



GRANULAR

Stakeholder engagement toolkit for territorial initiatives

A practical guide to address complex local challenges



Purpose

Showcase the different stages and operational strategies that can support the coordination of the territorial initiatives



Audience

Local actors, civil servants, consultants, researchers, students



Outcomes

Acquisition of the basic knowledge to address territorial initiatives with multiple actors



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Contextualisation... why this toolkit?

The toolkit takes a step forward from the experience and practical knowledge developed throughout the GRANULAR project, particularly through the Multi-Actor Labs and their initiatives. Rather than presenting a specific project methodology, the toolkit provides, especially for the beginners, a set of principles and practical guidance that can be used flexibly in different territorial contexts and alongside other materials and resources.

It is organised around principles emerging from the territorial experiences, including context-based, pluralistic and interactive approach. Its contents address key aspects of stakeholder engagement, such as understanding the territory, managing the process, the skills and knowledge required to work effectively with actors avoiding technicalities.

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Are you part of an NGO that wants to build a monitoring plan for biodiversity management involving a large territory, but you don't know what are the actors that have to be involved? Do you feel a little frustrated because the involvement of the actors to improve the water supply is difficult? What are the common points in these questions? In these cases, different actors are trying to cope with territorial challenges, e.g. from the decreasing of basic services and depopulation to the restoring of natural areas.

This is a toolkit that can support territorial actors during their stakeholder engagement process. It has the ambition to support the "leading actor" that can be a civil servant, a researcher, a local actor or a consultant during these processes and guiding you through the different stages and operational strategies, from the set-up of the group to the monitoring activities, within advice and practical examples for finding a common solution based on the continuous engagement and process of knowledge exchange. The toolkit is not a linear guideline, instead is a guided process that can be revisited as new knowledge, actors and circumstances emerge.





Key concepts	
Territory	The geographical area concerned by an initiative, together with the people, organisations, activities and conditions that shape it.
Territorial initiative	A set of activities through which actors work together to address a challenge or pursue an opportunity in a territory.
Territorial picture	A developing understanding of the territory, built by bringing together existing information and local perspectives. It can change as new knowledge emerges.
Local actors	People, groups or organisations connected to the territory through their work, knowledge, experience or interests.
Stakeholders	Actors who can influence an initiative, are affected by it, have relevant knowledge or have an interest in its outcomes.
Stakeholders mapping	The process of identifying relevant actors and considering how they relate to the issue and to the initiative. The map can be updated as the work develops
Local Needs	Problems, gaps or aspirations identified through evidence and the experiences and perspectives of people in the territory.
Local Knowledge	Knowledge gained through living or working in a territory, including practical experience that may not appear in formal data.
Sense of belonging	The feeling that actors are part of a shared initiative and that their contributions matter to its direction.
Facilitation	Supporting a group to communicate, exchange knowledge, address difficulties and work towards shared objectives.
Governance arrangements	The agreed ways in which actors organise their work, assign responsibilities, make decisions, share information and remain accountable.
Plan	A document setting out an initiative’s priorities, activities, roles and ways to monitor progress. It can be revised as circumstances change.
Reflexivity	The process where actors adopt to examine how the group is working, whose perspectives are heard and what should change.
(Cross) visits	A collective, organised group visit to a territory where an initiative is taking place to experience it firsthand with the aim of discussing in presence similarities, oppurtunities, policies and alternative solutions.
Territorial network	The relationships among actors that develop through an initiative and can support future collaboration.



Territorial picture



1. WHY?

Understanding the territory is the first step towards building a desirable initiative. Reassembling the knowledge for understanding the context implies a continuous process of interactions and knowledge exchange with local actors. This process is cumulative and iterative: understanding evolves as new actors become involved, new information emerges, priorities shift, and political or administrative conditions change.



2. GUIDING QUESTIONS

- 1 What is happening in the territory?
- 2 What information already exists? Which projects or initiatives are already active?
- 3 Which issues are repeatedly mentioned?
- 4 How can you contribute to a desirable future?



3. PRACTICAL EXAMPLE

A tourism association working across several municipalities wants to understand summer tourist flows so that public transport can be reorganised to better meet demand. With support from the municipalities, it plans to collect mobility data. It also intends to work with a university to develop a survey and distribute it through local tourism businesses. Before collecting new data, however, the association should identify what information is already available. This will help it use its resources effectively and involve local actors where their contribution is most useful.



4. CHECKLIST

- ☐ Review existing knowledge and sources, including relevant reports, projects and initiatives.
- ☐ Gather local perspectives through interviews, workshops, focus groups or other suitable methods to understand experiences and needs
- ☐ Compare perspectives to identify agreements and disagreements, overlooked issues, and opportunities for action
- ☐ As you develop these activities also think about resources (economic, human and time)



Identify the actors



1. WHY?

Territorial initiatives are pluralistic. To understand the territory and develop a collaborative initiative, identify and engage the people and groups who are affected by the issue, can influence the initiative, hold relevant knowledge or have an interest in its outcomes. In this case, you are mapping the actors who influence, are affected by, or have knowledge of the territory and the issue you want to address. This process is directly linked to building your picture of the territory.



2. GUIDING QUESTIONS

1 Who is already involved?

3 Do they have reputation, knowledge, resources or technical skills?

2 Why are these actors relevant? Who needs to be informed but not necessarily involved?

4 Which underrepresented groups could contribute to an alternative perspective?



3. PRACTICAL EXAMPLE

An initiative aims to improve telecare services for older people in rural areas. Key stakeholders include the service provider, for its operational expertise; a senior public officer, for knowledge of policies, resources and decision-making; and local socio-cultural actors, whose community knowledge and direct contact with residents can reveal needs not captured by administrative data. As the initiative develops, these actors may also identify additional stakeholders, making the stakeholder map an evolving tool.



4. CHECKLIST

- ☐ The territorial picture is your starting point
- ☐ Identify most appropriate visualisation tool that can support you in mapping, visualising, and prioritising actors
- ☐ Check the actors that have to be involved in your first steps
- ☐ Use existing networks, associations, key actors as entry points



Explore the needs in depth



1. WHY?

After identifying the key actors and understanding the territorial context, you have sufficient background to begin identifying local needs. These needs can emerge from a combination of quantitative evidence, local knowledge and stakeholders' experiences. Using multiple sources of information and engaging with different actors helps you identify not only the most visible challenges, but also emerging issues that might otherwise be overlooked.



2. GUIDING QUESTIONS

- 1 Which needs are shared across the groups?
- 2 Where the perspective differ?
- 3 What are the emerging issues?
- 4 Which needs should be prioritized?



3. PRACTICAL EXAMPLE

Imagine that you want to build an initiative to strengthen local food chains in your territory and enhance circularity within the local food system. You start by exploring existing information and find that local production and supply are relatively well documented. However, this only provides part of the picture. By engaging with local actors and bringing together their knowledge, experiences and perspectives, you begin to identify challenges affecting local food chains and an important knowledge gap now becomes visible: while there is information on what the territory can supply, much less is known about local demand.



4. CHECKLIST

- ☐ Map the challenges and the opportunities of the territory
- ☐ Identify the actors and involve them
- ☐ Discuss their needs and prioritise
- ☐ Start to think on your strategy for building the group and the vision



Build the sense of belonging



1. WHY?

Once needs have been identified and the territorial initiative is well established, meaningful participation requires building a sense of belonging around a common narrative and shared long-term goals. Emphasizing the added value of collective work can strengthen engagement and collaboration. Differences in perspectives, expectations and knowledge should not necessarily be resolved through consensus, but can become opportunities for mutual learning. This process should be adapted to the local context and to the timing of the initiative.



2. GUIDING QUESTIONS

1 Where are we?

3 In what way each actor can contribute?

2 Where we want to go?

4 What can we achieve together that actors could not achieve alone?



3. PRACTICAL EXAMPLE

You are part of an NGO that wants to build a monitoring plan for biodiversity management involving a large territory. Your narrative can be composed from different elements starting from the “territorial identity” (rich territory in biodiversity with a long tradition on bird watching and community resource management) and vision with long-term goals and aspirations for the future (restore natural area and establish a protected area for leisure and educational activities) that can go to support for maintaining interest in the initiative and highlighting the added value of it.



4. CHECKLIST

- ☐ Prepare an event and involve your actors
- ☐ Discuss the long term objectives
- ☐ Start to understand what can be the timeline and the resources that you need
- ☐ Think on the use of participatory approaches



Facilitation as transversal skill



1. WHY?

Leading a territorial initiative across a wide area and involving multiple actors can be challenging. For this reason, your initiative can be supported by a facilitator, which is a person who is both concerned with and guides the process of solving problems, learning and achieving outcomes in a group. More in practice, the facilitators are those who can make the most effort to network among people, to organize events to meet, exchange, promote the activities, and to contact even personally the actors to be involved.



2. GUIDING QUESTIONS

- 1 Are you listening and contribute to support an active communication?
- 2 Are you posing as a mediator?
- 3 Are you adaptable and proactive?
- 4 Have you the competences in manage the conflict?



3. PRACTICAL EXAMPLE



4. CHECKLIST

- ☐ Take into account various contextual factors that can influence your activity in rural areas
- ☐ Distance and geographical aspects are important to plan the activities and the involvement
- ☐ Think on simple and adaptable tools for facilitate the discussion
- ☐ Don't assume there is internet ;)



Governance arrangements



1. WHY?

By governance, we refer to the processes and practices whereby groups make decisions, build relationships, structures, and establish accountability to create a collaborative environment. There is no single governance model that fits every territorial initiative, in fact governance arrangements depends on actors, resources and time. Governance does not necessarily require a formal structure, but clear rules or procedures are needed to work together in a transparent and coordinated way.



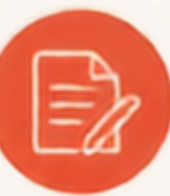
2. GUIDING QUESTIONS

1 Who does what?

3 How is information shared?

2 How are decisions made?

4 How will progress be reviewed?



3. PRACTICAL EXAMPLE



4. CHECKLIST

- ☐ Think on financial and human resources
- ☐ Define internally roles and responsibilities
- ☐ Create a shared and established decision-making model to guarantee a transparent communication
- ☐ Explain and share the organisation of the arrangements with all the actors



Your territorial Plan



1. WHY?

The Plan represents an iterative and reflexive document to plan your activities and future implementations, keep track of the progresses, development, monitoring, and evaluation of the initiatives. Think about the possible risks and solutions of your implementation strategy and the analysis of their possible consequences on the expected achievements and make a list of possible solutions. To build your Plan in a collaborative way, it is a good exercise to organise an event where actors can discuss and revise it.



2. GUIDING QUESTIONS

1 What are your priorities?

3 Who are the actors to be involve?

2 Why are necessary for the territory?

4 How are you thinking to monitor and evaluate the Plan?



3. PRACTICAL EXAMPLE

The stakeholders identified the need to improve support for older people living alone in rural areas. After the discussion with local authorities, social services and telecare providers, the group prioritised improving the use of telecare data to better identify vulnerable users and anticipate situations of risk. The Plan defined who would provide the data, who would analyse it, how local actors would contribute their knowledge of the territory, and how the results could be used to improve coordination and preventive support for older people.



4. CHECKLIST

- ☐ Identify and decide the main priorities
- ☐ Connect priorities to concrete territorial needs
- ☐ Define the actors to involve and their roles
- ☐ Identify possible risks and define monitoring and evaluation activities



Plan, monitor, adapt and..



1. WHY?

Planning and monitoring are not only procedural exercises for defining activities, deadlines, controls and indicators. They also reflect the different intentions and purposes emerging from territorial involvement and participation, making the path shared and collective. The timetable can serve as an organisational tool for checking and revising activities, while also reflecting the collective construction of the territorial process. For this reason, it should remain flexible and open to changes, revisions, delays or interruptions, as well as to renegotiation and discussion among actors with different perspectives, knowledge and roles.



2. GUIDING QUESTIONS

1

In what manner are you thinking to organise this process?

3

Have you establish indicators?

2

Are you reaching your results?

4

What can be the adaptation actions?



3. PRACTICAL EXAMPLE

A group of municipalities, farmers, unions, researchers and water authorities was working to improve access to water for farmers. The initial plan was to collect soil data and use sensors to estimate soil moisture. However, a specific survey of farmers and discussions with water management researchers showed that farmers were more interested in mapping water reservoirs, while field data collection would have required too many resources. The group therefore collectively revised the planned activities during a meeting on the preliminary results.



4. CHECKLIST



Your timetable is part of the Plan



The planning, monitoring and evaluation activities can be discussed in regular meetings



Establish an open moment to guarantee the involvement of all actors



Be flexible, use the adaptation to change the realistically the path



....Reflect



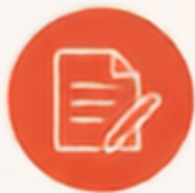
1. WHY?

In heterogeneous groups, continuous feedback, reflection and learning help local actors improve listening and make discussions more inclusive and effective. Reflexivity helps to identify bottlenecks, different perspectives, unexpected effects and possible adaptations. This can be recursive practice, through workshops, local events but also collective decisions and monitoring activities fostered a continuous learning process in which obstacles became resources for collective reflection and related action.



2. GUIDING QUESTIONS

- 1 Why reflexivity can be useful in your Plan?
- 2 How are you thinking of integrating it?
- 3 What can be the tools to make it effective?
- 4 How are you thinking to address the difficulties?

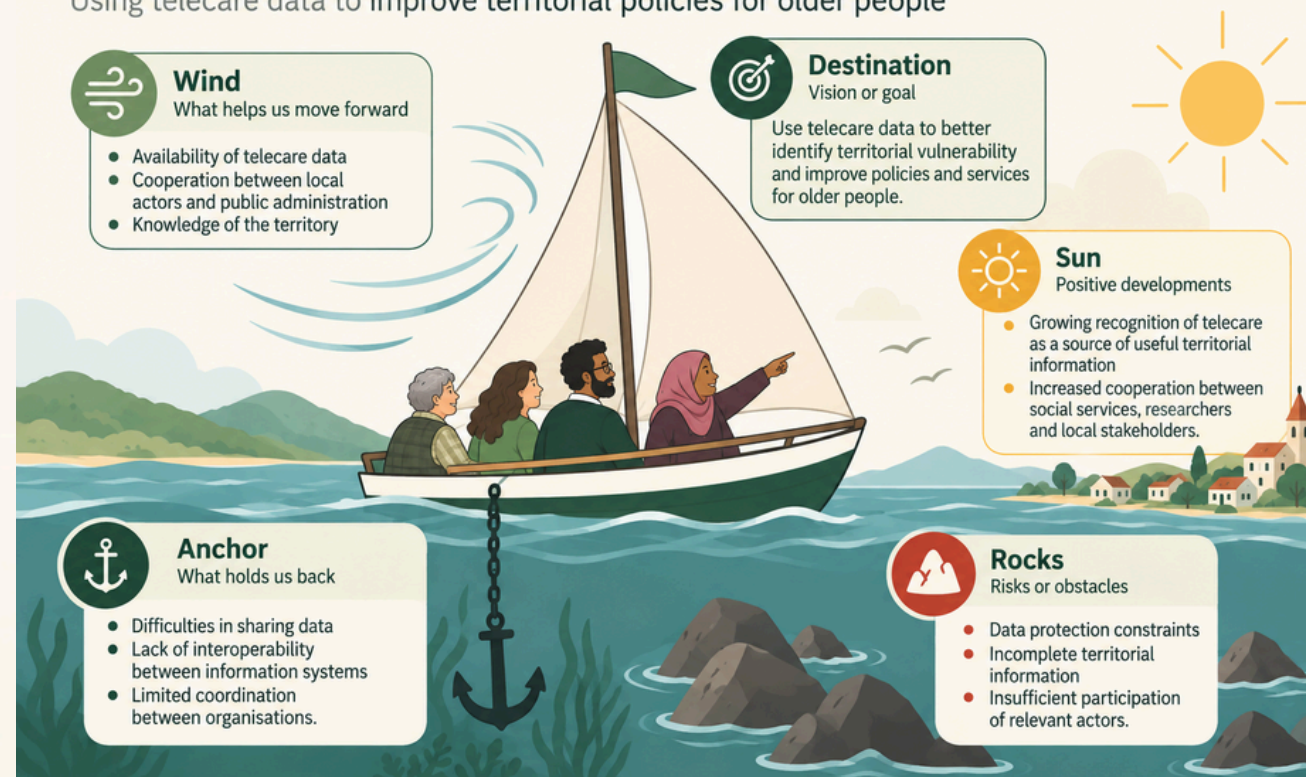


3. PRACTICAL EXAMPLE

Reflexivity can be practices in a different way, however “participatory methods” planned as interactive activities offer the opportunities to support the creation of reflections and discussions, integrate knowledge and skills, through the exchange of ideas and experiences. In this sense and depending on the outcome and on the phase, there are various ways that can support the territorial process.

Sailboat Retrospective

Using telecare data to improve territorial policies for older people





Strategies to maintain the interest



1. WHY?

To achieve the desired objectives, it is crucial to communicate openly about the process, activities and outcomes. Avoid passive engagement, one-way communication and isolated events. Organising an annual event in person can be valuable, although it takes considerable effort. To be effective, the event should be seen as an opportunity to share and discuss the work done so far, rather than as an activity in itself. Results, difficulties and changes to planned activities should also be communicated to everyone involved. This helps build mutual understanding and a shared path, while showing participants what has come from the time they have contributed.



2. GUIDING QUESTIONS

1 Are you supporting regular discussion?

3 What do the actors think?

2 Have you identify the suitable channel?

4 Follow-up moment are planned?



3. PRACTICAL EXAMPLE

Your working group includes various actors with different schedules and coming from different and also far parts of the territory. When organising an annual event, think about three phases: before, during and after. Before the event, agree on a suitable period, location and programme, considering agricultural calendars, working hours and travel distances. During the event, create opportunities to share results, difficulties and changes in the activities, as well as informal moments for exchange. After the event, communicate the outcomes and next steps to all actors involved.



4. CHECKLIST

- ☐ Adapt the communication channels to the needs of the activity, the size of territory and the actors involved
- ☐ Think on the frequency of the communication flows
- ☐ A WhatsApp group can be useful for short information or logistics aspect
- ☐ An email can support the sharing of more detailed activities, events and discussions



Knowledge creation and exchange



1. WHY?

After all, you reach your objectives and to be more impactful you can synthesize the results into understandable knowledge. In other words, you must work on facilitating access to relevant knowledge and ensuring that information is shared in an effective way. “Visits” create opportunities not only to collect knowledge, but to compare, combine and produce it, where shared and documented knowledge that can inform decisions, action and learning beyond your group.



2. GUIDING QUESTIONS

1 How you can show your results?

3 What are the channels that you want to use it?

2 Who needs to use the knowledge?

4 What could you learn from other territories or initiatives?



3. PRACTICAL EXAMPLE

Cross-visits should not be understood simply as opportunities to identify and transfer good practices from one territory to another. Their main value lies in understanding why a policy, service or intervention works in a specific territorial and social context, and whether the conditions that support its success are also present elsewhere.

Cross-visits should therefore create spaces for collective reflection involving different types of actors. For example, volunteer-based models that may work well in some Northern European countries could face important regulatory or social limitations in Southern Europe. Similarly, differences in the level of financial and human resources available in territories such as Spain and Sweden can strongly affect the capacity to maintain investments or policies over time.



4. CHECKLIST

- ☐ Sustain the promotion of mutual learning between territories and stakeholders
- ☐ Reflect on the suitable format
- ☐ Think on the experience that are suitable and valuable to share
- ☐ Conclude with joint reflect on lessons learned in a proactive way



Translation of the knowledge



1. WHY?

To increase impact, results can be translated into reports, maps, infographics, story maps, and shared through newsletters, radio and television, social media, ad hoc events. Moreover, to make the knowledge accessible (as recommendations): e.g. clear language, understanding the audience (different formats for different audiences), visual communication, etc. In short, you have to ensure that the knowledge that can be understood, accessed and used by the people who need it.



2. GUIDING QUESTIONS

1 Who is the audience?

3 Is the language understandable?

2 What do they need to know?

4 Is the format appropriate? How will they access it?



3. PRACTICAL EXAMPLE

Your group collects data on food consumption in local school canteens to understand local demand and explore opportunities to strengthen local agri-food supply chains. At a dissemination event, you present the results to municipalities, canteen managers, farmers' associations and trade associations, who may interpret and use the same information in different ways. You therefore use clear, non-technical language while providing enough detail for people with different professional backgrounds to interpret the results from their own perspectives.



4. CHECKLIST

- ☐ Match the audience to the format
- ☐ Infographic or practical guide for local actors
- ☐ Policy or decision brief for decision makers
- ☐ Visual communication, reports, guidelines for a more broader wider networks



But in concrete? Actions and impacts



1. WHY?

Transforming your results into concrete actions that can be reused across the territory to build new strategies, redefine them, or monitor them is quite complex but not impossible.

You can face several problems but if you are determined and creative you can find a way to develop your action and have a “real” impact. For example, it can happen that you already have the strategy where your final results can feed it or that you don't have the plan. In this case, you can try to organize specific events, such as the hackathon, that can help you identify specific solutions for results' applications.



2. GUIDING QUESTIONS

1

How can your results be turned into actions?

3

How could you make your results reusable?

2

Who could help you apply your results?

4

Could a specific event help you find creative solutions?



3. PRACTICAL EXAMPLE

Your community wants to measure the effects of climate change and drought to understand why the forest is declining and plan for its future. You work with local actors involved in forest management to collect data and with universities to analyse it alongside their quantitative data. Local knowledge helps identify the vulnerability of the trees and informs a model developed by researchers. Together, these contributions support the creation of a data-based tool for monitoring forest health. Local actors can use the tool to guide forest management and raise awareness of how climate change affects the forest.



4. CHECKLIST



Think on concrete actions and solutions



Create the opportunity to collaborate in a creative way



Involve different actors that can identify alternative path



Explore events and activities to support this process



Keep the network alive? Explore new opportunities



1. WHY?

Now your initiative is complete. However, during this period a good collaborative environment/territorial network is created and people begin to think that it is a shame to close the project. At the same time, maintaining the territorial network is a challenge. Continuity depends on communication, coordination, motivation, human and financial resources, and the ability to integrate new actors and identify opportunities. Being involved in collaborative or specific networks can facilitate and support you in exploring other opportunities that can be linked - totally or partially - to your past initiatives and or to identifying new ones.



2. GUIDING QUESTIONS

1 Are human resources available?

2 Are financial resources realistic?

3 Can the network respond to political, social or environmental change?

4 Are existing initiatives, policies or networks linked to your issue?



3. PRACTICAL EXAMPLE

During your initiative, a new network of territorial actors is created, together with new knowledge, tools and ways of working. When the project ends, an existing organisation – such as a Local Action Group or a network for rural development – can become a “home” for this legacy. It can keep the network connected, for example by maintaining the communication channels created during the project, such as mailing lists or WhatsApp groups. It can also preserve and use the knowledge and tools developed, involve new actors, and reactivate collaboration when new needs or opportunities emerge.



4. CHECKLIST

- ☐ Maintain communication among actors
- ☐ If are the conditions, establish a coordination mechanisms for future interactions
- ☐ Maintain the interest and the engagement
- ☐ Integrate new actors



Your notes





GRANULAR

GRANULAR is a four-year multi-disciplinary and transnational project. It aims at generating new datasets, tools and methods to better understand rural diversity and to promote place-based rural policies.



www.ruralgranular.eu



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