



bringing **ideas** to **life**

RUNNING

GeniUS! process



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REFINING THE CHALLENGE QUESTION

The purpose of the tool in this section is to drive the core team to a questioning process to better understand their current challenge and be able to define and draw up a clear, engaging and positive Challenge Question.

It can also be helpful to frame the problem and define the information needed to feed the discussion that later will take place around the question online and offline.

You'll find the following three documents:

- A graph that shows the flow of the main questions to answer
- A questionnaire key that includes inspiring questions for each box of the graph
- The Challenge Question Definition chart

Please follow the sequence of the questions in the graph. For most of the boxes you can consult the questionnaire key. Some of the questions given in the questionnaire might be familiar, whereas others will be totally new. The purpose of this key is to go further in the answer of the main questions, tending to be a tool to open the perspective of the challenge and make your thoughts more “elastic” around the problem.

In addition, doing this exercise you will achieve a clearer idea of the frame where the problem, thus the challenge, is situated. Consequently, the next step in the process, the definition of the themes for the Open Innovation event, will be easily took.

1. What is the **PROBLEM**?

This should summarize the essence of the issue and it should be drawn up in maximum one line.

3. What are the **EVIDENCES** of the problem?

4. Who it **AFFECTS**? Who is **INTERESTED** in it?

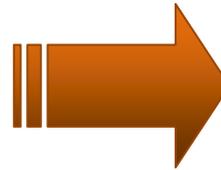
5. What are the **EXISTING IDEAS** for solving the problem and examples? Once you have defined them, can you detect any source for solutions in them?

6. You are opening the solving process to a new range of “solution providers”. What do you want this **PEOPLE to do**? By when?

2. What is your **VISION**?

Once the problem is solved, what might it look like?

One first line to sum the idea up and then two more lines to describe it.



Questionnaire Key

1. What is the PROBLEM?

This should summarize the essence of the issue and it should be drawn up in maximum one line.

2. What is your VISION?

Once the problem is solved, what might it look like?

One first line to sum the idea up and then two more lines to describe it.

- Can we tell a clear story of how an individual's life will be changed for the better by the new idea?
- Engaging everyone, can we ground the challenge in the local identity? Can we draw on the city History (grounding of a vision in a simple moral purpose, connected to people and place)?
- Write a newspaper headline reporting on the success of the new idea looking back from the future, what would we say?
- Are we using language and evidence that members themselves can use to engage their local communities?

3. Describe the problem. What are the EVIDENCES?

- How are we helping our clients and beneficiaries? Do we have any service currently? What specific needs are we meeting? Do they have other needs? Which ones?
- Do we understand enough about the quality and value of money of our current services?
- Have we looked at our challenge from every possible vantage point? Which are the most relevant for our challenge? What techniques and research methods are we using to explore new vantage points?
- Where are our blind spots?
- Are we gathering enough qualitative and quantitative data to understand the challenge? From our own resources? From other groups of interest and stakeholders?
- Which are our most important areas of influence, including those beyond the organisation?
- How are we using formal and informal governance and communications to keep up momentum?

Knowing and understanding stakeholders and how to get them on board:

- Do we know the group of interest's expectations? Is any of the expectations exclusive? What is important for them? Why? What are the outcomes of the solution for the challenge that can interest them as consumers? For which need?
- Are we engaging them? In every stage of the journey? How?

Communication

- Do we understand and communicate risks in order to manage expectations?

4. Who it **AFFECTS**? Who is **INTERESTED** in it?

- What do we really know about the lives of people involved in the challenge? Where can we have more information about them?

5. What are the **EXISTING IDEAS** for solving the problem and examples?

6. You are opening the solving process to a new range of "solution providers". What do you want this **PEOPLE to do**? By when?

Challenge Question Definition

Now we are ready to define the Challenge Question. Please draw up to 3 options for the Challenge Question and be sure all of them fulfil the following key aspects:

- the question must be written in a concise, straight out and **clear language**, that allow anyone to understand the core meaning (challenge yourselves asking your kids if they understand it!)
- might **engage people to discuss** about, even in a slightly provocative manner (ask your friends... do they feel engaged with the question?)
- it has to be posed in a positive way, using **positive language**. When we think about an issue or problem normally tend to use negative words to define the question we want to answer. The same question can be re-drawn up using positive words, moving to another brighter angle.

It will be helpful if you try three ideas for the challenge question and then choose and refine to get best one. Try different ways to ask the question, maximum 3, and chose the most positive, clear and engaging.

Now you can check which question is better understood and more engaging with people who have not been involved in the process.

Challenge QUESTION

Chose the most positive, clear and engaging

1.

2.

3.

Challenge TITLE

Maximum 10 words

Challenge DEFINITION

Concise but complete, including all the key aspects of the challenge, and not being prescriptive!

RUNNING THE ONLINE DISCUSSION

The purpose of this brief document is to provide some key information and suggestions to help you, the core team, to better understand, plan and run the online discussion with the resources they already have at this point of the process.

Once the research in the challenge area is completed, the challenge question refined and the stakeholders are engaged it is time to prepare it to go live on the GeniUS! open innovation platform. With the right tools, resources and stakeholder buy-in the platform can enable city-wide collaboration, allowing anyone who is interested and willing to co-develop city solutions in a new way.

This includes better responsiveness to city-wide needs, provision of the latest solutions through group intelligence, and proactive scoping of better ways to do things with a shared purpose of making the city a better place to live and work.

Challenges on the platform need to engage people, prompt them to contribute and motivate them. A challenge question needs to strike a balance between being focussed enough to give some structure to the discussion, but not so narrow as to remove any room for creativity and innovation. In order to assure you maximize the potential benefit of having this large group of people engaged in the discussion it is important to plan it well.

Planning the Discussion

Publicity

You will need to engage communication teams from both your own and partner organisations to ensure that your communities are made aware of the project. The existence and the opportunity must be circulated as much as possible.

To disseminate and engage your own organisation you can use existing internal communication channels and systems. Regarding to the first Genius Challenges, probably better during the second or third one, once the core team has gained experience and the model has been adapted to your context, it is recommended to consider the adequacy of an internal campaign in order to disseminate the principles of the model and the process itself, and encourage people to actively participate. In that case a specific communication plan should be designed and implemented.

It is indispensable to assure your stakeholders contribution during the online (offline) discussion due to their essential role in the process. Due to get them and other partner organisations on board you also can use your existing communication channels. It is recommendable to keep in contact with them during this stage, monitoring their participation and informing them about the course of the discussion, prompting them to post their ideas,

suggestions and insights, or asking them to do it on their behalf. . You might also want to contribute other key people from organisation partners.

Finally, opening the discussion and involving other people in the city in the online discussion will give you the opportunity to gather different points of views and ideas. Advertisements in local magazines, press releases and drumming up interest on social media are helpful in to get them involved. Targeted emails to key people. As we said before for the stakeholders group some people may be reluctant to post comments themselves but may want for a comment to still be posted, so one of the GeniUS! team can offer to post on their behalf.

Key topics

During the previous challenge question refining process you have researched around both the challenge area in general and, more specifically, the challenge question. Key information for the subsequent discussion activity has been spurred by this process: relevant data and statistics, evidences of the problem (blind spots too!), groups of interest needs and expectations, people/organisations affected by the problem, people/organisations interested in the solution, existing solution ideas (in other organisations, cities, regions...), our vision, our stakeholders and what do you want from them, our areas of influence...

Refining the challenge question you have carried out a clearly defining exercise of all the main and critical aspects you need to assure are going to be discussed at this point. It is important to know the specific topics on which we want the participants to discuss. In case these key topics don't arise throughout the conversation you can use the information gathered before to conduct the discussion to them.

For instance, during our last challenge in York "Unlocking GeniUS!" our challenge was to improve the GeniUS! process itself, specifically we wanted to gather ideas around how to engage people in the process. We wrote a list of reasons why people don't engage and, for each reason, some questions we wanted to prompt throughout the discussion. Many of the questions and reasons emerged naturally in the course of the debate, some were totally new and others were prompted in different ways such as posting articles, posing a direct question at an appropriate time, answering a specific comment with data and statistics, contrasting our ideas and vision, asking around our blind spots, etc:

Possible reasons for the lack of engagement:

1. *People have the time, the willingness to participate but they don't find an adequate communication channel:*
 - *what channels are the most adequate for residents? Can we think in the different groups of people and their preferences, online and offline?*
2. *People do want to participate but they don't have time:*
 - *do we have easy and accessible communication channels, online and offline?*
 - *an "express" participation channel (non-time-consuming channel), would it be effective? how do you imagine it? Online and offline? Click on this initiative in South Korea.*
 - *participation through civil communities, is it effective? Can we do it better?*
3. *People have the willingness to participate but they have the ideas at any time and there's no open channel at that precise moment:*

- *how can we collect ideas at any time, regardless to subject discussion timeframe, and process them? Can we re-think a 24/7 “listening” service?*

4. *People don't have the willingness to participate in their city challenges because they think it isn't worth the effort:*
 - *how can we show it is worth participating in your city challenges?*
 - *how can people feel listened by the City?*

Key people for the following Open Innovation Event

The Local Support Group and stakeholders in general as well as residents, businesses and organisations are your potential participants throughout the discussion. Before the discussion and over the previous contacts with some of them you might have picked some of the key people you would like to engage not just during the online discussion but also for the Open Innovation event. Identifying these people previously and then paying special attention to keep momentum during the discussion may help you to get them actively involved in the Open Innovation event.

In addition, the content of the participants' contribution and insights can give you the clue to identify new key people you might also want to engage and involve.

Challenge themes for the Open Innovation Event

Following the online (and offline) discussion, monitoring and processing the conversation you will be able to sort and define the challenge themes (5 or 6) you will ask people to work in depth during the Open Innovation Event. An ongoing planning of the Open Innovation event need to be designed, incorporating the ideas of the discussion to the structure and content of the event in the most suitable way. At the time when you can envisage the themes that are going to be brought to the Open Innovation Event the structure and tools that are going to be used can be defined.

Keeping the Conversation Going

There are many ways to encourage participation and enhance dialogue. Conversations on the platform work much better when multiple people are contributing. People don't often want to be the first one to contribute and will be more likely to get involved if they see others doing so first. The challenge team should start off the discussion and line up key stakeholders to contribute.

Challenge team members should all contribute to the platform and the discussions. Stimulation of conversation and encouragement of comments will keep the discussion lively and challenge responders enthusiastic. Posting news stories to get people talking and use of videos and pictures is also helpful. Making posts that ask questions of others also prompts participation.

Open processes also have its risks. Sometimes (fortunately the less) you might have negative and disruptive comments to the process itself or even the organisation that is running the process (a “troll” comment is also possibility). Answering to these participants in a respectful, constructive and positive way, leveraging the comment to bold the openness and transparency of the process, getting, when possible, a positive idea from the comment, and asking for a constructive discussion will help. Don’t panic, you will realise you are not alone and other contributions from other participants always arise and strengthen the principles of the process. Responses to disruptive comments must be quick and short and rapidly move back to the discussion continuing with the progress of the process.

Conclusion

At the end of the 4-6 weeks discussion and debate on the platform you have strengthened your capability to find new solutions because

- the perspective of the challenge is wider
- the challenge and problem is better understood
- the areas to focus on are better defined
- people’s concerns and priorities are defined and understood
- new topics, solutions and ideas are gathered

You will be ready to collectively find specific creative and achievable solutions in the course of the Open Innovation event.

RUNNING THE OPEN INNOVATION EVENT

Before the Event

Engagement

Experts Panel Criteria

Structure and Outcomes

Agenda Template

Open Innovation Event Guide

After the event: preparing the pilot stage

Open Innovation Event Before the event

The majority of the Open Innovation event can be planned in advance but some flexibility is needed to incorporate ideas coming from the online and offline discussion that is taking place simultaneously. The main aspects to consider when planning the event are:

Engagement

You will find a section that contains a very simple guidance for preparing an introduction to an engagement plan. The most important steps in this stage are to:

- Integrate the engagement process into your project planning and management
- Take into consideration the specificities of each key group of people in order to consider singular and particular approach to its successful engagement.

Logistics

Keep in mind you will need:

- ✓ A venue that offers flexible spaces for presentations, networking and group work
- ✓ Lots of tea/coffee and food!
- ✓ Creative materials and resources - post-it's, whiteboards, large paper/flipcharts, colour pens etc as a minimum.
- ✓ A big timer (to keep people on their toes!)
- ✓ Inspirational and Engaging Speakers
- ✓ Experienced Facilitators
- ✓ Copies of background information and relevant insight data
- ✓ Access for participants to review comments from the online phase
- ✓ Ideally, a ring-fenced funding opportunity for pilots.

Complementary activities

An exhibition space can be an opportunity to engage stakeholders to the event, giving them the chance to promote their products and services and get in contact with other professionals in their fields or potential customers. Exhibition and interaction space can also provide additional inspiration to participants, by showcasing products, services and ideas that may be relevant to the challenge and its solution.

Open Innovation Event Engagement

At this point of the process it will probably be useful to think about the different groups of people who might be interested in participating during the event and the ones you are interested to get involved in, as we did when we mapped our stakeholders:

What is in for them?

What do we want from them?

Open Innovation bases its principle in the fundamental idea that a diverse range of people participating on the solution research processes enables varied views, experience and skills and, consequently, enables cross-fertilisation of ideas and better solutions. Thus, it is crucial to identify the different groups of people and their particular roles in each challenge. Aside from the specifics of each challenge, the groups of people to take into account are mainly:

- The local support group, who have been involved from the beginning of the process. They understand the challenge, your purpose, and the refining process from the challenge area to the challenge question. They (probably) are also involved in the online and offline discussion.
- New people participating on the online and offline discussion.
- Inspirational speakers.
- Expert Panel members
- Other stakeholders you might want to engage as a possible source of any kind of necessary resources.

In general to all of them, attending an Open Innovation event **is a great opportunity to:**

- Create new partnerships and networks
- Use new collaborative and creative ways of working that could be adopted by their organisations/departments and become more open minded in that regard.
- Experience an open innovation practice
- Meet their current partners and colleagues in a different context and find new forms of working relationships in a more open and actively creative environment. .

Sending relevant information to the participants before the event might improve engagement. It would be useful to plan, for each one, a specific engagement action, taking into account the specific answers for each group to the two key questions above (What is in for them? What do we want from them?) and consequently:

- First contact and regularity of subsequent contacts
- The message: hook ideas, content and language style
- The channel(s) for contact and engagement

Members of the expert panel also might be informed as soon as possible, paying special attention in the purpose of their role. Eligibility criteria might be agreed and well understood by all the members.

Open Innovation Event Experts Panel Criteria

The Experts Panel is giving a RED, AMBAR or GREEN light to each pitched idea. It is desirable that people taking part in the panel (between 4 and 6) have:

- Positive approach towards the problem solution
- Knowledge about the challenge
- Capacity to find resources
- Representatives of the beneficiaries of the challenge solution (at least one)

Apart from the constraints given to the groups and other criteria based on the specifics of the challenge, the **basic assessment and selection criteria** are:

- **Impact:** the long term changes and benefits that the project will bring about that will continue after the pilot phase ends.
- **Deliverability:** whether the project would be achievable given capacity and capability of the current service/organisation(s) involved and available resources.
- **Innovation:** whether the project will test new / creative approaches or solutions or deliver increased capability to do so.
- **Sustainability:** whether the project can be sustained after the pilot phase ends and large-scale implemented.

Other assessment and selection criteria:

- **Leverage:** assessment of the cost of opportunity. What will the committed funding enable or what other activity won't happen (or won't work as well) if the project doesn't go ahead.
- **Other funding & support:** levels of other funding or support (e.g. in kind support) committed or with high probability of being committed to the project.
- **Risk vs. Reward:** do the potential benefits justify any risks involved.
- **One-off benefits:** any additional short term benefits that will occur during the life of the pilot project, but not continue after it finishes.

Open Innovation Event Structure and Outcomes

First part – BROADEN THINKING

INTRODUCTION – Context
ICEBREAKER
SHORT INSPIRATIONAL TALK
IDEATION
SELECT AND PITCH THE BEST IDEA
PEER REVIEW

Outcomes:

1. Joint understanding of the challenge, its causes, context and possible solutions
2. Participants have broadened their thinking and understand the challenge from new perspectives
3. Stakeholders and users co-creating solutions to solve their problems
4. One co-created idea per group
5. Peer review (and public review) of ideas
6. Team building

Second part – FOCUSED / PRAGMATIC THINKING

INSPIRATIONAL TALK – *A call to action: make it real*
CONVERGENCE
PITCH FINAL IDEA TO PANEL or AUDIENCE
PRIZES
FINAL REMARKS AND CLOSE

Outcomes achieved by the end of the event:

1. Shared understanding and ownership of the challenge
2. Co-created innovative, tangible and pilotable solution ideas
3. New alliances formed
4. Synergies between delegates identified and enhanced

Open Innovation Event Agenda TEMPLATE

First part – BROADEN THINKING

INTRODUCTION – Context 5-10 minutes max

ICEBREAKER 20 minutes max

SHORT INSPIRATIONAL TALK (TED-style) 20 minutes max

Expert view on the challenge or its context

IDEATION

- Forming the groups - themes
- Understand the problem – framing the challenge and root cause exploration
- Review and analyse initial ideas from the “Discover” stage of the process
- Brainstorming ideas for solutions
- Role play: different perspectives (on problem and ideas)
- Developing best ideas
- Picking top idea (or up to three possible ideas maximum)

SELECT AND PITCH THE BEST IDEA

- Selecting the best idea
- Pitch, questions and feedback

PEER REVIEW – All commenting on each idea

Second part – FOCUSED / PRAGMATIC THINKING

INSPIRATIONAL TALK – *A call to action: make it real* 20 minutes max

CONVERGENCE

- Options for team changes
- Review feedback from peer/audience review and incorporate
- Groups each developing their top idea, applying constraints
- Stakeholder analysis of solution idea
- Barriers analysis: budget / technology / etc
- How to pilot: team, resources, activities, alliances, etc
- Developing a prototype
- Preparing to pitch

PITCH FINAL IDEA TO PANEL OR AUDIENCE

PRIZES

FINAL REMARKS AND CLOSE

Open Innovation Event GUIDE

First part – BROADEN THINKING

In this first part of the event we are encouraging participants to think big, to break the boundaries, to imagine with no limits. Anything you can think of can be taken as a plausible idea.

INTRODUCTION – Context

5-10 minutes max

Welcome and introduction explaining the context and the format of the event

Achievements:

Clarified Open Innovation approach of the event.

Clear purpose, objectives and outcomes of the event.

ICEBREAKER

20 minutes max

The exercise might avoid to show up people's job titles.

Achievements:

Set an atmosphere lacked of hierarchy.

SHORT INSPIRATIONAL TALK (TED-style)

20 minutes max

Expert view on the challenge or its context

The speech can be related to the topic or not but it has to be INSPIRATIONAL.

How can you engage an inspirational speaker?

- *Paying them*
- *Setting out other meetings or contacts of their interest*
- *Bolding the big aspects of the project in which the event is framed, making it interesting and worthy to participate in it and to get new ideas to their own projects*
- *Asking them to participate in the event, facilitating groups ideation process*

Achievements:

Setting the tone (innovative, collaborative, exciting) in order to broaden people's thinking showing "out-of-the-box" ideas made real.

Broadening thinking, offering new perspectives, encouraging participants to think freely and creatively.

IDEATION

Forming the groups – themes

I would be desirable to assure there's a good mix of complementary people in each group. You can use the "mind badges" to set peoples profiles if you don't know everyone's background.

The number of people in each group can vary but it is advisable not to have more than 8 people in each group and minimum 6.

1 facilitator for each group is required.

Understand the problem – framing the challenge and root cause exploration

Review and analyse initial ideas from the "Discover" stage of the process

At this point is necessary to frame the problem, going back to the online discussion and the information facilitated.

Brainstorming ideas for solutions

Role play: different perspectives (on problem and ideas)

Developing best ideas

Picking top idea (or up to three possible ideas maximum)

The aim is to pick one top idea for each group but an option of up to 3 ideas for some groups who might be struggling can be offered.

Achievements:

Varied and complementary group of people working in each group, enabling broaden thinking, providing different perspectives and defining new solution ideas.

Joint understanding of the challenge, its causes, context and possible solutions.

Participants have broadened their thinking and understand the challenge from new perspectives.

Stakeholders and users co-creating solutions to solve their problems.

Defined ideas (up to 3 per group) in which design the views stakeholders and users are taken into account.

Teambuilding.

SELECT AND PITCH THE BEST IDEA

Selecting the best idea

Pitch, questions and feedback

Giving the groups **limited time** and a **guide** with the aspects we want to know about the idea. It is important to be firm with the timing. Use a stopwatch. 2 minutes for pitching and around 4 minutes for questions and feedback.

Achievements:

One best co-created idea per group, well defined and refined in order to be pitched.

Constructive feedback on the co-created solution ideas from a varied range of people.

PEER REVIEW

All commenting on each idea

Two different lists of feedback for each idea:

What excites them?

What difficulties do they find?

If possible the groups can look for feedback out of the venue in order to gather a public perspective.

Achievements:

Feedback from a varied range of people: stakeholders, users and their relatives, and even people with no connection to the challenge and public in general.

Aspects of the ideas to enhance.

Identified critical points on all the ideas in order to shape the idea into a pilot project in the next part of the event.

Second part – FOCUSED / PRAGMATIC THINKING

In this part of the event we are changing the direction and focus of the dynamic. The groups have been exercising their broaden thinking and imagination and now is time to focus on the practicality of the idea chosen, making it viable, tangible and pilotable.

SHORT INSPIRATIONAL TALK – A call to action: make it real

20 minutes max

It has to also be INSPIRATIONAL but on a practical focus, setting the tone to make people focus on turning ideas into reality, think in a pragmatic way, converging into details of the idea to turn it into a tangible projects.

Achievements:

Setting the tone (pragmatic, collaborative, exciting) in order to make the people think focussed on turning ideas into reality.

CONVERGENCE

Options for team changes

We want engaged and motivated people working in their groups so it's time to enable people to change teams if they want.

Review feedback from peer/audience review and incorporate

Groups each developing their top idea, applying constraints

Economical, regional and time constraints might be given to the groups to stretch and evolve their ideas. (i.e. 5.000€, city area, 6 months). It is important not to give this information before this moment to enable the broaden thinking during the first part of the event.

If you have a 2 days event you can facilitate physical material to “construct” the pilot, make it more visual and attractive and keep going on creativity in the room.

Stakeholder analysis of solution idea

Barriers analysis: budget / technology / legal... etc

Business model CANVAS

How to pilot: team, resources, activities, alliances, etc

Developing a prototype

Prepare to pitch

Achievements:

Motivated people working together on turning their solution ideas into real predetermined real context.

Co-created innovative, tangible and pilotable solution ideas.

PITCH FINAL IDEA TO PANEL (or audience)

Again giving the groups **limited time** and a **guide** with the aspects we want to know about the idea. It is important to be firm with the timing. Use a stopwatch. 5 minutes for pitching and 10 minutes for questions.

Achievements:

Best co-developed ideas refined in a specific and real context.

Constructive feedback from a varied range of people on the co-created solution ideas.

Shared understanding and ownership of the challenge.

PRIZES

Certificates, funny disruptive prizes to all the groups

FINAL REMARKS AND CLOSE

Clarify the following steps throughout the pilot project stage and encourage people to be involved and join the groups that are going to develop the pilot projects.

Achievements:

Setting momentum and engagement for further stages of the project and other challenges.

New alliances formed and other resources to enable the pilot project and future scale.

Synergies between delegates identified and enhanced.

Open Innovation Event

After the event: preparing the pilot stage

- ✓ Meet the winner group and other people in the event that might want to participate in the pilot project development and implementation.
- ✓ Assure they are going to commit for this stage and take forward the pilot project:
 - Know them and what they commit at this stage: roles and resources.
 - Assure they are equipped with the right and relevant combination of skills and professional profiles to success in the pilot development.
 - Support them looking for extra people with additional skills if necessary
 - Ask them to design a business plan.
 - Ask them to design a project plan including progress reports as a deliverables.
 - Support them with your:
 - Network and contacts
 - Expertise
 - Logistics
 - Other resources available
- ✓ Follow up their progress not only through the reports but also keeping informal contact with them and check if they need any support.
- ✓ Arrange follow-up meetings whenever it is necessary.
- ✓ Coordinate communication actions for any remarkable achievement over the course of the project.
- ✓ When the pilot project succeed support the process to enable large scale, searching for alliances and new resources.