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EXECUTIVE SUMMARY

MyUniversity is a project partially funded under the ICT Policy Support Programme (ICT PSP) as part of the Competitiveness and Innovation Framework Programme by the European Community.

One of the key aspects towards the success of the Bologna Process and the creation of unified European Higher Education Area is the close cooperation and interaction between governments, higher education institutions, students, staff, employers and quality assurance agencies. However in practise this is hard to achieve and the process lacks the active participation of a large number of students and university stakeholders.

For this purpose MyUniversity equipped universities with a cutting edge e-Participation platform which, giving them the means to reach out to all of their members and stakeholders, informing them of the issues under debate and providing them with innovative interactive tools so they can actively participate in the process. Thus providing the higher education decision making process with valuable input towards future polices and legislation.

MyUniversity was designed as a trial project that focuses on the unification of European Higher Education and its effect on university stakeholders, i.e., students, teaching and administrative staff with the aim of creating added value from the use of certain technologies

This report aims to define specific guidelines and best practices on how to engage the University stakeholders and increase e-Participation, as well as maintaining their interest over a prolonged period of time.

The first section is a preamble intended to present the report’s context, purpose, scope and intended audience. It also includes a list of used acronyms.

The second section is introductory and aims to briefly describe the MyUniversity project, in terms of defined objectives, target users and their needs, usage, technology and content.

The third section outlines the e-Participation ground rules and thoroughly describes each one. The main purpose of this section is to identify and explore a set of core principles that should drive e-Participation initiatives, towards an effective involvement of the participants in the actions which affect their lives, as well as the life of their community, thus contributing to an effective participatory democratic system. There are eight ground rules identified, namely Transparency, Respect, Trust, Creativity, Inclusion, Accountability, Productivity and Responsiveness.

The fourth section is focused on the e-Participation initiatives management. It aims to identify and describe a set of guidelines and good practices towards the deployment of successful e-Participation initiatives, based on an existent platform. The presented workflow is structured according to a conceptual model for an e-Participation programme cycle, comprising five phases, namely the Programming, the Planning, the Design, the Implementation and the Evaluation. Each of these phases is broken-down into stages that are contextualized and described. Moreover it presents guidelines suggestions for the defined stages.

The fifth section includes examples of e-Participation initiatives based on the guidelines and best practices included in the third and fourth sections.

The sixth section lists the references consulted during the preparation of this report.
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I. INTRODUCTION

I.1. Purpose

Political participation can be generically described as the direct citizens’ involvement in, or influence over governmental processes. In particular, e-Participation aims to empower citizens to act in bottom-up decision making processes, by means of ICT (Information and Communication Technologies), thus allowing politicians to make informed decisions while developing social and political responsibility. Currently ICT is becoming common on people’ lives and there is a broad range of ways to pursue citizens’ participation, however an effective participation does not only depends on the available technology. The citizens’ readiness to actively participate and to practice collaborative problem solving is strongly dependent on a general appreciation of transparency, openness and sharing, as well as the acknowledgement of the resulting tangible benefits.

The MyUniversity project was conceived to empower all university members and stakeholders in the higher education decision process, by the means of a transparent and extremely user friendly e-Participation platform. Using this platform together with specialized training on e-Participation and its impact on decision making, participant Universities should be able to engage their members and stakeholders on multiple issues to get their feedback, both locally and at European level.

Within this context, to build a sustainable and prolific e-participation practice, it is required to define strategies to deploy and manage e-Participation initiatives, develop effective participatory processes and make informed choices among the wide range of available ICT to adequately use them.

The purpose of this deliverable is to define specific guidelines and best practices on how to engage the University stakeholders and increase participation, as well as maintaining their interest over a prolonged period of time.

I.2. Scope and audience of the document

This report is a deliverable of the Work Package 2: “MyUniversity integration”. The objective of this Work Package is to deliver the MyUniversity platform based on the existing Demos@Work e-Participation platform with the addition of new technical features and tools to it (advanced portal generation module, integration with Facebook, security module, automatic translation module, Pnyx secure consultation module and others that may be required based on project evolution).

This report is released for public audience, project partners and the European Commission.

I.3. Definitions and acronyms

<table>
<thead>
<tr>
<th>Acronym/abbreviation/ special term</th>
<th>Description</th>
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<tbody>
<tr>
<td>C2C</td>
<td>Citizens to citizens</td>
</tr>
<tr>
<td>COTS</td>
<td>Commercial Off-The-Shelf</td>
</tr>
<tr>
<td>FAQ</td>
<td>Frequently Asked Questions</td>
</tr>
<tr>
<td>G2C</td>
<td>Government to citizens</td>
</tr>
<tr>
<td>GIS</td>
<td>Geographical Information System</td>
</tr>
<tr>
<td>ICT</td>
<td>Information and Communication Technologies</td>
</tr>
<tr>
<td>RSS</td>
<td>Really Simple Syndication</td>
</tr>
<tr>
<td>SNS</td>
<td>Social Networks Sites</td>
</tr>
</tbody>
</table>
II. MYUNIVERSITY OVERVIEW

II.1. MyUniversity Objectives

One of the key aspects towards the success of the Bologna Process and the creation of unified European Higher Education Area is the close cooperation and interaction between governments, higher education institutions, students, staff, employers and quality assurance agencies. However in practise this is hard to achieve and the process lacks the active participation of a large number of students and university stakeholders. For this purpose MyUniversity equipped universities with a cutting edge e-Participation platform which, giving them the means to reach out to all of their members and stakeholders, informing them of the issues under debate and providing them with innovative interactive tools so they can actively participate in the process. Thus providing the higher education decision making process with valuable input towards future polices and legislation.

The objectives definition is supported by an intervention logic that addresses three main levels, namely the general objective (top-level), specific objectives (middle-level) and operational (lower-level) results. The objectives are included in Figure 1.

<table>
<thead>
<tr>
<th>General Objective</th>
</tr>
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<tbody>
<tr>
<td>Creation of unified European Higher Education Area is the close cooperation and interaction between governments, higher education institutions, students, staff, employers and quality assurance agencies.</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Specific Objectives</th>
</tr>
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<tbody>
<tr>
<td>Enhancing the direct participation of citizens and civil society in the decision-making process itself, and improving the access to relevant content and available options, thus enabling them to interact with decision-makers in real time and with concrete contributions.</td>
</tr>
<tr>
<td>Involving citizens in the policy-making process by enhancing social networking capacities, using new intermediation models, creating collaborative input to policymaking (e.g. data gathering, sharing collective knowledge, Web2.0 technologies) thus enabling the provision of policy-making related services by citizens.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operational Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Obtain an average number of e-Participation initiatives per university and year of 12.</td>
</tr>
<tr>
<td>Obtain an average number of subjects being discussed per university and year of 5.</td>
</tr>
<tr>
<td>Obtain an average participation rate per process (compared to university population) is expected be 15%.</td>
</tr>
<tr>
<td>Obtain the creation of at least 5 cross-border participation processes.</td>
</tr>
<tr>
<td>Influence, either directly or indirectly, 2 Bologna Working Group reports.</td>
</tr>
<tr>
<td>Extend the use of MyUniversity to 10 new universities as external trial users.</td>
</tr>
<tr>
<td>9 different e-Participation tools will be available to the universities to offer to their members and stakeholders.</td>
</tr>
<tr>
<td>At least 10 decision making processes per university are affected by the collaborative input of members and stakeholders.</td>
</tr>
<tr>
<td>An average of 50% of all the universities decision making process will be open to members and stakeholders on the e-Participation platform for their contribution.</td>
</tr>
</tbody>
</table>

Figure 1 – MyUniversity objectives
II.2. Target users and their needs

The target end-users (participants) are students, professors and other members of the university and educational community, which have a lot to say on educational legal initiatives, may they be at European or local level. Currently their proposals rarely reach outside the university and have any impact on legislation and decision making processes.

II.3. Usage

This platform allows students, professors and other stakeholders to interact with their colleagues at both national and European level using ICTs (basically web and mobile based). For example, students are not only able to interact with other students from their own country, but with students from other countries participating in the project, allowing them to exchange their views on the key issues affecting them (e.g. ERASMUS, student mobility, Bologna plan, etc.). The same goes for the other higher education stakeholders such as professors, staff and even government institutions, which are also able to easily add and manage the contents and on-going debates and proposals through a web interface.

II.4. Technology

The used technology is based on COTS (standard) hardware, which centrally hosts the MyUniversity e-Participation platform (software) for all the end-users. The MyUniversity software platform is based on existing tools already being used by dozens of customers (basically Demos@Work, Gov2DemoSS and Pnyx). The majority of these tools are built on Web 2.0 Open Source technologies. Only Pnyx, an optional cryptographic solution for secure e-consultations, is not Open Source. The main delivery channel is the web, with complementary services offered through mobiles.

II.5. Content

The service requires stakeholders at each university and participating entities to add content to their specific portal, including issues to be discussed, background materials, etc. Content should be related to as many aspects of university life as necessary to engage its members to participate. Content related to common issues (e.g. European directives) is provided to all participants. Special attention should be paid to strategic user groups such as ERASMUS students, research exchanges.
III. E-PARTICIPATION GROUND RULES

III.1. Introduction

The purpose of this section is to identify and describe a set of core principles that should drive e-Participation initiatives towards an effective involvement of the participants in the actions which affect their lives and the life of their community, contributing for a participatory democratic system.

Participation involves the provision of easily accessible and relevant government information to citizens, in order to create opportunities for proactive contribution in the process of designing and improving policies and services. Within this context, principles are fundamental assumptions which form the basis for reasoning or action. The presented principles should act as ground rules for the different stages of e-Participation initiatives, including Programming, Designing, Implementation and Evaluation (see section IV). They comprise values intended to overcome potential barriers and leverage the drivers of e-Participation. It is also relevant to establish principles that can be quantitatively assessed to allow continual improvement.

The e-Participation is enhanced by ICT tools that constantly changing following the technological evolution. By contrary, the e-Participation ground-rules should be time-proof, meaning that they are not attached to any IT paradigm or specific technology, but instead to people engagement, since e-Participation is, above all, a social experience.

III.2. Ground Rules

The presented ground-rules must be understood as an whole, as they are all interlinked and are mutually re-enforcing, meaning that an increase or decrease in one dimension will necessarily impact the others in the same direction. The identified ground rules are represented in Figure 2.

Figure 2 – e-Participation ground rules
Ground Rule 1 - Transparency

The transparency and openness starts in the initiative design. The e-Participants should be aware of each initiative goals, potential outcomes, targeted participants, processes and tools. To clearly state the goals and potential outcomes will act as an incentive to the contributions, since e-Participants will understand the benefits of the initiative, as well as if they are included the target users. The e-Participation process should be provided in advance and, if reasonable and depending on the participation maturity stage, it can even be negotiable. The knowledge of the stages comprising the e-Participation process is extremely relevant, since e-Participants will be aware of the usefulness of their contribution and their role in each phase of the process, understanding how the contributions are being collected, who will make a decision and how it will be done. It is also essential to provide information on the communication of the outcomes.

Following the design stage, during the initiative running stage, it is important to publish all the contributions whenever is possible, to create trust among the e-Participants, motivating contributions from newcomers and fostering the discussion.

Finally, the initiative achievements should be broadcasted, providing the e-Participation real figures and impacts.

Guideline – How to ensure transparency

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available goals, scope, timeline and resources stated.</td>
<td>✓ Initiative goals, overview and timetable published online and offline.</td>
</tr>
<tr>
<td>Relevant information provided and plain language ensured.</td>
<td>✓ Information sources available and signposted.</td>
</tr>
<tr>
<td>Respective roles and obligations are stated.</td>
<td>✓ Terms and conditions provided to the participants.</td>
</tr>
<tr>
<td></td>
<td>✓ Role of all stakeholders (e.g. participants, decision makers) explained.</td>
</tr>
<tr>
<td></td>
<td>✓ Possibilities of complaints and appeals are specified and available.</td>
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</tbody>
</table>

Ground Rule 2 - Respect

The demonstration of respect for all the contributions and perspectives is fundamental to maintain the initiative and achieve successful outcomes at long term. The e-Participation initiatives shall promote civil behaviour, by means of constructive discussions and active listening. Different viewpoints and disagreements are natural, but it should be emphasized that the participation should be cordial. Furthermore, in many cases the aim is not to build consensus but to create understanding and facilitate deliberation.

Besides the contribution content treatment, the respect is also applicable to other dimensions such as the e-Participants consumed time and effort, as well as the selected tools and channels. The effective use of time is crucial nowadays, so the initiatives should be mature and robust in order to effectively use and acknowledge the provided contributions. As for the tools and channels, it is worthwhile to consider different levels of ability and practices among the e-Participants, selecting the most appropriate channels and tools.
**Guideline – How to ensure respect**

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
</tr>
</thead>
</table>
| Participants’ time and attention are treated as valuable and scarce resources. | ✓ Moderation and facilitation avoid duplication and ensure that governments and institutions information is identified and used.  
✓ Alternatives and timings are considered to avoid fatigue.  
✓ The content is focused on quality instead quantity. |
| Citizens can choose how they participate. | ✓ Back-office integration of multiples contribution sources is implemented. |
| Participants’ contributions are acknowledged. | ✓ Feedback is effectively implemented.  
✓ The users’ perspectives are considered in the available tools and processes. |
| Safety is ensured. | ✓ Accessibility, privacy and security concerns are addressed and implemented according to accepted standards.  
✓ Responsible usage of user data.  
✓ The quality of the online environment (e.g. privacy and neutrality) must be tailored to the needs of specific groups and it may often be appropriate to undertake a preliminary cultural needs and expectations analysis. |

**Ground Rule 3 - Trust**

The advance of new information and communication technologies (ICT), have coincided with a widespread sense that citizens have disengaged from formal politics, like voting or joining a political party, reflecting a degradation of trust.

Trust is a delicate challenge, since it grows slowly but it can easily and abruptly fall down. Within this context trust involves confidence in the e-Participation initiatives and it results in commitment from the e-Participants. It is has direct impact on cohesion and legitimacy. Since e-Participation is a relatively new practice, trust is a critical factor to its maturity and success. Confidence is a continual building process that mitigates socio-cultural barriers and, at long term, can sustain the e-Participation as a regular practice. The participatory process should have an independent and balanced moderation and facilitation, acting as a neutral and cooperating party to promote confidence. Actually the organisers should not only be neutral but also be seen as neutral by the participants.

Trust is also enhanced through data protection, identity management and security, which are vital factors considering the involved channels and the highly interactive and participative processes, in particular the social networking and personalized tools.
Guideline – How to ensure trust

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
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</table>
| Effective confidence in available tools and processes. | ✓ Institutions representatives and decision makers are involved in the programmed initiatives.  
  ✓ ICT corresponding setup tested and validated before launching the e-Participation initiatives. |
| Commitment to achieve the outcomes.                    | ✓ Commitment to achieve outcomes by means of e-Participation initiatives is reflected at all levels of the decision making process chain. |
| Independent facilitation and moderation.               | ✓ Sense of independent and balanced moderation and facilitation among participants. |

Ground Rule 4 - Creativity

Creativity is an essential condition to engage and motivate e-Participation and can be applied at several stages including the design, promotion and implementation of the initiative. A creative approach to build awareness contributes to attract participation. It is important to be dynamic and continually evolve the participation process, taking advantage of the available tools and adapting them to the existent socio-cultural context and trends.

Guideline – How to ensure creativity

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
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</table>
| New tools and integration options are continually explored. | ✓ Maintain the platform up to date with respect to new tools.  
  Deploy new modules and upgrade existing ones according to improve user experience and information collection.  
  ✓ Online tools are designed and deployed to be easily used. |
| New forms of collaboration are explored and tested.         | ✓ New approaches to the collaborative design and promotion of online participation are recorded and subject to critical review by all stakeholders. |

Ground Rule 5 - Inclusion

Within the context of this report, inclusion refers to the extent to which e-Participation contributes to equalise and promote a participative system, providing initiatives to the largest possible number of people, empowering citizens and acting as key factor to achieve legitimacy. The e-Participation initiatives should be designed to be socially inclusive, which requires a broad perspective of who should be informed and engaged, in order to effectively promote the awareness, go where people are and be accessible. Differences among participants are more often likely to enhance the debate and deliberation process and allow richer experiential input. It may include training in the necessary ICT skills.

Inclusion comprises the ability to:

- Make ICT accessible by meeting a wide spectrum of citizens’ needs, particularly special needs.
- Equip citizens with the required knowledge, skills and life-long learning approach needed to increase social inclusion.
- Increase the social well-being of citizens in remote locations by means of ICT
- Enable minorities, migrants and marginalised young people to fully participate in society by using ICT
- Deliver better, more diverse public services for all using ICT, while encouraging increased public participation in democracy

Guideline – How to ensure inclusion

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>A wide range of citizens are informed and engaged.</td>
<td>✓ The design of the e-Participation is shaped according to the inputs from a broad range of participants, reflecting their needs, expectations and preferences.</td>
</tr>
<tr>
<td></td>
<td>✓ Meaningful opportunities for those who would not usually participate in online events are provided.</td>
</tr>
<tr>
<td></td>
<td>✓ Multilingual information and summaries available whenever relevant.</td>
</tr>
<tr>
<td></td>
<td>✓ Accessibility features for people with special needs or disabilities.</td>
</tr>
<tr>
<td>Inclusive moderation and facilitation.</td>
<td>✓ The moderation seeks solutions incorporating or reflecting everyone’s points of view.</td>
</tr>
<tr>
<td></td>
<td>✓ The results representativeness is considered.</td>
</tr>
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</table>

Ground Rule 6 - Accountability

Accountability flows from transparency and openness and it includes clarity about the roles and responsibilities of the stakeholders involved in the decision making process. Stakeholders should be accountable for ensuring that contributions are recognized, fair and appropriate management of the content, ensuring a proper behaviour according to the established terms and conditions, efficient use of the budget and for the provision of feedback and justification to the participants.

Guideline – How to ensure accountability

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
</tr>
</thead>
<tbody>
<tr>
<td>Both organizers and participants are accountable for their actions.</td>
<td>✓ Agreed terms and conditions are enforced.</td>
</tr>
<tr>
<td></td>
<td>✓ Results are reported back to participants.</td>
</tr>
<tr>
<td></td>
<td>✓ The participants perceive to which extend they have actually influenced the policy making process.</td>
</tr>
<tr>
<td>Content generated by online participation is stored, archived, accessible and traceable.</td>
<td>✓ Digital content is recorded and archived according to accepted standards.</td>
</tr>
</tbody>
</table>

Ground Rule 7 - Productivity

The e-Participation initiatives shall be results-oriented, seeking a tangible impact on participative policy making. If the participatory process does not add value it has no reason to exist.
Guideline – How to ensure productivity

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
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</thead>
<tbody>
<tr>
<td>Final outcomes are perceived.</td>
<td>✓ Ideas, perspectives or solutions generated within the scope of the e-Participation initiatives are incorporated (and identified as such) and presented to relevant decision-makers.</td>
</tr>
</tbody>
</table>

Ground Rule 8 - Responsiveness
The implemented process shall envisage a response from a decision maker or institutional representative, in order to ensure that participants’ inputs are taken seriously and properly considered. The feedback shall occur independently of the achieved outcome.

The moderation and facilitation shall promptly respond to participants and provide the required support.

Guideline – How to ensure Responsiveness

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Measures</th>
</tr>
</thead>
</table>
| Response from decision makers or institutional representative. | ✓ The decision makers response is triggered.  
✓ Outcomes are reported back to the participants, no matter the success or achievement. |
| Effective users’ support. | ✓ The site provides contact information, FAQs, search functions.  
✓ The answers to the users’ question are prompt and effective. |
### III.3. Ground Rules Summary

#### e-Participation Ground Rules

<table>
<thead>
<tr>
<th>Ground Rule</th>
<th>Checklist</th>
</tr>
</thead>
</table>
| **1. Transparency** | ✓ Available goals, scope, timeline and resources stated.  
✓ Relevant information provided and plain language used  
✓ Respective roles and obligations are stated |
| **2. Respect** | ✓ Participants' time and attention are treated as valuable and scarce resources  
✓ Citizens can choose how they participate  
✓ Participants' contributions are acknowledged  
✓ Safety is ensured |
| **3. Trust** | ✓ Effective confidence in available tools and processes.  
✓ Commitment to achieve the outcomes  
✓ Independent moderation and facilitation |
| **4. Creativity** | ✓ New tools and integration options are continually explored  
✓ New forms of collaboration are explored and tested |
| **5. Inclusion** | ✓ A wide range of citizens are informed and engaged  
✓ Inclusive moderation and facilitation |
| **6. Accountability** | ✓ Both organizers and participants are accountable for their actions  
✓ Content generated by online participation is stored, archived, accessible and traceable |
| **7. Productivity** | ✓ Final outcomes are perceived. |
| **8. Responsiveness** | ✓ Response from decision makers or institutional representative  
✓ Effective users’ support |
IV. E-PARTICIPATION INITIATIVES MANAGEMENT

IV.1. Introduction

The purpose of this section is to identify and describe a set of guidelines and good practices towards the deployment of successful e-Participation initiatives.

The presented guidelines are structured according to a conceptual model for an e-Participation programme cycle, comprising five phases, namely the Programming, the Planning, the Design, the Implementation and the Evaluation, as depicted in Figure 3.

![Diagram of e-Participation programme cycle]

This approach is based on a continual improvement cycle, allowing the deployment of e-Participations initiatives on a regular basis. It assumes the existence of an e-Participation platform, which allows a regular launching of new initiatives.

In parallel and depending on the objectives and initiatives, it shall be possible to enhance the e-Participation platform, upon successive design iterations.
IV.2. Programming

The Programming phase starts with the scope definition, including the corresponding opportunities and challenges, followed by the stakeholders’ identification, goals setting and, finally, a feasibility study of the proposed initiative (see Figure 4).

IV.2.1. Scope Definition

The scope represents the ambit in which the participatory process will act. At this stage the purpose is to clarify what are the boundaries of the e-Participation process, by identifying the relevant issues, the engagement type and the intervention in the policy making cycle.

IV.2.1.a. Identify the Issues

This stage aims to identify the issues that will be addressed, understanding their corresponding challenges and opportunities. Within the scope of the MyUniversity project, the issues should be related with Higher Education, including local, national and European level. There is not a specific pre-defined agenda and the issues should be selected considering different factors, such as relevancy, impact, timing and e-Participation practice maturity.

The issues identified below should be considered examples and are not intend to bias or restrict the Universities’ agenda.

The Bologna process
- Social Dimension
- Qualifications frameworks
- International openness
- Mobility
- Recognition
- Reporting on the implementation of the Bologna Process
- Transparency mechanisms
- Employability
- Quality Assurance
- Recognition
- Funding

European Mobility Programmes
- ERASMUS
- TEMPUS

University
- Alumni (e.g. Lifelong Learning, Careers)
- Community (e.g. communities of practice)
- Faculty (e.g. Assessment Methods, Course Design,
- Teaching (e.g. Learning Styles)
- Staff (e.g. Careers)
• Students (e.g. scholarships, accommodation, student life)

National Higher Education

• Excellence in education
• Challenges (e.g. Recognition of degrees in the labour market across Europe)
• Employability (e.g. First job)

IV.2.1.b. Type of Engagement

The participants’ engagement can assume different types, depending on the purpose and maturity of the e-Participation system, namely Information, Consultation, Collaboration and Empowerment. These types comprise different levels of public involvement, as Figure 3, ranging from a minimum level in the Information to a maximum level in Empowerment. These engagement types are described below.

Information

This type of engagement consists in sharing information in a one-way relationship, in which governments, institutions or community based groups deliver information to the public or community. The purpose is to provide balanced and objective information to assist citizens to understand problems, alternatives, opportunities and possible solutions.

Although the Information does not represent an effective participation, it can be a huge benefit to citizens and communities if provided in a timely and targeted manner, reaching the right people in a way they can understand and respond to. Information is also important to support the other engagement types, since:

- Early in a consultation, information assists citizens in understanding issues, alternatives, opportunities and solutions.
- At the end of a consultation, citizens will want to know how their input affected the end result, and how things will move forward.
- In collaboration processes, sharing information builds trust and mutual understanding.
- Community-led decisions can be empowered by sharing citizens’ knowledge.
Consultation
This type of engagement consists in a two-way relationship in which governments, institutions or community based groups, implement an initiative to collect citizens or communities’ opinion on identified issues. The goal is to obtain feedback, including views of citizens or communities on policies, programs or services that affect them directly or in which they may have a significant interest.

The outcome of robust consultation is not necessarily consensus or agreement. Consultation is a process that allows and fosters the two-way flow of ideas and information. Consultation can occur at various points of the policy cycle and can be used to help frame an issue, identify or access options and evaluate existing policies, programs or services.

Critical elements of effective consultation include a shared understanding of how community input will inform policy or decision making processes, and timely feedback to participants on how their input contributed to the final outcome. It is also vital to report back to participants on how their input has contributed to the final decision, otherwise they are unlikely to see the value in contributing future initiatives.

Collaboration
This type of engagement is based in partnerships with governments or institutions, in which citizens actively engage in the policy making process, in order to ensure that their concerns are understood and considered. Citizens are involved in the development of alternatives and selection of the most appropriate solution.

The partnerships involve a cooperation to achieve a common goal. In partnerships, the responsibility, authority and decision-making are shared more evenly than in other forms of participation. There is often an agreement between the parties to share risks and benefits.

Empowerment
This type of engagement consists in sharing the power and responsibility between the government and citizens, in the selection of the final decision in the policy making process, empowering citizens to identify their needs, plan action, manage projects and evaluate the results of their activities.

IV.2.1.c. Intervention in the policy cycle
The implementation of an e-Participation initiative requires an understanding of the associated policy making cycle.

The policy making cycle comprise several sequential activities and it is required to know in which stage of the cycle the process is, to identify the interaction points that can be established and fit the process into the policy cycle.

The policy cycle can vary; although within the scope of this document it is assumed a generic cycle comprising five stages, as depicted in Figure 6.
1. Agenda Setting
The purpose of Agenda Setting is to identify relevant problems and issues that will act as inputs for the subsequent analysis.

2. Policy Analysis
The Policy Analysis stage is intended to clarify the issues included in the agenda in order to prepare a policy draft. This includes collecting information from a wide range of sources, including citizens and civil society organisations, understanding the political context, analyse trade-offs and develop possible options.

3. Policy Formulation
The Policy Formulation aims to design the policy, according a pre-defined methodology and based on the performed analysis. It can involve a broad range of mechanisms, including formal consultation, risk analysis, pilot studies and designing the implementation plan.

4. Policy Implementation
The purpose of the Policy Implementation is to implement the policy, including the development of supporting legislation, regulations, guidance and plans.

5. Policy Monitoring
The Policy Monitoring goal is to asses and reviews the policy execution, gathering feedback from the impacted citizens and institutions.
IV.2.1.d. Participation Area

The implementation of an e-Participation initiative requires an understanding of the context of the participatory process. The participation area refers to the specific area or areas of citizen engagement and involvement in the democratic process. Within the context of the MyUniversity project, the following areas may be applicable.

Campaigning

Campaigning refers to the process of lobbying, protesting, petitioning and other forms of activism in order to form a collective action. A campaign has tangible goals, a specific audience, uses tools to engage the targeted participants and aims to create supporters’ groups via the development and adoption of an attractive message or quote.

Community Building

Community Building refers to processes of creating opportunities for citizens join and form communities that have a special common characteristic, empowering and shaping such communities. This type of initiatives builds cohesion and trust through free interactions and opinion sharing. These communities can either share common interests or come from specific distinct domains such as regional communities, religious communities, political communities, social communities etc.

Community building is the core element of social networking, such as Facebook where users come together and create groups with the same hobbies, views, likes and dislikes and in such a way they make empower their voices. This is a way to engage more supporters and make citizens more active and much more aware of issues that are of their interest, through interacting with other people and sharing opinions with absolute freedom and without manipulation from power holders.

Consultation

Consultation refers to processes of collecting viewpoints concerning specific issues, corresponding to two way relationships between citizens and decision makers. The process is managed by the a public authority, which provides background information to citizens on the issues that are set for consultation, defines a set of questions that need to be answered and establishes the roles of the stakeholders involved in the consultation process. The citizens’ role is to provide information on the issue set for consultation, responding interactively and submitting online comments. Citizens have opportunity to build their arguments based on resources such as online data repositories, RSS feeds, newsletters and others.

Deliberation

Deliberation refers to the process of reflection and consideration of issues in a public exchange of opinions and formation of solutions, in order to achieve consensus. The participants are provided with detailed information on the subject under analysis and time to reflect and consolidate arguments. This technique requires moderation and facilitation as well as clear engagement rules.

By means of appropriate ICT, citizens are involved in the highest possible way in a deliberation process, actively participating in the decision making process, especially in the initial stages of the deliberation procedure (e.g. for the preparation of a law), since in the latest stages their role becomes less important, as their participation is confined to posting opinions and comments to a discussion that is moderated by subject matter specialists, legal experts and public officers.

Deliberation processes conducts to increase the awareness and the opinion exchange contribute to raise several aspects of the issue under analysis which promotes the understanding of the overall nature of the issue.

The high level of participation enforces trust and transparency and contributes to the creation of with common interests and common ideas.
Discourse
Discourse refers to the process of conversations and dialogue between citizens (C2C) and between elected representatives and citizens (G2C).

Information Provision
Information Provision refers to a one-way relationship in which information is produced and delivered to be used by citizens. Information provision plays a critical role of any e-Participation system as one of the main goals of an e-Participation process is to create informed participants that can contribute with opinions that are supported by strong arguments which can be created only if a person has deep knowledge of the issue discussed. The information shall be well-structured, accurate, legible and immediately related to the corresponding issue. A well informed user should be stimulated in order to actively share his opinion in the short-term- or long-term future.

Mediation
Mediation refers to processes of reconciling interdependent and opposed views on a particular subject. The parties themselves determine the conditions of any settlements reached - rather than accepting something imposed by a third party. The disputes may involve organizations, communities, individuals or other representatives. Mediators use appropriate techniques - tools and/or skills to open and improve dialogue between disputants, aiming to help the parties reach an agreement on the disputed matter. The mediator must be seen as impartial.

Polling
Polling refers to the process of conducting surveys and measurement of the public’s opinions in a variety of topics. These surveys are conducted through a series of questions, which end to the extrapolation of generalities in ratio or within confidence intervals. Usually there are not stringent security requirements, tolerating errors affecting a small percentage of votes, without compromising the final result.

Voting
Voting refers to processes of producing a final choice among several alternatives, by voting in elections, referenda or local plebiscites.
Based on the above mentioned dimensions to be considered in the scope definition stage, namely the issues identification, type of engagement, intervention on the policy cycle and e-Participation area, the following guidelines should be considered at this stage.

**Guideline – Participatory issues identification**

The configuration of the process building blocks depends not only on the aims of the initiative, but also on the stakeholders’ existent practice and habits, therefore the process shall be designed, from the beginning, together with the targeted participants.

It is important to know the targeted participants priorities, what will contribute to generate interest and what support is required to get involvement. In order to implement this it is required early engagement with students, teachers and University staff, as well as political representatives, higher education institutions representatives and University administration.

### Suggestions

- To identify the relevant issues it is required to know the existing needs, which can be done by designing a process for collecting the information from the universe of potential participants. This can be done by means of four step model including:
  - Free submission of ideas;
  - Ideas selection;
  - Consolidation of ideas and priorities;
  - Report back the results to the participants.

**Guideline - Select engaging topics**

There is no point asking questions that cannot be answered or have no value for making decisions about improvements or strategic direction.

Most probably the targeted participants are not especially interested in politics; however they do care about many specific issues that affect their lives and are willing to contribute with opinions or be informed. It is fundamental to be clear about the expected impacts of the selected topic to motivate participation.

### Suggestions

- Configure a permanent section in MyUniversity portal for submission of new ideas. This option contributes to ensure an inclusive e-Participation approach and allows gathering relevant issues. Analyse the provided suggestions and report back to the visitor.
**Guideline - Balance national and European issues**

Start establishing local and national public spheres, selecting national or local level issues, involving relevant subjects for the students, professors and other members of the university and educational community, to foster and encourage e-Participation and build communities.

Pursue the maturity of e-Participation practice from the bottom, starting at local level, then national and finally European level.

Specific topic hooks should be used to extend the participation to the European level and encourage a natural process of widening out to broader multi-issues many of which will have European resonance. This should be a natural bottom-up process.

**Guideline - Understand the existent barriers and opportunities**

It is crucial to have an understanding of the existent barriers and opportunities that may impact the initiative (see Figure 7).

The incorporation of technology into policy making and democratic process opens a broad range of opportunities, at different levels, such as local, national and European, including:

**Decision making**

Opportunity to explore high volumes of data, developing participative processes in order to develop, visualise or simulate decisions and policies. It may involve political representatives, higher education institutions and University administration, through processes of information, consultation, active participation and elections.

**Citizens’ empowerment**

Opportunity to leverage opinions and expertise of large number of individuals, including students, professors and other members of the university and educational community, setting their own agenda, contributing to policies development and awareness in a collaborative approach.

**Openness**

Opportunity to provide free access to information, revealing the agenda, plans, purposes, processes and policies of EU, government, higher education institutions and Universities.
Accountability
Opportunity to be transparent regarding responsibilities and roles, related with the designed processes, accounted contributions and decision-making, allowing tracing and real-time tracking.

Transcendent Time and Place
Through the use of online technologies, public participation can be open to students, professors and staff, over extended periods of time, lengthening the potential window during which the debate can occur and allowing time for a reflective argumentation and deliberation, regardless of their geographical location.

Nevertheless, before moving forward it is required to understand the existent barriers and consider mitigation strategies. The risks can include:

Trivialisation
The risk of trivialization results from the direct voting or participation without educational and informational support structures, leading to short-termism. This could arise if frequent polling, petitioning or voting reduces complex issues to over-simplified questions. In order not to exacerbate the problem it is thus important to focus on Participation’s potential to properly frame the debate, balancing simplicity and leverage, on the one hand, with the need of recognizing trade-offs with other issues on the other.

Unaccountability
The risk of unaccountability results from a disorganised bottom-up approach that leads to inconsequent debate and lack of visibility concerning responsibility. This can be particularly by the ICT Web 2.0 and social networks. It should be addressed providing guidelines and frameworks for participation.

Coercing
The risk of coercing the debate, by using aggressive language and extreme statements, specially results from the possibility of anonymous participation. Aggressive online behaviour can be mitigated to some extent by careful moderation, transparent communities and promotion of standards and guidelines.

Apathy
The risk of apathy and insufficient participation can result from different causes, including socio-cultural reasons and lack of interest or understanding of the participatory and democratic process, leading to democratic deficit and lack of legitimacy. The strategy to overcome this barrier depends on the culture, community and topic. Nevertheless, especially for students, an effective involvement with specific issues of relevance and interest to them, instead a mere consultation, can contribute to mitigate the risk. It is also necessary to have a clear language and use appealing tools and channels.

Incoordination
The risk of incoordination results from the existence of ad hoc initiatives, without collaboration or synergies across stakeholders. This contributes to a limited knowledge transfer, resulting in several misaligned invitations to participate and inconsequent debate. This risk can be mitigated by an effective initiative management and stakeholder’s involvement and communication.
Guideline – Determine the type of engagement

Determine the exact level of participation that the participatory process should address: Information, Consultation, Collaboration or Empowerment. These levels represent an increasing level of citizens’ involvement and the empowerment is the ultimate objective of e-Participation.

Nevertheless to establish conditions for a deliberative dialogue and for informed decisions, all the previous levels are required.

There should be a strategy to consolidate and maturate the e-Participation practice, by means of a continual deployment of initiatives that allow an increase of the citizens’ involvement.

Guideline – Tailor the initiative to the policy cycle

The participatory process can be implemented and play a relevant role at all the stages of the policy cycle. Table 1 describes, for each stage of the cycle, the role of the e-Participation. This information shall be understood as generic, meaning it can vary according to the specific addressed policy or decision-making process.

<table>
<thead>
<tr>
<th>Policy cycle stage</th>
<th>e-Participation role</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agenda Setting</td>
<td>Provision of an understating of the participant opinions on specific policies, gathering needs, express desires, scoop issues and weighting alternatives, in order to generate the agenda.</td>
</tr>
<tr>
<td>Policy Analysis</td>
<td>Provision of expert and experimental knowledge, by expressing preferences in available options and promote mutual understanding of the different positions and related rationales.</td>
</tr>
<tr>
<td>Policy Formulation</td>
<td>Allow the effective contribution of the participants (public or representatives), collecting preferences on specific topics, to be considered in the decision making process.</td>
</tr>
<tr>
<td>Policy Implementation</td>
<td>Provision of information on policies, programmes, laws and regulations, and other briefs of key public interest. Disclosure information to the impacted participants concerning the why and how of a policy in order to foster the execution of a plan.</td>
</tr>
<tr>
<td>Policy Monitoring</td>
<td>Collection of feedback concerning the policy impact to support its revision.</td>
</tr>
</tbody>
</table>

Table 1 – e-Participation role on policy cycle

Guideline – Define the participation area

Based on the selected issues, type of engagement to be established and the policy cycle stage, define the appropriate e-Participation area: Campaigning; Community Building; Consultation; Deliberation; Discourse; Information Provision; Mediation; Polling or Voting.
IV.2.2. Stakeholders Engagement

At this stage the target audience and key stakeholders are identified as well as their respective roles. There are several types of stakeholders’ worth to consider, playing different roles, including institutions, content experts, technology experts, community organizations, individual citizens and businesses.

**Guideline – Identify stakeholders**

There are different types of stakeholders to consider and identify, as described in Table 2.

<table>
<thead>
<tr>
<th>Stakeholder</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participant</td>
<td>The ones who provide input to the participation process, including citizens, citizens groups, representatives or institutions officers. This stakeholder is the target audience of the project.</td>
</tr>
<tr>
<td>Decision-maker</td>
<td>The responsible for the materialization of the achieved e-Participation results into policies.</td>
</tr>
<tr>
<td>Outcome Receiver</td>
<td>The ones who take advantage of the outcomes resulting from the e-Participation processes. Usually is a broader group that the actual participants.</td>
</tr>
<tr>
<td>Moderator/Facilitator</td>
<td>The ones who perform a wide range of tasks intended to support the process users, including facilitation, monitoring, organization, referral and summarisation.</td>
</tr>
<tr>
<td>Project Owner and Team</td>
<td>The one who initiates and is responsible for the process. Includes project team members, involving content experts, social experts, technical experts, managers and any other required staff.</td>
</tr>
</tbody>
</table>

The ability to address the different stakeholders’ needs and expectations is a critical success factor. It is required to understand their situation, characteristics, needs and motivation to get them involved.

The stakeholders can be identified at European, national, regional or local levels, depending on the initiative to be launched.

**Guideline – Conduct a stakeholders’ analysis**

The stakeholders’ analysis is a crucial activity, providing an overview of the stakeholders’ environment, identification of the stakeholders’ types, relationships and enables the creation of an engagement plan. The analysis comprises the following steps.

1. Identify shared goals
   - Definition of the initiative shared outcome and results, i.e. achievements that will benefit or have interest for the identified stakeholders.

2. Define Stakeholder’s group
   - List the broad stakeholder group for the identified goals. Depending on the issue, analysis can include University, local, national or European level and shall be as wide as possible.

3. Analyse relationships
   - This step aims to understand the nature of the relationships among stakeholders, in order to prioritise the engagement plan accordingly.
   - It involves:
- Mapping the stakeholders’ level of interest and power (direct or indirect influence - e.g. decision making, provision of resources).
- Identification of stakeholders’ types, based on the previous map.
- Consideration of the stakeholders’ perspectives, including urgency, ability to be involved, existent barriers and opportunities.
- Links and relations among stakeholders.

4. Develop engagement plan
   Based on the information collected in the previous steps, prioritise and define an engagement plan for all relevant stakeholders.

**Guideline – Stakeholders Engagement**

Following the stakeholders’ analysis, in order to have tangible impacts it is required to engage with the relevant decision makers for the identified issues.

The key Decision Makers’ early engagement and involvement in the initiative constitutes a critical success factor. It is required to have their interest, commitment and/or involvement to understand the decision-making process and how the participatory process fits into it in terms of timing, purpose and requirements.

Through the MyUniversity platform, decision makers will be able not only to engage with University Members on policy issues but also to communicate and collaborate with other decision makers engaged to the platform operation. Decision Makers are expected to collaborate, publishing information and gathering University Members feedback on specific issues of common public interest by viewing expressed opinions that are related to specific issues currently discussed.

Members of the Decision Makers user group can be one of the following user categories:

- **University Level:**
  - School, Faculty, Centre or Department Directors.
  - Members of the University Senate
  - Members of the University Council
  - Members of the University Committee
  - University Rectors/Vice-Rectors
  - University Deans
  - Other members

- **Regional & National Level:**
  - University Rector/Vice-Rector
  - University Deans
  - Ministers of Higher Education
  - Other members

- **European Level:**
  - Members of European University Associations (such as EUA, EURASHE, ESMU, IMHE, EAIR, UNICA, Utrecht Network, EUPRIO and the European network of deans).
  - Ministers of Higher Education
  - Members of the Bologna Working Groups
  - Other members

The participation of these members as Decision Makers users ensures the validation of the effectiveness and the usefulness of MyUniversity in policy formulation at all levels of legislative engagement (local, national, and European level).
To obtain required involvement it is important to address their needs, be open about the involved risks and build confidence throughout the lifecycle of the initiative.

<table>
<thead>
<tr>
<th>Suggestions</th>
</tr>
</thead>
<tbody>
<tr>
<td>➤ Meet with University Vice-Chancellors to promote <em>MyUniversity</em> and obtain their effective involvement.</td>
</tr>
<tr>
<td>➤ Create awareness of the <em>MyUniversity</em> purpose, emphasizing that it creates opportunities to:</td>
</tr>
<tr>
<td>➤ Promote awareness of subjects relevant to the University.</td>
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<tr>
<td>➤ Strengthen the communication with students.</td>
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<tr>
<td>➤ Collect opinions and understand students’ needs and expectations.</td>
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<tr>
<td>➤ Make decisions based on students’ feedback.</td>
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<tr>
<td>➤ Raise issues and find solutions that can contribute to improvements on relevant areas.</td>
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<tr>
<td>➤ Share topics already gathered and identify opportunities for achieving tangible benefits.</td>
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<tr>
<td>➤ Identify common goals and define the role that University management can have in the identified topics. Get management commitment to be involved.</td>
</tr>
<tr>
<td>➤ Ensure that the University management is involved in the initiative design;</td>
</tr>
<tr>
<td>➤ Establishing regular progress meetings: Set up processes to reflect periodically on the progress of the initiative and establish action points collaboratively.</td>
</tr>
<tr>
<td>➤ Encourage Vice-Chancellors, Professors or Directors to prepare articles concerning hot topics for the University, or conduct interviews to publish in <em>MyUniversity</em> portal. These materials could generate debate and the University responsible could have opportunity to reply and promote understanding and sense of community.</td>
</tr>
<tr>
<td>➤ Meet with National Bologna Working group to promote <em>MyUniversity</em> and obtain their effective involvement. Encourage them to:</td>
</tr>
<tr>
<td>➤ Provide background information that can be used in the <em>MyUniversity</em> portal.</td>
</tr>
<tr>
<td>➤ Moderate a discussion forum on a selected topic.</td>
</tr>
<tr>
<td>➤ Identify relevant portals, blogs and other sites that can have a permanent link in the <em>MyUniversity</em> portal to promote awareness on Higher Education related subjects.</td>
</tr>
<tr>
<td>➤ Meet with the University Marketing and Communication group to define strategies for the <em>MyUniversity</em> online and offline promotion.</td>
</tr>
<tr>
<td>➤ Meet with the University Students Association or other relevant associations to jointly define initiatives that could generate tangible benefits. Promote the potential that <em>MyUniversity</em> has to empower the students and establish an effective communication channel.</td>
</tr>
</tbody>
</table>

*Example:* Challenge the Students Association to promote debates regarding specific university themes. This can start with a moderation of discussion forum and can evolve to a deliberation process focused on relevant local issues.
Suggestions

➢ Encourage University Administrative staff to debate their own issues on a discussion forum.

➢ Meet with specific University department that may have interest in joining the team, or can potentially manage a particular participatory process or activity. Encourage them to participate.

  *Example: If the University as an Information Systems department with a Knowledge Management discipline, there is opportunity to develop a student practical work on Communities of Practice using the portal.*

  *Example: If the University as a Faculty of Law, this department can have special interest on e-Participation processes development and exploration. It can also be interested in providing information and context of the Bologna process.*

  *Example: If the University as a group or department dedicated to Student Mobility and International Relations, it can have interest in launching initiatives related with ERASMUS or the Bologna process.*
IV.2.3. Goals Definition

The *MyUniversity* general objective, specific objectives and expected results are defined in section II.1, at European level.

The initiatives planned by the Universities, within the scope of the *MyUniversity*, project shall be aligned with these objectives, but targeted according to the local and national context.

Following the previous stages, each initiative shall have clear outcomes and results defined. The key to successful performance measurement is the effective articulation of outcomes and outputs against which initiative success shall be measured.

Outcomes

Following the issues identification, the initiative outcomes are designed to provide tangible benefits for the targeted participants and stakeholders, by means of better policy-making, decision-making or legislation awareness that result from a successful use of the provided tools and processes.

Within the context of the *MyUniversity*, there are several types of outcomes that can be considered, including, but not restricted, to the following:

- Alternatives analysis and assessment;
- Awareness;
- Collect potential participants’ needs;
- Community building
- Identify service priorities;
- Obtain public support;
- Policy change;
- Policy evaluation;
- Promote behavioural change;
- Scenarios generation.

Results

Following the outcomes definition, the results consist in operational and measurable outputs that act as a mean to accomplish the defined outcomes.

These outputs can be related and combine different dimensions such as specific figures on the contribution for a policy, decision making, number of participants, satisfaction level, etc.

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**Guideline – Define outcomes**

The outcomes are the broad goals that the e-Participation initiative aims to achieve, representing the benefits for the identified stakeholders. Outcomes must be clearly defined before the outputs definition. Outcomes differ from outputs in that they do not specify what is being provided, but rather the changes expected in citizens’ lives after delivering the outputs.

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**Guideline – Define results**

Results define the initiative major outputs, the timeframe in which they are delivered and the cost to deliver them. Results can be seen as the building blocks to achieve the defined outcomes. Key measures of outputs typically assess: quality, quantity, targeting, timeliness, cost and coverage. Coverage measures provide confirmation of services reaching key groups.
IV.2.4. Feasibility Study

It is recommended to evaluate the feasibility of the initiative, before making the decision of moving forward to the Planning phase. The following guidelines should be considered at this stage.

Guideline - Analyse participants

In order to guarantee the success of the initiative it is required to understand the targeted participants, in particular to the following factors:

- Groups that are unlikely to participate but which would add value to the process.
- Existing relationships between key participants including relationships with facilitators and relevant decision-makers.
- Existence of groups and participants with different participation experience that could dominate the debate.
- Existent language barriers, in particular in case of initiatives at European level.
- Cultural diversity impact on willingness to contribute.
- Collection of the reporting needs and expectation.
- Appropriated e-engagement strategies.
- Identify established platforms, channels or communities that aggregate the target participants.

Guideline - Incorporate earned knowledge

The e-Participation shall be understood as a continual improvement process. Whenever a new initiative is being planned it is important to:

- Review lessons learned that resulted from the evaluation of previous initiatives.
- Review the results of similar initiatives in other Universities or other institutions.
- Identify opportunities and barriers related to the existence of on-going activities on the same subject involving the same geographical area and/or the same targeted participants.
- Have a clear understanding on the platform usage statistics, from the tools and server log file analysis to obtain information on visits and page requests.
- Analysis of online questionnaires and discussions concerning the issues being addressed.

Guideline - Analyse decision makers

The Decision Makers’ involvement is a critical success factor.

- Evaluate Decision Makers’ interest, commitment and availability to be actively involved.
- Understand and gather Decision Makers’ requirements and collect risks.

Guideline - Analyse implementation feasibility

Evaluate if the initiative can be implemented in terms of:

- Required resources (e.g. human, ICT).
- Required expertise.
- Require timing to achieve the expected results.
- Risks mitigation.

Guideline – Make a go/no go decision

Based on all the defined objectives and conducted feasibility study conclusions, make a go/no go decision.
IV.3. Planning

The planning phase follows the programming and it includes the team definition and the work plan preparation, as represented in Figure 8.

![Figure 8 – Planning stages](image)

IV.3.1. Team Definition

The e-Participation implementation is multi-dimensional, requiring a mix of skills in several areas. The team shall include all competences required to ensure the results achievement. The roles and responsibilities shall be defined and allocated to the team members.

**Guideline – Ensure a multi-disciplinary team**

A broad skill set should be considered, including competences in different areas, such as:

- Higher Education European policy;
- Higher Education national policy;
- University administration and management;
- Marketing and Communication;
- Community development;
- Teaching and facilitation;
- IT and systems design;
- Information and knowledge management.
IV.3.2. Work Plan Preparation

The work plan preparation stage includes the definition of the work breakdown structure, time planning and responsibilities definition. The work breakdown structure includes the initiative tangible outputs, i.e. the project results that are the mean to achieve the established outcomes. The time plan aims to estimate and control the initiative schedule and effort. Figure 9 contains a draft of a plan.

<table>
<thead>
<tr>
<th>Programming</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Scope definition - identification of issues, type of engagement, tailoring to the policy cycle and participatory area.</td>
</tr>
<tr>
<td>• Stakeholders identification - identification ana analysis of stakeholders.</td>
</tr>
<tr>
<td>• Goals definition - definition of outcomes and results.</td>
</tr>
<tr>
<td>• Feasibility study - collection of information and analysis to determine the initiative feasibility.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Planning</th>
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<tbody>
<tr>
<td>• Team definition - definition of responsibilities and roles.</td>
</tr>
<tr>
<td>• Workplan - initiative work breakdown structure, schedule, resources allocation an roles consolidation.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Design</th>
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</thead>
<tbody>
<tr>
<td>• Participatory technique design - tasks required to design the process .</td>
</tr>
<tr>
<td>• Tools selection – tasks including the identification the appropriate tools and corresponding configuration and setup.</td>
</tr>
<tr>
<td>• Content preparation – tasks including contents analysis, preparation, discussion and revision.</td>
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</tbody>
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<tr>
<th>Implementation</th>
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<tbody>
<tr>
<td>• Promotion - tasks related to the engagement of the targeted participants, including materials preparation and communication of the initiative objectives and processes.</td>
</tr>
<tr>
<td>• Maintenance - tasks required to facilitate and moderate the debate.</td>
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<tr>
<td>• Institutional Response – tasks required to publish and disseminate communications concerning the initiative’s progress and results</td>
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<th>Evaluation</th>
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<tr>
<td>• Criteria definition - task related with the consolidation of the criteria</td>
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<tr>
<td>• Initiative assessment – tasks related with the overall assessment of the initiative success</td>
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<tr>
<td>• Results reporting – tasks related with publishing the results of the assessment</td>
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<tr>
<th>Management</th>
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<tbody>
<tr>
<td>• Follow-up meetings – project team status meetings plan</td>
</tr>
<tr>
<td>• Status report – plan for the initiative regular reporting with the status of the assigned tasks, including progress, risks and deviations</td>
</tr>
<tr>
<td>• Deliverables revision and approval – decision making points milestones</td>
</tr>
</tbody>
</table>

Figure 9 – Draft of a plan
**Guideline - Checklist for preparing the work plan**

The preparation of the work plan shall be carefully considered in order to ensure that all required activities are identified, planned and allocated.

- Step 1. List main activities
- Step 2. Break activities down into manageable tasks
- Step 3. Clarify sequence and dependencies
- Step 4. Estimate start-up, duration and completion of activities
- Step 5. Summarise scheduling of main activities
- Step 6. Define milestones
- Step 7. Define expertise
- Step 8. Allocate tasks among team
IV.4. Design

At this stage the issues are identified, the objectives defined, there is an understanding of the stakeholders’ characteristics and the project team is identified.

The design of the initiative plays a fundamental role to engage and sustain the participation. It is important to design the e-Participation initiative so that it provides meaningful and timely information for participants and decision-makers. The content should be engaging, relevant and appropriate for the chosen platform and intended audience. The targeted participants' acceptance and motivation for the initiative to be implemented strongly depends on the transparency of the process and defective traceability of the contributions. The participants should be rewarded with the sense of achievement. To allow continual improvement it is required to embed evaluation in the designed initiative.

The Design phase involves three main activities, namely the design of the participatory technique; the tools selection and the contents preparation (see Figure 4).

Following the scope definition in the programming phase (see IV.2.1.), the flow starts with the design of the most appropriate participatory technique that defines how the participatory process will take place. Until this stage no technical features are specified. The technology acts as an enabler and it is addressed at the Tools Selection stage. Finally the Design ends with the Content Preparation, during which the information is tailored to the defined process and ICT.

IV.4.1. Design Participatory Technique

During the scope analysis (see section IV.2.1.) stage the issues, engagement type, participatory area and policy cycle were addressed. This stage follows such analysis and aims to define the way and methods used to engage and involve all stakeholders, including citizens, communities and decision makers, in the democratic process. The participatory technique refers addresses the how to make the participatory process happen.

A wide range of participatory techniques can be implemented. Considering the scope of the MyUniversity project the following techniques may be applicable, even though other may also be developed. The participatory techniques can involve one or more online tools.

**e-Communities**

The e-communities refer to portals usage to enhance e-Participation through community building tools and especially social networks. Social networks are very popular among citizens and, in particular, among university population which find a way to express opinions and communicate to each other in a way that is often far from the strict and official environment of other e-Participation systems. The e-Communities are formed by users that share common interests and by using new media and several other small scale applications. The e-Communities are able to engage a large number of users, creating a new culture in public and consequently in e-Participation. It can be particularly powerful to build sense of community, gather opinions and promote participation towards a common objective. This technique can be used as a starting point to form communities that can then actively participate in more structured and result-oriented processes. There are however issues to consider such as privacy, security, information structure and analysis.

**e-Consultation**

The e-Consultation technique corresponds to consultation processes, designed to allow the provision of provide background information on an issue and ask a group of citizens their opinion, by means of
answering to specific questions or by submission of open comments. It should be possible for participants to comment the issues in detail and, for those organising the process to collect the responses immediately and to present the results back to participants in a quickly, comprehensively and transparently way.

**e-Deliberative Polls**

This participatory technique aims to measure what citizens would think about an issue if they had the opportunity to reflect on it. It combines online deliberation in small discussion groups with random sampling. In a first stage participants are randomly assigned to small groups and are polled on the issues under analysis. Balance background materials are sent to the participants and dialogue with experts is engaged. During this period, participants have the possibility to question specific experts and policy makers on the issues under deliberation. At the end of the period, the opinions of citizens are surveyed. A diversity of tools can be used to support the e-deliberative polling technique, including online surveys, discussion forums and chats.

**e-Petitioning**

The e-Petitioning technique corresponds to processes which allow the posting of petitions to mobilize others who can sign. Similarly to a conventional petition, the greater the number of signatures, the more likely the e-petition is to be taken seriously and to have desired impact.

The e-Petition should have a thought of the rationale of the petition, the name of the owner, the opening and closing dates, and a list of the supporters. The e-Petition publishing depends on the revision of an editorial content manager. Before it can be made live, the content is reviewed to guarantee it is aligned with the scope of the system and checked against the acceptable use policy to ensure conformity. The e-Petition could have an associated discussion forum to clarify eventual doubts. The supporters are able to follow the progress.

**e-Voting**

The e-Voting technique refers to remote voting (e.g. using the internet or via mobile phone), using a secure environment for casting and counting the votes.
Independently of the designed participatory technique, the user engagement is one of the key challenges to address. The following guidelines should be considered during the design of the participatory technique to ensure a successful engagement.

**Guideline – Select participatory technique**

Select the most appropriate participatory technique to be designed based on:

- Initiative purpose and goals;
- Decision makers’ granted involvement;
- Available technical and non-technical options;
- The targeted participants e-Participation maturity and characteristics, including habits and skills;
- The policy cycle stage and selected participatory area;

The participatory technique design should consider all the stages of the initiative, namely the implementation (see section IV.5. ) and Evaluation (IV.6.).

Independently of the selected participatory technique, it the following design questions should be clarified to manage the initiative:

- Who is responsible for managing the participatory process?
- What are the stakeholders’ requirements?
- What are the technical constraints?
- How will participants be assisted?
- Who will assist the participants?
- How will the results be communicated to the participants?
- How are the previous initiatives lessons learned incorporated in the current initiative?

In order to later design a participatory process with effective outcomes, the following design questions should be clarified:

- How are the contributions collected?
- Who is responsible for collecting the contributions?
- At which stages are the stakeholders and decision makers involved?
- What is the methodology to reach conclusions, results, contributions or decisions?

Finally, to evaluate the initiative success, the following design questions should be clarified:

- How are the outcomes and results measured?
- Who is responsible to measure the outcomes and results?
- How will the participant satisfaction be assessed?

**Guideline - Consider the participants’ feedback**

The previous learned lessons and participants’ feedback should be considered in the design. In order to allow a continual improvement, include a questionnaire to assess the initiative to be deployed and identify opportunities for improvement.

If possible, it is worth to consider evaluation early on the process. This will allow tracking the progress, make corrective actions if any misalignment is detected and will also demonstrate high responsiveness, which is appreciated by the participants. It should be provided clear indications on how participants can express any complaints they may have about the participation process itself.
**Guideline - Define the appropriate timeframe**

Time is of the essence for the e-Participation initiatives and should be tailored to the selected methodology. A polling process intended to measure public opinion and sentiment on a given subject may not take long, however a deliberative process requires time to think and consolidate views.

**Guideline - Ensure data protection**

Ensure the data protection appropriated for the initiative to be launched (e.g. anonymous submissions, online registration or password).

**Guideline - Ensure transparency**

Be clear and communicate the initiative’s purpose and the expected outcomes, as well as the not expected. Pre-defined roles promote accountability and increase participation. Be honest up-front about the involved risk. Ensure leadership and communicate the commitment of the relevant stakeholders. Guarantee the protection of the independence the independence and free thought of participants, ensuring that there is no manipulation or coercion.

**Guideline - Be Inclusive**

Create strategies to overcome socio-cultural, gender, minorities and any other kind of barriers that may impact the initiative. For example, cultural diversity of participants may affect people’s willingness to debate in public with others; language barriers can impact the understanding of the purpose.

Different experience in public participation of the participants can lead to domination from the most experienced participants. Use careful, trustworthy and independent moderation.

**Guideline - Perform a pilot test**

Ensure that the defined tools and processes are tested in advance in terms of functionality and usability. Use a representative test team.

**Guideline - Ensure traceability**

Participants should be able to track their contributions and see how they are used or organized. At the same time it should be possible to check how others have responded to the same issue, in order to encourage collaboration, mutual understanding and awareness of the self-position against the overall picture. The contributions should be easily navigable, multi-threaded and cross-referenced.
IV.4.2. Tools Selection

Tools act as enablers for implementing the e-Participation methodologies. The following sections describe a set of tools that can be used within the scope of e-Participation initiatives to implement the participation techniques. At this stage the usability and usefulness of the available ICT plays an important role. The tools are structured in two types: the e-Participation Enhancement Tools and the e-Participation Support Tools.

The following sections include a description of some e-Participation related tools, aggregating different dimensions in a table format, according to the definitions included in Table 3.

<table>
<thead>
<tr>
<th>Dimensions</th>
<th>Purpose</th>
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<tbody>
<tr>
<td>Description</td>
<td>High level description of the tool functionality and purpose.</td>
</tr>
<tr>
<td>Implementation Considerations</td>
<td>General considerations of the tool usage within the context of e-Participation.</td>
</tr>
<tr>
<td>Most applicable e-Participation Areas</td>
<td>Typical e-Participation areas (according the areas defined in section IV.2.1.d.) in which the can be applicable. This classification is generic and shall be understood as describing typical cases.</td>
</tr>
<tr>
<td>Most applicable stages of the Policy Cycle</td>
<td>Typical stages of the policy cycle (according the stages defined in section IV.2.1.c. in which the tool can be applicable. This classification is generic and shall be understood as describing typical cases.</td>
</tr>
<tr>
<td>Usage Evaluation</td>
<td>Typical form of evaluate the tool usage to assess the engagement success.</td>
</tr>
<tr>
<td>Main Strengths and Weaknesses</td>
<td>Qualitative assessment of the tool main strengths and weaknesses, considering three levels: High (Θ), Moderate (Θ) and Low (Θ). This classification is generic and shall be understood as describing typical cases.</td>
</tr>
<tr>
<td></td>
<td>▪ Information Richness – Ability to provide information.</td>
</tr>
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<td>▪ Interactivity – Ability promote the interaction with the user.</td>
</tr>
<tr>
<td></td>
<td>▪ Accessibility – Ability to allow user access considering required skills and experience.</td>
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<tr>
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<td>▪ User Privacy – Ability to preserve user privacy.</td>
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<tr>
<td></td>
<td>▪ Security – Ability to preserve navigation security.</td>
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<td></td>
<td>▪ Deployment Simplicity – How simple is to setup the tool for an e-Participation initiative.</td>
</tr>
</tbody>
</table>

Table 3 – Tools description definitions

IV.4.2.a. Enhancement Tools

The Enhancement Tools comprise tools that may not be exclusively used in e-Participation systems; however they involve interaction in several ways and constitute core applications of an e-Participation system.

The e-Participation enhancement tools comprise a wide range of tools including e-Participation Chat Rooms, Decision Making Games, Online Surgeries, e-Panels, Suggestion tools and others. Considering the scope of the MyUniversity project, the following tools will be addressed in this document:

- e-Discussion Forums;
- e-Petitions;
- e-Quick Polls
- e-Voting
e-Discussion Forums

Description

Asynchronous web-based applications for online group discussions where users, usually with common interests, can exchange open messages within the scope of specific issues. Users can pick a topic, see a “thread” of messages, reply and post their own message.

Usually the discussion forums are opened to anonymous users, but it is required to be registered to post or reply to comments.

Implementation Considerations

- Discussion forums have the potential to support interaction, thought, deliberation, debate and allow for a full discussion. Possibility of the following two different approaches:
  1. Issue based
     Organized around policy issues resulting from existent policies and presented as the heading of one or more discussion threads. Particularly relevant for the Agenda Setting and Policy Evaluation stages.
  2. Policy based
     Organised around issues that are directly related to draft policy, in order to solicit and collect responses from those affected. Participants might be encouraged to submit alternative ideas and suggestions. Particularly relevant for the Policy Analysis stage. Potential for the analysis of complex policy.

- To be effective requires moderation, facilitation, users’ support and content analysis to produce reports embedding the results into the political process and to give feedback to the participants.

- It should be supported by guidelines to be followed by both the participants and moderators.

- The information concerning how the collected information will be used to foster transparency and trust.

- The initiative duration shall be clearly visible to the users. When used for consultation, the initiative should take enough time to maturate the ideas and viewpoints, allowing re-visits to reply to others. Discussions are usually active during several weeks (e.g. 4 to 12 weeks).

- It allows threaded discussion, convenient, searchable, good for information dissemination and archive, file attachment, easier to manage multiple conversations. The main disadvantages are that it can lead to public misunderstandings, interfaces can be confusing, lack of visual and audio cues, poor context. Hard to follow multiple discussions.

Usage Evaluation

Content analysis (time consuming) and statistics of posting and consultations.

Most applicable e-Participation Areas

<table>
<thead>
<tr>
<th>Campaigning</th>
<th>Community Building</th>
<th>Consultation</th>
<th>Deliberation</th>
<th>Discourse</th>
<th>Information Provision</th>
<th>Mediation</th>
<th>Polling</th>
<th>Voting</th>
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Most applicable stages of the Policy Cycle

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<th>Agenda Setting</th>
<th>Policy Analysis</th>
<th>Policy Formulation</th>
<th>Policy Implementation</th>
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Main Strengths and Weaknesses

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<th>Information Richness</th>
<th>Interactivity</th>
<th>Accessibility</th>
<th>User Privacy</th>
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e-Petitions

Description
System for hosting electronic petitions, allowing users to draft their own petitions online and have others joining in, as a mean of pressure towards decision making.

Implementation Considerations
- The purpose of the petitions shall be clear, stating what the accountable body shall do or stop do. It contains the identification of the initiator and the supporters.
- It needs to be checked against an acceptable use policy before it can be made live.
- It is important to ensure use of a strict authentication protocol for the users in order to avoid double voting which can affect a petition's validity.

Usage Evaluation
Analysis of usage statistics and exit questionnaires.

Most applicable e-Participation Areas

<table>
<thead>
<tr>
<th>Campaigning</th>
<th>Community Building</th>
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Most applicable stages of the Policy Cycle

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### e-Quick Polls

**Description**

Short polls which enable the retrieval of simple opinion statements. Instant or short time survey with a single and simple question and a set of answer options. Typically, allow participants to select one answer from a list of alternatives responses, or reply to a yes/no question.

**Implementation Considerations**

- Mostly used to gather initial opinions that are going to be used to feed a more complex decision making process.
- Usually the answers given are anonymous and there is no way to stop participants responding more than once.
- A user’s answers are not disclosed to others except as statistical totals, which are displayed on completion.
- Initiative with short lifecycle (several days to weeks) and often replaced by a new quick poll.
- The results of previous quick polls can be archived and accessed by users at a later date.
- It should be positioned in a visible section of the homepage. A high number of quick poll participants draws attention to the popularity of the web site. A low number may have the opposite effect.
- The results do not have the precision of more structured e-consultation activities. Nevertheless pools provide immediate results that are easy to analyse and when used on a regular basis can foster the sense of engagement and collect trends.
- Difficult to use in complex issues.

**Usage Evaluation**

Analysis of the answers received.

**Most applicable e-Participation Areas**

<table>
<thead>
<tr>
<th>Campaigning</th>
<th>Community Building</th>
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**e-Voting**

**Description**
Remote internet enabled voting system, providing a secure environment for casting a vote and counting of the votes.

**Implementation Considerations**
- Requires special concerns regarding security and usually very specific and dedicated solutions are implemented.

**Usage Evaluation**
Usually include a built-in audit facility.

**Most applicable e-Participation Areas**

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<thead>
<tr>
<th>Campaigning</th>
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IV.4.2.b. Support Tools

The Support Tools comprise tools that are not specific or core to e-Participation, but can assist e-Participation initiatives.

The e-Participation support tools comprise a wide range of tools including Podcasts, GIS tools, Blogs, Search Engines and others.

Considering the scope of the MyUniversity project, the following tools will be addressed in this document:

- FAQ
- Newsletters
- RSS Feeds
- Surveys
- Wikis

FAQ

**Description**

This tool presents information through questions (Q) and answers (A), all supposed to be frequently asked in some context, and pertaining to a particular topic. In some cases, can be searched using keywords or by inputting a question or statement in natural language. They are typically developed through viewing various log reports of previously asked questions on a specific subject.

**Implementation Considerations**

- Within the context of e-Participation, FAQ are usually not sufficient to communicate the relevance of a complex issue, however can make participation of a system\’s users easier and help them overcome any difficulties they meet and become active participants.

**Usage Evaluation**

Possible if provided with an exist questionnaire.

**Most applicable e-Participation Areas**

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<th>Consultation</th>
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Newsletters

Description

Newsletter consists in are regularly distributed publications, involving a subject that is of the interest of its subscribers. The distribution requires a subscription and is mainly used for dissemination and marketing reasons. The user has also the option of unsubscribe when no longer interested.

Implementation Considerations

- Within the context of e-Participation can be used for to inform a pre-registered audience of specific news and upcoming events, to foster engagement and promotion of initiative.

Usage Evaluation

Number of subscriptions.

Most applicable e-Participation Areas

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<tr>
<th>Campaigning</th>
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Most applicable stages of the Policy Cycle

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Main Strengths and Weaknesses

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<th>Information Richness</th>
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### RSS Feeds

#### Description

Feeds allow users to be continually updated with the latest news on a subject they are explicitly interested. When a new entry is added to a website that supports RSS, the RSS feed saves its title, a short abstract and a link to the full content. If a user is subscribed to that RSS feed, he is automatically informed of that new entry. This is convenient since it saves the users from having to manually check the publication of website.

#### Implementation Considerations

- Users will need to sign up the alert mechanism; therefore privacy of information needs to be considered. There should be mechanisms to allow users to unsubscribe.

#### Usage Evaluation

Number of subscriptions.

#### Most applicable e-Participation Areas

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<thead>
<tr>
<th>Campaigning</th>
<th>Community Building</th>
<th>Consultation</th>
<th>Deliberation</th>
<th>Discourse</th>
<th>Information Provision</th>
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Surveys

Description

Web-based self-administered questionnaires, which users answer and submit their responses online. They can be used to research views, attitudes and experiences of participants either through a sampled approach or through an open invitation to respond.

Implementation Considerations

- Within the context of e-Participation, an e-Survey is very useful when conducted in parallel with the execution of an e-Consultation procedure. Usually includes a short series of questions to be answered using tick boxes or combo boxes, based on material that has been provided by a recognised authority during consultation on a specific issue.
- Typically implemented in a number of close-ended questions, with ordered response categories, and some open-ended ones. The usability can be improved if provided with convenient features, such as progress bars, and save option.
- The survey can collect quantifiable data, specifically structured according to its purpose and are easy to analyse and understand. For complex subjects it requires a thorough design in order to assure it fits the purpose and allows structuring the conclusions.
- Security could be an issue if not implemented carefully.

Usage Evaluation

Analysis of the answers received and the total number of responses.

Most applicable e-Participation Areas

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<th>Campaigning</th>
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## Wikis

### Description

Wikis are web-based applications that allow users to view content that has been submitted by other users, edit this existing content, add more content, or comment on it. Wikis are collaborative platforms where users with common interests are cooperating in order to produce the best possible result.

### Implementation Considerations

- For wide or not mature communities, it may require strict moderation policies.

### Usage Evaluation

Number of page views and page edits.

### Most applicable e-Participation Areas

<table>
<thead>
<tr>
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<th>Community Building</th>
<th>Consultation</th>
<th>Deliberation</th>
<th>Discourse</th>
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### Most applicable stages of the Policy Cycle

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**Guideline – Match ICT to the participatory need**

The tools selection should be based on the selected participatory technique, engagement type, and policy cycle and participation areas.

Based on the aforementioned descriptions the Table 4, relates the different engagement types and the corresponding typical applicable tools.

<table>
<thead>
<tr>
<th>Engagement Types</th>
<th>Information Provision</th>
<th>Consultation</th>
<th>Collaboration</th>
<th>Empowerment</th>
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<td><strong>Enhancement Tools</strong></td>
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<tr>
<td>+Discussion</td>
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<td>Forums</td>
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<tr>
<td>+Petitions</td>
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<td>+Quick Polls</td>
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<td>+Voting</td>
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<td>FAQ</td>
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<td>Newsletters</td>
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<td>Wikis</td>
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**Table 4 – Type of engagement and tools correlations**

Based on the aforementioned descriptions the Table 5, relates the policy cycle and the corresponding typical applicable tools.
### Table 5 – Policy cycle and tools correlations

Based on the aforementioned descriptions the Table 6, relates the Participation Areas and the corresponding typical applicable tools.

### Table 6 – e-Participation areas and tools correlations
Guideline – Design for participation

The tools selection and a layout well organized and visually pleasing play a fundamental role to leverage participation. The MyUniversity portal homepage should:

- Letting users know what's going on;
- Getting user’s views;
- Encourage participation;
- Help users to act for themselves.

Suggestions

➤ Create a “Do you know...” static section in the MyUniversity portal homepage, with short informative messages about relevant Higher Education topics, intended to promote awareness. If possible include a link to a more structured information repository, or to an on-going initiative. This section should be updated on a regular basis.

Example: “Do you know what ECTS stands for?”

➤ Create a “How to...” static section in the MyUniversity portal homepage, with information on how to use the available modules. This section should be updated on a regular basis.

Example: “How to start an e-Petition”

➤ Create a “Why to participate...” static section to foster and encourage participation.

Example: Include your selected top 5 reasons to participate, such as share your opinion with interested parties, be informed, ask questions, raise important issues or contribute to decision making, etc.

➤ Organize the portal layout and use tools to draw users’ attention to the most relevant on-going participatory initiatives.

Example: If the current initiatives involve an active debate on a discussion forum, configure the layout to display the forum in a central position with a size that allows having an idea of the latest posts content.

Example: If the MyUniversity portal is in an initial phase make sure that the portal purpose is clearly visible, attractive and located at a central position.

Example: Use the Events calendar to keep the users informed on the up-coming initiatives.

Example: Use the news to inform users concerning the results and correspondent interpretation of the latest poll.
Suggestions

➢ Organize the portal layout and use tools to encourage and harness the interaction and increase participation, by means of regular polls, surveys and discussion forums.

*Example:* Configure a section to deploy regular polls. Use polls to enhance the sense of community by making the user understand that the questions deployed on a regular basis and will lead to actions or initiatives. Call the poll “*MyUniversity Question of the Month*” and, if possible post a question related with the on-going initiatives or that contributes for the agenda setting.

*Example:* Embed social media commentary in the news.

➢ Organize the portal layout and use tools to help users to be more involved, by collecting ideas for participatory initiatives and let users or communities to collaborate in identifying new initiatives aligned with the project goals.

*Example:* Setup a clearly visible link on the homepage to collect users’ ideas on new initiatives.

*Example:* Setup a clearly visible link on the homepage for new users “Are you a *MyUniversity* new user?” associated to a static page with a welcome message, a description of the portal purpose and a visible invitation to register.

*Example:* Create a FAQ section including relevant questions about e-Participation and *MyUniversity*.

➢ Organize the portal layout and use tools to help users to act for themselves using the existent tools and take as much control as possible.

*Example:* Place a visible message “Would you like to start a forum? Read the guidelines and contact us today”.


IV.4.4. Contents Preparation

The content shall be prepared considering the identification of the participatory area and tools selection. The content preparation involves several dimensions such as quality, control and medium.

**Guideline - Establish a process for content preparation**

It is recommended to establish a structured process for preparing the content, in order to define what information shall be prepared, how it should be prepared.

Consider the following:

- Clearly define content objectives;
- Clearly define language objectives;
- Define what content shall be produced;
- Fit the content to the participants background
- Consider revision and validation points.

**Guideline - Focus on quality instead quantity**

The content preparation should be focused in quality instead quantity to not overload the potential participants. Producing good content demands a considerable effort to frame the issues in a way that will provoke thoughtful responses from participants.

**Guideline - Ensure good readability**

Information should be transmitted as clear as possible in a format that is understandable by all targeted participants. Readability refers to the reading easiness and impacts users' comprehension, retention, reading speed, and reading persistence. Readability is affected by the content, the style, the design and the structure.

The text and information density should be adapted to the importance of the information transmitted and the participant interest. The writing style shall be simple and adapted to the targeted participants.

In order to improve readability, the content layout shall be carefully designed, considering the use of illustrations, navigation aids and colours.

The structure should be concise and easily digested, making complex information or long documents, simpler and interactive taking advantage of the available tools. The usage of clear sentences, short paragraphs, subheadings, bullet lists, bold for key concepts can have a positive effect on the readability.

**Guideline - Adapt the content to the medium**

The content needs to be aligned with the selected tool. Different communication tools, such as wikis, letters or pools, bring different expectations concerning the tone, style and interactivity.

**Guideline - Provide balanced information**

Some consultation, such as polls may not require respondents to have access to any information before they state an opinion.

Nevertheless deliberative processes primarily aims to discover what citizens think about issues once they have become reasonably informed about them, to produce solid arguments. The provision of information to deliberation processes needs to be comprehensive, balanced and accessible. It is not possible to assure that all the participants study the information with the same extent; however efforts should be made to provide the necessary background information to allow informed deliberators.
Guideline - Attractive communication

The content should be attractive to the targeted participants. The content should be provocative, in the sense of raising key questions for discussion. Use images and videos whenever possible to attract users.

Suggestions

➤ Use engaging messages in the portal sections names and related content.

*Example*: “Participate!” “Take Action!” “Be involved!” “Are you registered?” “Register now to give your views on issues that affect your life”

*Example*: “Give us your feedback”; “What do you think about…”

*Example*: “Are you a new user?”

*Example*: “Welcome do the discussion forum”

*Example*: “What is MyUniversity about?”; “1 min. tour on e-Participation”

*Example*: “View MyUniversity recent achievements”

➤ Use visually stimulating media.

*Example*: Ensure that the News have related images.

*Example*: Ensure that the initiative responsible team photos are available, as well as the related decision makers. It fosters the sense of trust and transparency.

*Example*: Prepare a short streaming video performed by the initiative moderators and decision makers with a welcome message.

Guideline - Ensure quality control

The content quality should be controlled and revised from the following perspectives:

- Subject matter experts to evaluate its accuracy, reliability, scope of coverage and usefulness.

- Communication experts to evaluate its explicitness, adequacy, presentation and language.

- Test participants to evaluate its understandability and attractiveness.

Guideline – Prepare participatory process guidance

The initiative participatory process should be clearly described. The process guidance shall be focused on providing information about:

- Purpose;

- Expected outcomes and results;

- Who are the key stakeholders;

- Who are the moderators, if applicable;

- How to participate;

- Initiative phases and how transition between phases takes place.

- Starting and ending dates.
Suggestions

➤ Use engaging messages in the portal sections names and related content.

  Example: “Participate!”; “Take Action!”; “Be involved!”; “Are you registered?”; “Register now to give your views on issues that affect your life”

  Example: “Give us your feedback”; “What do you think about...”

  Example: “Are you a new user?”

  Example: “Welcome do the discussion forum”

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IV.5. Implementation

The initiative implementation comprises three main stages including the initiative promotion, the initiative maintenance and institutional response, as represented in Figure 11.

![Figure 11 – Implementation stages](image)

IV.5.1. Promotion

There should be a defined promotion strategy, including a multi-channel approach, combining online and offline channels. The e-Participation initiatives require a wide promotion to guarantee the targeted participants awareness and engagement. Marketing shall be implemented as a continual process, which is regularly updated with the initiatives to be launched.

**Guideline – Involve key-stakeholders in the initiative promotion**

The involvement of decision makers or institutional representatives in the promotion of the initiative will provide the necessary sense of transparency, trust and responsiveness and will contribute to increase participation.

**Suggestions**

- Plan in advance the key-stakeholders involvement in the promotion activities, to create sense of trust and commitment among the potential participants.

  **Example**: Local level initiative: University Administration; National level initiative: Representatives of Higher Education Ministry; European Level: Members of the Bologna Working Groups.

  **Example**: Work with the University Marketing and Communications department to prepare a video with an interview with the University Vice-Chancellor or other important representative about MyUniversity project potential for the University.
**Guideline – Ensure regular online promotion**

In order to have fruitful and sustained engagement there should be a regular online promotion addressing all the programmed initiatives.

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<th>Suggestions</th>
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| ➤ Create permanent links to *MyUniversity* portal in the homepage of relevant websites.  
  *Example:* the University’s portal; the Students Association’s portal; Alumni’s blogs. |
| ➤ Prepare an informative message to be published in a relevant websites, describing the *MyUniversity* purpose.  
  *Example:* Work with the University Marketing and Communication group and publish an article on the University’s portal; the Students Association’s portal; Alumni’s blogs or other Higher Education relevant websites. |
| ➤ Prepare a static section in the *MyUniversity* portal homepage, describing its purpose.  
  *Example:* Prepare and attractive content, including promotional text, images, links to the *MyUniversity* project and photos of the local key stakeholders and MyUniversity local team. |
| ➤ Design a Newsletter with the support of the University Marketing and Communication group.  
  *Example:* In the first edition include a foreword describing the concept and purpose, a section with the current initiatives purpose, a section with statements from the University Vice-Chancellor about the project, a section describing the current and the up-coming initiatives and instructions on how to participate. |
| ➤ Ensure regular updates on all the general sections of the *MyUniversity* portal homepage. Be dynamic.  
  *Example:* Publish the newsletter on a monthly basis and ensure that the general sections, such as News and Polls are updated at least on a weekly basis. |
| ➤ Ensure that the achievements of previously launched initiatives are promoted and easily accessible. |
| ➤ Maintain strong messages in the portal homepage to encourage users to register. |
Guideline – Ensure regular offline promotion

Online promotion has the ability to be time and location transcendent with all associated advantages. Nevertheless a multi-channel approach, combining traditional and electronic tools to engage people, is more likely to reach a wider, more diverse audience and contribute to better policy and service. To promote the initiative it is important to consider public meetings, local workshops, exhibitions, press releases in traditional media.

Face to face events can play an important role in kicking off the MyUniversity portal or a particular initiative, building trust among potential participants and decision makers by informing about the expected outcomes and demonstrating commitment to achieve tangible results.

<table>
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<tr>
<th>Suggestions</th>
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</table>
| ➤ Ensure the contribution of the University Marketing and Communication group in the preparation of the marketing material.  
   *Example:* Flyers distribution on relevant University events; posters on relevant places and brochures distribution in places where people gather, such as University canteen or University sports events. |
| ➤ Find opportunities to meet students.  
   *Example:* Obtain Teachers’ permission to have a 5 minutes presentation of the initiative in the beginning of a lesson.  
   *Example:* Obtain a time slot in the welcome reception event of new students to promote the MyUniversity portal. |
| ➤ Include the promotion of the initiative in the University mentoring programmes.  
   *Example:* Meet with mentors in order to encourage them to promote MyUniversity in the direct contact with the student mentees. |
| ➤ Conduct local workshops to disseminate the purpose of MyUniversity and collect feedback from students. Promote the event using online and offline material and collect video messages or short films to publish in the MyUniversity portal. |
Guideline – Take advantage of Social Networks

Considering the impressive growth of SNS in recent years and their ability to ability to strengthen relational ties, the initiative promotion in SNS should be considered, since it allows:

- A continual presence in spaces that target participants use in their daily lives,
- User binding and the spreading of content.
- To keep participants interested, through regular updates and continually encouragement to be involved and contribute.
- Facilitation of viral marketing of the initiative and generation of snowball effect.
- Chance to establish sustainable computer-mediated relationships and community building.
- Saving promotion costs and time.

Suggestions

- Publish new Articles and Process in relevant social networks massively used by the University students.
  
  Example: University Facebook account, Students Association Facebook account or other local or national accounts related with Higher Education.

  Example: Whenever a new initiative is launched ensure that it is promoted in the social networks, including information about the purpose, expected outcomes, starting and end dates, involved stakeholders and instructions on how to participate.

- Configure the MyUniversity portal to provide visualization of social network accounts of existing relevant communities.
  
  Example: Bologna process National Working Group Facebook or Twitter account.

- It's relatively easy to get potential participants to “like” or follow, but getting them to engage a participatory process is no so simple. Engagement must be recognized and rewarded, requiring creativity.
  
  Example: create contests, quizzes, polls and other interactive participation opportunities.

- If not possible to publish in an existent social network account, create one for MyUniversity and explore it to leverage participation.

- If a post in a Social Network generates comments, remember to respond in order to enhance relations and attract user to participate. Digital conversations tend to have a lifespan of about 48hr, so, whenever possible, the responses should be in real time.
IV.5.2. Maintenance

The initiative maintenance includes the facilitation and moderation. High quality facilitation can encourage people to participate online while competent moderation ensures that the online platform works well and participants comply with its terms and conditions.

IV.5.2.a. Facilitation

The online facilitation aims to guide the process, helping the community to generate its purpose, addressing conflicts and making interventions to keep the community working towards its purpose.

**Guideline – Foster Inclusive participation**

Encourage full participation, helping all the participants to feel heard, by creating the necessary conditions for less regular participants to contribute and avoid incidents of premature criticism. Work towards the accommodation of diverse skills, culture and personal styles.

**Guideline – Be impartial**

Guarantee impartiality, not taking sides or expressing strong points of view during the process.

**Guideline – Summarise results**

The deliberations should be summarised, outlining the key points and set out the conclusions in a balanced and accessible form.

**Guideline – Think outside of the box**

The creativity should be promoted in order to stimulate participants to think outside of the box, seeking new ways of addressing the problems and find solutions;

**Guideline – Establish contact points**

Establish contact points for the community concerning the process and/or difficulties with the technology.

**Guideline – Support participants**

The participants should receive prompt support in both participatory process doubts and tools usage difficulties. Responsiveness is a key success factor.

**Guidelines – Prepare events**

Online events should be prepared on a regular basis to attract participation.

IV.5.2.b. Moderation

The online moderation aims to ensure that online group content is functioning. This may include monitoring discussion boards to ensure all postings meet guidelines or standards of behaviour, and organising discussion material.

The contributions can either be moderated before being posted or allow the posting and moderate afterwards in collaboration with the community.

Moderating comments before they appear on the site requires intensive labour and not possible to implement in some applications. If the post is published immediately, the facilitator or the community can flag any inappropriate content. This approach is efficient, promotes trust in the
community and allows people to be satisfied at seeing their contribution appear immediately. In registered applications it also delegates responsibility on the participant.

**Guideline – Set participatory rules**

Set out clear and transparent rules for participants’ contributions, such as maximum length of messages, maximum frequency of messages; attitudes to offensive language and defamation, etc.

**Guideline - Regulate the debate**

The debate should be regulated by the e-Participation ground-rules (see section III.2.), the participatory process agreed rules and adhering to ethical principles, such as data privacy, political neutrality and non-coercion;

**Guideline – Help to reach conclusions**

The moderation should help debate participants to reach conclusions, not necessarily shared ones, rather than incessantly rehashing old arguments;

**Guideline - Maintain the content organized**

The moderation shall ensure that the debate space is kept organised and navigable.

**Guideline – Manage inappropriate content**

Troubleshooting techniques to deal with inappropriate contents:

- If a member is violating the guidelines or rules, or other members have expressed concern, the moderator can clarify the situation by e-mail.

- If the option is to resolve inappropriate content issues publically, there should be a defined and disclosed procedure.

- In certain circumstances, such as spam, obscenities or personal attacks, the published content can be either hided or erased. In this case a warning message should be sent. These actions should only be done in extreme cases due to clear reasons to avoid the sense of censorship.

- In extreme cases of participants with sole purpose of disrupt the process, the banning could take place, according to the agreed participatory rules. In some cases the banning is difficult to implement and if this is the case the most effective solution is simply to get everyone else to ignore them.
IV.5.3. Institutional Response
Each e-Participation initiative should trigger a response from a Higher Education institution, University, government or MyUniversity Administration. The response can either be a reaction or a change in a procedure or policy.

**Guideline – Ensure institutional response transparency**
If by any reason the institutional response cannot be obtained this need to be clarified as soon as possible with the participants. Failing to comply with the communicated expectations, after the participants have invested time and energy in the participatory process, lead to mistrust and can undermine future initiatives.

**Guideline - Communicate the institutional response**
Participants should be aware of what the outcomes of the process were, how they were achieved and how they will be implemented. It is required to establish a clear link between the participatory process and the institutional response.

**Guideline – Celebrate achievements**
The initiative outcomes should be celebrated to promote the sense of achievement by:

- Recognizing the participants’ individual contribution and collective endeavours;
- Providing evidence that online participation is making a difference;
- Ensuring that online participation is can effectively lead to clear improvements in decision-making processes and outcomes;
- Highlighting obstacles or challenges that e-participation can overcome.

**Suggestions**
> Following the institutional response, publish News on MyUniversity portal and relevant Social Networks describing the achieved outcomes, the participants’ role, the e-Participation potential and inviting potential participants to contribute with new ideas.
IV.6. Evaluation

The evaluation can be carried out using a variety of techniques, such as questionnaires, interviews, focus groups or panels. The evaluation consists on the assessment of the participatory process, in terms of results, outcomes and also on how the overall process was performed. It allows to know if the goals were achieved and how to improve future initiatives. The evaluation shall include the perspectives of all involved in the process and the results should be widely communicated to all identified stakeholders, in particular the participants and the decision makers.

Generically the Evaluation phase involves the criteria definition, the data collection, the results reporting and the results usage, as represented in Figure 12.

![Figure 12 – Evaluation stages](image)

IV.6.1. Criteria definition

The criteria definition can be assigned to the online moderator. It is important to consider what constitute the success of the initiative (criteria), how to measure the success (indicators) and how to know if it has been successful (data).

There are many possible approaches to define the criteria. The following guideline includes some possibilities that can be applicable, depending on the initiative nature and e-Participation maturity.

*Guideline – Consolidate dimensions to be assessed and assessment criteria*

The evaluation can be goal-bound, intended to measure the extent to which the predefined objectives have been met, or goal-free focused on the effective achieved effects. Both approaches have advantages and disadvantages. This guideline includes elements of these two types of evaluation. It also combines objective evidences of the initiative effects and the participants’ perception.

Table 7 contains identifies dimensions and the corresponding assessment criteria that can be applicable in e-Participation initiatives evaluation.
### Table 7 – e-Participation evaluation dimensions

<table>
<thead>
<tr>
<th>Dimension</th>
<th>Assessment Criteria</th>
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</table>
| **Methodology**| - Identification of the participatory techniques used.  
                 - Level of participation per participatory technique.  
                 - Time plan deviations.  
                 - Participatory process understanding by the participants. |
| **Participation**| - Level of participation, including number of participation figures and decision makers’ involvement.  
                      - Participation representativeness, involving the targeted participants and communities.  
                      - Effectiveness of the methods used to promote the initiative.  
                      - Achieved result legitimacy.  
                      - Comments and feedback concerning the participatory process.  
                      - Moderation and facilitation effectiveness. |
| **Results**    | - Results achievement figures, depending on the defined results (see section IV.2.3.).  
                      - Typical measures include indicators related to quality, quantity, targeting, timeliness, cost and coverage. |
| **Outcome**    | - Effective achievement against the planned outcomes.  
                      - Sense of shared achievement and outcome ownership.  
                      - Commitment to implement the defined changes. |
| **Resources**  | - Time spent.  
                      - Consumed effort.  
                      - Costs. |
| **Learned lessons** | - What should be improved in subsequent initiatives. |
| **Platform (ICT)** | - Accessibility  
                        - Usability  
                        - Reliability  
                        - Security  
                        - Updatability  
                        - Customization  
                        - Readability |
IV.6.2. Data collection and reporting

The evaluation data collection stage aims to gather the assessment results and should involve all involved stakeholders, participants, project team and decision makers.

The initiative’s assessment results shall be reported to the participants and decision makers, including information on the following matters:

- Involved participants and participation figures;
- Summary of the achievements and results;
- Recommend actions or issues raised during the participatory process;
- Learned lessons;
- Next steps;
- Outcomes not initially expected.

Guideline – Collection responses

Upon the criteria design and, the responses collection can be obtained by means of

- Interviews with the decision makers.
- Surveys intended to gather the participant’s feedback.
- Platform usage statistics, from the tools and server log file analysis to obtain information on visits and page requests.

Guideline – Promote participatory analysis

Participants should be invited to analyse and review evaluation results by regularly providing updates, annotated research findings and direct access to the underlying raw data.

Guideline – Reports archival

The initiative assessment results shall be archived and properly tagged in order be available for consultation.
IV.6.3. Results usage

The results can be published online, although the usefulness depends if there are known and used acted upon.

**Guideline – Promote results dissemination**

The participants should be encouraged to disseminate the results and use them to generate discussion and debate on their own blogs, websites or discussion boards.

**Guideline – Compile learned lessons**

The identified learned lessons should be organised in a dynamic and repository that allows easy consultation in subsequent initiatives.
IV.7. Guidelines Summary
The presented guidelines are structured according to a conceptual model for an e-Participation programme cycle, comprising five phases, namely the Programming, the Planning, the Design, the Implementation and the Evaluation.

This approach is based on a continual improvement cycle, allowing the deployment of e-Participation initiatives on a regular basis. It assumes the existence of an e-Participation platform, which allows a regular launching of new initiatives.

### e-Participation Initiatives Management

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<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1. Scope Definition</td>
<td>1.2. Stakeholders Engagement</td>
<td>1.3. Goals Definition</td>
<td>1.4. Feasibility Study</td>
<td></td>
</tr>
<tr>
<td>Participatory issues identification</td>
<td>Identify stakeholders</td>
<td>Define outcomes</td>
<td>Analyse participants</td>
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<tr>
<td>Select engaging topics</td>
<td>Conduct a stakeholders' analysis</td>
<td>Define results</td>
<td>Incorporate earned knowledge</td>
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<tr>
<td>Balance national and European issues</td>
<td>Stakeholders' engagement</td>
<td></td>
<td>Analyse decision makers</td>
<td></td>
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<tr>
<td>Understand existing barriers and expectations</td>
<td></td>
<td></td>
<td>Analyse implementation feasibility</td>
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<tr>
<td>Determine the type of engagement</td>
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<td>Make a go/no go decision</td>
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<tr>
<td>Tailor the initiatives to the policy cycle</td>
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<tr>
<td>Define the participation area</td>
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<tr>
<td>Create a multi-disciplinary team</td>
<td>2.2. Workplan Preparation</td>
<td>3.1. Design Participatory Technique</td>
<td>3.2. Tools Selection</td>
<td>3.3. Contents Preparation</td>
</tr>
<tr>
<td></td>
<td>List main activities</td>
<td></td>
<td>Match ICT with the participatory need</td>
<td>Establish a process for content preparation</td>
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<tr>
<td></td>
<td>Break activities down into manageable tasks</td>
<td></td>
<td>Design for participation</td>
<td>Focus on quality instead quantity</td>
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<td></td>
<td>Clarify sequence and dependencies</td>
<td></td>
<td>Ensure quality control</td>
<td>Ensure good scalability</td>
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<tr>
<td></td>
<td>Estimate start-up, duration and completion of activities</td>
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<td></td>
<td>Adapt the content to the medium</td>
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<tr>
<td></td>
<td>Summarise scheduling of main activities</td>
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<td>Provide balanced information</td>
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<td></td>
<td>Define milestones</td>
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<td>Ensure quality control</td>
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<td></td>
<td>Define expertise</td>
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<td></td>
<td>Allocate tasks among team</td>
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<tr>
<td>Select participatory technique</td>
<td>4.1. Promotion</td>
<td>4.2. Maintenance</td>
<td>4.3. Institutional Response</td>
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<td></td>
<td>Foster Inclusive participation</td>
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<td>Ensure an institutional response</td>
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<td></td>
<td>Consider participants' feedback</td>
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<td>Communicate institutional response</td>
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<td></td>
<td>Define appropriate timeframe</td>
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<td>Celebrate achievements</td>
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<td>Ensure data protection</td>
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<td>Ensure transparency</td>
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<td></td>
<td>Be inclusive</td>
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<td>Perform pilot test</td>
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<td>Ensure traceability</td>
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<tr>
<td>Select key stakeholders in the initiative promotion</td>
<td>5.1. Criteria Definition</td>
<td>5.2. Data Collection and Reporting</td>
<td>5.3. Results Usage</td>
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<td></td>
<td>Consulate dimensions to be assessed and assessment criteria</td>
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<td></td>
<td>Collect responses</td>
<td>Promote results dissemination</td>
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<td>Promote a participatory analysis</td>
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<td>Reports archival</td>
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V. EXAMPLES

The purpose of this section is to provide examples of initiatives managed according to the guidelines described in this document and considering the e-Participation ground rules identified. The selected issues are merely illustrative and may not be relevant for some Universities. The examples were designed for an early stage of the e-Participation maturity, assuming this is the current situation among the Universities. For this reason, the examples emphasise the need of community building and active participation, mainly addressing topics with local impact and seeking information and consultation types of engagement, as it was considered that these types of initiatives could be the starting point to leverage the e-Participation practice towards an effective collaboration and empowerment.

V.1. Case 1 – Group Study Rooms

Programming

Following the meeting intended to present the *MyUniversity* project to the Students Association, the Students Association representative mentioned that they are responsible for the management of two Group Study Rooms. During the current year they intended to review the Rooms management in order to improve the current situation. There was an approved budget for that purpose. The decision regarding this issue would take place at a general meeting in about 5 months. For the time being they were preparing possible improvement options, concerning the rooms’ equipment (such as LCD screens, whiteboards, projectors, etc.) and room’s availability schedule.

Considering the *MyUniversity* platform, the Students Association was interested to collaborate in the design of an e-Participation initiative intended to consult the students’ concerning proposals of improvement. Following a subsequent meeting on this matter to guarantee the Students Association commitment to participate in the initiative it was agreed to develop a participatory process, intended to ensure that students’ concerns are understood and considered in the final solution.

The following goals were defined.

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Results</th>
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<tbody>
<tr>
<td>Ensure that the proposals to be considered in the general meeting consider the students views.</td>
<td>✓ Existence of 5 suggestions addressing all identified topics (i.e. equipment, schedule), resulting from generated debate</td>
</tr>
<tr>
<td>Contribute for community building.</td>
<td>✓ 100 posts ✓ 800 visits</td>
</tr>
</tbody>
</table>

Considering the available time, promotion requirements, existing material, students holidays and other constraints it was concluded that the initiative was feasible.

Planning

The initiative team as defined as follows:

- Initiative responsible – *MyUniversity* Manager
- Contents Responsible – Students Association Facilities Manager
- IT Responsible – *MyUniversity* Administration responsible
- Communications - Students Association Communications Manager

The initiative design, including process definition, portal configuration and content preparation would take 1 month. The debate would be active for 2 months. Two extra weeks would be necessary for the roll-out and evaluation.
Design
It was decided to design an e-Consultation participatory process that would require the provision of background information, the collection of opinions and report-back to participants.

It was decided to use a Discussion Form, supported by a repository of documents with the background information.

The Content responsible prepared an informative document with the Group Study Rooms current conditions, available budget, topics to be addressed and rooms’ occupancy figures in the previous year.

The Promotion responsible described in the initiative in the MyUniversity Newsletter, prepared a video with the Students Association President that would be available in the Students Association website, just above the link to MyUniversity portal. A text too be included in the News to be published one week in advance to the initiative launching was also prepared, as well as the small texts to be posted in SNS.

The Students Association Facilities Manager was assigned as the Forum Moderator, and defined together with the initiative responsible the Forum ground rules. The main principles were the following:

- When responding to a post, keep your message brief.
- Stick to issues, stay on topic.
- Do not reply with posts that add little to the conversation.
- Adhere to the same standards of behaviour that you follow in real life.
- If you have a conflict, please settle it though a private e-mail.
- Be courteous to the other participants.
- Do not post more than 3 times a day.

A “How to participate…” section was configured and instructions were prepared to guide the participants.

Implementation
The initiative was promoted in:

- University Facebook account (news automatic publishing from MyUniversity portal);
- Students Association Twitter account;
- Students Association website;
- Newsletter;
- 10 minutes presentation, during a University event;
- Direct contact among colleagues.

The Newsletter clearly stated the initiative purpose, expected outcomes, key stakeholders, moderators the instructions to participate and the process phases, including the debate, the conclusions collection and the Students Association meeting. The Event tool had the process major milestones.

During the debate, the Moderator regulated the conversation, provided additional information whenever required and managed some inappropriate posts. Based on the existing participants’ feedback, during the debate, the defined topics were reviewed and it was added a topic that was not initially considered: the rooms booking procedure. This addition was posted in the same SNS used for the promotion.

When the discussion finished, the moderator prepared a summary of all contributions and published in the Portal, using the News. The actual participation figures were compared with the expected results. In parallel the proposals summary was sent to the Students Association. During the general meeting the proposals were considered, as it was initially assumed by the Students Association. The final decision clearly included some of the proposals resulting from the discussion and the booking procedure was also revised.
The meeting results were immediately posted in the Portal to inform the participants. The SNS were also used to provide information of the initiative tangible results. The MyUniversity Portal News tool was used to celebrate the results.

Evaluation
The Forum was used to collect feedback about the initiative. It was concluded that the participants appreciated the collaboration, but the time frame defined should have been greater. This conclusion was recorded in the lessons learned repository. Considering the potential of the MyUniversity platform the Students Association became responsible for the management of a dedicated Discussion Forum.

V.2. Case 2 – Recognition of ECTS within ERASMUS

Programming
Following some suggestions that MyUniversity portal users submitted through the recently created “Take Action!” link intended to collect ideas on new topics, the MyUniversity project team identified that the ECTS recognition in the ERASMUS students was considered an important topic since it generates doubts among the students. The MyUniversity content manager has acknowledged the proposals replying to the user and informing that a Poll would be used to measure the community sentiment on that matter. The Poll revealed that the doubts seem to be a general sentiment.

Based on this input the University ERASMUS group was contacted. It was decided to launch an informative initiative, to improve the awareness on the subject and considering the existing mobility agreements with other Universities. The University responsible for the ERASMUS agreed to participate in the initiative. The goals were established as follows.

<table>
<thead>
<tr>
<th>Outcomes</th>
<th>Results</th>
</tr>
</thead>
</table>
| Contribute for the awareness on students’ mobility. | ✓ Active participation with posts, comments or questions from 100 students.  
| | ✓ Provision of informative material on the subject.  
| | ✓ One workshop promoted by the University on the subject. |

The University Marketing and Communication group was contacted to help on the initiative promotion, in order to guarantee that the students’ engagement meet the established goals.

Considering the goals, the available ICT, the learned lessons from previous initiatives, and the knowledge on the University students’ habits and usual behaviour, the MyUniversity team and the identified stakeholder have concluded that the initiative was feasible.

Planning
The team was assigned and the initiative was scheduled, considering all the stages of the initiative lifecycle. It would be a 6 month initiative, from Design to Evaluation. It was decided to have a continual promotion through several means. The initial content, portal configuration and initial promotion would take one month.

Design
It was decided to design a process intended to contribute for awareness among the students. The University ERASMUS group provided background material that would be available in the portal, with information on students’ mobility. To draw students’ awareness to the importance of the subject, the portal static section “Do you know...” would be used, containing simple, informative and appealing messages. The poll would also be used throughout the initiative timeframe to have an idea of the student’s engagement. The discussion forum would be available for clarifying students’ questions. The Forum rules of a previous initiative were adopted.
The University Marketing and Communication group participated in the design of the promotion material, including the preparation and printing of a limited number of flyers and posters. The online promotion strategy was also defined. The initiative expected outcome, duration, responsibilities and participation guidance was included in the promotional content.

**Implementation**

The online promotion comprised a dedicated section in the *MyUniversity* Newsletter, including an interview with the University ERAMUS responsible, which was also available in the homepage of the University’s intranet. One Article available in the *MyUniversity* portal was also published in the University Facebook account and in a Students Association popular blog. The posters were placed in strategic places. The flyers were distributed at lunch hour in the canteen. One of the main messages was that the students’ participation and adherence would play a fundamental role for initiative outcome.

The ERASMUS group responsible replied to several questions in the Forum. Some students also shared experiences using the Forum. During the initiative the Poll results were regularly checked by the initiative responsible and when a new question did not generate a considerable number of votes, the SNS were used to re-enforce the initiative promotion.

At month 4, there was a workshop with presentations from the University ERASMUS group that also contributed for direct contact among the *MyUniversity* participants. During the workshop it was suggested the creation of a FAQ related with the initiative subject, based on the information produced so far.

The FAQ was prepared, shared with the participants and revised. The Workshop presentations were published in the *MyUniversity* portal.

**Evaluation**

The evaluation was performed by means of a survey. It was possible to conclude that the goals were achieved but many other issues related with students’ mobility also deserved attention and should be addressed in subsequent initiatives.
VI. REFERENCES


