Collaborative Platform

Moderator Manual

Version : 2023A

Sustainable MED Cities

Sustainable MED Cities - Integrated Tools and Methodologies for Sustainable Mediterranean Cities, is a capitalization project whose main objective is to enhance the capacity of public administration in delivering, implementing and monitoring efficient measures, plans and strategies to improve the sustainability of cities, neighbourhoods and buildings.

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Content of the Booklet

Editor: Andrea Moro (iiSBE Italia R&D), Elena Bazzan (iiSBE Italia R&D), Paola Borgaro (iiSBE Italia R&D)
Editing and layout: Luis Alonso, Valentina Restrepo Rojas, ESDesigner - iiSBE Italia R&D

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The SMC Collaborative Platform

Introduction

Stakeholder participation is a key element in all decision-making processes. It provides private individuals, as well as groups and institutions the opportunity to inform, influence, monitor and evaluate public decisions, processes, and actions. Moreover, it enables the effectiveness of public decisions and encourages transparency, responsibility, accountability, participation, and responsiveness to the needs of the people.

The following document is the user manual for the Sustainable MED Cities Collaborative Platform. An open-source digital tool that seeks to involve all stakeholders in each of the seven key phases of the decision-making process in order to fulfill the sustainability goals as efficiently as possible.

What is a Collaborative Platform?

A collaborative platform is an online digital tool to involve different types of stakeholders in every process where decisions need to be made. It serves governments, social groups, and other institutions to involve different types of stakeholders in all types and stages of participative processes. They are useful for:

- Community and stakeholder engagement.
- Deliberation and collective decision-making.
- Public communication.
- Monitoring and supervision of projects.

Platform Features

The Sustainable MED Cities Collaborative Platform is the open-source online tool to engage with stakeholders in every phase of the decision-making process. It is powered by Adhocracy+, a non-profit association that has been developing concepts and software for digital democracy as a non-profit association since 2009 with the aim to contribute to a modern, transparent, and democratic culture.

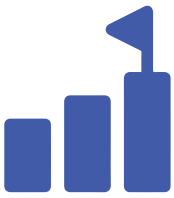
The different functionalities of the platform are:

Brainstorming

A space where participants can submit their own ideas and discuss the ideas of others.

Spatial Brainstorming

Participants are able to submit their own ideas and locate them on a map. They can also discuss the ideas of others.



Idea Challenge

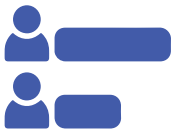
In a first phase, participants can submit their own ideas and discuss the ideas of others. In a second phase, the ideas can be rated (pro/contra).

Spatial Idea Challenge

In a first phase, participants can submit their own ideas and discuss the ideas of others. In a second phase, the ideas can be rated (pro/contra).

Text Review

Participants can discuss the paragraphs of a text that has been added beforehand.



Poll

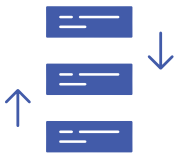
Participants can answer open and multiple-choice questions and comment on the poll.

Participatory Budgeting

Participants can submit their own suggestions, mark them on a map, and add a budget. The ideas of others can be discussed and rated (pro/contra).

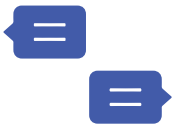
Interactive Event

The participants of an event can ask their questions online. Other participants can support the question. You as the moderator can sort the questions by support or affiliation.



Prioritization

Participants can discuss and rate (pro/contra) previously added ideas and topics. Participants cannot add ideas or topics.



Debate

The participants can lead structured discussions. The contributions can be marked as suggestions, comments, or questions.

How to use the platform

At the present, three projects have been set up on the Sustainable MED Cities Collaborative platform, one for each partner city implementing the SMC decision-making methodology. Each partner city has to manage autonomously the participative process throughout the implementation of the 7 phases included in the SMC decision-making methodology. To do this each city has, as a first thing, to designate a moderator.

Different roles inside the platform:

-Administrator: The administrator has control over the whole collaborative platform as well as the ongoing projects on it. Can create and edit projects and participation tasks and is the one capable of designating moderators.

-Moderator: A moderator user profile can create and edit participation tasks in the specific city project page with previous authorization from the administrator.

-User: Different stakeholders that will take part in the participation tasks available.

Being a moderator

•What is a moderator and what can the moderator do on the platform?

A moderator is a member of the SMC team responsible for enabling the participation activities in the collaborative platform for each phase of the decision-making process.

The platform allows moderators to add modules and publish them on the city project page as well as see and download the results of each participation activity carried out.

To do this, the designated moderator from the SMC team will have to send an email to **SMC@iisbeitalia.org** with the contact information (Full name and email) in order to be assigned as a moderator in the platform. Then, the moderator will have to create an account with Adhocracy+.

Getting Started

1. Open the link of the platform on Google Chrome:

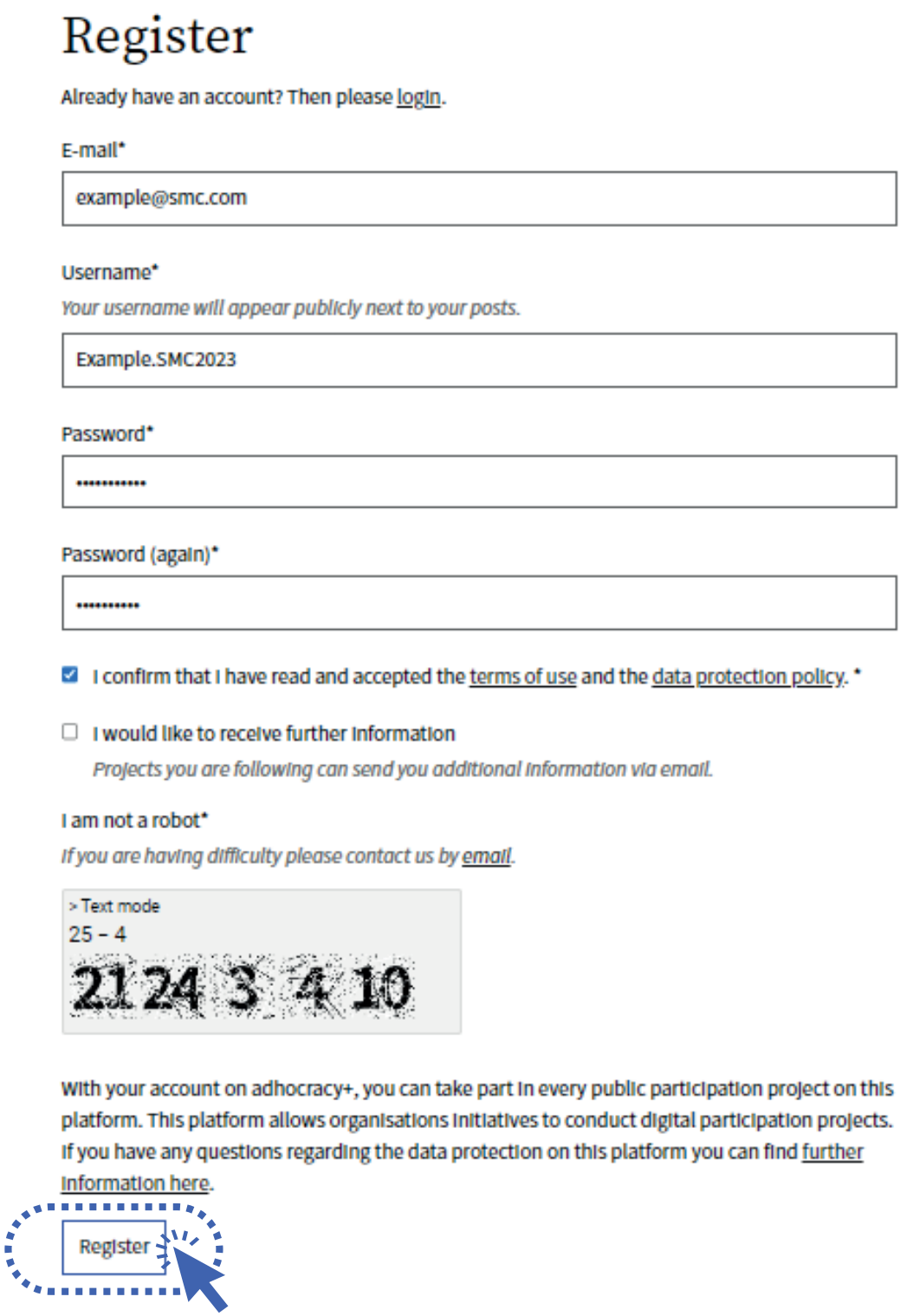
https://adhocracy.plus/sustainable_med_cities/

2. Create an account with Adhocracy+:

Click on the Login/Register button in the top right corner of the platform to go to the registration form.

3. Fill in the Registration form:

In the registration form, you will be asked to enter your e-mail, create a username and set a password. Make sure to complete all the authentication steps before clicking on Register.



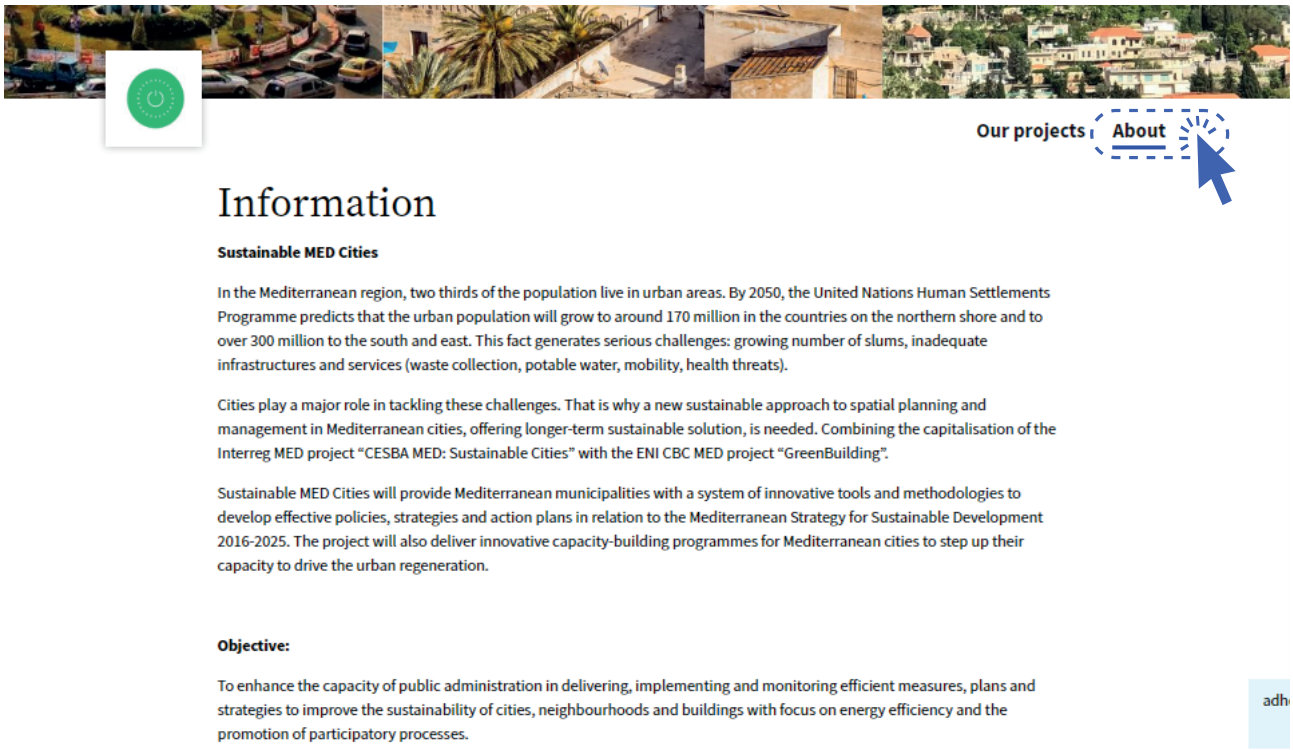
After registering you will have to verify your account by going to your email inbox and confirming your registration on the platform.

The Sustainable MED Cities Homepage

The homepage of the Sustainable MED Cities collaborative platform is where the general information of the project is found in addition to the active projects. The project library contains the project page for each one of the municipalities.

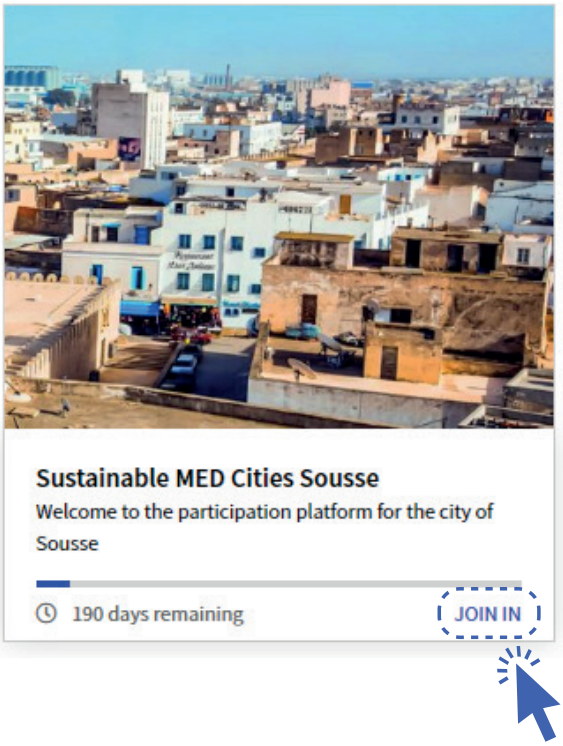
In the **Our projects** tab users can select access to the respective city project page to participate in the active collaboration activities set up by the municipality.

On the other hand, in the **About** tab, users can read more detailed information about the project's objective, aims, benefits and the expected results as well as the different partners involved.



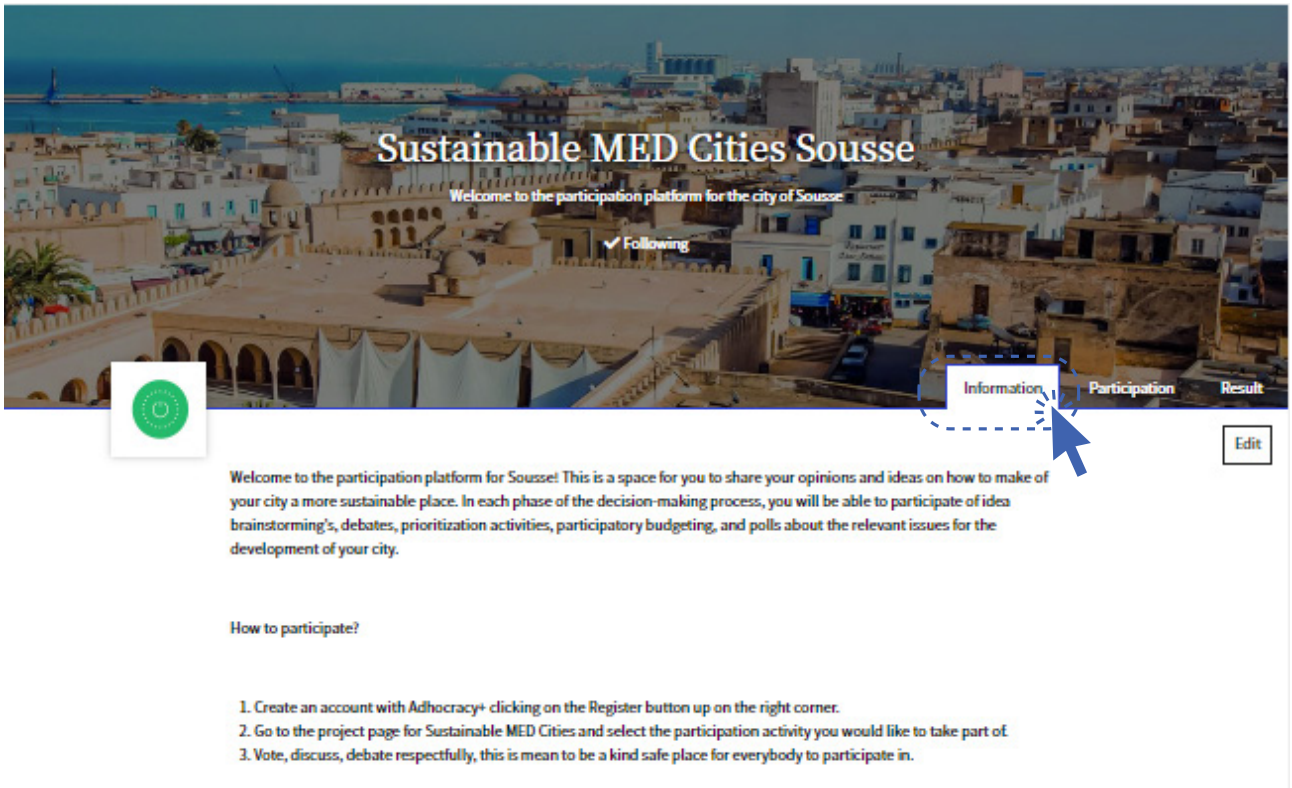
The City Project Page

Select the city project on the homepage of the SMC Collaborative Platform by clicking in **Join In.** It will open the project page for the selected municipality.

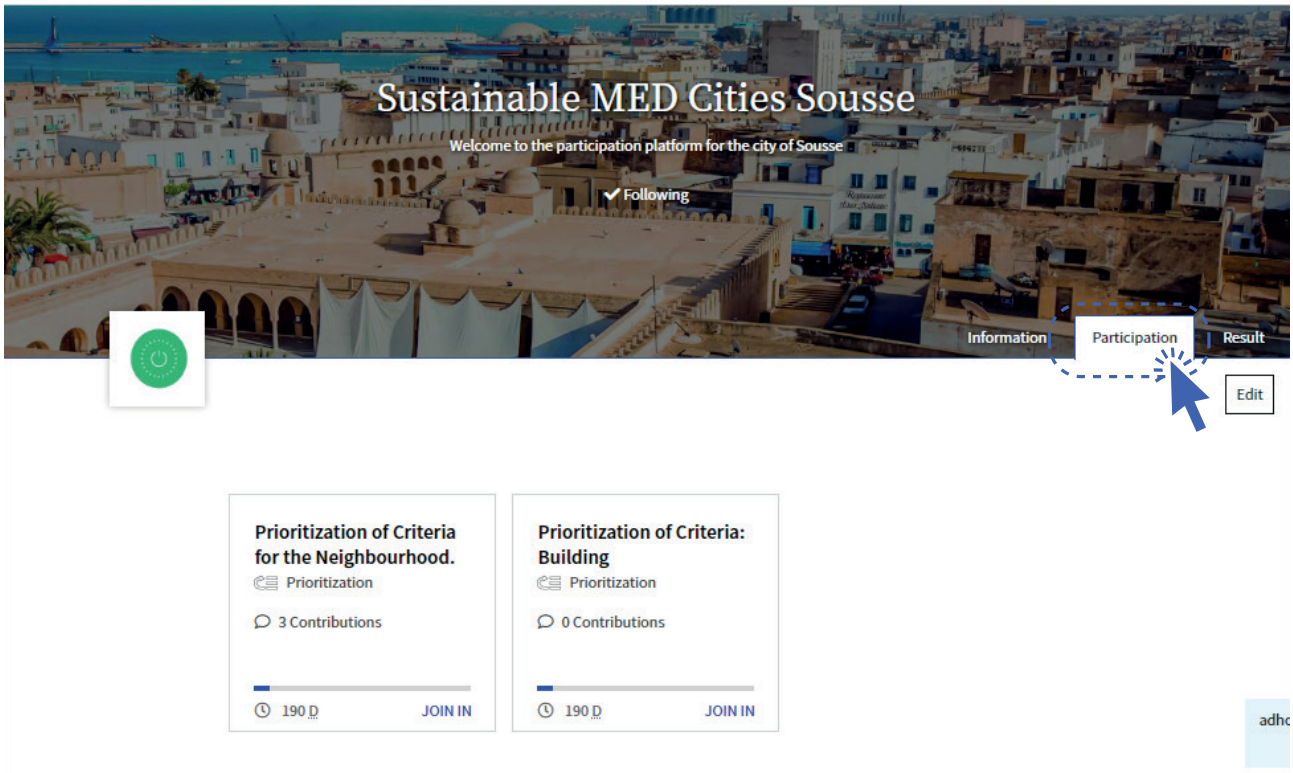


In the City Project Page, you will find three different sections, **Information, Participation and Results.**

In the **Information** section, users will find a short description of the objective and participation tools of the platform as well as how to participate in the present participation tasks.

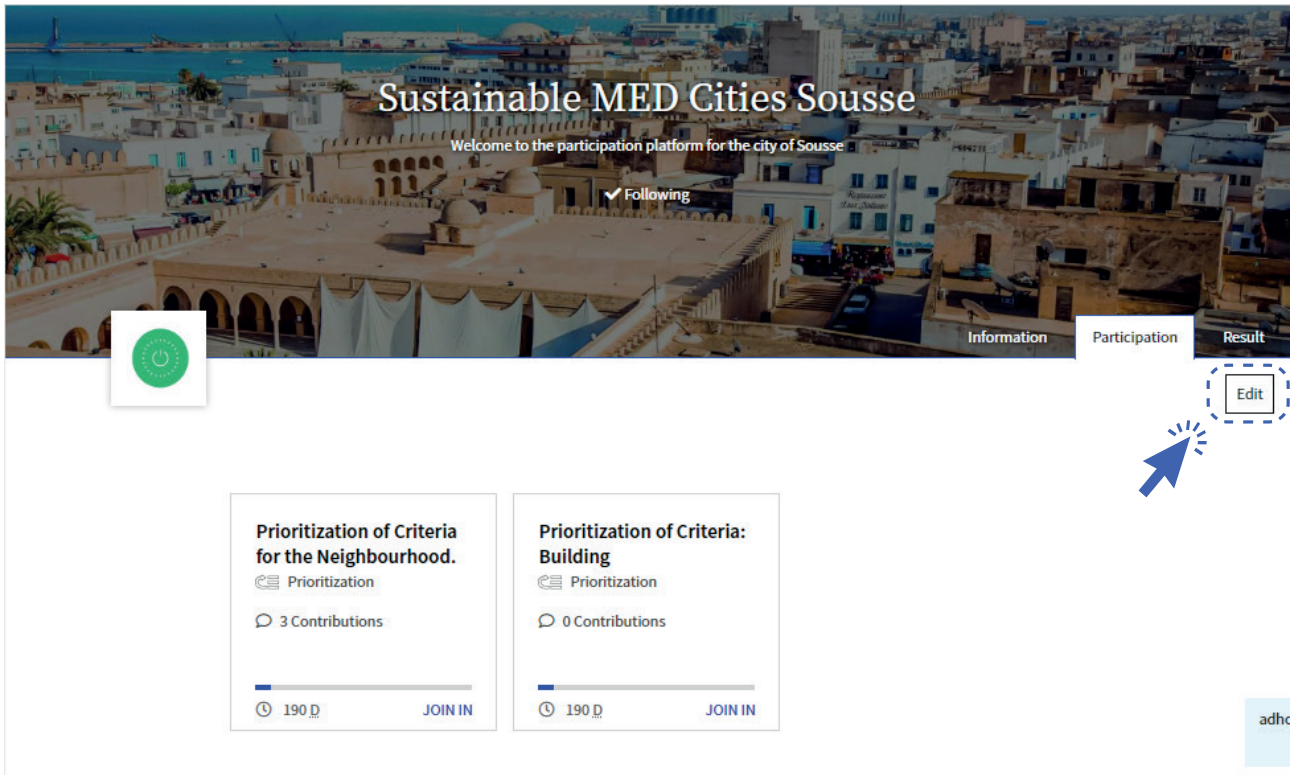


In the **Participation** section users will find all the participation tasks available to take part in.To engage in the activities just click on the Join In button in the task of your interest and follow the instructions.

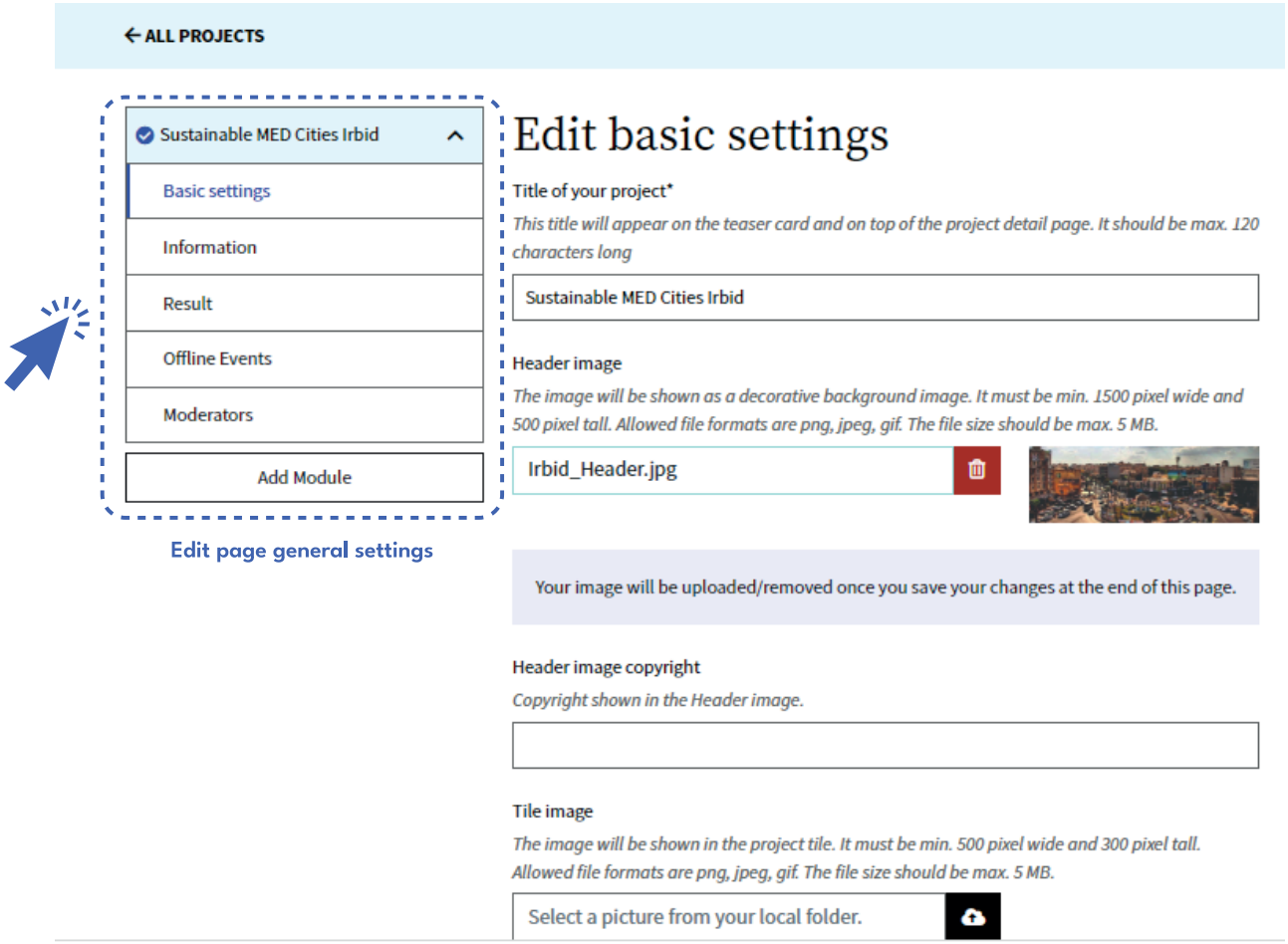


And finally, in the **Results** section administrators and moderators of the collaborative platform will be able to see an overview of the obtained results for each participation task.

As a moderator, you will be able to create new participation tasks as well as edit existing ones by clicking on the **Edit** button on the right part under the Results section.



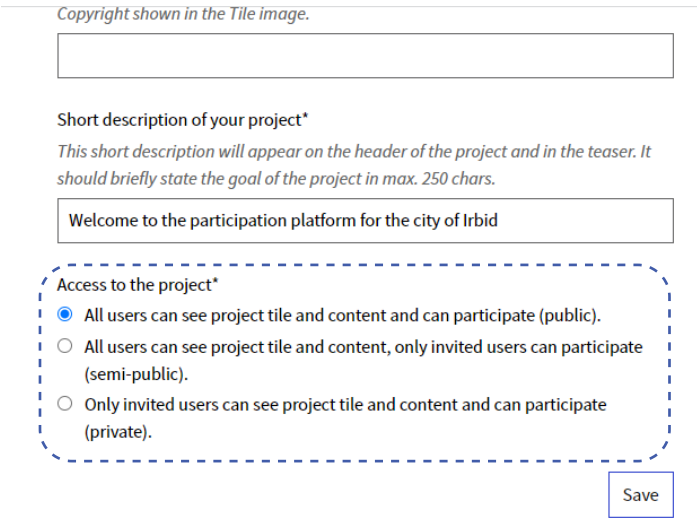
In the city project page, go to the edit section. It will open a general menu to set up the page.



Edit page general settings

Basic settings. Title and description of the project. Graphical identity. Tile and header pictures are uploaded.

In the basic settings page it is possible to manage the accessibility to the project. Throughout the participation moments it is possible to change the settings of the page to public, semi-public or private depending on the objective of each phase based on the type of participants that each phase is expected to have. You can modify this setting anytime.



Information: Short description of the goals of the project and how to participate.

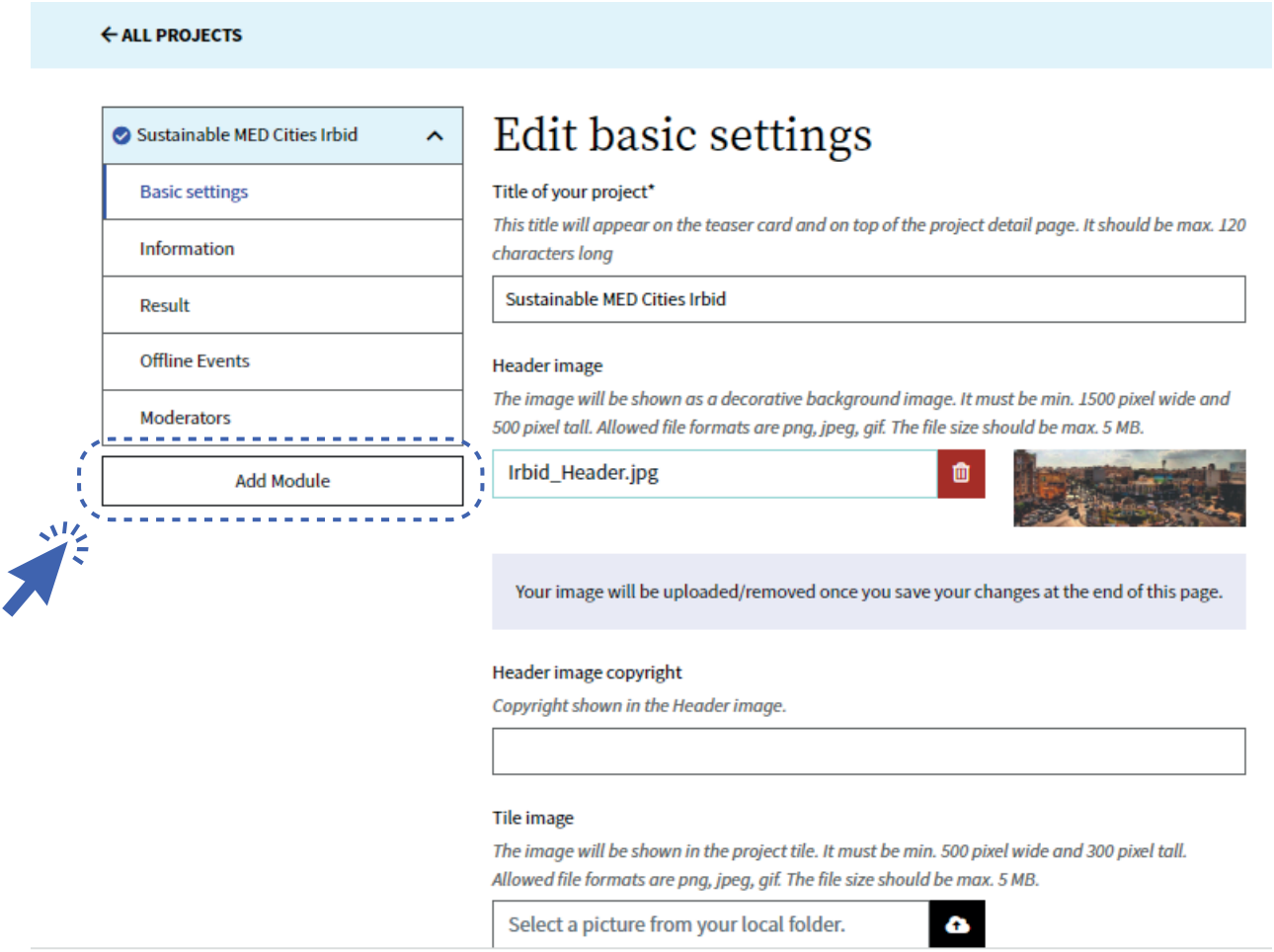
Result: Short description of the expected results of the project.

Offline events: Information of possible events outside the collaborative platform.

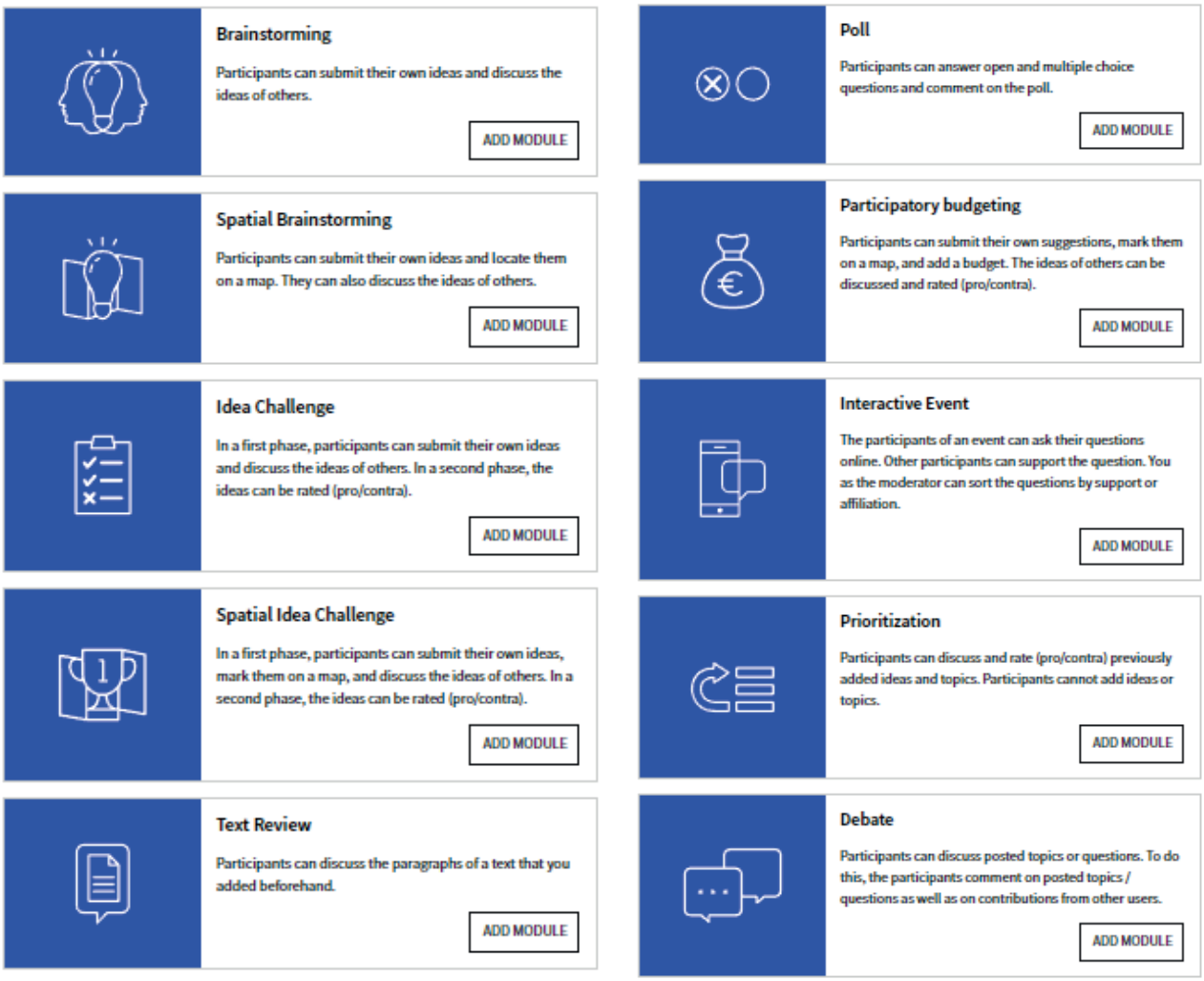
Moderators: Add or remove moderators to the project.

How to add a new module to the project?

Under the edit page general settings there is the **Add Module** tab, click on it to create a new participation task.



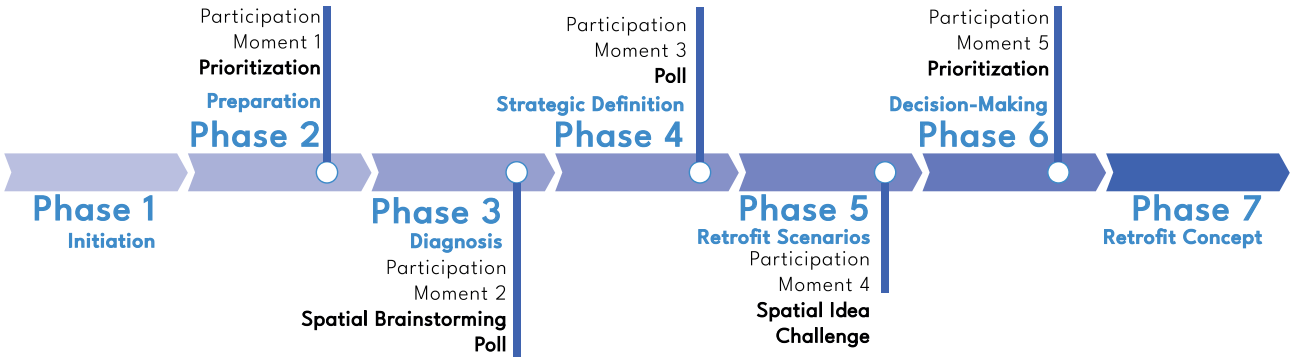
It will display the list of all the different participation modules available. After selecting the specific task, you would like to carry on with, click on **Add Module** to add it to the project.



The SMC Collaborative Platform and the decision-making process

In the following section, we will go through each of the seven phases of the decision-making process stressing what type of participatory task should be developed in order to involve the different stakeholders in the most efficient way possible and achieve each phase's objective. Moreover, an explanation of how to create and edit each type of participatory task step by step as a moderator to finally publish it will be given.

Timeline of the participation moments:



Participation moment # 1 Prioritization of categories

Phase 2: Preparation

The first task on this phase consists in the contextualisation of the SBTool and SNTool generic frameworks (transnational version) to the local conditions and priorities.
In this first participation moment it is recommended to carry out the selection of criteria and the weight assignment through a participatory approach, involving the key stakeholders identified in phase 1.

Task: Prioritization

What type of stakeholders to involve?

- The SMC team
- Municipality's departments and other local authorities (e.g., Building Control,
- Health & Safety , Green Areas, Mobility Management, Urban Planning).
- Experts (e.g., urban planners, energy managers, landscape designers, etc.)

In this phase it is recommended to set the platform in the semi-public option in order for people to see the task but only the selected stakeholders can participate

How to create a prioritization task in the sustainable MED Cities Collaborative Platform?

1. In the **Edit** section of the City Project Page, add a new module:

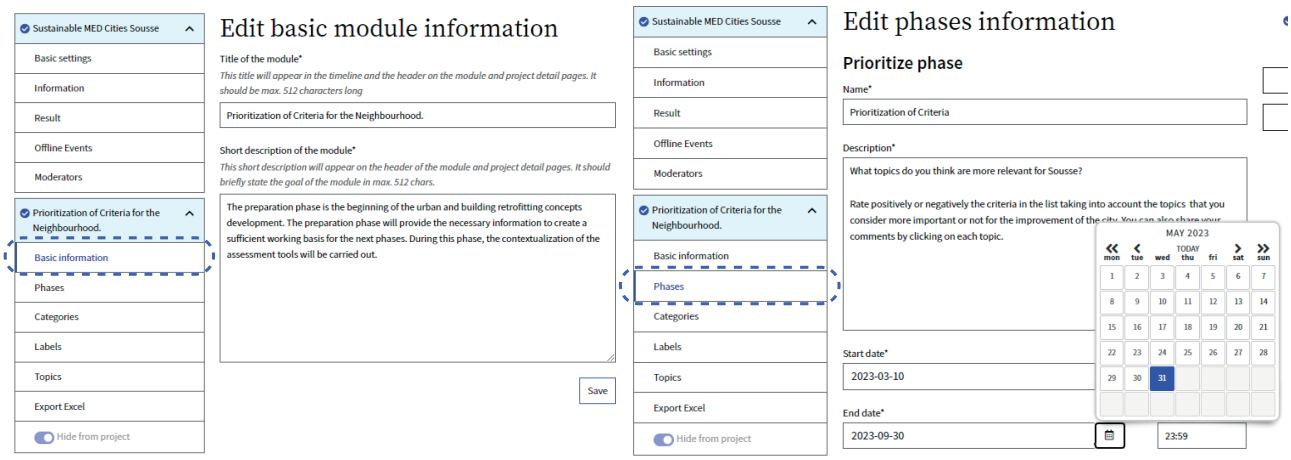
2. Select the option called **Prioritization.**

It will open a new menu to set up the participation task.

3. Fill the different sections as follows:

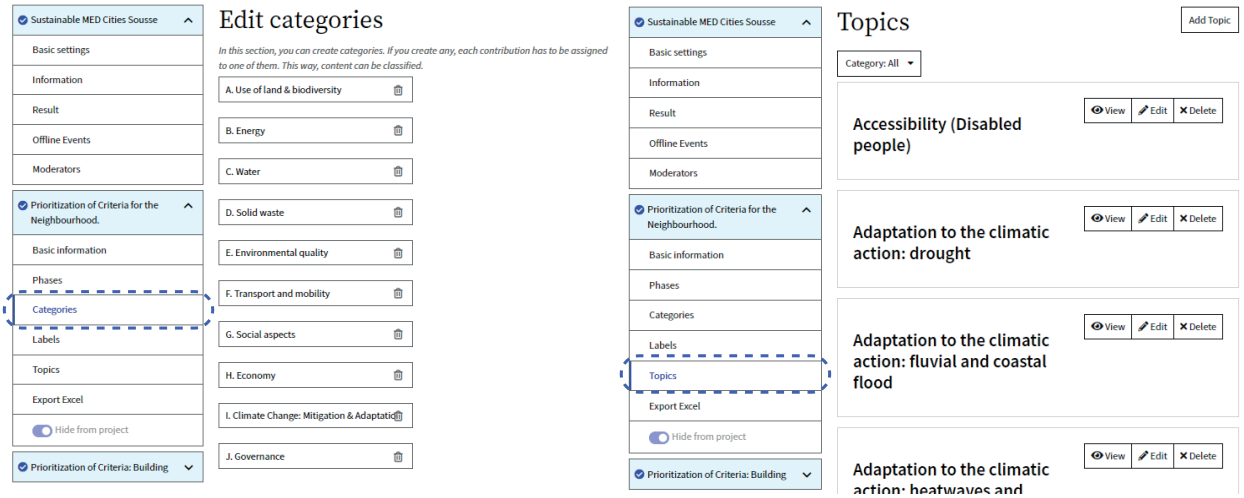
Basic Information

Phases



Categories

Topics



Fill the information in every section:

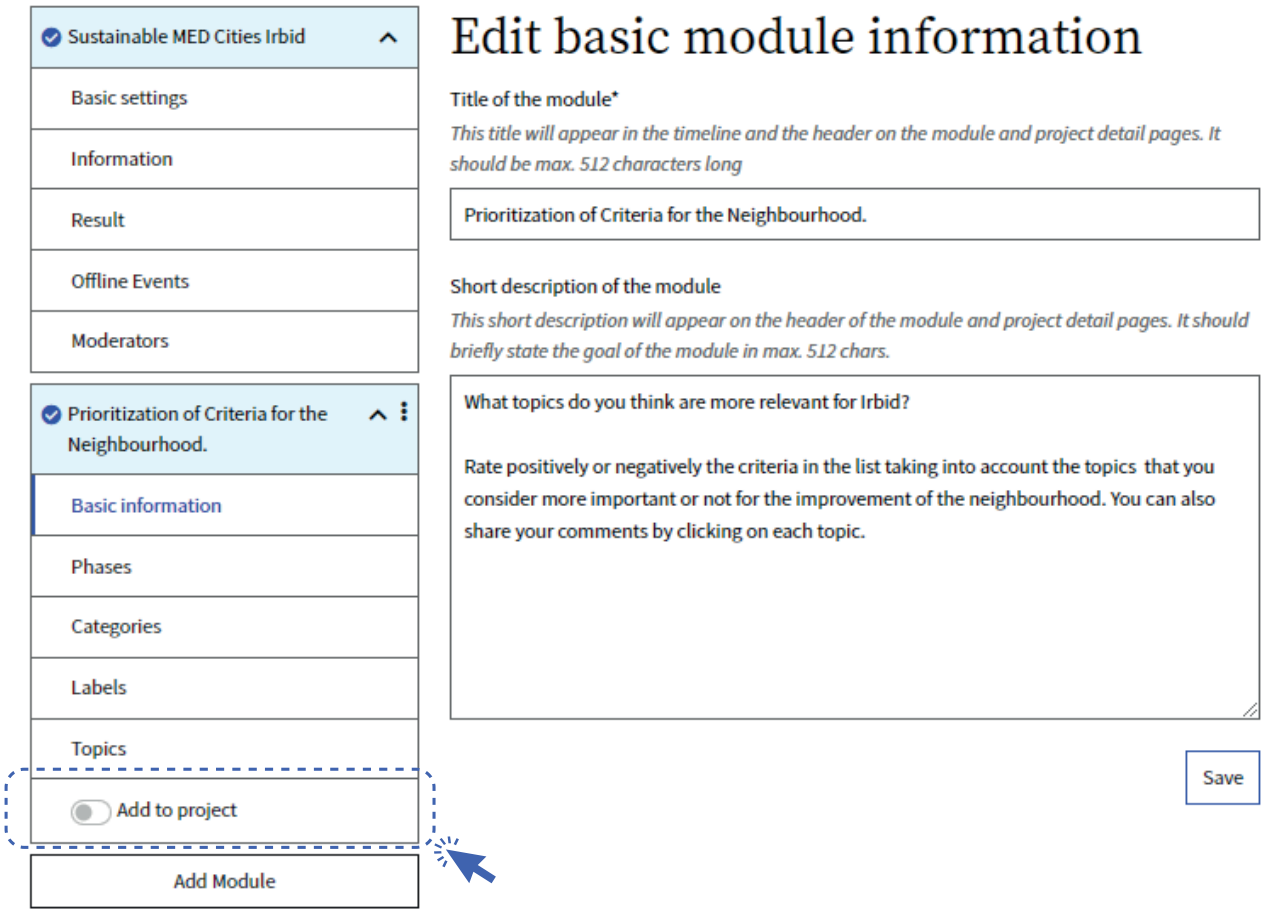
Basic information: In this section the title and description of the participation task is specified.

Phases: Description of the Decision-Making process phase the participation task belongs to. It is important to set the start and finalisation dates.

Categories: In the Categories section all the SNTool and SBTools Issues were identified in order to classify the feedback of users on the topics (SNTool and SBTool Categories) in a better way.

Topics: Corresponds to the section where all the SNTool and SBTool Categories will be shown. This section contains the information that the users will see in the participation task and will share their opinion about.

4. After all the information has been filled click on **Add to Project.**



Participation moment # 2.1 Analysis of the urban area and the building

Phase 3: Diagnosis

The diagnosis phase consists in the evaluation of the current condition and relative level of sustainability of the urban area and buildings using the contextualised versions of SNTool and SBTool. The aim of the diagnosis phase is to analyse the current state of the buildings and the urban area, trying to identify their strengths and weaknesses.

Task: Spatial brainstorming

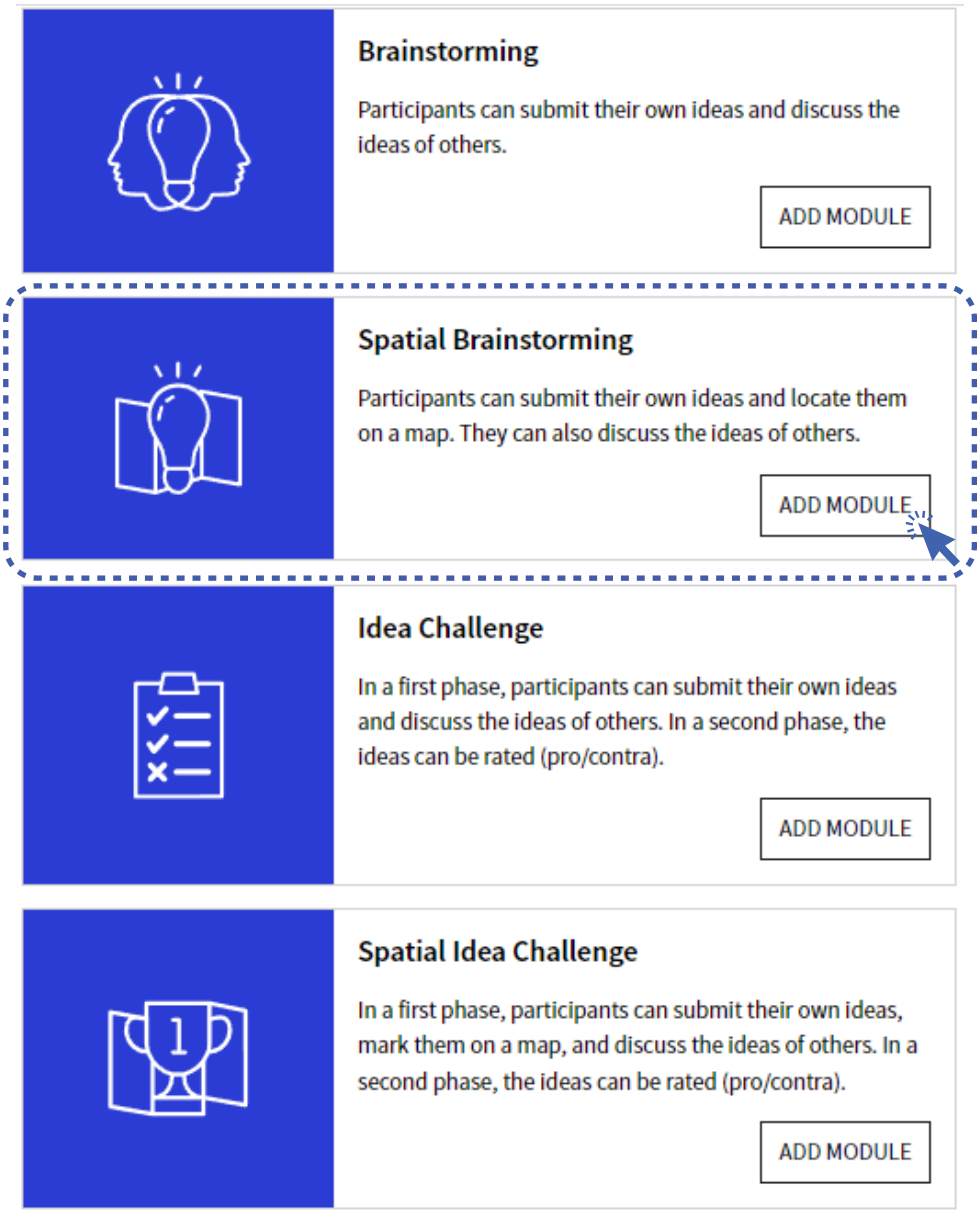
What type of stakeholders to involve?

- Municipality's departments and other local authorities (e.g., Building Control,
- Health & Safety , Green Areas, Mobility Management, Urban Planning).
- Experts (e.g., urban planners, energy managers, landscape designers, etc.)
- Utilities and service providers (e.g., energy, water, solid waste, etc.)
- Public Interest Groups (e.g., neighbours, residents' associations, business as asociations, sports and other local clubs and societies, neighbourhood watch, NGO's, politicians)
- External Parties (e.g., banks, funding agencies)

How to create a Spatial Branstorming task in the sustainable MED Cities Collaborative Platform?

1. In the **Edit** section of the City Project Page, add a new module:

2. Select the option called **Spatial Brainstorming.**

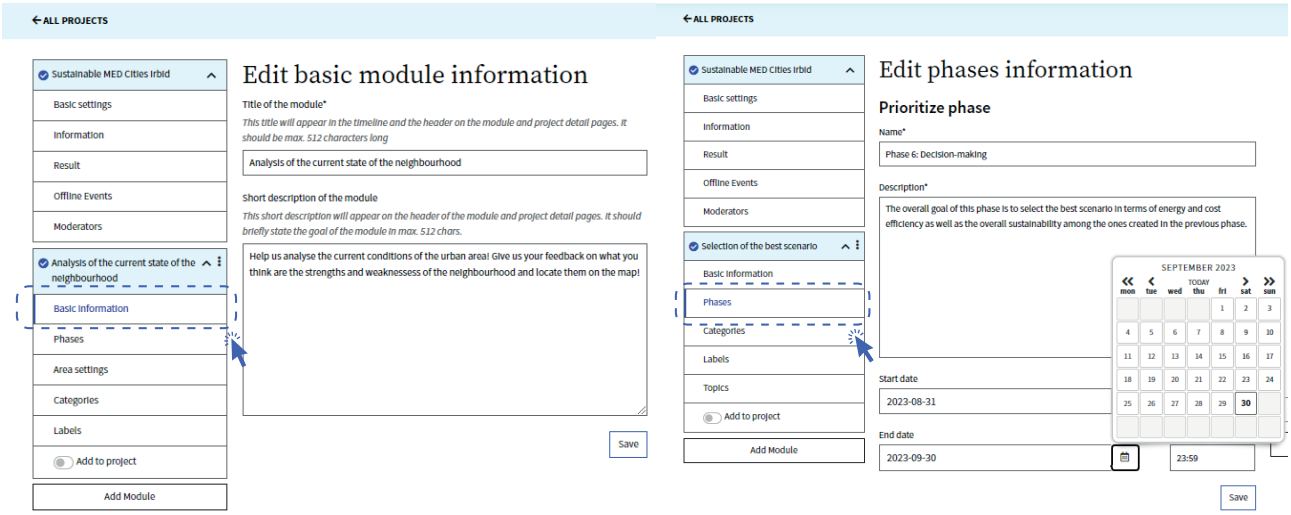


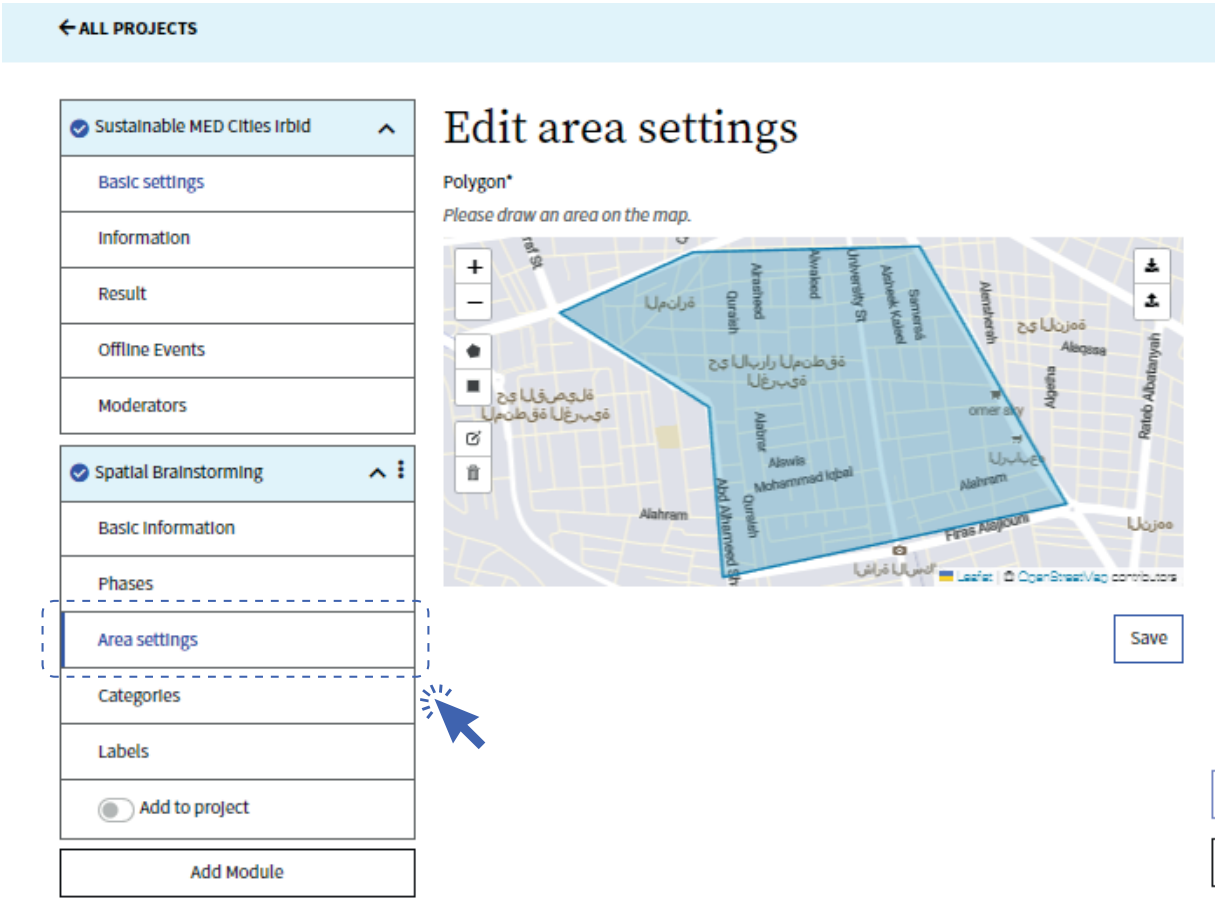
It will open a new menu to set up the participation task.

3. Fill the different sections as follows:

Basic Information

Phase



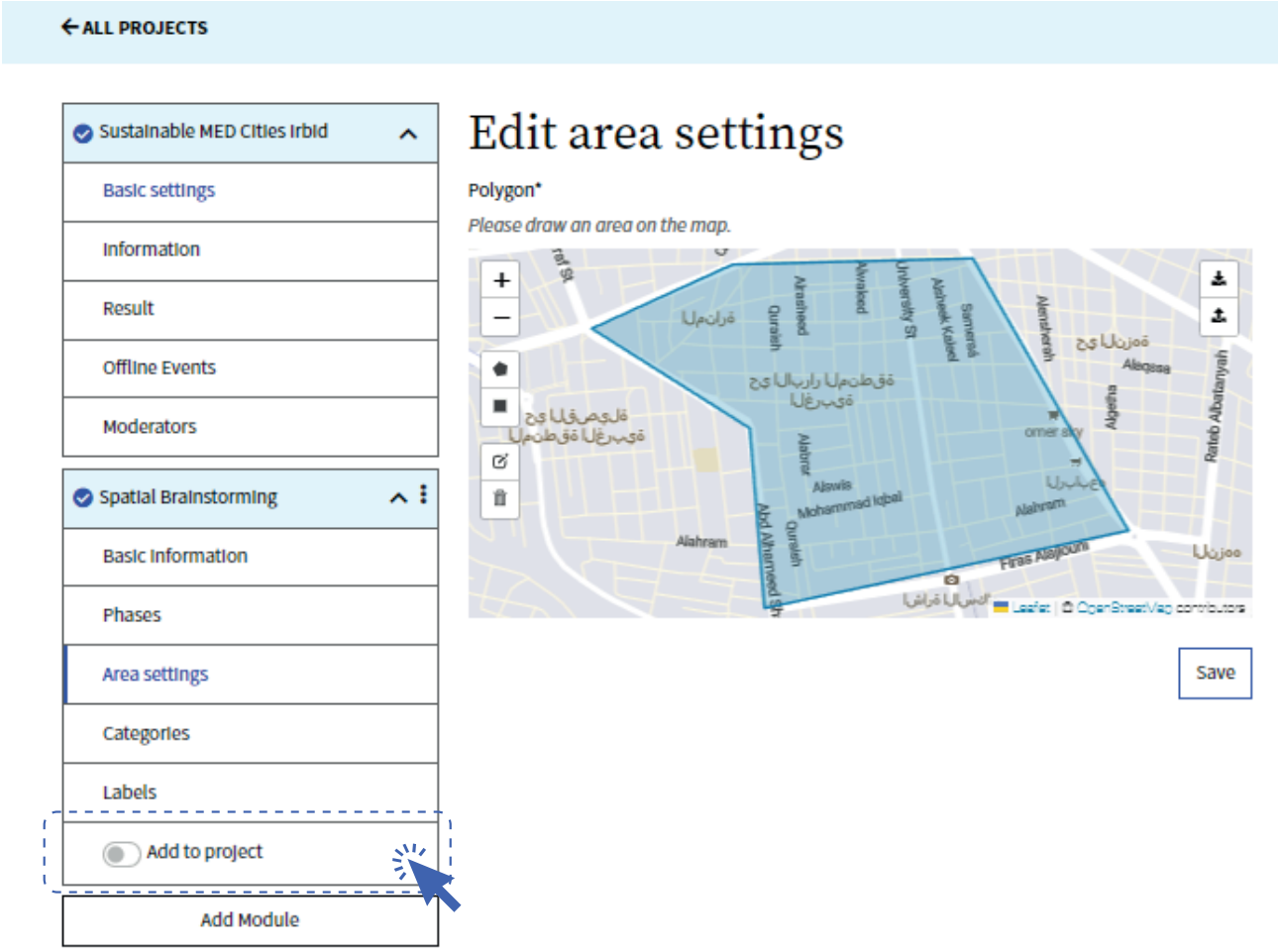


Basic information: In this section the title and description of the participation task is specified.

Phases: Description of the Decision-Making process phase the participation task belongs to. It is important to set the start and finalisation dates.

Area settings: In this section the moderator identifies the boundary of the urban area by using the pentagon or square tool.

4. After all the information has been filled click on **Add to Project.**



Participation moment # 2.2 Validation of the sustainability assessment

In this second participatory moment within the phase 3 of the decision-making process, it is important to collect the point of view of people regarding the current situation of the neighbourhood and building in order to make a contrast between the results of the sustainability assessment using the tools and the local's perspective.

Task: Poll

What type of stakeholders to involve?

- Municipality's departments and other local authorities (e.g., Building Control,
- Health & Safety , Green Areas, Mobility Management, Urban Planning).
- Experts (e.g., urban planners, energy managers, landscape designers, etc.)
- Utilities and service providers (e.g., energy, water, solid waste, etc.)
- Public Interest Groups (e.g., neighbours, residents' associations, business as asociations, sports and other local clubs and societies, neighbourhood watch, NGO's, politicians)
- External Parties (e.g., banks, funding agencies)

How to create a Poll task in the sustainable MED Cities Collaborative Platform?

1. In the **Edit** section of the City Project Page, add a new module:

2. Select the option called **Poll.**

It will open a new menu to set up the participation task.

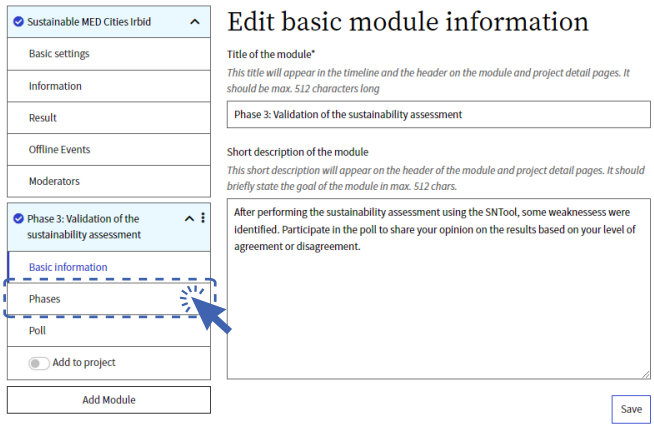
3. Fill the different sections as follows:

Basic information: In this section the title and description of the participation task is specified.

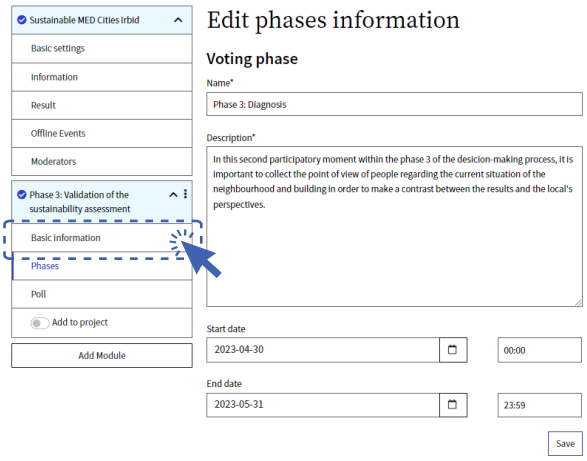
Phases: Description of the Decision-Making process phase the participation task belongs to. It is important to set the start and finalisation dates.

Poll: In this section is where the questions of the poll are created. It allows you to write the question and write the possible answer options. Add as many answers as possible by clicking on **+New answer.**

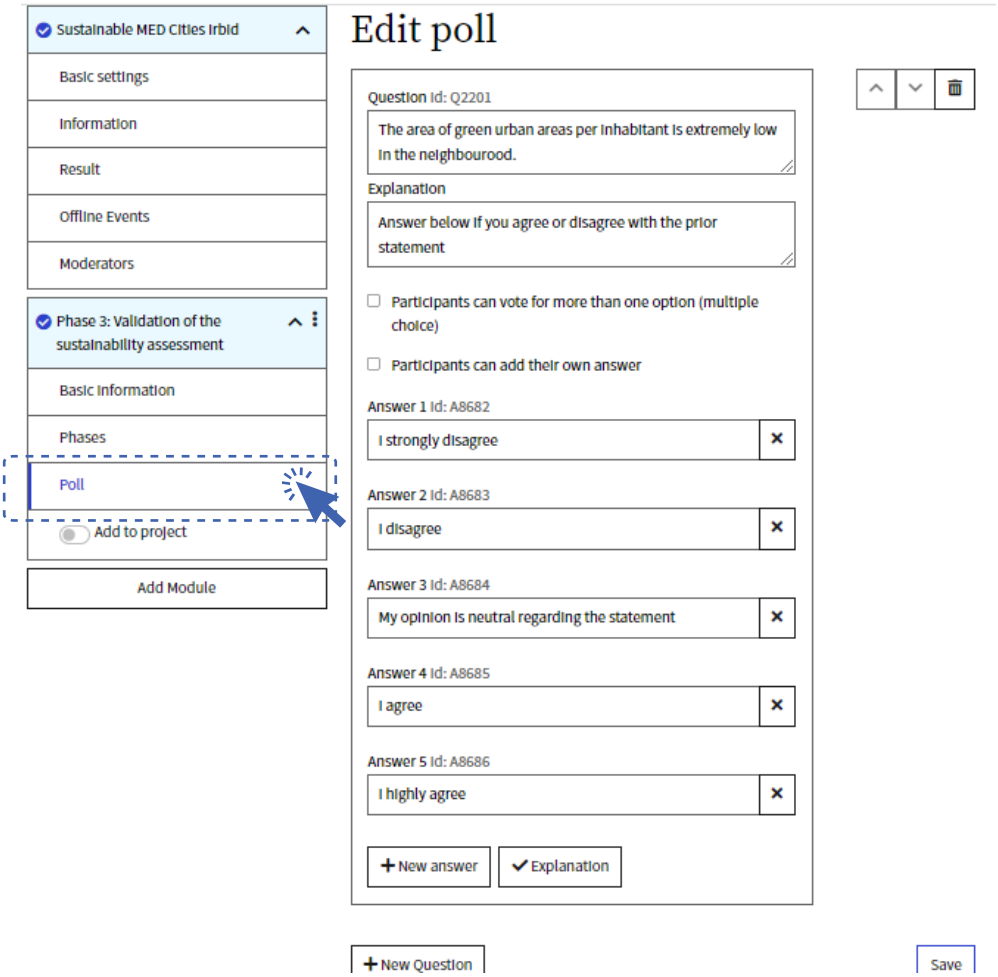
Basic information



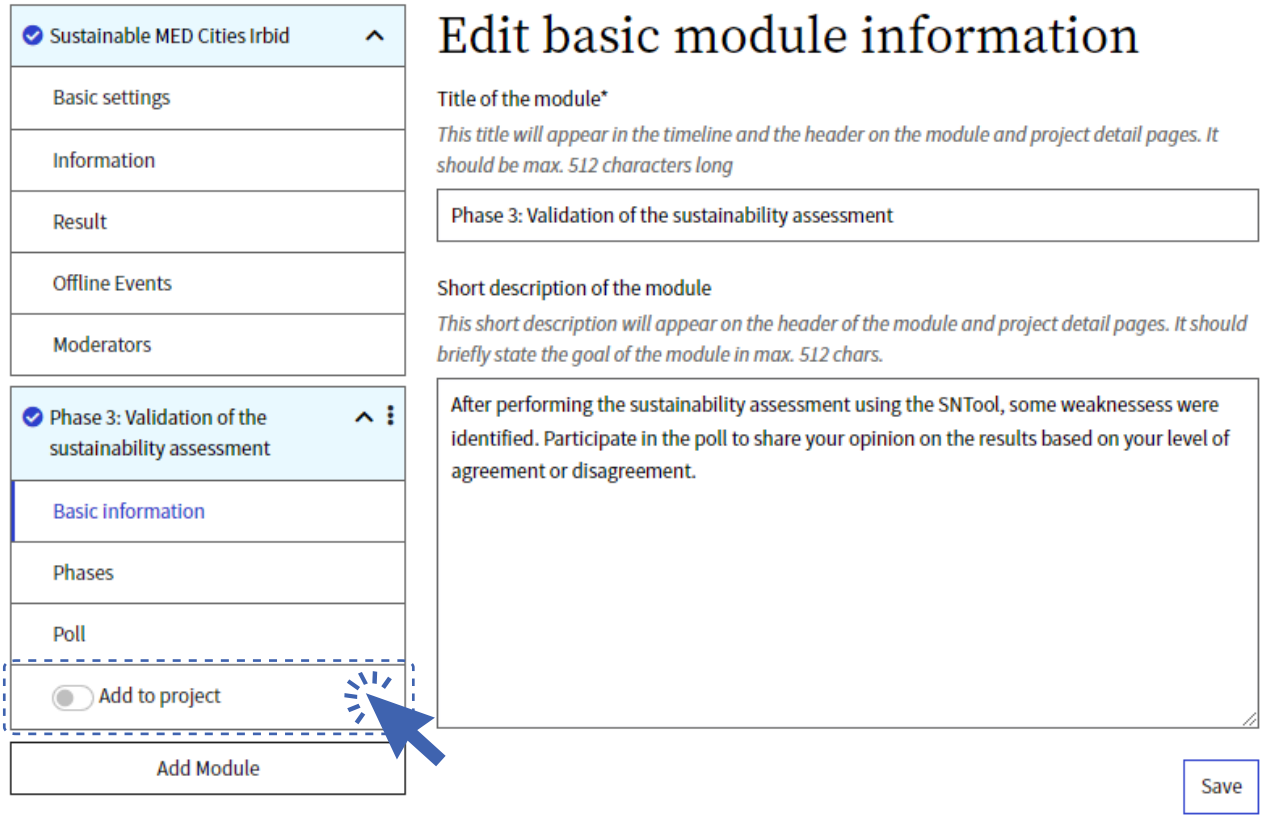
Phases



Poll



4. After all the information has been filled click on **Add to Project.**



Participation moment # 3 Identification of the main targets for the retrofitting stage

Phase 4 Strategic definition

The main goal of this phase is the definition of the main framework conditions for the later retrofitting design based on the results of the diagnosis phase. The strategic definition therefore serves as pointer for further design phases by setting meaningful targets for the retrofitting project and by identifying the main constraints and restrictions which may limit the retrofitting design.
Indeed, this phase allows both to build a shared vision to support Decision-Making and to drive improvement in performance by setting a baseline from which to assess change.

Task Poll

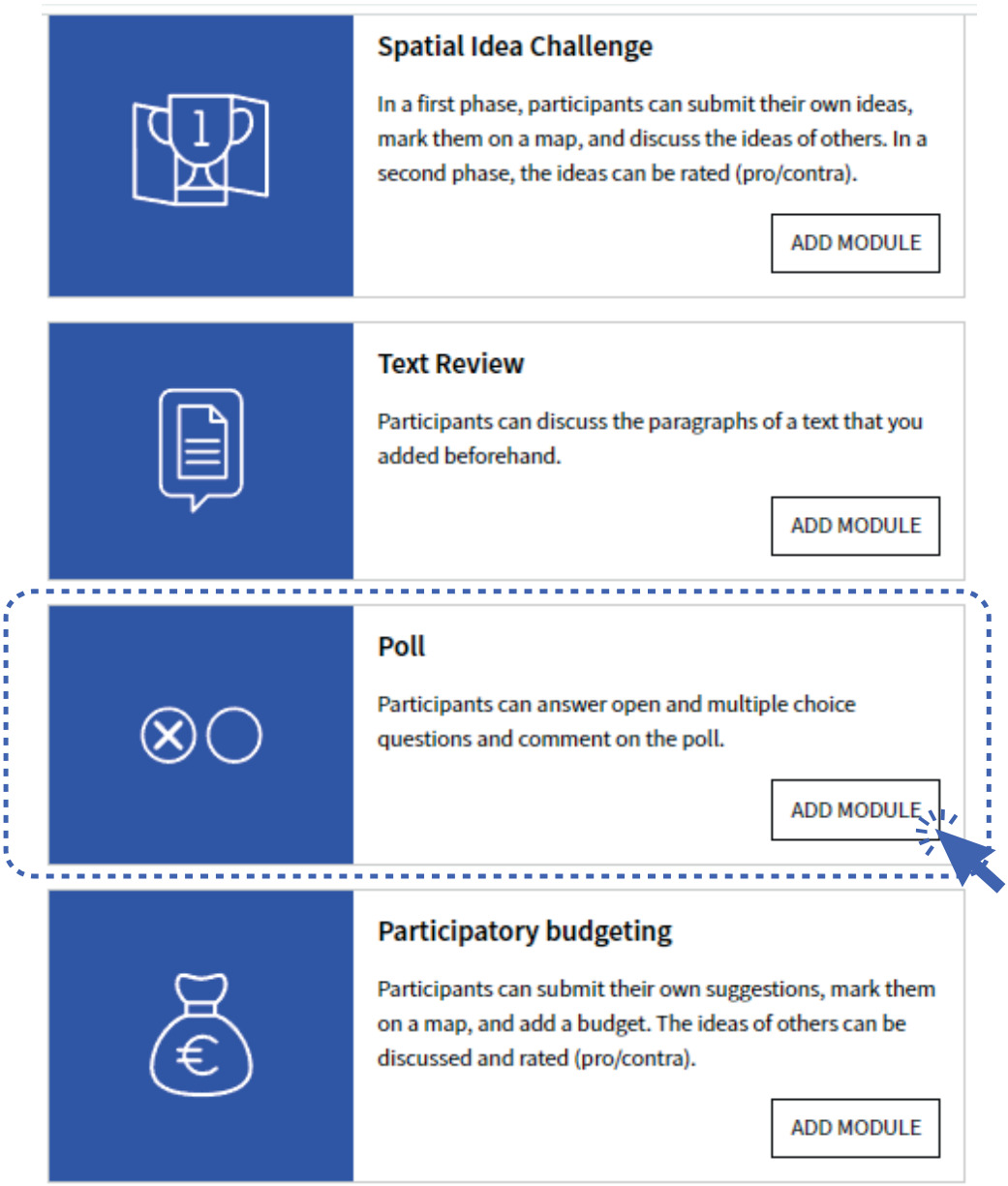
What type of stakeholders to involve?

- The SMC team
- Municipality's departments and other local authorities (e.g., Building Control, Health & Safety,
- Green Areas, Mobility Management, Urban Planning).
- Experts (e.g., urban planners, energy managers, landscape designers, etc.)

How to create a Poll task in the sustainable MED Cities Collaborative Platform?

1. In the **Edit** section of the City Project Page, add a new module:

2. Select the option called **Poll.**



It will open a new menu to set up the participation task.

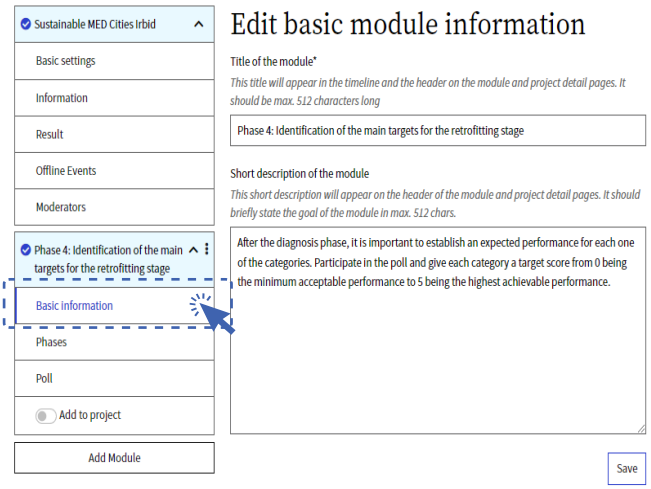
3. Fill the different sections as follows:

Basic information: In this section the title and description of the participation task is specified.

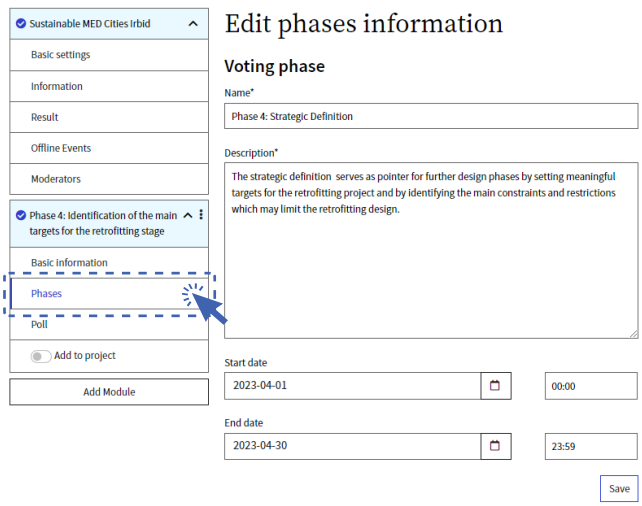
Phases: Description of the Decision-Making process phase the participation task belongs to. It is important to set the start and finalisation dates.

Poll: In this section is where the questions of the poll are created. It allows you to write the question and write the possible answer options. Add as many answers as possible by clicking on **+New answer.**

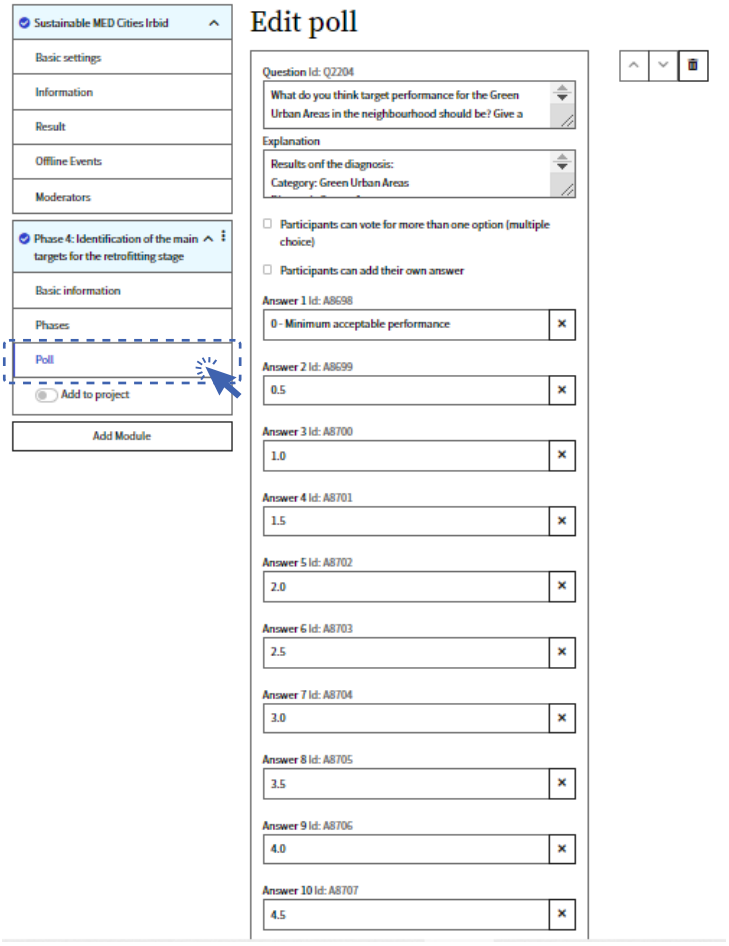
Basic Settings



Phases



Poll



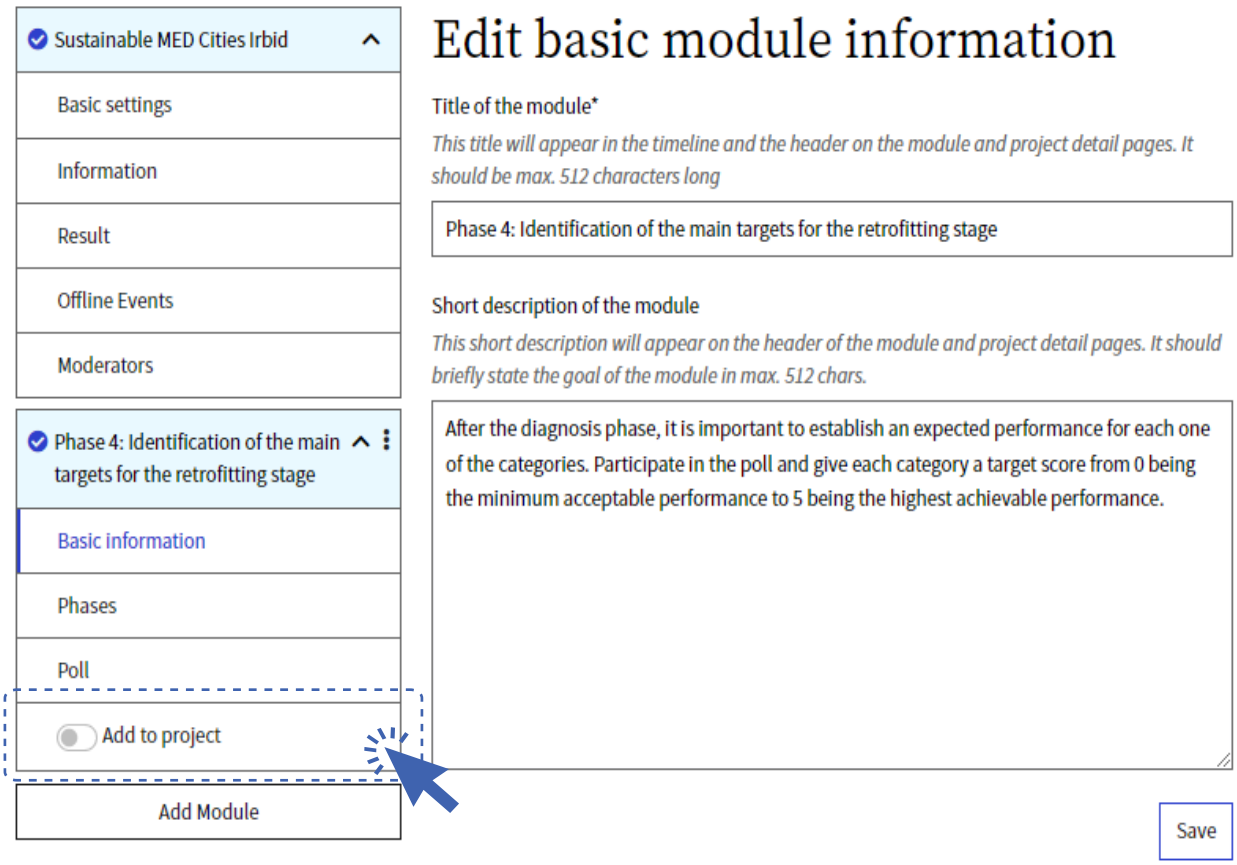
The objective of this phase is to ask the stakeholders their opinion on what target score should each category has based on the previous diagnosis results.
The target scores are the same score scale used for the Diagnosis score stage. The only difference is that the scale starts from 0 being the minimum acceptable performance.

Target score scale:

0- Minimum acceptable performance
1.0
1.5
2.0
2.5
3.0
3.5
4.0
4.5
5.0. Maximum acceptable performance

Note: In the Explanation section of the edit page for the poll is where the diagnosis score as well as the weight is shown for each category in order for people to have all the information obtained in the diagnosis phase and assign an appropiate target score.

4. After all the information has been filled click on **Add to Project.**



Participation moment # 4 Development of alternative retrofitting scenarios

Phase 5: Retrofit scenarios

In this phase, the SMC team develops possible alternatives for retrofitting scenarios to be applied to the urban area and the buildings that fulfill the defined sustainability targets in the Strategic Definition phase.
As is often the case, the team might come up with a number of different scenarios, all of which fulfill the sustainability targets.
In this phase, the participation moment is important so that the stakeholders can submit their ideas and help the SMC team structure the different scenarios.

Task: Spatial idea challenge

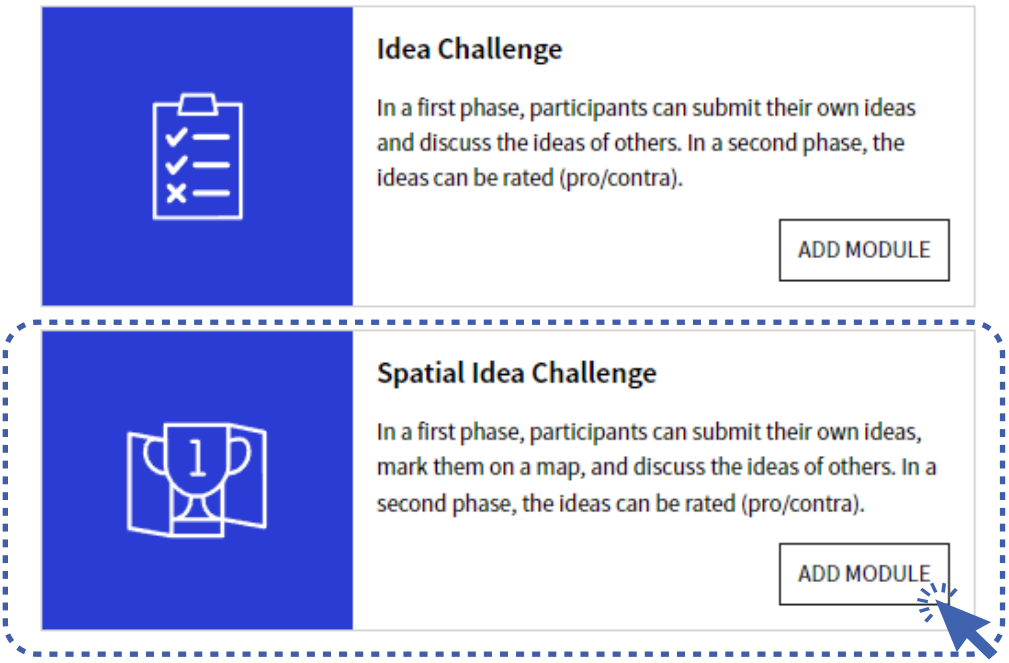
What type of stakeholders to involve?

•Municipality's departments and other local authorities (e.g., Building Control,
•Health & Safety , Green Areas, Mobility Management, Urban Planning).
•Experts (e.g., urban planners, energy managers, landscape designers, etc.)
•Utilities and service providers (e.g., energy, water, solid waste, etc.)
•Public Interest Groups (e.g., neighbours, residents' associations, business as asociations, sports and other local clubs and societies, neighbourhood watch, NGO's, politicians)
•External Parties (e.g., banks, funding agencies)

How to create a Spatial Idea Challenge task in the sustainable MED Cities Collaborative Platform?

1. In the **Edit** section of the City Project Page, add a new module:

2. Select the option called **Spatial idea challenge.**

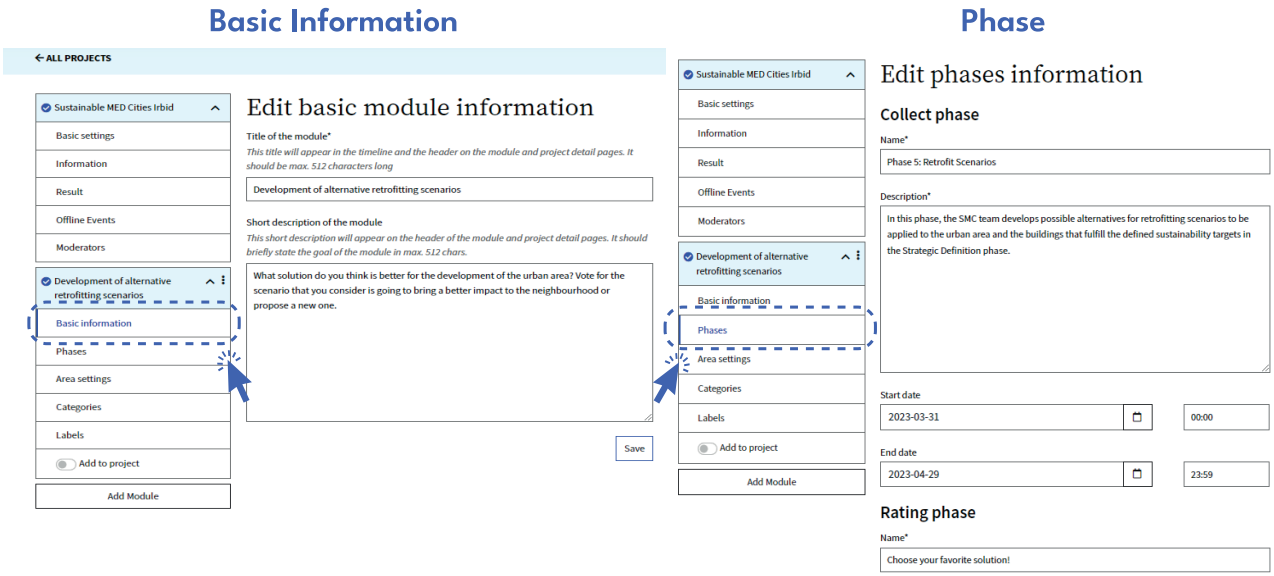


It will open a new menu to set up the participation task. Fill the different sections as follows.

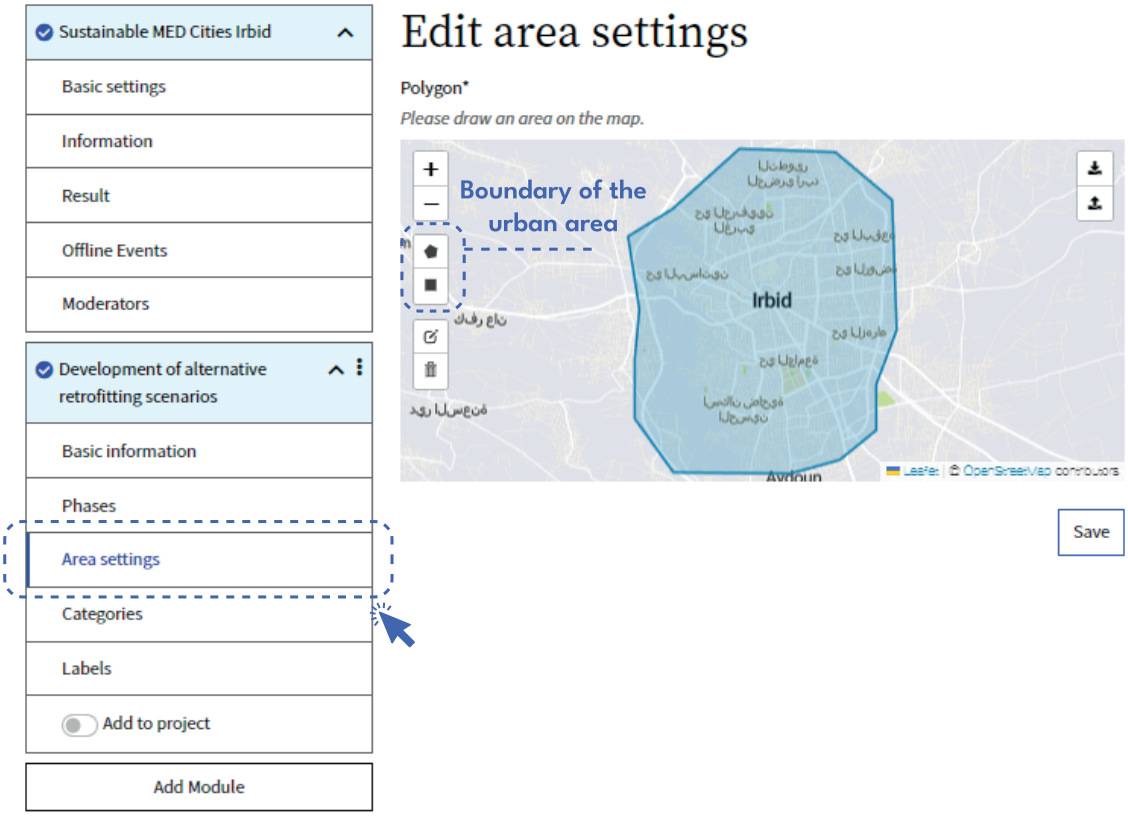
Basic information: In this section the title and description of the participation task is specified.

Phases: Description of the Decision-Making process phase the participation task belongs to. It is important to set the start and finalisation dates. This type of task is divided into 2 moments. The moment where people submit their ideas and a second moment where users rank them.

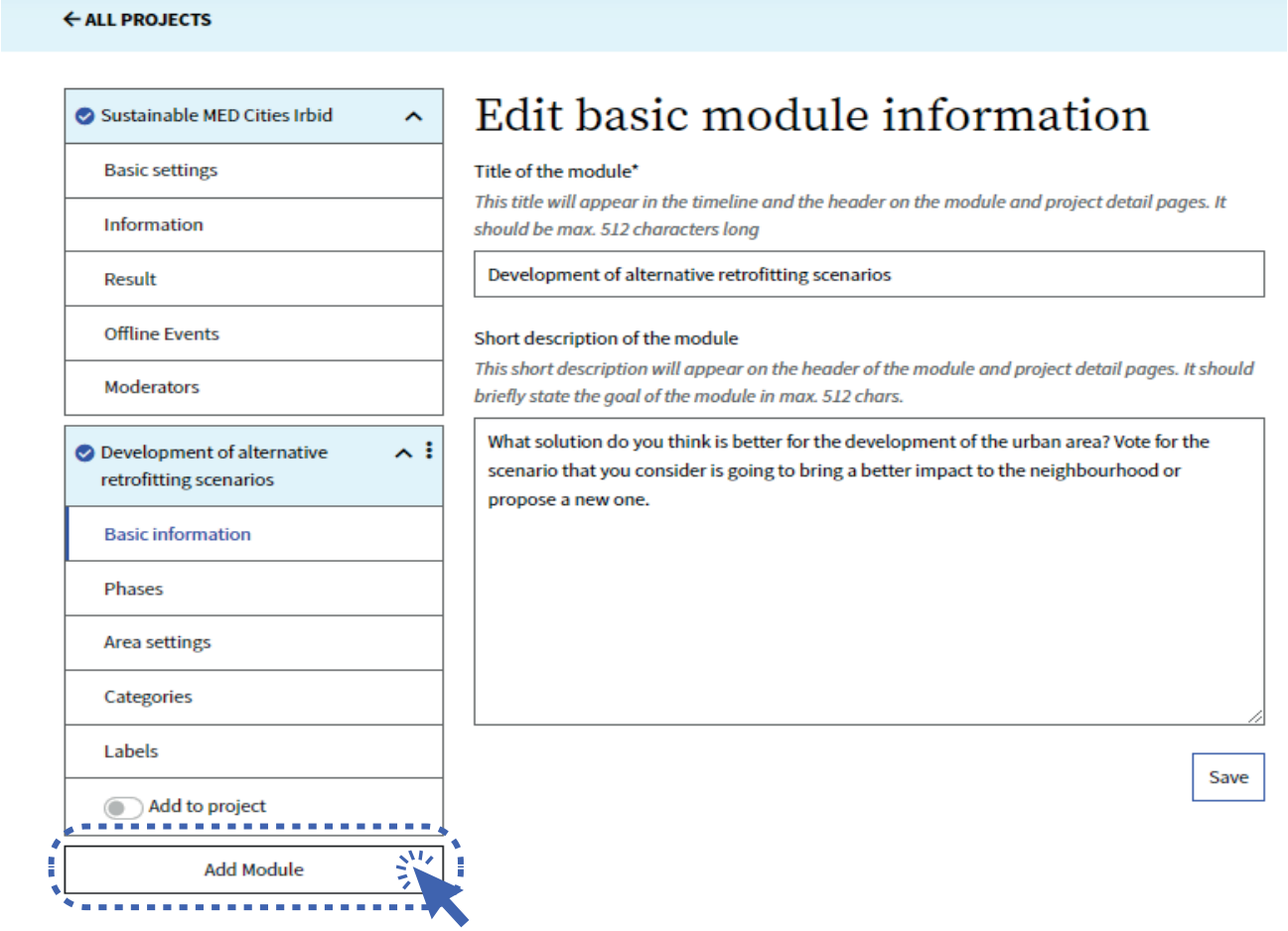
Area settings: In this section the moderator identifies the boundary of the urban area by using the pentagon or square tool.



Area Settings



After all the information has been filled and the area identified click on **Add to Project.**



Participation moment # 5 Selection of the best scenario

Phase 6: Decision-making

The overall goal of this phase is to select the best scenario in terms of energy and cost efficiency as well as the overall sustainability among the ones created in the previous phase. This phase is articulated in two main steps represented by the assessment of the scenarios and their ranking process.

Only the scenarios which have reached the sustainability targets can be compared in the Decision-Making phase.

The selected best scenario will then be developed in a retrofitting concept in the next phase. Occupant and user participation becomes critical once more at the Decision-Making stage, where a selection is made from among the scenarios previously generated. In all cases, feedback from occupants and users should be invited at this point, before a final decision is made on the best scenario.

Task: Prioritization

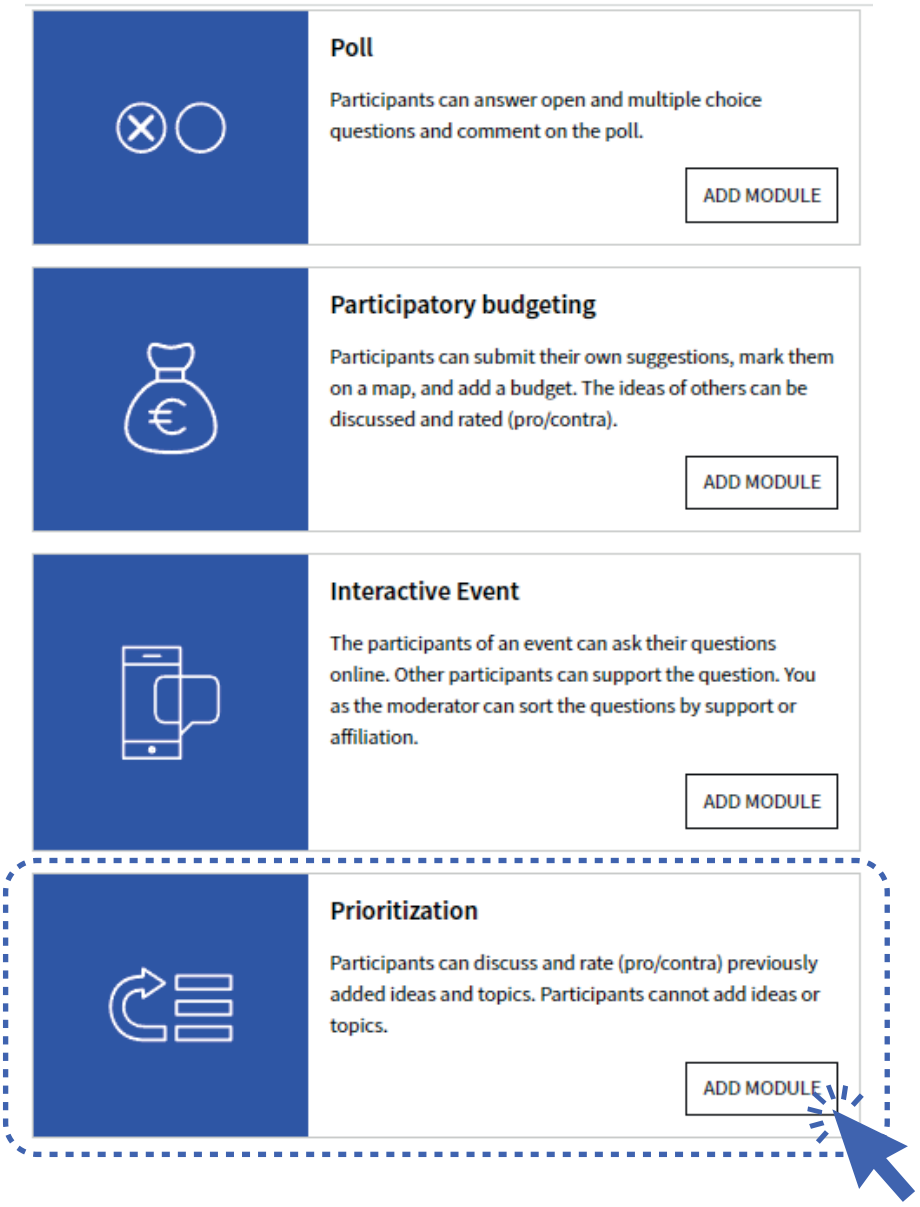
What type of stakeholders to involve?

•Municipality's departments and other local authorities (e.g., Building Control,
•Health & Safety , Green Areas, Mobility Management, Urban Planning).
•Experts (e.g., urban planners, energy managers, landscape designers, etc.)
•Utilities and service providers (e.g., energy, water, solid waste, etc.)
•Public Interest Groups (e.g., neighbours, residents' associations, business as associations, sports and other local clubs and societies, neighbourhood watch, NGO's, politicians)
•External Parties (e.g., banks, funding agencies)

How to create a Prioritization task in the sustainable MED Cities Collaborative Platform?

1. In the Edit section of the City Project Page, add a new module:

2. Select the option called Prioritization.

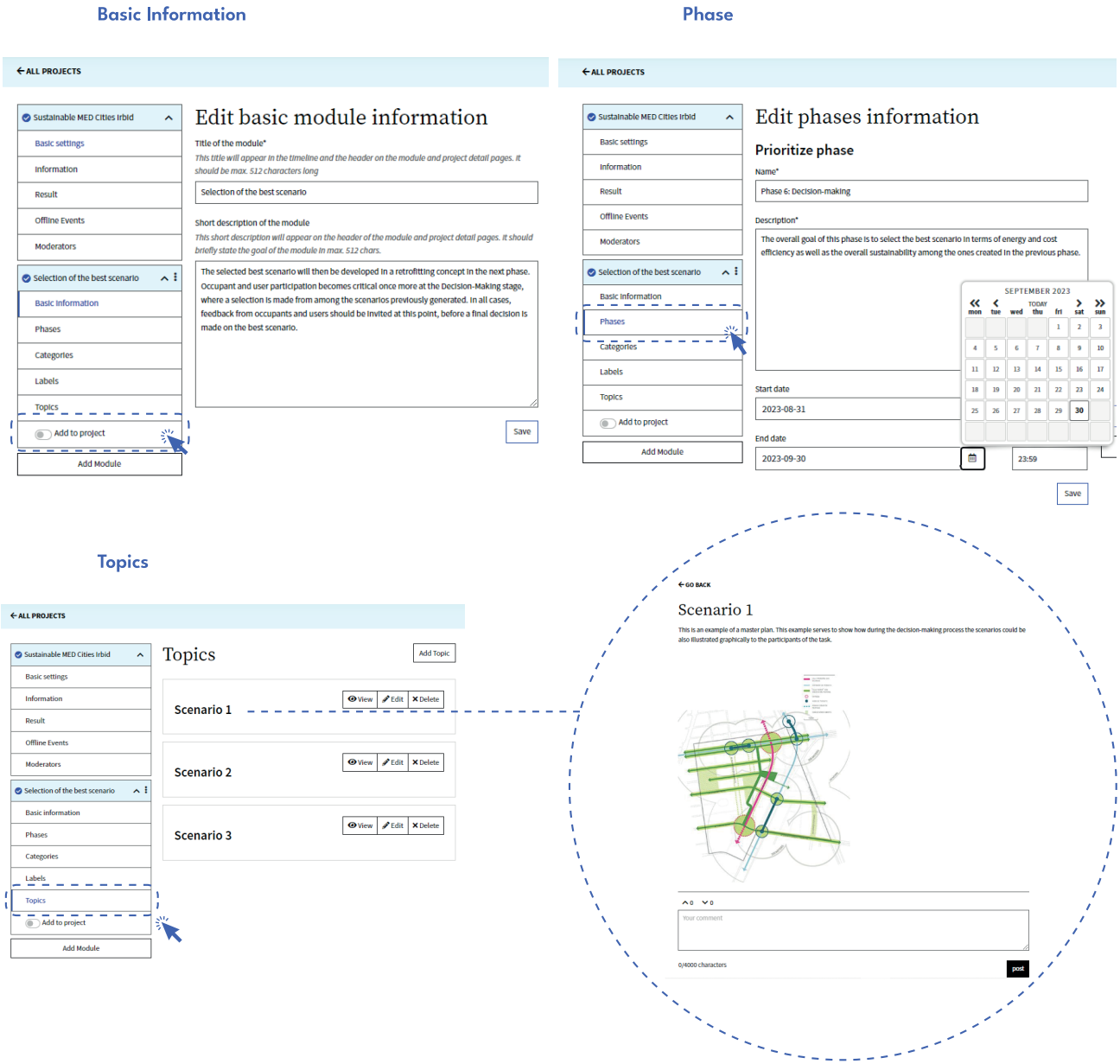


It will open a new menu to set up the participation task. Fill the different sections as follows:

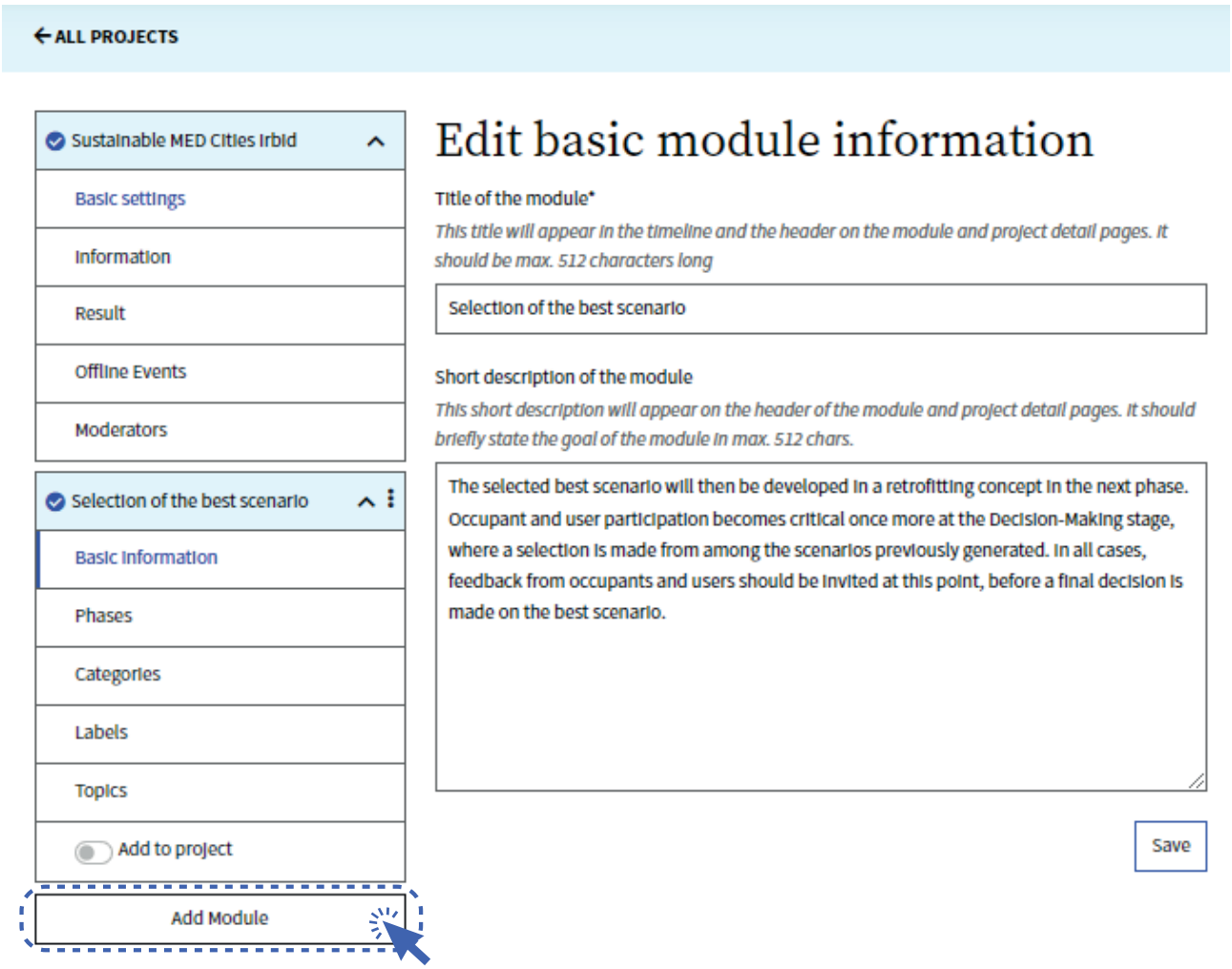
Basic information. In this section the title and description of the participation task is specified.

Phases. Description of the Decision-Making process phase the participation task belongs to. It is important to set the start and finalisation dates.

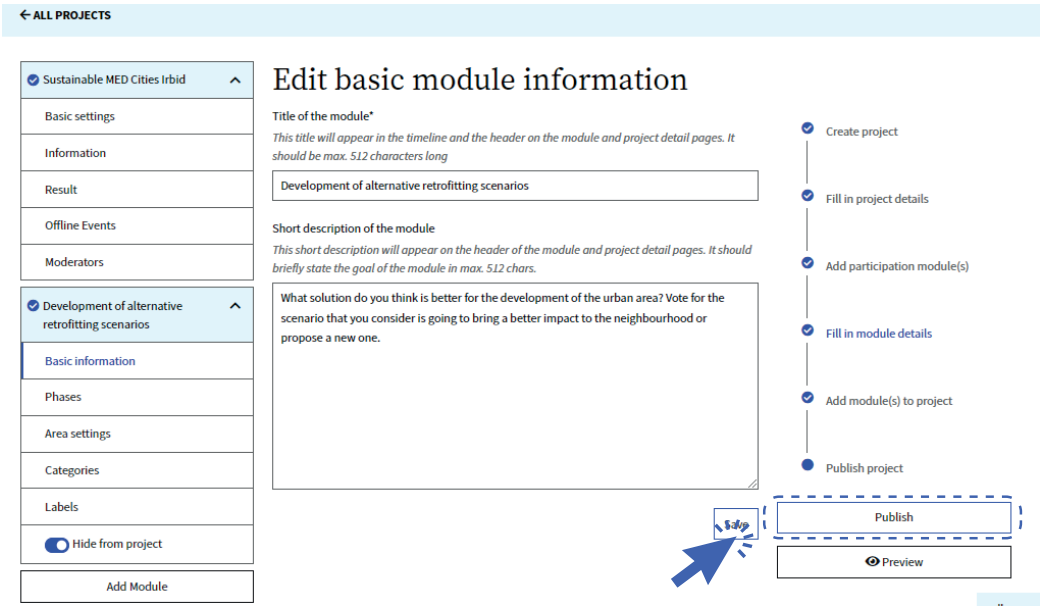
Topics. In this section all scenarios that reach the energy and cost efficiency targets are presented to the public in order to obtain feedback from the stakeholders. Each participant is going to be able to see the final retrofit scenarios, vote and comment their opinions. Moreover, the platform allows for each topic (scenario) to upload pictures and maps in order to better illustrate each solution to the participants.



After all the information has been filled and the area identified click on Add to Project.

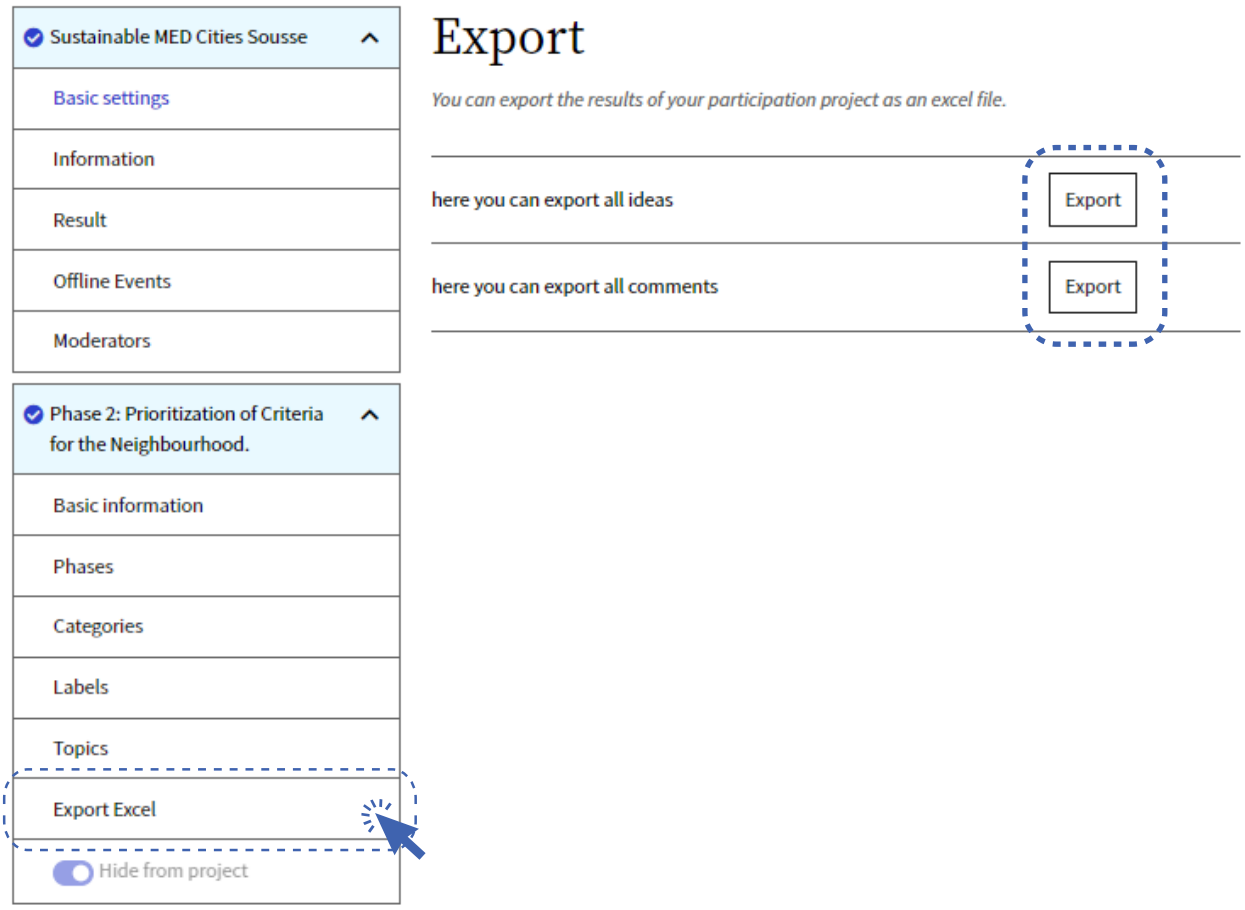


Publishing the project



After creating and setting up the expected phases and adding the modules click on Publish to make the project public to the selected audience. Otherwise, participants will not be able to see the city project page and the tasks in the collaborative platform.

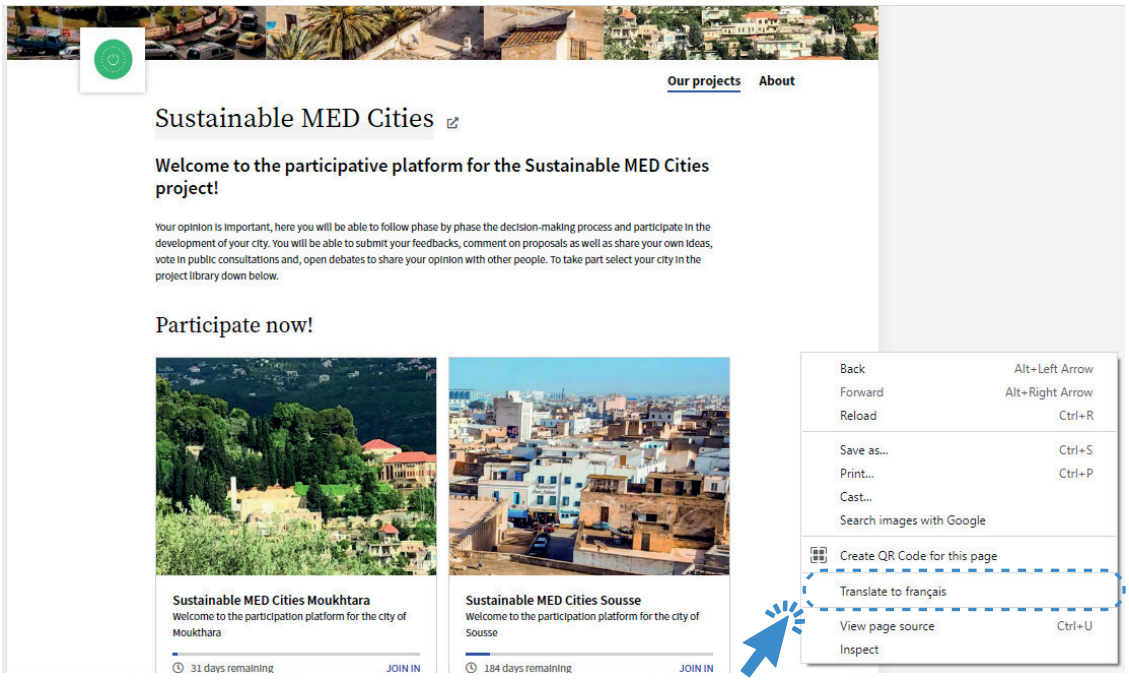
Visualizing the results



At the end of every participation task it is possible to download the results in order to carry on with the evaluation and analysis of the different outcomes. In the edit section of every task, you will find a tab called Export Excel. In this section it is possible to download an excel file with all ideas and comments of the people who participated.

How to translate the platform

The platform has been designed as default in English. The Adhocracy+ platform allows to change the language to German and Dutch. However, using the translation function of explorers like Google Chrome and Microsoft Edge it is possible to translate the platform to any desired language. Using Google Chrome, you can translate the platform by first right clicking.



A small window on the right corner will appear. Click on the three dots to choose another language from the list.

It will display the list of any language available for google chrome to translate the platform. Pick the desired language and then click on Done.

Goverment of Catalonia
(Spain)
sustmedcities.tes@gencat.cat

iiSBE Italia R&D
(Italy)
Info@iisbeitalia.org

Municipality of Sousse
(Tunisia)
mehdoulk@gmail.com

Moukhtara Municipality
(Lebanon)
ashiro@terra.net.lb

Greater Irbid Municipality
(Jordan)
rjammal@ymail.com

National Observatory of Athens
(Greece)
costas@noa.gr

Associated Partners

United Nations Environment
Programme Mediterranean
Action Plan

MedCities Association