> 70+	<input type="checkbox"/> Female <input type="checkbox"/> Male <input type="checkbox"/> Non-binary	<input type="checkbox"/> Major city <input type="checkbox"/> Rural <input type="checkbox"/> Suburb <input type="checkbox"/> Town	
Educational level		Occupation	
<input type="checkbox"/> Primary or lower secondary education <input type="checkbox"/> General upper secondary education <input type="checkbox"/> Vocational education or training <input type="checkbox"/> Bachelor's degree or equivalent <input type="checkbox"/> Master's degree or higher		<input type="checkbox"/> Employee <input type="checkbox"/> Self-employed/employer <input type="checkbox"/> Student <input type="checkbox"/> Retired <input type="checkbox"/> Unemployed <input type="checkbox"/> Other: <i>Please indicate which occupation.</i>	
Personal motivation			
<i>Please write your personal motivation to participate in the Citizen Review Panel in a few sentences.</i>			
[Territory specific question]			
<i>Please write a short answer to the question.</i>			
Data protection policy			
<p>To organise the Citizen Review Panel, we will collect information about your name, e-mail address, age, gender, geographical zone, educational level, occupation, personal motivation, and [territory specific question]. We collect these data to ensure diversity in the panel, to facilitate the panel, and to be able to provide you with practical information. The information will be deleted when all administration has been finalised at the end of the project in 2023. You can withdraw your consent at any time.</p> <p>If you are willing to participate in the Citizen Review Panel, please confirm the following statement:</p> <p><input type="checkbox"/> I confirm that I have read, consent, and agree to the above-mentioned processing of my personal data.</p>			
Date and signature			
<i>Please provide date and signature.</i>			

22 Appendix L: Confirmation Letter



Territorial Logo

Dear [Name]

We are thrilled to announce that you have been selected to participate in the Citizen Review Panel on *[policy area of your territory in a catchy phrase]*.

[Please write a few sentences to elaborate on the policy area and the transformations you wish to obtain, including motivation to participate. The aim is to make citizens interested in the topic.]

These are some of the issues we need **your opinion** on.

Moreover, we aim to explore a systematic way of including citizens in the policymaking process, because we believe that the people who are affected by the policies should have a say! The goal is to create a systematic framework to responsible policymaking, at the same time including principles such as ethical considerations, and promotion of gender equality and diversity.

By participating in the Citizen Review Panel, you will have the chance to influence the future policies developed in your *[region/municipality/city]*, responding to some of great challenges within *[policy area]*.

The Citizen Review Panel will take place on **[date, time, and location]**.

Participation is free, and expenses for transportation and food will be covered by the organiser *[Name of territorial partner]*.

The Citizen Review Panel is a one-day event during which we will ask your opinion on actions we have developed for an action plan on *[policy area]*. Throughout group work, you will have a chance to discuss with other citizens.

No professional experience or prior knowledge on the subject is needed. Your participation depends solely on your capacity as a citizen in *[territory]*.

Further information on the Citizen Review Panel can be found here: *[link to information page]*.

Please confirm your participation no later than [deadline and means of registration].

In case of any dietary restrictions, please let us know upon registration.

Kind regards

[Name and surname of contact person(s) from territory, including signature]



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23 Appendix M: Rejection Letter



Territorial Logo

Dear [Name]

Thank you for expressing interest in participating in the Citizen Review Panel.

We regret to inform you that you have not been selected to participate.

The panel was assembled to represent citizens across different categories such as age, gender, and residential area. Unfortunately, several applicants matched your profile, and we were only able to select a limited number of citizens.

Again, we thank you for your interest in participating in the Citizen Review Panel. *[Optional: If your organisation wishes to save the contact in a database for future engagement activities, ask the citizen of their consent to save their contact for a specified amount of time].*

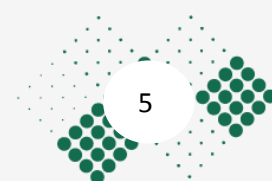
If you wish to follow the RRI-LEADERS project and outcome of the Citizen Review Panel, please visit www.rri-leaders.eu/rri-events/

Kind regards

[Name and surname of contact person(s) from territory, including signature]



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24 Appendix N: Application Letter



Territorial Logo

Dear [Name]

You have the opportunity to become **one of 20 participants** in a **Citizen Review Panel** regarding the *[policy area of your territory in a catchy phrase]*.

[Please write a few sentences to elaborate on the policy area and the transformations you wish to obtain, including motivation to participate. The aim is to make citizens interested in the topic.]

These are some of the issues we need **your opinion** on.

Moreover, we aim to explore a systematic way of including citizens in the policymaking process, because we believe that the people who are affected by the policies should have a say! The goal is to create a systematic framework to responsible policymaking, at the same time including principles such as ethical considerations, and promotion of gender equality and diversity.

By participating in the Citizen Review Panel, you will have the chance to influence the future policies developed in your *[region/municipality/city]*, responding to some of great challenges within *[policy area]*.

The Citizen Review Panel is a one-day event during which we will ask your opinion on actions we have developed for an action plan on *[policy area]*. Throughout group work, you will have a chance to discuss with other citizens. The Citizen Review Panel is the last stage of a co-creation process. During this process, different experts have contributed to shape the actions. Now, we need your input to understand the citizen perspective. Based on your experiences as a citizen of *[territory]*, we want to hear your feedback on potentially positive and negative implications of the actions developed.

After the Citizen Review Panel, we will give your input to experts, who will work on ways to best realise your suggestions. The citizen and expert contributions will be included in our further work on the intended changes and will be presented to policymakers in September 2023.

The Citizen Review Panel will take place on *[date, time, and location]*.

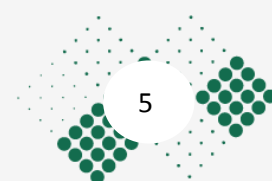
No professional experience or prior knowledge on the subject is needed, and the only requirement is a willingness to discuss the *[policy area]* and a wish to cooperate with other citizens. Participation is free, and expenses for transportation and food will be covered by *[Name of territorial partner]*.

Further information on the Citizen Review Panel can be found here: *[link to information page]*.

Please apply for the event no later than *[deadline and means of registration]*.



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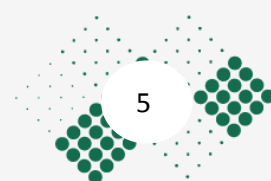
Unfortunately, there is only a limited number of seats available. After the registration deadline, a panel will be assembled, and we will inform you if you have been selected for participation. We aim to select a diverse panel and encourage all citizens above 18 to register.

Kind regards

[Name and surname of contact person(s) from territory, including signature]



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25 Appendix O: Information Sheet

Information regarding the Citizen Review Panel

When and where is the Citizen Review Panel conducted?

[Please provide information on time and place for the Citizen Review Panel]

What is a Citizen Review Panel?

The Citizen Review Panel is the last stage of a co-creation process which aims to develop an action plan with measures for realising the intended changes to *[policy area]*. During this process, different experts have contributed to shape the actions. Now, we need your input to understand the citizen perspective. Based on your experiences as a citizen of *[territory]*, we want to hear your feedback on potentially positive and negative implications of the actions developed.

During the Citizen Review Panel, we will ask your opinion on the actions we have developed. You will be informed about the challenges and potentials within the *[policy area]*, and during group work you will have the chance to discuss the subject with other citizens. In return for your time, you as a citizen will be given the opportunity to influence the intended changes of your *[region/municipality/city]*.

After the Citizen Review Panel, we will give your input to experts, who will work on ways to best realise your suggestions. Your work during the panel and the input by the experts will be included in our further work on the intended changes and will be presented to policymakers in September 2023. We will then inform you about the outcome of the process.

What does it entail to participate?

No professional experience or prior knowledge on the subject is needed, and the only requirement is a willingness to discuss the *[policy area]* and a wish to cooperate with other citizens.

Participation in the Citizen Review Panel is voluntary, and you can withdraw at any moment without giving any reason about your decision.

What about expenses for transportation and food?

Participate is free, and expenses for transportation will be covered. Food and refreshments will be provided during the event.

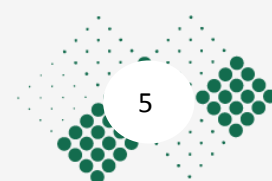
What is RRI-LEADERS?

RRI-LEADERS is a three-year EU-funded project (2021-2023). The project explores a more systematic way of integrating principles such as public engagement, ethical considerations, and promotion of gender equality and diversity into policymaking, creating a systematic framework to responsible policymaking. Different regions, municipalities, and cities participate in this project, including the region of Western Macedonia (Greece), the municipalities Sofia (Bulgaria) and Thalwil (Switzerland), and the city of Sabadell (Catalonia - Spain). Through a co-creation process involving multiple stakeholders and citizens, each of the project partners will analyse and integrate the framework into different policy areas. The Citizen Review Panel is one of the elements in this co-creative process, seeking the feedback and suggestions by citizens.

For more information about RRI-LEADERS, please visit www.rri-leaders.eu



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How will my data be used?

During the Citizen Review Panel, we will collect your feedback and suggestions to the intended changes in the *[policy area]*. Your contribution will be used as input in the policy process, and a synthesis of the outcome from the group work will be included in the final policy document.

How will my anonymity be guaranteed?

All information collected during the event will be made anonymous upon collection and it will not be possible to associate a particular participant to specific information in the resultant analyses. All personal data will be stored securely on internal servers.

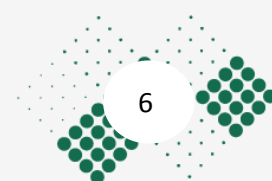
Who organises the Citizen Review Panel?

The Citizen Review Panel is hosted by *[territory]* in collaboration with *[methodological partner]*. *[If applicable, provide some information on your organisations]*.

The guidelines for the Citizen Review Panel have been developed by the Danish Board of Technology, an independent foundation committed to deliberative democracy in the form of participatory technology assessment and foresight, knowledge-based public decision-making, parliamentary dialogues on science, technology and innovation, and collaborative governance. For further information, please visit www.tekno.dk.

Who do I contact for further questions?

[Provide information on contact person(s) and Data Management Officer].



26 Appendix P: Informed Consent Form

Informed consent

Informed consent form for participation in the Citizen Review Panels as part of the RRI-LEADERS project.

I, _____ (name and surname), agree to participate in the Citizen Review Panel voluntarily after I was informed about the objective of the Citizen Review Panel and my role in it.

I understand that:

- I can decide to withdraw from the Citizen Review Panel at any moment without giving any reason about my decision.
- I am aware about the objective of the Citizen Review Panel, and I had the opportunity to ask for additional information.
- My involvement entails participation in individual reflections and group work that aims to obtain my review and validation regarding the intended transformation within [**Territory**].
- All information I provide will be used confidentially.
- My identity will be kept anonymous, unless I choose otherwise, in any output, produced as a result of my participation in the Citizen Review Panel. Disguised and anonymised extracts from my participation may be quoted in resulting publications.
- The anonymous information collected from my participation as well as the signed consent form will be stored (*location, security arrangements and people who have access as listed in the Data Management Plan*) until project completion. I am entitled to access the information I have provided at any time while it is in storage as specified above.
- I am free to contact (*name and contact details of researchers*) for further clarification, if needed.

During the Citizen Review Panel, pictures will be taken for reporting and communication about the event. Please check the box if you consent to have your pictures taken during the event:

☐ I agree to have my pictures taken.

Participant: (Name & Signature)

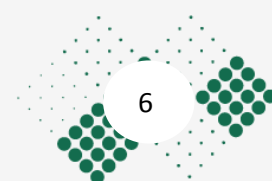
Date

[**Territorial representative**]: (Name & Signature)

Date



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27 Appendix Q: Moderation script (stakeholder workshop)

Time (min)	Title	Description	Notes	Materials
30	Arrival and registration	Stakeholders arrive, receive name tags, sign the attendance list, and hand in a signed copy of the informed consent form. Coffee.	Stakeholders will be seated in three groups of five.	Name tags with table number. Attendance list. Informed consent form (extra copies).
10	Welcome and introduction - plenary	Head facilitator makes an introduction (plenary). The introduction includes: <ul style="list-style-type: none"> • Welcoming of stakeholders. • Presentation of agenda. • The RRI-LEADERS project and co-creation process. • The Citizen Review Panel, process, and outcome. • Purpose of the stakeholder workshop and outcome of the work. 		
10	Participant introductions - groups	Introduction round (groups). At each table, all stakeholders take turns in saying their name and professional background.		



90	Realisation of actions - plenary and groups	<p>Head facilitator introduces the task (plenary).</p> <p>Realisation of actions (groups).</p> <p>The objective of the stakeholder workshop is to realise the input made by the citizens at the Citizen Review Panel. The groups should proceed in the following way:</p> <ul style="list-style-type: none"> a) First, the group chooses an action sheet. The groups should start by choosing the actions where the citizens have assessed a possibility of improvement. b) The group then moves to discuss the information on the action sheet and write in <i>Template 7: Realisation of actions</i> how the actions can be formulated when transforming the citizen's comments and suggestions into new and/or updated policy actions. c) The group places the action sheet and completed template on a designated table. <p>The sequence is repeated until all actions have been processed by one of the groups. Approximately 30-40 minutes should be estimated for each action.</p>	Action sheets (both types) are displayed on a table that can be easily accessed by all groups. Another table is arranged to collect the action sheets after they have been processed.	Action sheets. Template 7: Realisation of actions (one for each action sheet + extra copies).
30	Break	Depending on the time of the day, this break can either be a coffee or lunch break. In either case, plan to serve some refreshments for the stakeholders.		



90	Realisation of actions continued - groups	<p>Realisation of actions (groups).</p> <p>The groups continue the work by following the same sequence:</p> <ol style="list-style-type: none"> First, the group chooses an action sheet. The groups should start by choosing the actions where the citizens have assessed a possibility of improvement. The group then moves to discuss the information on the action sheet and write in <i>Template 7: Realisation of actions</i> how the actions can be formulated when transforming the citizen's comments and suggestions into new and/or updated policy actions. The group places the action sheet and completed template on a designated table. <p>If all action sheets have been processed before the time is up, the groups can be asked to review the work made by the other groups and add their suggestions.</p>		
10	Thank you for today - plenary	<p>Head facilitator wraps up the day (plenary).</p> <p>The wrap up should include:</p> <ul style="list-style-type: none"> Thanking stakeholders for their input and for taking the time. The next step in the process/what will happen after today/how the outcome will be used. How to follow the process/results. Questions. 		



28 Appendix R: Action sheet 1: Improvement of existing actions (stakeholder workshop)

Group number: [Insert number]

SESSION 1: ACCEPTABILITY OF ACTIONS

	Criteria 1 – Do you think this action will help reach the objective?	Criteria 2 – Do you think the possible negative effects of the action are acceptable? (e.g., on people, environment, or health)	Criteria 3 – Do you think the action addresses the needs of the citizens and/or intended target group(s)?
Objective xx: [Insert title]			
Action xx: [Insert title]	[Insert assessments]	[Insert assessments]	[Insert assessments]
Notes [Insert notes]			

SESSION 2.1: IMPROVEMENT OF ACTIONS

Instructions for citizens: What do you suggest to improve the assessment? (This can both be specific suggestions and more general statements that need to be taken into consideration).

[Insert suggestions by the citizens]

SESSION 2.2: NEW ASSESSMENT

Instructions for citizens: If the suggested changes were made, what would the new assessment be?

	Criteria 1 – Do you think this action will help reach the objective?	Criteria 2 – Do you think the possible negative effects of the action are acceptable? (e.g., on people, environment, or health)	Criteria 3 – Do you think the action addresses the needs of the citizens and/or intended target group(s)?
New assessment	[Insert assessments]	[Insert assessments]	[Insert assessments]



29 Appendix S: Action sheet 2: New actions (stakeholder workshop)

Group number: [Insert number]

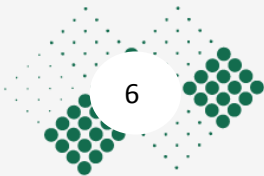
SESSION 3: SUGGESTIONS FOR NEW ACTIONS

Instructions for citizens: Please note down suggestions for new actions proposed by the group.

[Insert suggestions by the citizens]



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30 Appendix T: Template 7: Realisation of actions (stakeholder workshop)

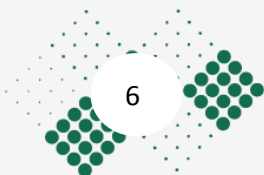
REALISATION OF ACTIONS

Group number:

Action No.:

Objective No.:

Please discuss the information on the action sheet and write below how the actions can be formulated when transforming the citizen’s comments and suggestions into new and/or updated policy actions.



31 Appendix U: Information Sheet (stakeholder workshop)

Information regarding the stakeholder workshop

When and where is the workshop conducted?

[Please provide information on time and place for the stakeholder workshop]

What is the objective of the workshop?

The stakeholder workshop is the last stage of a co-creation process which aims to develop an action plan with measures for realising the intended changes to *[policy area]*. During this process, both experts and citizens have contributed to shape the actions. The stakeholder workshop follows a Citizen Review Panel, where citizens have provided their feedback on potentially positive and negative implications of the actions developed. The objective of the stakeholder workshop is to realise the input made by the citizens.

During the workshop, we will ask your professional opinion on how to transform the input made by the citizens into realisable actions. You will be briefed about the work done at the Citizen Review Panel, and during group work you will discuss your opinion with other stakeholders.

What does it entail to participate?

Participation in the workshop is voluntary, and you can withdraw at any moment without giving any reason about your decision.

What is RRI-LEADERS?

RRI-LEADERS is a three-year EU-funded project (2021-2023). The project explores a more systematic way of integrating principles such as public engagement, ethical considerations, and promotion of gender equality and diversity into policymaking, creating a systematic framework to responsible policymaking. Different regions, municipalities, and cities participate in this project, including the region of Western Macedonia (Greece), the municipalities Sofia (Bulgaria) and Thalwil (Switzerland), and the city of Sabadell (Catalonia - Spain). Through a co-creation process involving multiple stakeholders and citizens, each of the project partners will analyse and integrate the framework into different policy areas. The stakeholder workshop is one of the elements in this co-creative process.

For more information about RRI-LEADERS, please visit www.rri-leaders.eu

How will my data be used?

During the workshop, we will collect your professional opinion on the realisation of the citizen input. Your contribution will be considered in the last revision of the action plan and be presented to policymakers in September 2023. A synthesis of the outcome from the workshop will be included in the final policy document. We will then inform you about the outcome of the process.

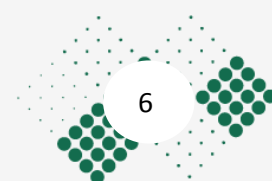
How will my anonymity be guaranteed?

All information collected during the event will be made anonymous upon collection and it will not be possible to associate a particular participant to specific information in the resultant analyses. All personal data will be stored securely on internal servers.

Who organises the Citizen Review Panel?



This project has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 101006439



The workshop is hosted by [territory] in collaboration with [methodological partner]. *[If applicable, provide some information on your organisations].*

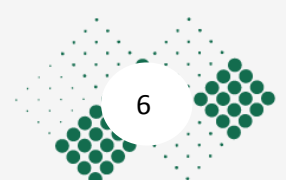
The guidelines for the workshop have been developed by the Danish Board of Technology, an independent foundation committed to deliberative democracy in the form of participatory technology assessment and foresight, knowledge-based public decision-making, parliamentary dialogues on science, technology and innovation, and collaborative governance. For further information, please visit www.tekno.dk.

Who do I contact for further questions?

[Provide information on contact person(s) and Data Management Officer].



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32 Appendix V: Informed consent form (stakeholder workshop)

Informed consent

Informed consent form for participation in the stakeholder workshop as part of the RRI-LEADERS project.

I, _____ (name and surname), agree to participate in the stakeholder workshop voluntarily after I was informed about the objective of the workshop and my role in it.

I understand that:

- I can decide to withdraw from the workshop at any moment without giving any reason about my decision.
- I am aware about the objective of the workshop, and I had the opportunity to ask for additional information.
- My involvement entails participation in group work that aims to obtain my professional opinion on how to transform input by citizens into realisable actions.
- All information I provide will be used confidentially.
- My identity will be kept anonymous, unless I choose otherwise, in any output, produced as a result of my participation in the workshop. Disguised and anonymised extracts from my participation may be quoted in resulting publications.
- The anonymous information collected from my participation as well as the signed consent form will be stored (*location, security arrangements and people who have access as listed in the Data Management Plan*) until project completion. I am entitled to access the information I have provided at any time while it is in storage as specified above.
- I am free to contact (*name and contact details of researchers*) for further clarification, if needed.

During the workshop, pictures will be taken for reporting and communication about the event. Please check the box if you consent to have your pictures taken during the event:

☐ I agree to have my pictures taken.

Participant: (Name & Signature)

Date

[Territorial representative]: (Name & Signature)

Date



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