MATILDE

Migration ImpAct assessment To Enhance Integration and Local Development in European rural and mountain regions

Self-assessment Toolbox for Practitioners and Policymakers

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MATILDE has received funding from the European Union's Horizon 2020 research and innovation programme under grant agreement No 870831

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Migration Impact Assessment to Enhance Integration and Local Development in European Rural and Mountain Regions

Call: H2020-SC6-MIGRATION-2019

Work Programmes:

H2020-EU.3.6.1.1. The mechanisms to promote smart, sustainable and inclusive growth

H2020-EU.3.6.1.2. Trusted organisations, practices, services and policies that are necessary to build resilient, inclusive, participatory, open and creative societies in Europe, in particular taking into account migration, integration and demographic change.

Deliverable 6.6

MATILDE toolbox for self-assessment for Practitioners and Policymakers

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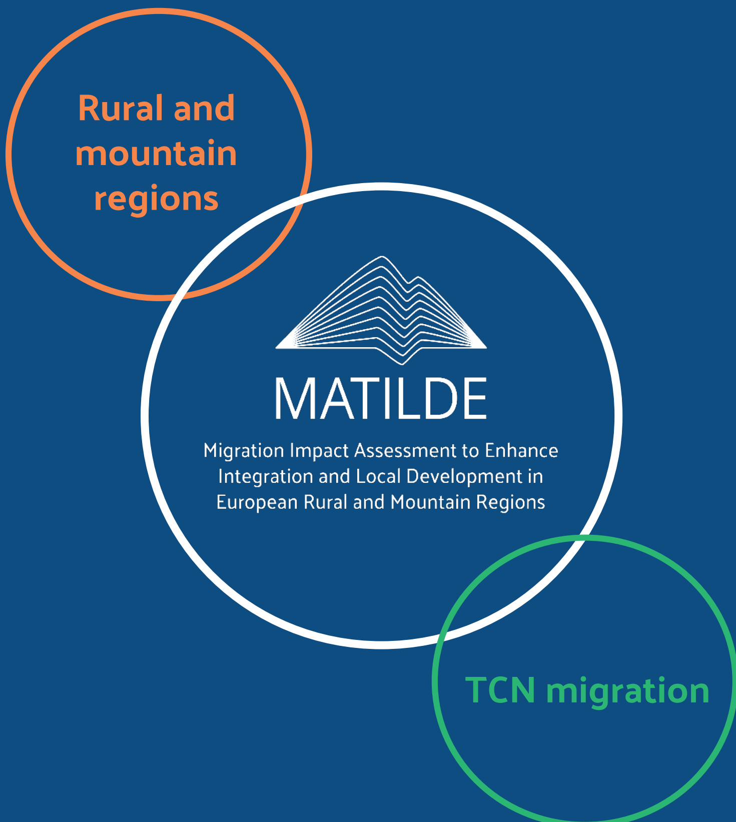
Approved by Work Package Manager of WP6: Marika Gruber, CUAS on 21.11.2022

Approved by Project Coordinator: Jussi Laine, UEF on 25.11.2022

Version: 25.11.2022

DOI: 10.5281/zenodo.7326344

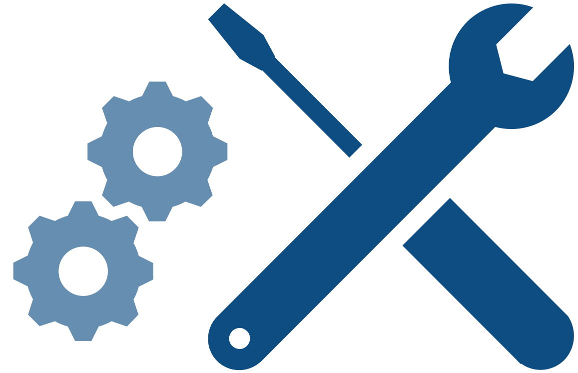
What is MATILDE, and who are the people behind it?



MATILDE – Migration Impact Assessment to Enhance Integration and Local Development in European Rural and Mountain Regions.

The Horizon2020 research project MATILDE aims to assess the impact of migration on local development and territorial cohesion in European rural and mountain regions to improve the integration of third-country nationals (TCNs) and local development. As MATILDE aims to improve knowledge of the social and economic impacts of migration processes, the project conducts a quantitative and qualitative analysis of the social and economic impacts of the immigration and settlement of TCNs. Behind this objective lies the ambition to promote socially inclusive and territorially balanced growth that can be stimulated by improved urban-rural-mountain linkages, reflecting the potential of TCNs for local development (MATILDE Grant Agreement No. 870831). The project team consists of research partners from various disciplines and local partners from a total of 10 countries.

What is this toolbox for?



Collection of assessment tools for participatory work at different levels

The aim of this toolbox is to support practitioners and policymakers in assessing the status quo of their own integration work to identify the potential for transformation and improvement. Policymakers at the national and European level will also receive suggestions for how to upscale the described tools to obtain information on the current framework conditions and influences for decision-making processes regarding specific needs in rural and mountain regions.

Provision of scientific foundations

In the following, important basics and concepts are introduced in the context of their applicability and comprehensibility. For detailed scientific descriptions and more information about the methods used, please refer to the ‘MATILDE toolbox: methods to assess migration impact in rural and mountain areas’ (Kordel et al. 2022), which represents the basis of this document and will be especially useful for those operating in universities and/or other research institutions.

Important concepts

Assessment

Self-assessment

Participation

Participatory self-assessment

Assessment

What is an assessment, and how can it be helpful?

Terms such as ‘assessment’ and ‘evaluation’ are becoming more commonly used in today’s language but are also increasingly applied synonymously, although they are intended to cover different areas and functions. The first step is therefore to establish a **common definition** of terms on which the following descriptions and tools can be based. Some **characteristics** most uses of the term **‘assessment’** have in common are (Müller-Kohlenberg 2000):

1. **Process:** it is a structured and planned process using a methodological approach
2. **Object:** a specific defined object or issue is investigated and assessed
3. **Assessor:** the investigation is carried out by people (or groups) who are particularly qualified, e.g. through special expertise or the fact that they are ‘affected’
4. **Criteria:** the examination is carried out using the most suitable criteria

Research and undertakings that assess according to the above criteria are often concerned with the investigation of the conceptual design and the implementation and effectiveness of social and political interventions (Bortz and Döring 2006).

Assessment

What's the difference between Assessment and Evaluation?

Assessment

An assessment may have several **functions** (Bortz and Döring 2006):

1. **Insight gathering:** gaining new knowledge based on the collection of data and information
2. **Optimization:** to determine where strengths and weaknesses exist to make improvements accordingly
3. **Controlling:** to check whether certain targets and objectives are met
4. **Decision making:** the assessment as a basis for making decisions
5. **Legitimation:** implementation and results contribute to e.g. a measure being better accepted or resources being approved

Evaluation

To summarize, it can be said that in the context of this toolbox, assessment is understood as a snapshot or review of the status quo regarding a specific set of issues, whereas evaluation has a different meaning. Meanwhile, evaluation is not exclusively a review of certain circumstances at a certain point but aims to determine the effects and consequences of social or political interventions, possibly over a longer period (Mertens and McLaughlin 2004). The indicative criteria that can be used in an evaluation are identified by the OECD (2021, 18) as 'relevance, coherence, effectiveness, efficiency, impact and sustainability'. If carried out more frequently, it can therefore be seen as quite close to the concept of monitoring, which will be discussed in more detail after the explanation of the tools for self-assessment, as it may represent the next step after an assessment.

Self-assessment

How does a self-assessment differ, and what are its advantages?

Compared with other forms, self-assessment involves the examination of one's own organization/community/region. Although external support and knowledge can be used, the main characteristic is that people evaluate themselves. This is because, although an external perspective can often help in approaching change more objectively, collaborators/citizens/stakeholders have knowledge and experiences that are essential for identifying strengths and weaknesses and improving processes (Ford and Evans 2002; Ruben et al. 2007).

In addition, self-assessment offers the opportunity to create a common understanding and subsequently a common language within the organization/community/region of certain processes and problems. These can eventually be used as a basis for creating an analytical framework, prioritizing specific actions for improvement, and consequently for developing longer-term strategies (Ruben 2004; Ruben et al. 2007).

Participation

What is participation, and why is it important?

Participation goes beyond mere attendance. Rather, it describes active involvement, co-creation, and in some cases even co-ownership of processes and developed solutions. Especially in the area of change management, it is seen as critical to success. Because participation not only informs people but also allows them to contribute their perspectives and suggestions, actual changes often meet less resistance, are better accepted, more in line with the actual needs of those they are intended to benefit, and ultimately much likelier to be sustainable (Lauer 2019). In the context of examining integration processes, participation may even occur in three different forms:

- **Transdisciplinary participation:** Joint collaboration of research and practice and inclusion of both points of view
- **Interdisciplinary participation:** The involvement of experts from a wide range of disciplines and thus methods and approaches
- **Participation for legitimization:** Involving citizens in identifying actual needs and legitimizing measures
- **Participation for empowerment:** Having a say, and a voice can thus have an empowering effect

None of these types is preferable to the other, nor can a truly comprehensive participatory process do without one of them. However, it is always necessary to analyse one's own situation carefully and based on this make decisions for the approach that will deliver the best results in this regard.

Participation

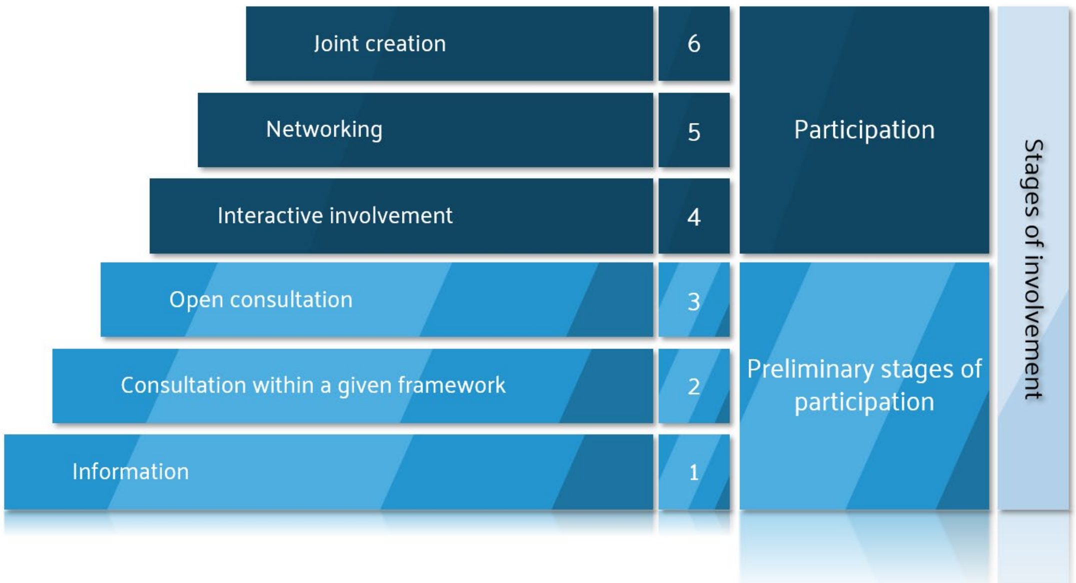


Figure: Stages of involvement within the MATILDE project

The stage model of participation

There are many ways to involve individuals and groups in processes, but not all of them can be considered participatory. For this reason, and because each activity has different objectives that need to be achieved, there are different degrees of participation, which are mapped in various stage models across disciplines. Based on 'Arnstein's ladder of citizen participation' (Arnstein 1969) and the further developed participation pyramid (Straßburger and Rieger 2019), a separate stage model was derived for MATILDE regarding the different possible degrees of involvement within the project that can be achieved.

Ethics of public participation

Participation is a complex process that often not only reveals critical perspectives but also offers many opportunities. However, taking advantage of these opportunities relies on the cooperation of all the involved parties. The International Associations for Public Participation's Code of Ethics for Public Participation Professionals will be shown in this section to provide a basic framework for respectful and effective interactions with stakeholders (IAP2 2017).

1. **Purpose:** Supporting public participation as a process to make better decisions that incorporate the interests and concerns of all affected stakeholders and meet the needs of the decision-making body.
2. **Role of practitioner:** Enhancing the public's participation in the decision-making process and assist decision makers in responding to the public's concerns and suggestions.
3. **Trust:** Undertaking and encouraging actions that build trust and credibility for the process among all the participants.
4. **Defining the public's role:** Carefully considering and accurately portraying the public's role in the decision-making process.
5. **Openness:** Encouraging the disclosure of all information relevant to the public's understanding and evaluation of a decision.
6. **Access to the process:** Ensuring that stakeholders have fair and equal access to the public participation process and the opportunity to influence decisions.
7. **Respect for communities:** Avoiding strategies that risk polarizing community interests or that appear to 'divide and conquer'.
8. **Advocacy:** Advocating for the public participation process and not advocating for interest, party, or project outcomes.
9. **Comments:** Ensuring that all commitments made to the public, including those by the decision maker, are made in good faith.
10. **Support of the practice:** Monitoring new practitioners in the field and educating decision makers and the public about the value and use of public participation.

Participatory self-assessment

What is participatory self-assessment?

As described earlier, a participatory process not only enables a wide range of stakeholders to participate but also allows real problems and needs to be identified and solutions to be jointly developed, which are thus more readily accepted and can be implemented with less difficulty and more sustainably.

The principles for Collaborative Approaches to Evaluation formulated by Shulha et al. (2016) provide a useful overview of the main aspects to consider when planning and implementing participatory self-assessment:

Principles	Contributing Factors
Clarify motivation for collaboration	▪ Evaluation purpose ▪ Evaluator and stakeholder expectations ▪ Information and process needs
Foster meaningful relationships	▪ Respect, trust, and transparency ▪ Structured and sustained interactivity ▪ Cultural competence
Develop a shared understanding of the programme	▪ Programme logic ▪ Organizational context
Promote appropriate participatory processes	▪ Diversity of stakeholders ▪ Depth of participation ▪ Control of decision making
Monitor and respond to resource availability	▪ Time ▪ Budget ▪ Personnel
Monitor evaluation progress and quality	▪ Evaluation design ▪ Data collection
Promote evaluative thinking	▪ Inquiry orientation ▪ Focus on learning
Follow through to realize use	▪ Practical outcomes ▪ Transformative outcomes

Participatory self-assessment

What else needs to be considered?

Keeping these principles in mind is important for designing a truly inclusive participatory process. For example, Chouinard and Milley describe that in practice, participants are often used as a source of data rather than actually being empowered to actively participate and collaborate (2018). Likewise, in terms of inclusion, it is essential to think about the diversity of participants, representative selection, and equitable and moral distribution of resources and voices, and to address them openly in planning and implementation (Fraser and Honneth 2003).

What are the possible disadvantages?

An assessment process designed to facilitate the greatest possible participation will require more resources than simply hiring an external agency. These resources may be financial, but they will also increasingly take the form of time and personnel.

What are the possible advantages?

However, there are numerous benefits. For example, Hanza et al. (2021, 172) summarize their obtained results as follows: ‘Although engaging in a comprehensive self-evaluation requires substantial investment from stakeholders, such an assessment has significant value. It enables partners to reflect on the mission and vision of the partnership, explore the history and context for its existence, identify factors that have contributed to outcomes, and plan strategically for the future.’

Some basic tips for successful participatory processes

Sufficient preparation time

Bringing together a number of people always presents a challenge to find a date that everyone will have time for and a location that is easily reachable and accessible. It is therefore important to start planning early enough, sending out announcements and invitations in a timely manner, and attaching necessary explanations about what is to be done, and what exactly is needed from the participants. The participants must know about the intended goal, as well as the intended use of results to make an informed decision to participate.

Working with a(n external) moderator

Topics like migration and integration especially are closely associated with many different life stories and backgrounds, and participatory processes can involve a variety of different groups that each bring with them different experiences, concerns, and needs. When using these participatory tools, it is therefore a good idea to engage an external moderator who can provide a neutral perspective during participation and thus ensure fair discussions and an objective guidance of the process, which ultimately leads to better and more accurate results. Also, in cases where, for example, there are no people within the organization who are comfortable with the task of facilitation, an external person can be of great benefit and value.

Some basic tips for successful participatory processes

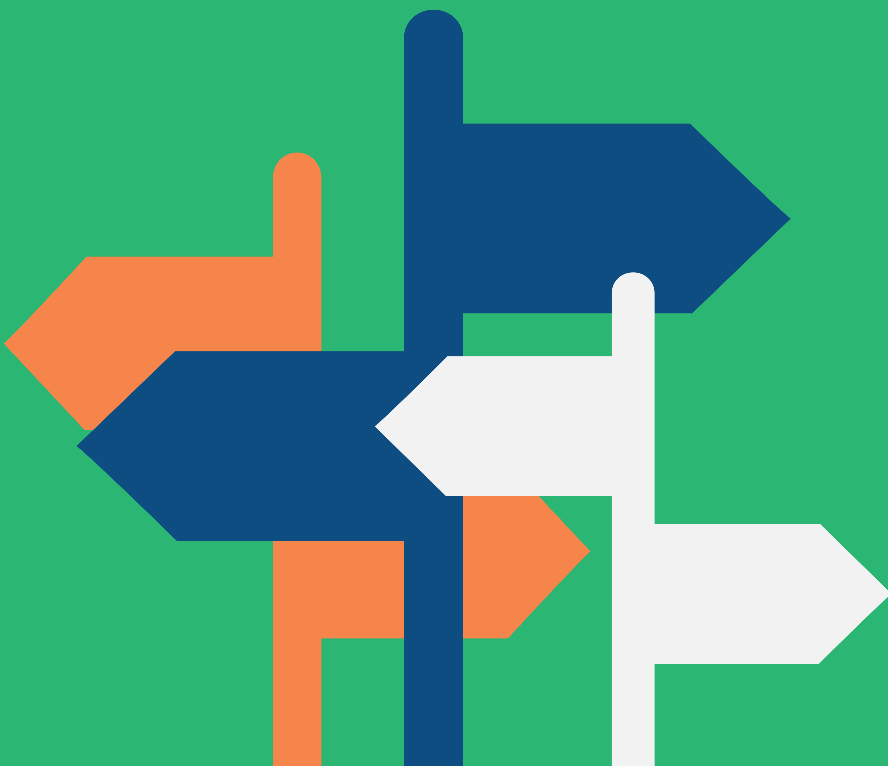
Timekeeping

Effective timekeeping is important not only for the obvious reason of adhering to scheduled working hours but also to show that the people who make themselves available for the assessment process are valued. It is also important to ensure that during discussions, for example, the various participants are given equal time to express their opinions or have the opportunity to speak at all. This activity should therefore be taken seriously and well thought out in advance.

Combination of different methods and technologies

Different tools are used for different purposes and are not necessarily suitable for all areas. In this document, this is also referred to at the beginning of each tool's description by recommending suitable areas of application. However, based on this, it may be helpful to combine several methods and tools in a broad process to cover more areas and reach different/more people. For this purpose, the use of different technologies such as hosting online events or asynchronous methods also lends itself to a certain degree of location independence.

Where do we start?



The process

1. Need for change

2. Assessment of current situation and practices

3. Taking action and growing together

The process step by step

1. Need for change

At first, there is always an idea and the decision to change something, be it due to necessity, the commitment of individuals, or in the context of a reform. The first step is to define goals and assess what is possible and useful, how many resources are needed, where to carry out the desired process, and who needs to be brought on board and convinced. Congratulations! You have accomplished what is often the most difficult step!

2. Assessment of current situation and practices

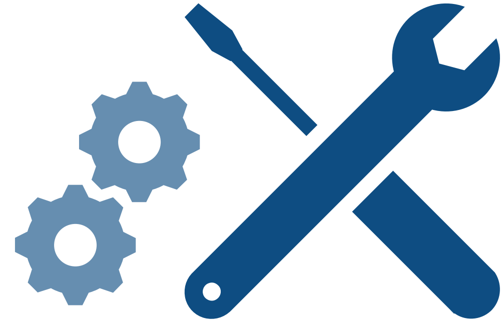
It is now time to select the appropriate methods and tools for the areas of interest to be analysed. And this is exactly where this toolbox will support you. No community is identical with another, and no country is identical with a different one. It is therefore important to keep in mind that tools must and should be adapted to the specific circumstances to bring the right results for you.

3. Taking action and growing together

After all, a process should not be done without benefit but should bring lasting changes and improvements. It is therefore absolutely vital to utilize the results and to follow words with actions. After a participatory self-assessment, you now have all the information you need to improve the situation, create real change, and grow together with the participating community. Take advantage of this opportunity!

What tools should be used?

Choice of tools



The choice of tools depends on many influences that make some of them more suitable for certain circumstances than others.

- For basic orientation, the tools in this toolbox are divided into two main categories: The first is for those such as municipalities and NGOs that are just beginning the process of assessing social and economic migration impacts and improving integration processes and territorial cohesion (**tools for starting**). The second is for those who already have experience of assessing and working on improvements, and whose goal is to expand previous processes or conduct more detailed evaluations (**advanced tools**).

- Within the categories, the tools that are simplest and require fewer resources (e.g. time, space, and funding) are described first. The effort and complexity required for the tools mentioned thus increases within the categories.

- The use of the tools is outlined for working at a local level, mostly by utilizing the example of a fictitious municipality, However, at the end of some tools you will find suggestions and notes on what adjustments and changes can be made to upscale the tools and apply them at a national and/or transnational level.

  If you see this icon , the conducting of the tool will be provided with an integrated example.

- For some tools, additional templates are available, which can be found in the appendix of the document and can be freely used and modified.

  If you see this icon , templates are available.

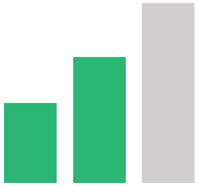
Tools for Starting

Municipality profile

First Step

Resources needed:

Time needed:



People involved:

Recommended to get the bigger picture

Municipality profile

Definition and application:

International immigration is not equally relevant for every municipality; many municipalities, especially in rural areas, are not affected by immigration but by out-migration. Before taking measures to revitalize the municipality, to improve coexistence and the social and economic integration of migrants, or to utilize the potential that international immigration can bring, it is important to get an impression of one's own municipality first.

This tool is intended to help municipalities **gain an overview of the current and future** demographic **situation**, the special features of the municipality, the economy and labour market situation, the educational background of the population, the infrastructure, including education and healthcare facilities or public spaces, the budgetary situation, and the social climate in the municipality, based on statistics and detailed information and qualified assessments.

Standardization:

Municipalities can use a standardized **template**, which is provided. Preformulated topics and questions make it possible to work through them systematically. The inclusion of quantitative data means the result gains greater intersubjective validity. This standardized analysis can be carried out regularly and enables a comparison with other municipalities (bench learning).

Level of participation and citizen activation:

It is recommended that the profile is not filled in by only one person in the municipality, but that **several people work together to create the profile**. Both professionals and citizens without a specific function, with and without migration experience, should be involved.

Municipality profile

Preparation:

Two essential questions in the preparation should be answered:

What information is necessary and already available for the creation of the community profile?

As statistical information is also necessary to develop the municipality profile, it is important to collect all relevant and available information (also from different municipal departments) (e.g. population statistics, statistics on the employment situation and unemployment figures, and on municipal finances). An overview should be created of which (statistical) information is available in the municipality, and which needs to be requested from other institutions (e.g. statistical offices at federal or state/regional level) (Gruber 2013; Stadt Wien 2020).

Who (which participants) should be invited to jointly develop the municipality profile?

The advantage of jointly developing the municipality profile is that different perspectives can be brought to light, especially concerning open questions such as the existing infrastructures or the climate of coexistence in the community. It is advisable to invite people to participate who are working with different target groups (e.g. from the fields of education/school, business, senior citizens, women, or migrants). It can also have a special added value to invite not only stakeholders or multipliers but people from the respective target group itself (Gruber 2013).

Municipality profile

Conducting:

A moderator should be appointed from among the participants. This can be a person from the municipal administration responsible for the development of the municipality profile, but it can also be another person.

1. The first step is to **explain why a municipality profile is being created**. Possible aims could be to get an up-to-date overview of the municipality's current situation, to assess the impacts of migration on different areas of life such as education or housing and neighbourhood, to foster the exchange with stakeholders and citizens, or to use the results to draft policy recommendations and measures for improvement. What will happen with the information collected should be transparent.
2. The **facilitator then presents the statistical information** that is already available (this could also already be entered into the template).
3. Open questions such as on the climate of living together or the existing infrastructure can also reveal needs. These should be summarized under the heading **'Needs for improvement'** (Gruber 2013). The discussion with the participants can be designed as a focus group (→ see Kordel et al. 2022, chapter 3.2).

How do you upscale?

The municipality profile can be created not only for a status quo assessment and drafting policy recommendations and suggestions for improvements for a municipality but also for a district, a province, or a state. However, the group of participants invited to participate in the preparation of the municipal, district, regional, or national profile must be adapted. While care should be taken in the district profile to invite participants from different areas and different municipalities (both more urban and more rural), in a regional/country profile representatives from different districts/provinces should be invited.

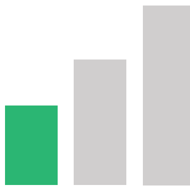
Documentation:

All statistical data and results from the focus group discussion should be documented in the template.

Participatory Photo/Video Talk

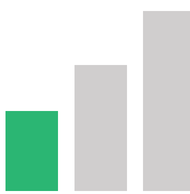
Starting
Tool 2

Resources needed:



Time needed:

People involved:



Recommended for:

Photo/Video Talk

Definition and application:

Visual methods, i.e. photo or video talks, can be designed for various purposes, target groups, and with a varying degree of participation (Kordel et al. 2022). This tool offers several possibilities to involve citizens in a participatory way with the aid of visual materials and to get an impression of their actual living environments (for examples see Standardization). In total, three different approaches will be described, which can be combined and adapted accordingly, depending on the possibilities and usefulness.

- **Photo-elicitation:** For this variation photography and interviews are combined, with the interviewer taking the photographic material and then reviewing it with the participants either individually or in small groups.
- **Photo-novella:** This approach places the participant at the centre by getting them to take the photo and/or video footage to simply document their life and perspective over a longer period.
- **Reflexive photography:** Here, too, the participants record video and/or photo material but then discuss it together, which enables the participants to go into more detail about the background and to jointly reflect on and understand the thought processes involved in creating the material.

Standardization:

While it is important that to some degree there is openness in the process to address the individuality of the discussed material, guiding questions can be developed, or specific stimuli can be used, for comparability. These can be important places, certain things that are disliked, or situations that are characteristic of the municipality in which the interviewees live, and whose integration processes are to be studied in more detail (Kordel et al. 2022).

Preparation:

In preparing to use this tool, it is necessary to decide which approach will be used. Based on this, it is particularly important to communicate to the participants exactly what is expected of them, which can be done in the context of an introductory meeting with all the people involved. Another important point is to communicate clearly that it is not a question of obtaining aesthetic or professional material, and that it is unnecessary to have previous knowledge or experience in the field of photography to participate and share one's perspective. It is also important to decide whether private end devices will be used, or whether it is feasible and/or useful to provide disposable cameras, for example.

Photo/Video Talk

Conducting 1/2:

As with preparation, it is again important when conducting the actual discussions about the created photo or video material to point out that there are no right or wrong shots, and that prior experience is unimportant. The decision whether to conduct individual interviews or to reflect on the images in a small group needs to be well considered and should always be in the best interests of the participants and not the practitioners, as it may well involve emotional and personal content (Kordel et al. 2022).

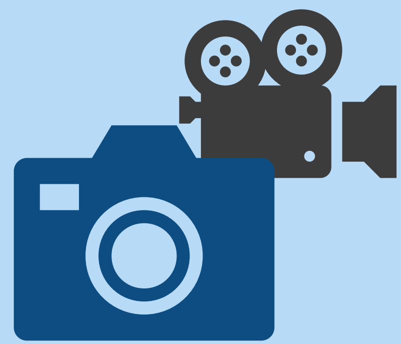
Example: To explain the process more clearly, we will use the example of a municipality that would like to improve the integration and inclusion of former asylum seekers who have settled in the area: there are often conflicts with the other residents, who complain that they keep to themselves and mostly stay in certain parts of the area.

1. Contact is made with potential participants, and word eventually gets out to the community, resulting in several people coming forward and agreeing to take a week's worth of photos of their everyday life in the form of reflexive photography. For this purpose, disposable cameras are provided by the municipality, and their use is explained. Photos can also be taken with the participants' own smartphones.
2. Two weeks before the discussion date, the cameras are dropped off, and the films are developed and printed. A pre-selection can be made by representatives of the municipality, but this should not be too limited.
3. Eventually, a group discussion will take place to which the participants are invited. A separate room and some catering should provide an atmosphere in which the interviewees can feel comfortable and want to open up.
4. A good way to start the conversation is to ask the participants how they liked taking the photos/videos.

Photo/Video Talk

Conducting 2/2:

5. After this informal introduction, a picture/video can be used to start the actual discussion. As participants reach for their own photos and talk about their daily lives, problems and needs are also addressed, which are noted by municipal staff. However, it soon becomes clear that many share the same views, and the photos show recurring motifs in which living conditions and housing are suboptimal, for example. They often cannot afford to move to other areas, which makes it difficult to get in touch with other locals.
6. During the discussion pictures can also be used as an intervention by the interviewer, e.g. in a group setting, to enable different perspectives on certain problems and to allow them space.
7. Although images can be used in sequence, it is important to ensure that the associative character of this method is not overly restricted, and that a certain freedom is retained in the choice of material discussed.
8. If the material is underused or not used at all, and the discussion digresses, it is important for the interviewer to engage with the participants to refocus the discussion.
9. For example, in a final discussion the entire group concludes that construction projects for affordable housing have neglected the needs of some communities, and that there is a greater need for additional and/or more inclusive housing than was actually anticipated.



Photo/Video Talk

Documentation:

Photos/videos taken by participants are documented and stored in a protected folder, while a clear assignment for interviewees is necessary. Moreover, photos are numbered consecutively, which allows the insertion into the analysis. Visually stimulated interviews are documented by the interviewer's notetaking and audio-recordings. When taking notes, the interviewer must be aware of affective notions stimulated by photos, as well as the moments when the participants refer to the pictures. A debriefing after the interview includes a critical reflection on the content, as well as the interview situation (Kordel et al. 2022).

Level of participation and citizen activation:

This tool may allow a higher degree of participation than traditional in-depth discussions, as the participants can contribute their perspective to a greater extent through the visual documentation of parts of their lives. Above all, problems and needs can be presented more strikingly. Moreover, because the material they create can be used as the main component, the participants are strengthened in their role and importance as stakeholders. Vulnerable groups may especially feel empowered and get a notion of integration and participation in the municipality.

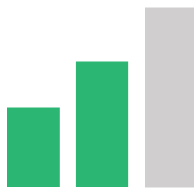
How do you upscale?

This tool is particularly useful at the municipal or regional level, because even if participants come from different areas, they often know the places that are being photographed/filmed. Nevertheless, this tool can also be used at the national level or at an even larger scale to deliberately show regional differences and/or similarities and thus stimulate a discussion across administrative boundaries.

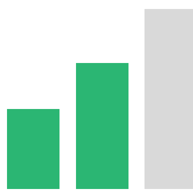
Investigation of areas of action

Starting
Tool 3

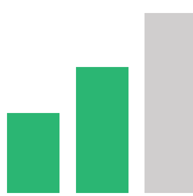
Resources needed:



Time needed:



People involved:



Recommended for:

Investigation of areas of action

Definition and application:

The investigation of areas of action is an analysis that combines the examination of the current situation in a specific (political) field with a **SWOT-Analysis** to integrate an assessment of strengths, weaknesses opportunities, and threats, but also impacts. However, the focus of the investigation does not have to be limited to an area related to integration but can also be applied to other fields (e.g. rural development). Furthermore, the assessment is not limited to certain institutions or groups of persons such as local authorities, but can also be carried out by schools, NGOs or private companies. For examples, companies could examine the area of labour, education, and language (Gruber 2013).

Standardization:

The analysis can be standardized with the aid of templates. The templates contain exemplary questions, which give an idea of what can be analysed in the respective area of action. However, the questions allow a deeper analysis and can be adapted and extended.

Level of participation and citizen activation:

As the area of action investigation analyses central areas of people's (with/without a migrant background) life, selected citizens relevant for the respective area of action should be included, as well as NGOs and counselling organizations that can contribute their knowledge as experts. Taking the example of housing, the municipality (e.g. the contact person of the housing office) or an NGO/counselling organization (e.g. which is active in housing counselling/housing assistance, etc.) can act as a coordinating body.

Preparation:

In the preparation, the selection and composition of the participants is essential. In addition, a facilitator/coordinator should be provided by the coordinating body. It is also important to prepare observation sheets together and to roughly define which locations are to be visited. For this, a preparatory meeting should be considered so that the participants can get to know each other in advance and the onsite visit can start immediately with content-related work.

Investigation of areas of action

Conducting 1/3:

1. The area of action investigation starts with an **onsite visit** to locations and facilities in the respective field of action. For example, if the 'housing' area of action is to be analysed, public and cooperative housing complexes, private apartment buildings, housing estates, the outdoor facilities of residential buildings with a view of playgrounds, public parks and meeting places without compulsion to consume, the accessibility of housing complexes by public transport, and the proximity of childcare facilities and educational institutions are to be investigated. Special housing infrastructure can also be visited, such as refugee shelters. The aim is to get an impression of the quality of housing estates, houses, individual flats, and refugee shelters, both inside and outside (gardens, playgrounds, meeting/communication places). In addition, infrastructure such as the availability of grocery shops, childcare facilities, schools, facilities for the care of elderly, etc. (which is especially important for rural areas) and its accessibility should be investigated. Furthermore, the quality of intercultural encounters and coexistence is of interest, as well as how neighbourhoods have changed in recent years (decades) due to immigration/emigration.
2. This inspection tour should be done **with various stakeholders** such as housing owners, tenants with and without a migrant background and their children, NGO representatives who advise on housing, the contact person of the housing office in the municipality, etc.

Investigation of areas of action

Conducting 2/3:

3. The onsite visit's method is '**structured participatory observation**' (for more details about structured observations see Kordel et al. 2022, chapter 3.4). The **prepared observation form** allows notes to be made on the respective observation point (e.g. residential facilities, the presence of infrastructure, places of intercultural encounter). What exactly is to be observed is to be decided individually for each case. In any case, there should be enough space for free comments and notes. In addition, the observation participants should be encouraged to **take pictures for better documentation** during the onsite visit. When access to the field of interest is completed, the stakeholders start to take notes about their impressions and what they see. This can be done in a relatively unstructured way but should help sharpen the view of what is essential in this area of action. As Kordel et al. (2022) describe, the observation should proceed in several phases.

4. While in the first phase general impressions are also noted, in the second, participants **should concentrate only on those observations which fit the defined areas of interest well**. In the given example of housing this could be the composition of residents in neighbourhoods or housing estates, including if they are predominantly locals or immigrants and the extent to which nationalities are mixed among immigrants. To define what is really of interest to the stakeholders, after the first inspection phase and after an initial overview has been created it is advisable to pause briefly, discuss the initial results, and decide what the focus of a more in-depth observation should be. After the second phase a third observation phase can still be carried out (again, after a joint reflection on the results of phase 2) by selecting and visiting specific sites of interest.

5. In parallel, an **inventory based on statistics** is made, coordinated by a civil servant of the municipal office (or another institution that has the largest overview of existing data), for example. In the area of housing this statistical collection should include data, e.g. on the number of public and cooperative housing units, private rented houses and flats, the number of refugee shelters, housing applicants on the waiting list for subsidized housing, etc.

Investigation of areas of action

Conducting 3/3:

6. Under the guidance of the moderator/coordinator the group of stakeholders meets at a **roundtable.** It first identifies, based on the results (photos and observation notes), migration-related transformations and impacts in the field of investigation. Second, the group conducts a **SWOT analysis**. The aim of this step is to jointly agree strengths, weaknesses, potentials, and possible threats in the respective field of action. For example, immigration can be – depending on the municipality – a strength, weakness, potential, and/or danger. In this step the results of the roundtable discussion (for instructions on how to conduct a roundtable see Toolbox chapter from p. 47) are brought together and get enriched with further background and the participants' expert knowledge. The result is a SWOT and impact analysis for the respective field of action, providing a structured overview. Subsequently, the area where there action is required is jointly determined. In a further roundtable concrete **improvement measures** could be derived.

It is possible that the SWOT and impact analysis is carried out without a prior onsite visit and observation phase.

How do you upscale?

This tool is designed for implementation at the municipality or local district level.

Documentation:

For the structured documentation a jointly agreed observation sheet should be used, as well as the template for preparing a SWOT analysis. A template for a SWOT analysis is enclosed.

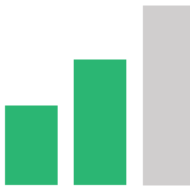
Tip from the field:

Plan enough time for the SWOT analysis, even if it is done in a small group, to discuss the individual points in detail.

Future Forum

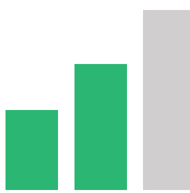
Starting
Tool 4

Resources needed:



Time needed:

People involved:



Recommended for:

Future Forum

Definition and application:

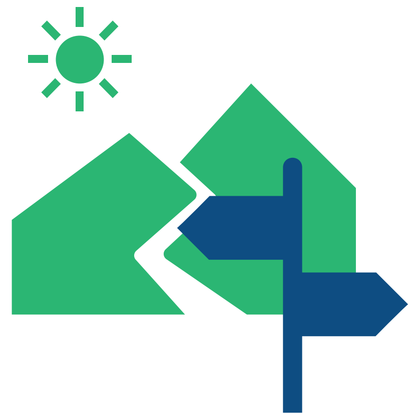
The Future Forum represents an elaborate and to some extent resource-intensive process, but one that has great potential for participation, as well as learning and sustainable change (Vetter and Remer-Bollow 2016). The goals of the Future Forum are 1) to openly express wishes and criticisms, 2) to develop well-founded alternative courses of action for existing problems, and 3) to empower participants to effectively represent these proposed solutions to third parties. The basic assumption of this tool is that the future can be shaped. Processes can be changed, relationships can be influenced, new goals can be set, and problems can be solved. This requires a positive/optimistic attitude from the participants, as well as from the facilitator and the organizers (Albers 2001).

Standardization:

The Future Forum generally follows a standardized procedure, but its contents must be individually adapted to the respective goals (what is to be achieved with the implementation of the tool?) and needs of the participants (what has to be considered to make the Future Forum a success?) (Albers 2001).

Preparation:

Special attention in planning should be paid to moderation and the assignment of a competent (preferably external) individual. Likewise, a Future Forum is only meaningful and successful with the participation of representatives from all affected areas, which is why it is important to identify and approach a variety of potential participants early enough. Future Forums usually last 2–3 days but can also take place in a shortened form of 1–1.5 days.



Level of participation and citizen activation:

The Future Forum thrives on participation and the active involvement of citizens to shape a shared, comprehensive, and inclusive vision of the possible future, one that is not only created for but co-determined by citizens.

Future Forum

Conducting1/2:

Several techniques can be used during the process to provide both variety and the activation of participants. This includes various visualization techniques, creative methods, and other imagination-stimulating elements. The process suggested by the developer of this tool, Robert Jungk, includes the following phases (Koch 1999):

- **Preliminary phase:** The aim here is to introduce the participants to each other in an introductory session, ensure an open and tolerant atmosphere, and identify the individual interests. In this phase the organizational framework is also presented so that the schedule and content are clear to everyone.
- **Phase 1 – Complaints/criticism:** In this step participants are given the opportunity to express their frustrations, negative experiences, and problems. This is not yet a systematic analysis but a brainstorming session that can be used both to cluster frequent mentions and to eradicate anger and disappointment at the beginning of the work so that the solution can then be approached creatively and openly afterwards.

Example 1/2:

A city has set itself the goal of investing more in public transport to offer equal access to it for all population groups, placing sustainability to the fore. To determine mobility needs, it was decided to invite citizens from all parts of the city to a Future Forum to work together on the vision for the future mobility concept.

- **Preliminary phase:** The participants are introduced to each other, and the moderator explains the time schedule, as well as the main topics, to focus the discussions on the set goals for later.
- **Phase 1 – Complaints/criticism:** Here, participants have the opportunity to share their frustration. Something that comes up often is the poor public transport connections with schools in certain neighbourhoods, and the group soon realizes that many have the same criticism. Some feel excluded, as neighbourhoods with a higher percentage of individuals with a migrant background are less served by the local transport network.

Future Forum

Conducting 2/2:

- **Phase 2 – Fantasy/Utopia:** Here, too, the brainstorming technique can be used, and a very creative approach can be taken. The idea is to very imaginatively think of a utopia and envision an ideal future. Phrases like 'It would be nice if…' or 'I wish that…' are required, no matter how possible or impossible some ideas may be. Openness and creativity are important. The resulting suggestions can also be clustered again.
- **Phase 3 – Realization/Practice:** In this final phase the previous results are linked together, and concrete approaches are developed to move from the elaborated problems to the imagined visions. Here, either additional experts can be invited to assist in the formulation, or their expertise is deliberately omitted to strengthen the participants in their role as experts for themselves.
- **Follow-up:** The moderator ends the Future Forum for the moment by again summarizing what has been worked out. Finally, the participants collectively think about how to proceed, and whether more meetings should take place in the future.

Example 2/2:

Phase 2 – Fantasy/Utopia: Afterwards, various proposals, some of them almost utopian, are discussed, which bring out creative solutions, e.g. a separate shuttle service for elementary school students of these areas only. Of course, it is clear that this is not really feasible, but the underlying need, namely safe transit using public transport, is the same. This is something that can be built on.

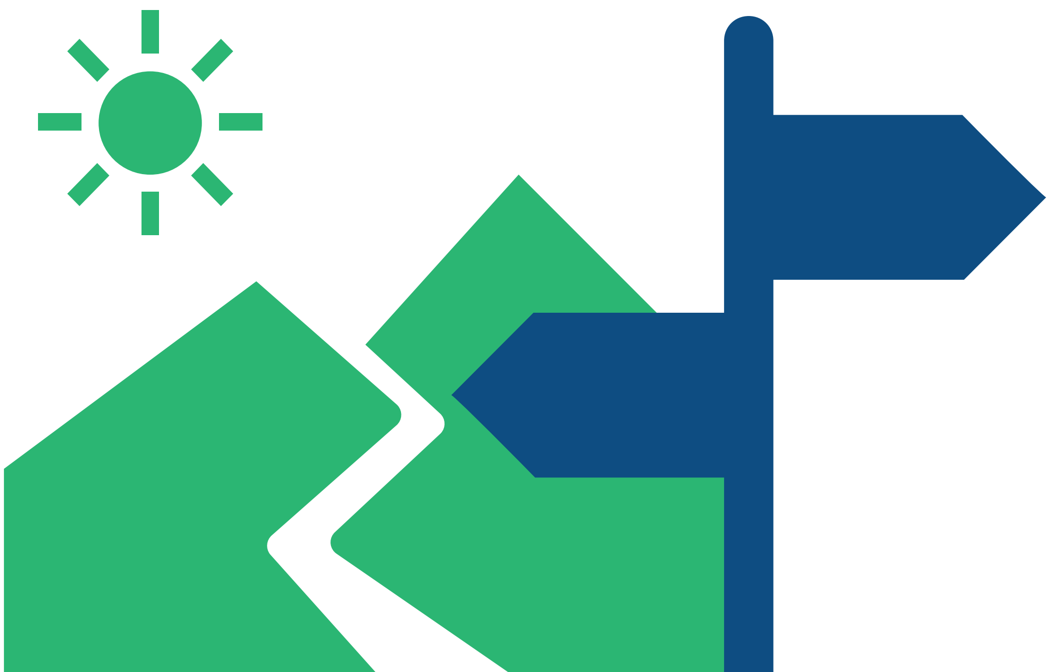
Phase 3 – Realization/Practice: City planning experts are brought in to listen to the wishes of the participants and to assess what might actually be feasible. It is discovered that although there are public bus routes, they are planned in an outdated way and no longer go to the residential areas where most of the students live. Redesigning bus routes could help reach more children from all neighbourhoods and get them safely to school in the morning.

Follow-up: It is decided to keep the participants in the loop and schedule another workshop to optimize the bus routes.

Future Forum

Documentation:

In addition to the documentation occurring anyway through the use of visualization methods, a protocol should be prepared by a person who does not actively participate in the activities, which contains both content and observations that can be of great use later (Albers 2001). A debriefing with the facilitator is also advisable.



How do you upscale?

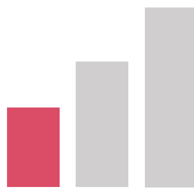
Future Forums can also be held at other levels if content is to be covered that crosses certain boundaries. However, such an event requires more resources and a longer preparation time to be carried out accordingly. When selecting participants, care must also be taken not to exclude any groups who are affected by what is being discussed, so that a certain 'representativeness' can be ensured: the more people can identify with what is being worked on, the more successfully changes can be implemented.

Advanced Tools

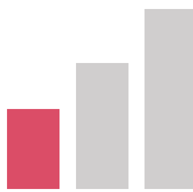
Focus groups

Advanced
Tool 5

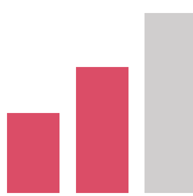
Resources needed:



Time needed:



People involved:



Recommended for:

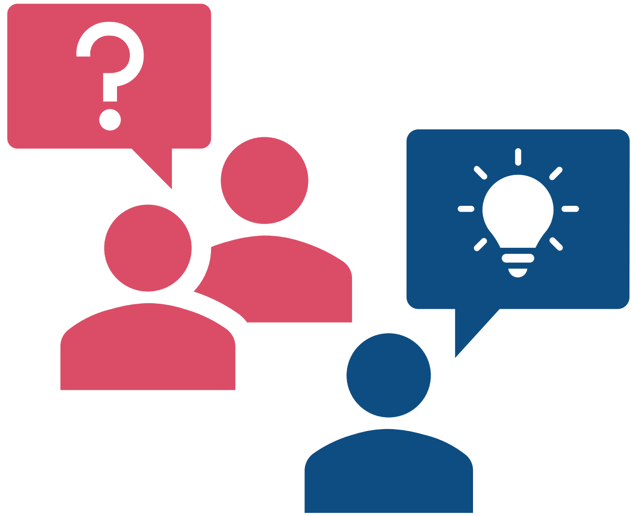
Focus groups

Definition and application:

Focus groups represent a form of **group discussion** on a specific topic, and the relevant information is collected through group interaction. Focus groups can be used to explore a topic or to validate findings and solutions (Kordel et al. 2022). The fields of application are wide-ranging and the life worlds of the participants, their attitudes to a topic, their experiences, everyday routines, as well as challenges and solution strategies on diverse topics such as 'intercultural housing', 'multilingualism', 'labour market integration', or 'racism and discrimination' can therefore be discussed.

Standardization:

As Kordel et al. (2022) explain, the focus group can be designed very openly, in the sense that a discussion impulse is set, but the direction is left open and barely guided. Depending on the objective and interest, questions which should be discussed by the participants can also be defined in advance to structure and guide the discussion. If you want to increase the comparability between the focus groups, the same questions or topics can be used.
Several focus groups can be conducted on one topic with different target groups (e.g. in the field of 'economy and employment', if it concerns problems of migrants' labour market integration, focus groups can be conducted with migrants looking for work and with potential employers. However, several focus groups can also be conducted with different groups of migrants (e.g. different age groups, contrasting men/women, etc.) to explore the labour market integration challenges in more detail.



Focus groups

Preparation:

- **Participants and moderation:** It is important to choose the participants (see 'Level of participation and citizen activation') and the facilitator well. When selecting participants, care should be taken to ensure that they can actually say something about the specific topic. Moreover, attention should be paid not to invite participants who may introduce a power imbalance, meaning some may not dare to speak. The number of participants can vary. Depending on the topic, 4–12 persons may be a good number (Kordel et al. 2022). It is important that the focus group is facilitated by a moderator (for more details see Kordel et al. 2022) with experience of facilitating such group discussions and no vested interests in the topic. Municipal officers can also take over the moderation if they have enough experience or have been specially trained.
- **Locality:** When selecting the location, care should be taken to ensure that it is equally accessible to all participants and does not convey a symbolic meaning that may be exclusionary or cause rejection by some participants (e.g. religious buildings). The focus group should be conducted in a quiet environment that allows a comfortable discussion (Kordel et al. 2022).
- **Duration:** Depending on the type of topic and the objectives, the focus group's duration can also vary. It can last up to 5.5 hours (Kordel et al. 2022).

Documentation:

Notes should be taken during the focus group (for more details see Kordel et al. 2022), and **visualization on flipcharts** can also help the participants keep an overview of the intermediate results.
The visible documentation can also be used to validate the results – whether everything was correctly understood and interpreted by the moderator and/or the minute-taker. There is also the option of '**graphic recording**' (for more information see the 'Roundtables' chapter).

Focus groups

Conducting:

Example: The following steps (for more details see Kordel et al. 2022) are described based on the 'economy and employment' action.
Initial situation: The residents of the 'Abandoned land' region are disproportionately older people who have already retired. The young generation of working age commutes to other regions to get better paid jobs or leaves the region to study in another city. It is noticeable that many jobs in the care sector and in tourism cannot be filled. However, with the last refugee influx many younger migrants have also come to the region. They are looking for jobs but are usually not invited to job interviews. The focus group aims to find out what the challenges are for migrants in finding a job, and how the mismatch on the labour market can be avoided.

1. **Introduction:** The moderator welcomes the participants, introduces themselves, their role, and the aims of the focus group. Additionally, sponsors, data protection rules and rules for discussion should be presented.
2. **First-Person Perspective ('I'):** The participants are invited to present themselves.
3. **Group Perspective ('We'):** The participants' experiences, perspectives, and positions in relation to the topic, including their professional/practical background, are collected.
4. **Main Questions/Issues ('It'):** In the focus group with migrants, the main issue is to collect the challenges to labour market entry, while the focus group with the employers aims to collect the barriers to migrant employment from the perspective of entrepreneurs and managers. In addition, the participants of both focus groups should suggest and discuss tangible measures for tackling the mismatch on the labour market.
5. **Conclusions:** Finally, the moderator sums up the most important aspects and results of the discussion. The participants should again have the opportunity to contribute opposing views to those presented or to add further important aspects that were previously unmentioned.

Focus groups

Level of participation and citizen activation:

An important step in the preparation of a focus group is the selection and mobilization of the participants. It is important to find people who can and will share their perspectives and experiences – including negative ones. This makes it all the more important to **establish a trusting and appreciative approach** to the potential participants. However, contact with the target groups can often only be achieved through multipliers who work or are engaged in NGOs, counselling institutions, workers' associations, entrepreneurs' associations, etc. and have access to the target group. In this sense, these actors can become '**door openers**'.

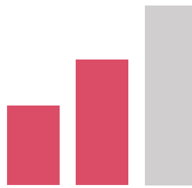
How do you upscale?

Focus groups can be used not only for issues that affect the municipal level but for issues at the district, provincial, national, and EU levels. The selection and composition of participants remains particularly important.

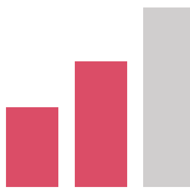
Roundtables

Advanced
Tool 6

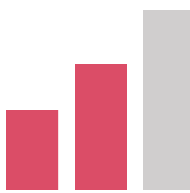
Resources needed:



Time needed:



People involved:



Recommended for:

Roundtables

Definition and application:

According to Merriam Webster's Dictionary (2021), a roundtable is a 'conference for discussion or deliberation by several participants', but 'participants in such a conference' could also be called a roundtable. The Duden Dictionary (2021) adds that the seating arrangement of the conference (at a round table) is intended to express the equality of the participants in the discussion, which Collins English Dictionary (2021) also stresses.

The roundtable is an established form of organization in the **quest for solutions to complex and/or conflictual social issues**. As mentioned, it is more an organizational form than a method but can make use of different methods in its practical design. A roundtable makes sense when different institutions and positions on a topic should be brought together and put on the table, and the entirety of the participants agree a common solution. Different topics and objectives can be worked on in a roundtable, such as the development of a model for sustainable urban development, a marketing concept for a region, a new traffic concept, policy recommendations for improved migrant integration, or concrete actions to prevent violence. The prerequisite of a roundtable is that the **discussion is kept open-ended**, and that it is not already determined in advance what the outcome should be, or that only one solution is possible/permissible. If it is already clear what the outcome must be, a roundtable makes little sense. In protracted conflicts it is also not enough to simply get all the actors around the table. But if conflict regulation in the form of mediation is required, this can be organized as a roundtable. The roundtable is a meeting place where people with different views and concerns come together. It is thus a **place of democracy, negotiation, and learning** (Wüst 2018).

Standardization:

Roundtables are a well-organized and structured form of communication. They can take place on an occasional basis or in a more or less regular manner. The structure and core principles of a roundtable can be standardized. Following Wüst (2018), care should always be taken that:

- everyone has sufficient and equal space, and no one is disadvantaged because of the seating position (corner, poorly visible angle, etc.).
- no hierarchies are created by the seating arrangement, and equal participation is possible for all.
- a moderator moderates the roundtable so that everyone has an equal opportunity to speak and present arguments.
- the expertise of all the participants is brought into a productive dialogue by the moderator.

Roundtables

Preparation:

- **Preliminary investigation:** First, investigating discussions should be held with relevant actors to get a better picture of the relevant topics and issues and properly prepare the roundtable. A previous 'Investigation of areas of action' (see Toolbox chapter from p. 31) or a focus group (see Toolbox chapter from p. 42) conducted in advance can contribute to such an overview.
- **Participants and moderation:** It is important to choose the participants (see 'Level of participation and citizen activation') and the facilitator well. The moderator should not be a participant in the process at the same time, but someone who can moderate the discussion neutrally. However, the moderator can come from the municipality involved in the process – for example, if the necessary competences are available, and the person has the necessary acceptance among the participants (Wüst 2018).
- **Locality:** The roundtable usually does not need to take place at a round table. However, the premises should be attractive and spacious so that both a joint discussion and small group work is possible. The room should therefore be equipped with facilitation materials (facilitation walls, paper/posters, pens, cards, Post-Its) (Wüst 2018). Care should also be taken to ensure that the room is easily accessible for everyone.
- **Duration and catering:** Depending on the type of topic and the objectives, the roundtable can last 3–4 hours. Drinks and small snacks should therefore also be offered during the breaks (Wüst 2018).

Documentation:

The moderator should take notes throughout the roundtable (if necessary, a second person should be present to take notes). Documentation via flipcharts is also possible, which allows participants to transparently follow the main discussion points that are noted down. There is also the option of '**graphic recording**', which is the 'skill of listening, synthesizing, and translating the spoken word into a drawing created in real-time. (…) (G)raphics are drawn on a large sheet of paper or artist board (…) [or] created on a tablet and projected on screens throughout the room' (Ink Factory 2021). However, this service usually has to be paid for separately.

Roundtables

Conducting:

In general, roundtables follow a multistage process that can include several meetings and workshops of varying length, and in the end achieve a result that is supported by all the participants (a consensus) (Wüst 2018).

Example: The following steps are based on the procedure of the focus groups (see toolbox chapter from p. 42) and described with the example of '**intercultural housing**'.
Initial situation: In the 'Little village' rural municipality, the mayor has heard about problems with housing integration policy. He therefore calls for a roundtable and invites representatives from the public administration, housing cooperatives, property management, neighbourhood supervisors, and residents with and without a migrant background who are living in apartment buildings where problems are reported again and again. The aims (and underlying questions) that such roundtable(s) follow could be a) to explore the most important problems concerning intercultural housing and living together from different perspectives, b) to define measures that can help avoid those problems or calm and solve them, and c) to agree which steps must be taken, and by whom.

1. **Introduction:** The moderator welcomes the participants, introduces themselves and their role, as well as the aims of the roundtable. Sponsors, data protection rules, and rules for the discussion should also be presented (Kordel et al. 2022). At the outset, it should be clarified how the cooperation and exchange of information between the roundtable, politics, and administration are to be organized, and the binding effect the results will have. Decision makers' expectations and fears should be discussed in advance, and expectations among participants that cannot be met should be avoided (Wüst 2018).
2. **Exploration of the topic and collection of different perspectives:** The participants are invited to present themselves and share their experiences, perspectives, and positions in relation to the topic, including their professional/practical background (Kordel et al. 2022).
3. **Develop possible solutions to the questions raised:** Various measures should be collected, which could help avoid and calm the mentioned problems in intercultural housing.
4. **Decision:** To identify the most important or urgent measures/interventions, a prioritization can be made with the aid of different evaluation methods. In the end, the participants should decide which interventions must be taken, and by whom.
5. **Collecting feedback:** While the main stakeholders were gathered at the roundtable to work on the issues, in a subsequent step, feedback on the measures worked out can be collected from an extended group of interested parties (onion skin principle; Arbter 2018).

Roundtables

Level of participation and citizen activation:

An important step in the preparation of a roundtable is the selection and mobilization of the most important actors in the respective thematic field. In a preliminary step, it is necessary to analyse who the relevant actors (persons and institutions) are for the respective topic (for conducting a proper stakeholder analysis, see also Gruber et al. 2020). The selected actors should be personally invited. To ensure that the selected actors agree to participate in the roundtable, a personal discussion should be held with them in advance, during which they can be informed about the process, and any reservations and doubts can be addressed. A preliminary talk can also help identify other important actors (Wüst 2018).

Who are the right/relevant actors? For example, if a roundtable discusses the topic of childcare, kindergarten teachers, childcare providers, and parents need to be addressed, for example. If relevant actors are not represented at the roundtable, the results will not be very binding. Depending on the topic, up to 30 people can take part in the roundtable, which can also take the form of a regional dialogue forum (Wüst 2018).

How do you upscale?

Roundtables can be used not only for issues that affect the municipal level but for issues at the district, provincial, national levels, and EU levels. The selection and composition of participants remains particularly important.

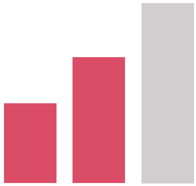
Tip from the field:

Give enough space to less experienced actors in the field of local integration to avoid the discussion being dominated by the more experienced participants.

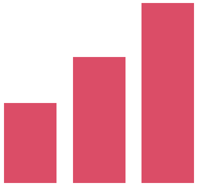
Open Space

Advanced
Tool 7

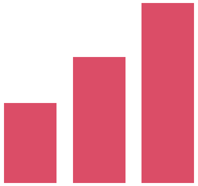
Resources needed:



Time needed:



People involved:



Recommended for:

Open Space

Definition and Application:

The Open Space can use the Open Space Technology as its method (see Kordel et al. 2022). In Open Spaces opportunities and challenges in a municipality can be discussed in general, as well as concrete topics like social connection, languages, or housing and the problems which arise from these topics in the municipality. Hence, 'Open Space Technology is effective in situations where a **diverse group of people must deal with complex and potentially conflicting material in innovative and productive ways**' (Owen 2001, 15). 'Open Space Technology is a method designed for [...] large group workshops or conferences' (Kordel et al. 2022, p. 27), in which civil society and stakeholders participate and focus on one topic of discussion with all its perspectives, expectations, and approaches. The outcome should be quite binding and will influence the municipality's social and economic development.

Standardization:

Open Space is led by four principles and one law instead of a guideline, which is organized by the participants at the beginning of the event (Owen 2001).

1. The first principle **'Whoever comes are the right people'** focuses on the working groups during the event, because the high quality of the interaction is most important.
2. The second principle **'Whatever happens is the only thing that could have'** means that steps forward may happen when the participants are open to something new.
3. The third principle **'Whenever it starts is the right time'** focuses on the creativity and energy of the process instead of deadlines and time pressure.
4. The fourth and last principle **'When it's over, it's over'** pays attention to the aim of the process, independent of the time.
5. The **law of two feet** is the law of mobility – if a participant does not feel productive in one group, the group can be changed.

Open Space

Level of participation and citizen activation:

Because the participants (see 'Preparation') in Open Space are setting the topics, taking responsibility for their topics and organizing the agenda on their own, the Open Space reaches the highest level of participation, 'joint creation' (Gruber et al. 2020, 35). Open Space even leads to co-ownership of processes and developed solutions (see 'What is participation, and why is it important?').

Documentation:

For every group session, minutes are written to document the discussed topic, the responsible person, the participants of the group session, the discussed aspects, and the solutions. These minutes are put together in a final report before the Open Space event ends. The participants thus directly receive the tangible results of their work and rank the ten most important topics (Owen 2001).

Preparation:

1. The starting point is a **topic** (e.g. social connection, languages, housing) or a problem that might be conflictual and needs to be solved. So the first step of the preparation is to formulate an **initial question.** Example questions: What are the opportunities and challenges of migration for the municipality? How can respectful communication between newcomers and the local population in the municipality be increased? How can different languages be treated equally in the municipality? How can housing needs in a housing estate be reconciled?
2. **People** who are interested in the topic and feel responsible and want to join voluntarily should be invited, because **'voluntary self-selection is the absolute sine qua non for participation in an Open Space event'** (Owen 2001, 37). The participants may be people from civil society, policymakers, representatives from the public administration, associations, and NGOs, etc.
3. The Open Space **event** should be organized for approximately 1–3 days in a room with a sitting circle for all those attending and a free wall. Smaller rooms for group discussions are also necessary (Owen 2001).

Open Space

Conducting:

1. The Open Space event itself starts with a welcome from a person everyone knows, and an introduction of the host.
2. The host introduces the topic or problem and a concrete simply and briefly – “Why are we here? What do we do?” (Owen 2001, 100), and the method of Open Space Technology is mentioned.
3. The participants are invited to note a specific aspect regarding the topic and their name on the bulletin board, taking the responsibility for this aspect.
4. Then the marketplace opens, and all the participants are invited to select one aspect that interests them and to build a group session for each aspect.
5. The group sessions are organized freely by the group, while the law of two feet is kept in mind. Ideas and solutions are discussed and logged.
6. The logged discussion (collected in a final report) are ranked and brought together. Which are the most important? What are the related topics? What are the steps for actions and measures?

Example:

1. An Open Space on the topic of social connection will be briefly described below. In the example, the municipality aims for more respectful communication between newcomers and the local community.
2. The representative of the municipality welcomes the participants and introduces the host
3. The host gives information about the ‘social connection’ topic and the concrete order to find new and creative ways of respectful communication to increase the social connection in the municipality.
4. The participants approach the bulletin board and note the aspects of respectful communication that are important for them. Such aspects might be insecurity towards strangers, a lack of opportunities for connection, fear about losing existing connections, a need for meeting points, a desire for clear communication, etc.
5. Each participant selects one aspect in the marketplace and joins one group.
6. In the group discussion, the aspect is discussed, and possible solutions are found, which may be to open the regulars’ table for newcomers, approaching unknown parents at the public playground, introduction evenings, or the creation of meeting points.

Open Space

How do you upscale?

The Open Space can be organized at local, regional, national, and even at European levels. It depends on the people who are invited, and who want to join voluntarily. The higher the level, the bigger the group, and the more complex and conflictual the topic may become.

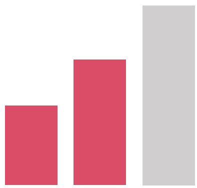
Topic Ideas

1. General: What are the opportunities and challenges of migration for the municipality?
2. Specific – social connection: how can a respectful communication of newcomers and the local population in the municipality be increased?
3. Specific – languages: how can different languages be treated equally in the municipality?
4. Specific – housing: how can housing needs on a housing estate be reconciled?

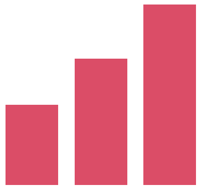
Mobility Map

Advanced
Tool 8

Resources needed:



Time needed:



People involved:

Recommended for:

Mobility Map

Definition and application:

'Mobility mapping is a spatio-visual tool, which allows the spatial dimension of everyday life of individuals or groups to be investigated, and both spatial (im)mobility and the meanings attached to places to be quantitively and qualitatively captured.' (Kordel et al. 2022, p. 41)

The mobility map is recommended for local communities to address challenges and improvement needs for the region, e.g. regarding the population's mobility. Affected individuals or groups are chosen and invited to take part in developing a mobility map and determining lacks and needs for improvements.

They therefore 'draw maps with individually important places that are frequented (or not), as well as means of transport used to get there. Perceptions and experiences of distances to and (in)accessibility of places are thereby captured.' [...] 'Finally, spatial (im)mobility and related experiences of exclusion and inclusion can be compared according to variables such as age, gender, or household composition to identify commonalities and differences in mobility patterns. Thus, mobility mapping addresses core challenges in rural and mountain areas' (Kordel et al. 2022).

Preparation

Participants and conductors: A mobility map should be implemented with a single person or family, depending on which topic or regional issue has been chosen from the local community to work on. To conduct a mobility map, it is necessary to set fixed roles and responsibilities beforehand: e.g. a facilitator asks questions, a second person takes notes (notetaker), and a third provides the material to the participants.

Locality: An appropriate location featuring a big table or enough space on the floor should be provided to ensure a good working atmosphere.

Work material:

- **Small cards of different shapes** for the places frequented (or not) with pictograms showing different realms of everyday life (e.g. shopping, visits to the authorities or services, free time).
- **Different coloured marker pens** for the different modes of transport and **prompt cards with the respective pictograms** and short written explanations.
- For reasons of inclusion, the latter should be provided in **all the languages** spoken by the participants.
- The material should be **standardized** to foster intersubjective traceability (Kordel et al. 2022).

Mobility Map

Conducting 1/2:

Example: The implementation steps of a mobility map (for further details see Kordel et al. 2022, chapter 3.5) is explained using a practical example. In this case, the local community found that people with disabilities tended to focus on one area of the local community according to daily life activities such as living, looking for a job, visiting a doctor, etc. For the Mobility Map, people with different physical disabilities are invited. In this special case, it may be necessary to adapt the various phases of the process to be accessible to the disabled, e.g. to organize access to the location, a workspace accessible to the disabled, and additional conductors to help/support during the mapping process if necessary.

1. First, one of the facilitators **explains the purpose**, e.g. that the local community is interested in learning about the everyday life and (im)mobility practices of people with physical disabilities. In addition, the facilitator explains how the method works. The participants are invited to **draw their apartment, house or accommodation** in the middle of the poster. They are then asked to **talk about the places they usually visit** in their everyday lives.
2. Those who hesitate to draw and write by themselves are encouraged, while pointing out that assistance is offered throughout the process, e.g. in terms of providing the 'correct' spelling for the place. Once the **participants have started to narrate or write/draw on the small cards**, they are not interrupted until they stop.
3. After they have finished, the participants should **clarify or add places they had mentioned but not written/drawn or vice versa**. The prompt cards with pictograms and short explanations of different realms of everyday life serve as reminders.
4. In the next step, the **participants arrange the small cards with the places visited around the apartment/house/accommodation** according to the perceived distance from their home. If the participant is happy with the arrangement, the small cards are glued on the poster.

Mobility Map

Conducting 2/2:

5. Afterwards, participants are requested to **draw lines between the house and the places visited**, indicating the means of transport used to reach these places. For the different means of transport, e.g. on foot, by bike, public transport, or long-distance bus services and by car/given a lift, different coloured marker pens are used.
6. If they had not yet done so before, the interviewer will encourage the participant to **explain the meaning of the drawn places**, including reasons for going there, activities onsite, the duration and frequency, who is accompanying them, and the modes of transport used to get there.
7. The **participants are then invited to draw or write about places where they have to but do not want to go to, as well as places they never frequent** for various reasons, on small cards of different shapes. Reasons may include inaccessibility due to the expenditure of time or financial resources, legal issues or health constraints, negative representations of or negative experiences of places due to discrimination or racism, indicating exclusion processes.
8. Finally, the **cards are also fixed on the poster,** a picture of the final version of the map is taken by the interviewer, and the map is handed over to the participant.

Mobility Map

Documentation/debriefing:

For documentation purposes, one person should be nominated who is responsible **for taking photos** of the mobility map process, as well as of the final mobility maps. It is recommended to ask the participants if they will permit their faces to be recognizable in the pictures (Kordel et al. 2022).

Possible challenges/side notes:

- **Difficulties with participants:** These may appear due to a lack of experience of the place or not being used to open forms of interviewing and drawing exercises, and with those who are not confident about their drawing or writing skills.
- **Hesitant participants:** If participants hesitate to draw or to write by themselves, it is recommended to encourage them and offer assistance (Kordel et al. 2022).

Example (or topic ideas)

Examples for target groups:

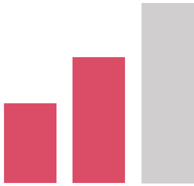
- Migrants/migrant families/migrant women
- People with disabilities
- People with illnesses
- Pupils and pupils with a migrant background
- The elderly
- The unemployed
- And many more, depending on the research interest

The target groups could be used for the Villach region, for example. With this tool, challenges and improvement needs for the inclusion of the chosen target group regarding their mobility can be determined and further addressed.

Social Map

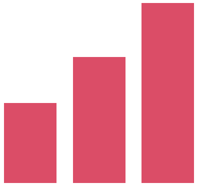
Advanced
Tool 9

Resources needed:



Time needed:

People involved:



Recommended for:

Social Map

Definition and application:

A social map is a tool to explore the spatial dimensions of people's realities. Local communities thus have the opportunity to find out how their residents perceive their living environment, their relationships within the local community, and their access to resources. The practical implementation of the social map is designed so that the **participants draw a map and express their thoughts** aloud. The advantage of a social map is that the variety of individual information about their own local community is visualized on a map and can provide an increasingly complete picture of the real situation. During the process, participants can continuously discuss and add representations to the map. The composition of the group does not play a decisive role if enough different perspectives are represented (Kordel et al. 2022).

Here, as well as in the Mobility Map, challenges, potentials, and/or improvement needs for individuals or groups can be determined regarding their realities in the local community. Whether individuals or groups are taken will depend on the resources, and what makes the most sense in terms of the interest of the local community. This could be the perception of the local population regarding housing, health, social connections, etc.

Preparation

- **Participants and conductors:** A social map can be implemented with both individuals and groups. If groups are chosen, one effective way is to ask the group to nominate a person to draw the map. The number of social maps to be conducted depends on the topic and the size of the community. For conducting, **two facilitators are needed: a moderator and a notetaker**. The required time for social mapping depends on a variety of factors, including the size of the locality, the number and interest of participants, the level of details sought, and the type of materials used. In previous projects, well-prepared social maps last from 1.5 to two hours.
- **Locality:** The selected location should be a central place that is accessible for all members of society. It should also provide a good working atmosphere.
- **Work material:** To ensure the social map can be created by the participants, adequate work material such as posters for drawing, different coloured pens, pictogram cards, etc. must be provided (Kordel et al. 2022).
- **Side note:** It is helpful 'to characterize the people participating in the process of social mapping, e.g. with regard to their socioeconomic background, gender, occupation, etc. (ibid.). At the same time, ethical issues must be considered. For example, poverty and disease may go hand in hand with social stigma, and being described as 'poor' can cause hesitation in participation' (Kordel et al. 2022).

Social Map

Conducting 1/2:

Example: The development of a social map is explained using a practical example. In a fictitious small rural municipality, a group of refugees has arrived, and policymakers want to know how they perceive the new locality compared to the local people. Accordingly, the social map is used to **filter out the social relations** in the village. A social map is therefore produced with a groups of refugees and (in parallel or afterwards) with local people. The participants are divided into these groups to prepare a social map for each one. In this special case, it may be necessary to pay attention to possible tensions between the participants (of different cultural and religious backgrounds) and to intervene promptly.

1. The purpose of **the tool should be explained** to all participants and should include a brief description of what is expected of them. Also, time for questions from the participants should be foreseen. Before the beginning, each group should nominate one participant for the drawing (an 'illustrator').
2. At the beginning, the participants are asked to **draw the main physical features of their locality and their social relations,** e.g. where they live, where acquaintances or members of their respective ethnic communities live, where people of the local population live, as well as about their access to resources within this setting, and where they access them. The illustrator therefore draws what the other participants in their group contribute through the discussion.
3. The moderator listens to and watches the discussions and the drawing process alertly. Meanwhile, **the notetaker takes detailed notes**.
4. The moderator **lets the discussion flow** and shows faith in the participants. They should have the total control and initiative.

Social Map

Conducting 2/2:

5. The moderator keeps an eye on the participation from every perspective and **takes proactive steps to involve those being left out**.
6. The moderator keeps in mind that the role is limited to the facilitation of the process. **The moderator therefore only intervenes when necessary**, e.g. when the interaction between the participants is tense.
7. Clarifications or additions from the moderator's side should be sought gently, e.g. by asking 'what about...?', 'what does this symbol represent?'. The mapping is finished **when nothing more is added by the participants side** (Kordel et al. 2022).

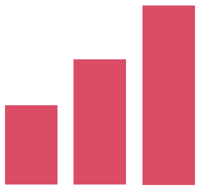
Documentation/debriefing:

The process of conducting the map is highly meaningful and should be documented through continuous notetaking. Details which are indicated with symbols in the map should be recorded and explained in the legend. Finally, the results should be saved (e.g. by **taking pictures**), and it is also recommended to compile the information about the participants in tabular form for the later data analysis (Kordel et al. 2022).

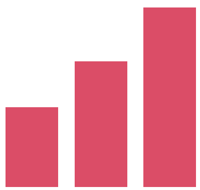
Village Talk

Advanced
Tool 10

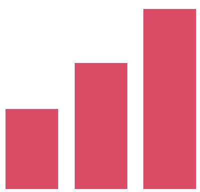
Resources needed:



Time needed:



People involved:



Recommended for:

Village Talk

Definition and application

The **‘Dorfgespräch’ (Ger.)** was developed by Wenzel and Boeser-Schnebel (2019a) and is the framework of the following tool. The village talk aims to ‘maintain an open society, where diversity is addressed actively and productively’ (ibid.: 17). Language and culture, safety and stability, social connection, mobility, dissemination and network, and rural/regional development are linked to an open and diverse society and to social cohesion, which means they can be points of discussion in the village talk. The **dialogue – personal, emotional, and value-based** – is essential, and the focus is on values, similarities, and differences. Engaged and open-minded participants are crucial. The aim is for traditional belonging (e.g. due to dialect, associations, or traditions) to be replaced by an **integrated social cohesion**. Existing hierarchies and structures are questioned to open them to an integrated development. The reliability of the results should be considered, because **democratic participation, responsibility, and joint action** should be increased in integrated social cohesion (ibid.; ibid. 2019b; Kordel et al. 2022). A successful village talk has a positive impact on the social development of a municipality.

Level of participation and citizen activation:

Policymakers, representatives of the public authorities, private institutions, associations and NGOs, as well as civil society (locals and newcomers) should participate. All participants join as individuals – voluntarily and motivated. They **meet at eye level**, independent of their daily role. The topics are elaborated and defined during the village talk, which is why the village talk is a **‘joint creation’** (Gruber et al. 2020, 35).

Standardization:

The village talk is based on a **circular approach**, and four criteria – **participation, motivation, dialogue and implementation** – are inherent: 1st circle: initiation; 2nd circle: stakeholder; 3rd circle: dialogue; 4th circle: implementation (Wenzel and Boeser-Schnebel 2019a).

Village Talk

Preparation 1/2:

The process of a village talk takes about **six to nine months** – planning, interviews and meetings with stakeholders, public relations, meeting dialogues, follow-up. The implementation process itself lasts even longer (Wenzel and Boeser-Schnebel 2019a). Hence, when a circular process is initiated, the village talk can even become a monitoring system.

1. The **initiator** talks to people who may be interested in starting such a project, and who can motivate other people (in different institutions) to participate.
2. 2–4 people ('door openers' and 'bridgebuilders'; ibid., 42) become the **core team** of initiators to further plan the village talk. They take responsibility and give inputs for the next steps.
3. The team of initiators reflects their **motivation and value proposition**.
4. Then the **stakeholder[1] process** starts. It may take 80% of the project's duration. The reasons for the village talk should be explained in conversations, and written information (by email or newsletter) should be spread in the village. Up to 1% of the population should be directly asked and invited.

[1]Wenzel and Boeser-Schnebel have a broad understanding of stakeholders, including people who do not belong to a group or an association

Village Talk

Preparation 2/2:

5. To address the village's diversity, categorize and schematize the people/stakeholders by mapping the village and marking the positions of the people on the map and their relations, conflicts, and power structure with symbols. This **stakeholder analysis** should be done in teams (see also Gruber et al. 2020).
6. Stakeholders are **interviewed** about their motivation, relevant topics, and the project's potential and risks. Each stakeholder is then ranked (facilitator, sceptic, brake(wo)man, resistor) and can be categorized as local, emancipated, newcomer, and segregated.
7. 10–20 stakeholders who are motivated to participate meet (ideally) in the town hall to organize the village talk. During the **stakeholder meeting**, the state of the project affairs and the common focus on the resources and strengths and on value-based dialogues are explained. The stakeholders reflect their position in the village and discuss the different criteria of success for the village talk. Afterwards, the stakeholders spread the idea and ask other people to participate.
8. A **website**, a **flyer**, and a **video** call people's attention to the village talk. The video should contain statements from the stakeholders and other people about the project. The flyer/website is an invitation to the village talk, with information about the dates and content of the three village talks and FAQs. The information needs to be widely shared.
9. Look for appropriate **locations**, e.g. vacant places. Movable walls and seats made of carton are a good solution. Such seats can also be used to note comments.

Village Talk

Conducting 1/3:

The focus is on social cohesion, integration, openness, and diversity, so the discussed values, similarities, and differences can be based on traditions, a lack of understanding, cultural peculiarities, loneliness in rural regions, and a lack of connection, for example. The themes of the three dialogue evenings are **'civil relationships, deliberation, and collaboration'** and Boeser-Schnebel 2019a, 68), and each lasts about 3 hours. The dialogues provide space for exchange, discussion, and ideas. In between, there is time for informal talks and for breaks with drinks and snacks (ibid.).
(Wenzel

1st Dialogue evening: 'civil relationships' (ibid., p. 78) to get to know the diversity of motivations, talents, potential, and resources:

1. **'Who attends?'** (ibid., p. 72) – do line-ups with some introductory questions to display the diversity of the participants, e.g. who is local/a newcomer/married into/external?
2. **Circle 'speed dating'** (ibid., p. 73) – build an inner and an outer circle. Each participant asks the person opposite them in the circle and vice versa to answer the following questions: 'When did you feel you were part of the village? [...] What is the highlight of your time in the village? [...] What is your most important personal talent [...]? [...] What is your idea for the future of this village? Why are you important for the village?' (ibid., p. 73).
3. **'Belonging'** (ibid., p. 74) – people are invited to mark their position in the village in a circle on a flipchart that displays the village. Afterwards, the position is shared in the room, and belonging is reflected on together. In smaller groups, participants discuss how more marginal people can feel a greater sense of belonging.
4. **'Highlights and visions**' (ibid., p. 75) – two people interview each other about their motivation for participating and the highlights, liveability, development, and vision of the village. The main statements are systematized on flipcharts.
5. **Plenary reflection** on the experiences and emotions during the first dialogue evening. Everyone is invited to write down the most important **sentence** of the evening on their seats.

Village Talk

Conducting 2/3:

2nd Dialogue evening: 'deliberation' (Wenzel and Boeser-Schnebel 2019a, 89) about the differences and conflicts:

1. **'Barometer of conflicts'** (ibid., p. 83) – one of the following statements is displayed in each corner: 'conflicts are a burden, conflicts activate, conflicts need to be solved, conflicts do not matter' (ibid., 83). People should take a position in the room and are asked to comment on their decision.
2. **'This is what bothers me about others'** (ibid., p. 85) – according to the value square (Schulz v. Thun 2006) they experience the diversity of a value and the tension between values. They then discuss the bothering values of people in the village in the sense of the value square.
3. **Systematization** – small groups discuss the three main challenges of the village, areas of tension, and values and responsibility.
4. **Question** – the participants write down a question for the village on their seats. When all the seats build a wall, the questions are presented. The second dialogue evening therefore ends with challenging questions.

3rd Dialogue evening: 'collaboration' (Wenzel and Boeser-Schnebel 2019a, 68) about ideas and changes for the village:

1. **'Positive deviance'** (ibid., p. 94) – in the plenary discuss citizens who find a way to deviate positively in response to challenges and conflicts and find future issues for the village together. Small groups discuss each of the topics and innovative solutions in the sense of positive deviation.
2. **'Value-based topic editing'** (ibid., p. 97) – formulate the topics positively and create solutions or ideas for how to deal with them, accept the borders that may arise, focus on the strengths, be creative, and document the results.
3. **Stakeholders** discuss how the selected topics and discussed solutions/ideas can be implemented, and how the targets can be achieved. Concrete agreements are made, and active working groups are established. The results are presented, and support is requested. Thank all participants.
4. **The participants** write a note – **'What I intend to do now'** (ibid., p. 101) on their seats.

Village Talk

Conducting 3/3:

‘Follow-up, evaluation, and implementation’ (Wenzel and Boeser-Schnebel 2019a., 103):

1. Stakeholders, other participants, and citizens who did not participate are invited to the follow-up.
2. Evaluation – ‘does the village talk bring a lasting change?’ (ibid., p. 104) in the sense of an integrated social cohesion and an open and diverse society. Criteria of success, categorized as **‘enabling civic relationships [and] achieving results’** (ibid., p. 105) are ranked and evaluated.
3. Collect the wishes of the participants for the village.
4. In addition, a permanent **meeting point** can be implemented, where further developments can be elaborated, and supporters can join.

Documentation:

Each step of the process is documented with interview or meeting minutes, reflection sheets, photos/videos, commented seats, results on flipcharts, notes from discussion, notes on worksheets, etc.

How do you upscale?

The village talk process can be implemented in smaller municipalities and small districts of cities besides villages.

After the assessment

Monitoring

In this chapter we are leaving the area of individual 'tools' and moving towards 'monitoring' – the process of continuous assessment and comparison of goals and their actual achievement.

What is monitoring?

Monitoring represents the observation of defined goals based on predetermined indicators. This makes it possible to identify deviations from the defined values and targets at an early stage, which is intended to assist in taking the appropriate countermeasures. It is important to find the appropriate period between measuring points, so that neither too frequent checks, which are unlikely to produce different results due to their proximity to one another, nor too long a period between measuring points, making deviations difficult to observe, result in high costs (Müller and Lenz 2013). In doing so, it is important to involve external consultants and experts when necessary to avoid a certain degree of 'operational blindness', but to avoid becoming too dependent on external expertise and above all to make use of the experience and knowledge of internal personnel and citizens (Doppler and Lauterburg 2008).

Why monitor integration?

The areas of migration and integration especially are emotionally charged topics that are also often discussed publicly with ideological intent. Stereotypes, prejudices, and disinformation are often part of the discourse and can have negative consequences.

'People are very ready to generalise about migrants, not only in the public debate but also in the political arena, ignoring the substantial differences in backgrounds, starting positions, needs and wishes of migrants with diverse migration motives, such as refugees, labour migrants, family reunifiers and students' (Bijl and Verweij 2012, p. 31).

It is therefore important to create a fact base on which policymakers can draw, and that helps to objectify this topic area (Bijl and Verweij 2012). And this is exactly what monitoring can do, as *'the comparison of results over time enables assessments of legal, social and economic developments in society'* (Stadt Wien 2020, p. 9).

Monitoring

How do you monitor?

For a comprehensive target-performance comparison several methods, tools, and their combination are needed. These are to be selected differently for different levels and framework conditions, but may also just include the regular use of the previously described tools to gain information.

However, one way is to examine if and how policies have been realized is the **implementation assessment.** An implementation assessment examines concepts that have already been developed, such as mission statements, guidelines, or other policies to determine the implementation status of the measures described in it. It is thus a target-performance comparison that is intended to help identify gaps to provide the necessary additional support and resources and to make adjustments if certain measures prove not to be feasible or beneficial (CDC 2021).

To carry out an implementation assessment, the policy programme to be examined is systematically broken down into indicators that can be used to measure implementation. Depending on the nature of the indicators, data on the present situation are collected using suitable methods to compare it with the formulated goals. A comprehensive example of the analysis of indicators and their usefulness and suitability is the 'Mapping Integration Indicators' report, which can be mentioned as an example of good practice. It aims to review the most LG-pertinent (Ljubljana Guidelines on Integration of Diverse Societies) indexes on integration currently existing across the OSCE (Organization for Security and Co-operation in Europe) and engaging participating states in operationalizing the LG in their own policymaking and evaluation (Eurac Research et al. 2020).

Monitoring

How do you monitor in a participatory way?

Reese et al. (2019) state that the joint reflection of findings of participatory self-evaluation and the development of measures based on them act as an empowering factor. Based on this, it is recommended that the goals and current situation are compared and discussed in a final meeting with representatives of the involved stakeholders and impacted citizens to agree new goals, reallocate resources where they are needed most, identify new needs, and adapt the policy programme under review for the future.

Another good practice example, in which not only indicators for a one-off assessment were developed, but a comprehensive monitoring system was established, is the diversity monitoring of the city of Vienna (Stadt Wien 2020).

How do you upscale?

Such assessments and monitoring systems can be applied at all levels, local, regional, national, and even transnational. However, it is important to keep in mind that every kind of self-assessment of varying levels of participation is most successful when it involves the groups most affected by the policy, which can easily be overshadowed when scaling up to a larger level and involving more and more experts. The larger the process, the more it is advisable to standardize the data collection method to ensure the indicators are collected consistently. This can include interviews with the aid of shared guidelines or sending out the same questionnaire to several authorities to obtain quantitative data.

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