

DIY Workshop Manual

“From local analysis to strategy”

**Transformcity online masterclass “Collaborative Urban Development”
Module 1: “Setting Up Your Strategy”**

Preparation

Setting:

- Ca. 4 hour live workshop
- 4-8 team members (incl key decisionmakers) + facilitator and note taker
- Take place around the table on which the material is laid out. A large screen can be helpful to show this manual with the steps to take.
- It is recommended to plan an informal moment after wrapping up the workshop. Have a drink and some bites and debrief together.

Goal:

The goal is translate the local analysis into an integral local strategy, align the project team and distribute tasks and responsibilities for successful and sustainable implementation.

Summary:

Start by going back to the local analysis and the project outline canvas you already made. We take our main goals and define where our success depends on other stakeholders and what drives those stakeholders. We add opportune existing initiatives and other starting points. Then we sketch the first outlines for our strategy based on a set of action lines, always trying to hit as many birds possible with one stone. We highlight the first actions to take immediately. At the end of the workshop we distribute tasks, responsibilities and budgets.

Material needed:

- A0 size map of the area (project area + a bit of the surrounding context)
- Filled in 'Project Outline Canvas', printed on A0
- 2 x Empty Strategy Canvas (7-layer model), printed on A0
- A4 hardcopy of this booklet and/or digital version on large screen
- 4 different colours of post-its + enough pens

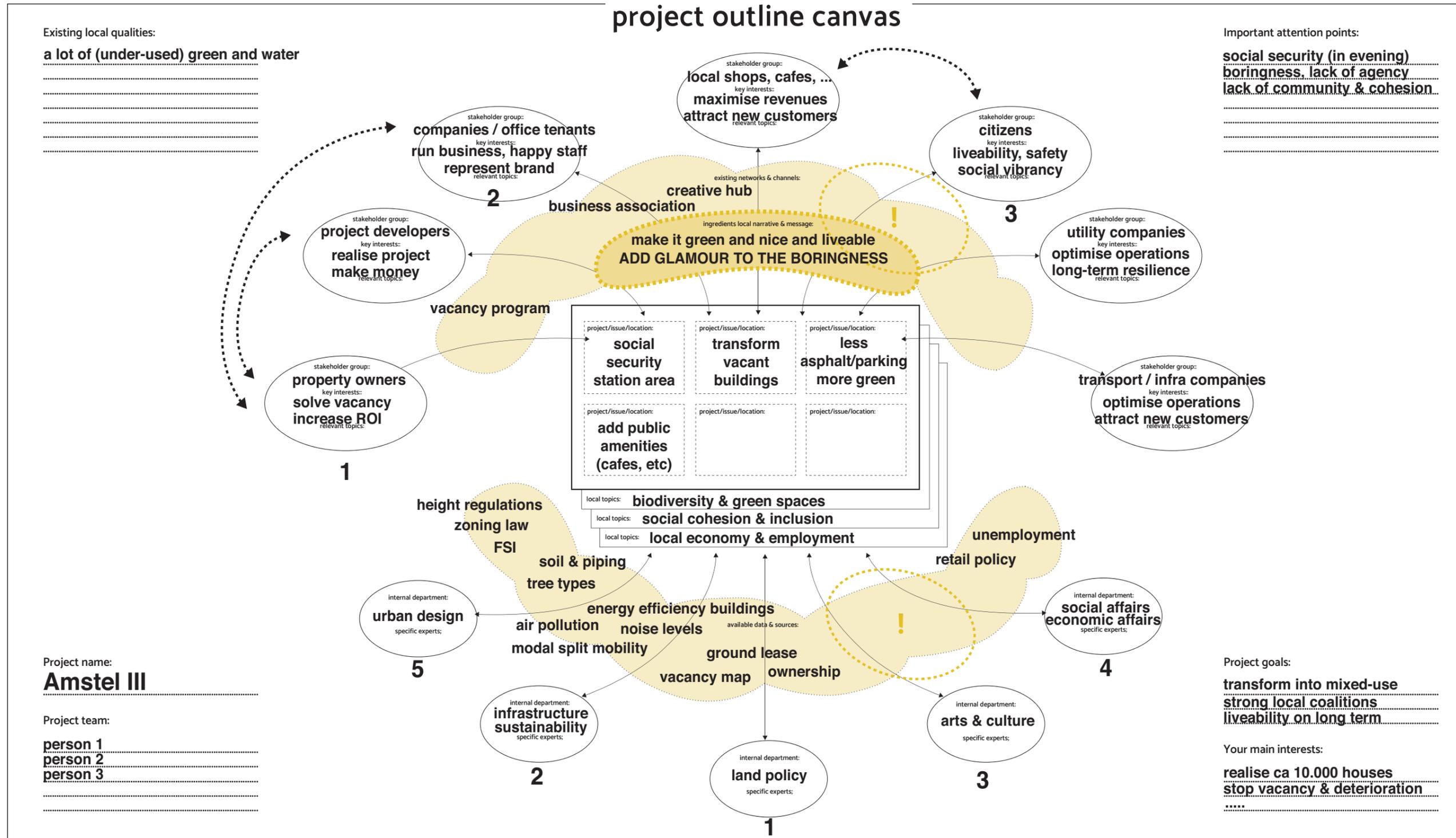
Preparation needed:

- Appoint a facilitator for the workshop and agree on who takes notes
- Make integral analysis of the neighbourhood and summarise findings in "Project Outline Canvas"
- Make an inventory of existing plans and visions in your organisation (incl other departments) and in the area (is part of your analysis)
- Make an inventory of local events, networks, initiatives, platforms (is part of your analysis)

Step 1: Analysis "Project Outline Canvas"

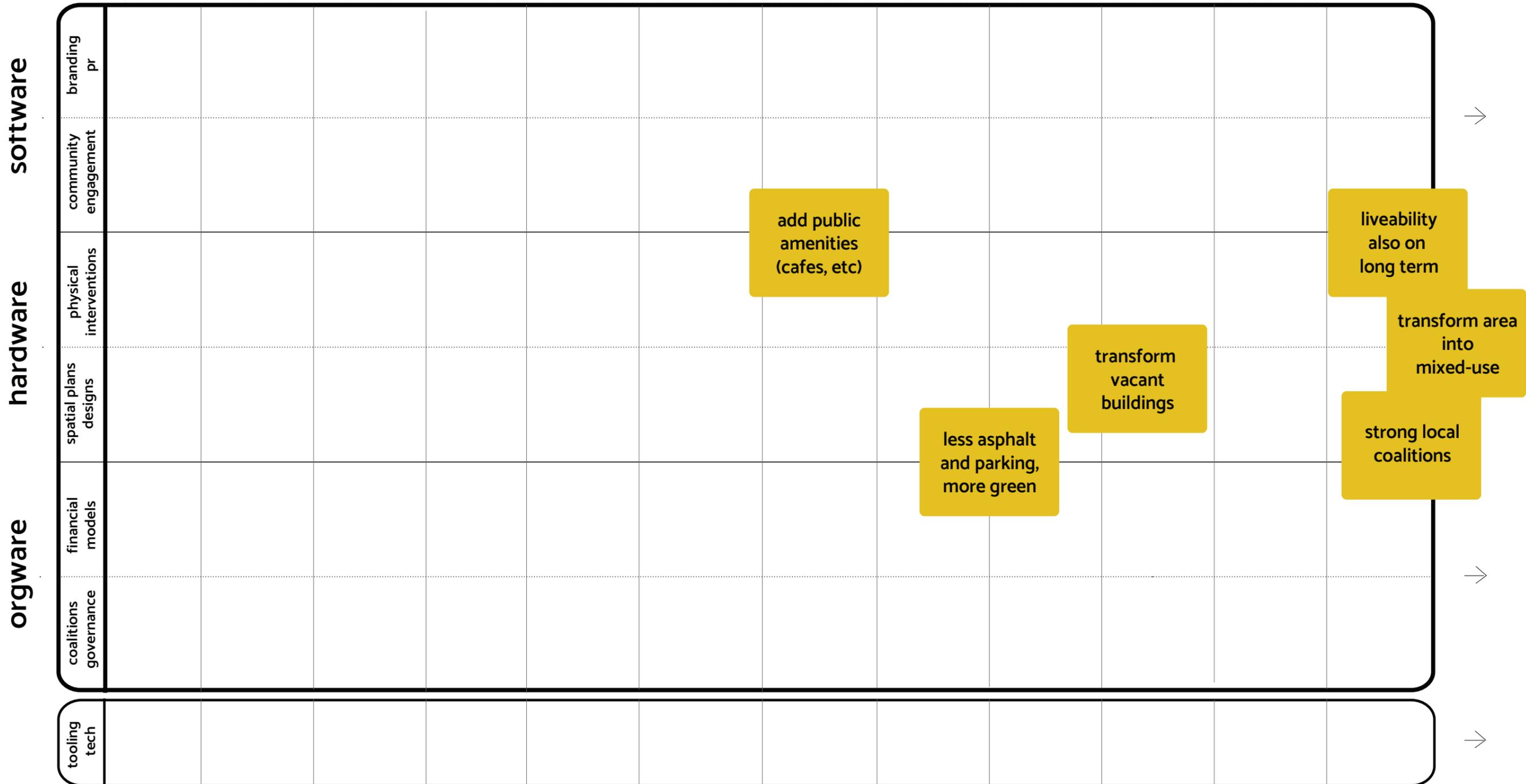
Take the Project Outline Canvas that you filled in, ideally together.

Have a look at it together and allow for a round of questions. Is everybody familiar with this canvas and most of all its content? Are there questions? Is anything missing on the canvas? Make sure you have a clear and shared understanding of this project outline as it is the basis on which you will build your local strategy. We will show the example canvases from Amstel III here:



Step 2: Copy project goals

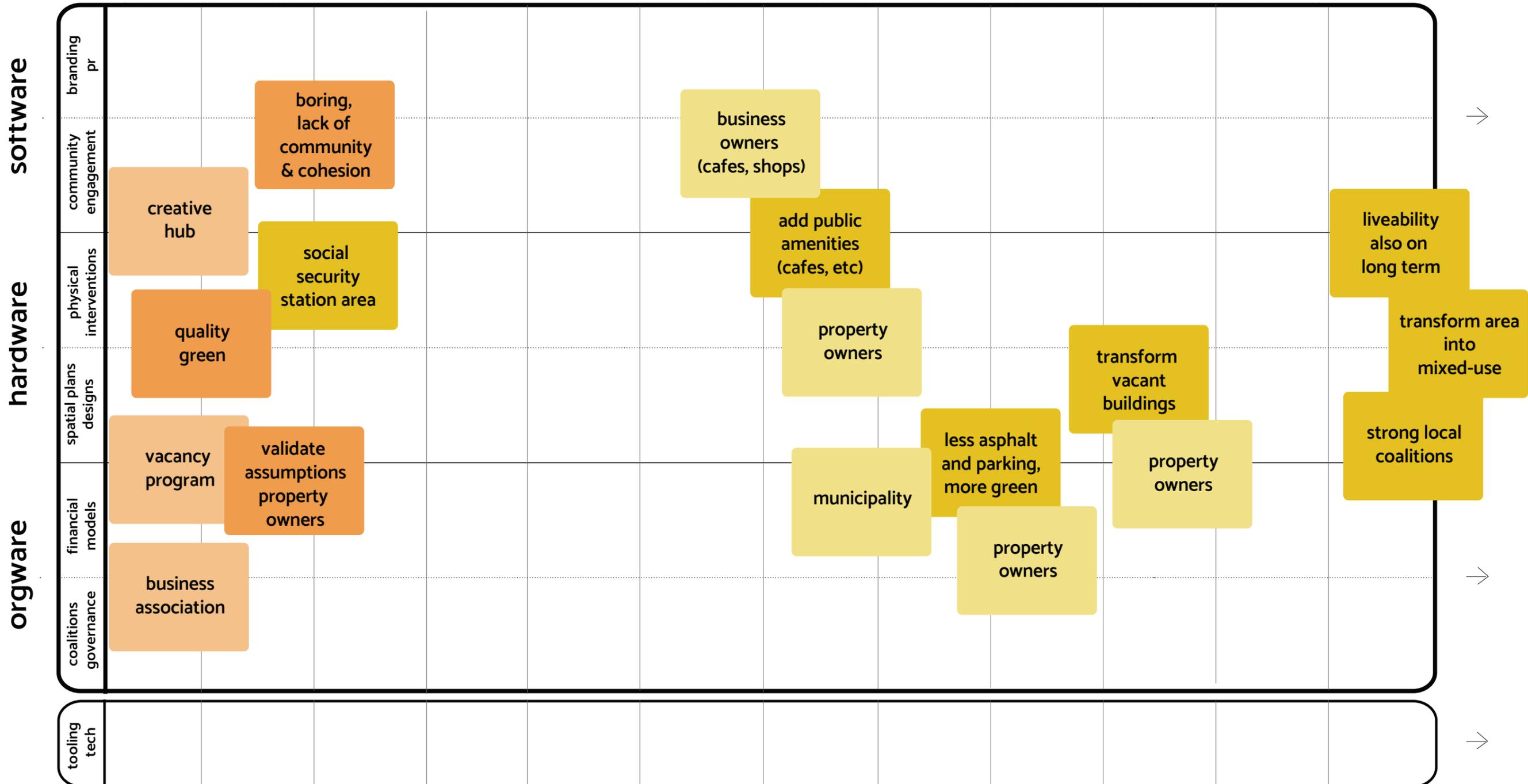
Take your main project goals (bottom right) and the key topics and issues for the short, middle and long term and put them on the right side of the 7-layer model. The exact position is not so important yet, just put them more or less in the right order. Also put them in the relevant layer: so community goals in the software, building transformations in the hardware, etcetera. Some goals may be related or even combined into one goal, make smart combinations where opportune. Make a round to check if you are complete before continuing.



timeline

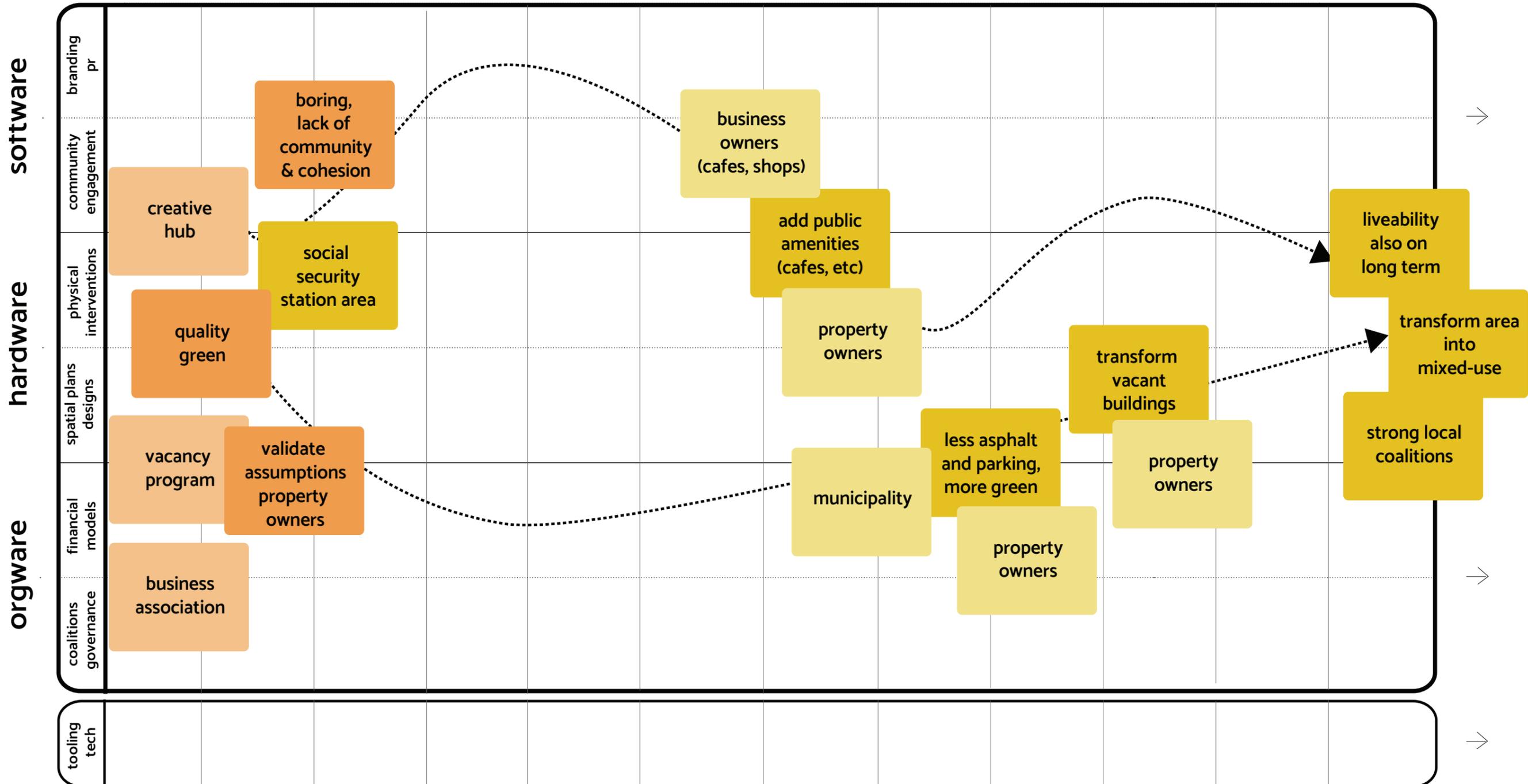
Step 4: Existing initiatives & prioritised actions

Add existing initiatives, events and networks that can serve as potential starting points for your strategy. Also add the prioritised challenges, actions from your project outline canvas, like collecting missing data, validating assumptions with key stakeholders, etcetera. These are all potential starting points. Some may be combined into one compact starting point, for example validating assumptions about owners during a vacancy program meeting. Make it broad: even a small or far-fetched starting point can kickstart serious change.



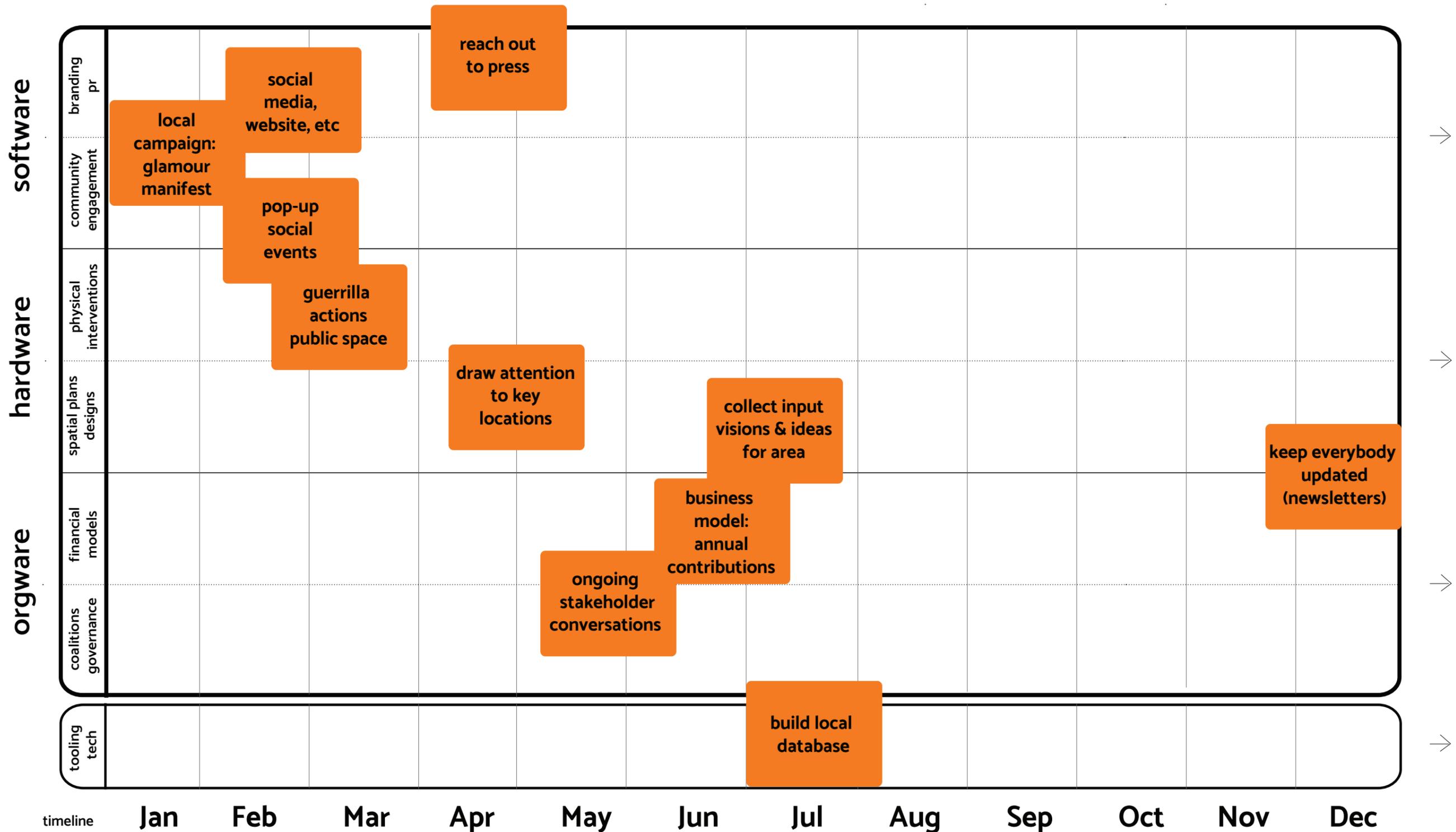
Step 5: Make first connections

Make a round: can you spot interesting connections or overlaps, where you feel you can create a strategic action line? Maybe the same stakeholder group that comes back in very different topics on short, middle and long term could be connected to build up the relation and collaboration over time. Or a specific location comes back in many topics, which can be an interesting leading principle to build actions around and scale and spread from there. If these lines are not yet clear, you need a few more steps to reveal or create them.



Step 7: Define your first steps

Based on this strategy, you can finetune the first year. Take a new canvas and fill in the timeline. Which actions from your strategy can you prioritise and can you refine them into more precise steps? Then collectively define **at least three actions** you can start with straightaway, without being dependent on external commitments, permits or budgets. The size of these steps depends on the area, there is no right or wrong. Make a last round to check if everybody agrees with this and recognises their own interests in this plan.



Step 8: Team, responsibilities & budgets

- Take photographs of both canvases to distribute with the notes
- The project leader will be responsible for monitoring the integrality and the progress in the strategy.
- Define who is responsible for specific action lines or even individual actions. In large and complex projects you may want to appoint action line leads (coming from the department with the strongest interest in the related goals)
- Estimate resources needed per action line (time, space, expertise, budget)
- Weigh the resources needed per action line with our shared interests when it successfully achieves all goals as planned
- Maybe you need to bring in budgets from different departments to create one integral strategy budget. Agree on distribution (%) among the different departments (for example on how big or small their interest is in the success)
- Agree on the first concrete actions, appoint the responsible people and make agreements for deadlines or follow-up meetings.. Make sure everybody distills their own actions for their own planning. Take good notes here.
- Plan regular meet-ups with the whole team to discuss overall progress, updates on new insights and developments and proposals on new opportunities and actions (for example every six weeks, but this depends per area and per project phase)
- Agree on an easy and centralised platform to exchange updates and info in-between meet-ups (Slack is a very handy tool for this, but there are more options). Make sure everybody stays updated and you have a shared database.
- Agree on decision-making mandates for each action line lead. Of course you meet and discuss regularly, but the action line lead needs the trust and freedom to act fast and flexibly responding to changes or opportunities popping up in the area. It also ensures ownership and accountability within this highly integral and cross-disciplinary way of working. If you fail to do this, you run the risk that nobody is really responsible and actions fall in-between departments and people.
- Share notes with all attendees and plan the next workshop