D3.1 - Guidelines for stakeholders' identification and engagement within the RHHs

Grant Agreement No:	776465
Project Acronym:	RURITAGE
Project Title:	Rural regeneration through systemic heritage-led strategies
Funding scheme:	Horizon 2020: Climate Action, Environment, Resource Efficiency and Raw Materials
Start date of the project:	01/06/2018
Contractual delivery date:	30/09/2018
Actual delivery date:	30/09/2018
Contributing WP:	WP3
Type:	Report
Dissemination level:	Public
Document description:	This deliverable supports Rs and RMs to select the local stakeholders to be involved in the Rural Heritage Hubs.

Editors

Organisation	Name
CE	Michelle Perello
	Beatrice Avagnina
UNIBO	Simona Tondelli
	Claudia de Luca

Contributors

Other partners involved:
ICLEI, NMBU, CRS, Savonia, all RMs and Rs

List of Abbreviations

D	Deliverable
WP	Work Package
M	Month
RHH	Rural Heritage Hub
RM	Role Model
R	Replicator
SIA	Systemic Innovation Area

Table of content

Summary

WP3 supports the co-development of heritage-led regeneration plans within Replicators and of innovative strategies for further supporting cultural heritage in Role Models. WP3 contributes to develop a sense of ownership and responsibility among the inhabitants and key stakeholders of rural areas, mainly through local engagement in the participated and inclusive Rural Heritage Hubs (RHHs) established in both Replicators and Role Models.

This Deliverable '*D3.1 - Guidelines for stakeholders' identification and engagement within the RHHs*' aims to provide guidelines to Role Models and Replicators for the stakeholder identification and engagement strategy within the Rural Heritage Hubs of the project.

The deliverable presents the overall methodology for stakeholder involvement and engagement and then it provides specific guidance to partners on the steps to do for the selection of relevant local actors to be engaged into the RURITAGE participatory process.

Introduction

This Deliverable 'D3.1 - Guidelines for stakeholders' identification and engagement within the RHHs' is developed with the objective of providing an ad-hoc stakeholder identification and engagement strategy that will support the Replicators and Role Models in identifying the stakeholders to be involved in the Rural Heritage Hubs set within the RURITAGE project. WP3 aims at the co-development and co-implementation of heritage-led regeneration strategies in the RURITAGE Replicators and it supports an enhanced sense of ownership and responsibility among the inhabitants of the rural areas through local engagement in the participated and inclusive Rural Heritage Hubs (RHHs) within both Role Models (RMs) and Replicators (Rs). The guidelines, developed in collaboration with UNIBO, ICLEI, NMBU, CRS, Savonia, and all Rs and RMs, will serve as a bridge towards those stakeholders whose participation is vital for the activities that will be carried out within the RHHs, with a view to ensure effective and participated development and implementation of the heritage-led rural regeneration plans and to support the creation of new business ideas and selection of the best business models for further development (WP3).

The guidelines are clearly based and strongly intertwined also with the overall activities of Work Packages 2 on collective community management approach and capacity building activities and with the dissemination and communication activities of the project foreseen in Work Package 7. In particular, Deliverable 2.1 – RURITAGE Methodology for Community based Heritage Management and Planning (CHMP), due at Month 6, almost in conjunction with the drafting of these guidelines, is going to be developed paying careful attention to next steps concerning the engagement of rural communities within the RHHs for the development and implementation of the local heritage-led rural regeneration plans. Indeed, the WP2 work, and in particular D2.1, is strongly related to the activities and approach outlined in the present deliverable.

However, whilst recognising their importance and piggybacking on the WP2 activities to avoid duplication and strengthen the potential outcomes, WP3 developed this deliverable with the goal of complementing the overall community engagement approach with a tailored strategy that analyses the key interest groups for RHHs' establishment and matching engagement activities.

The deliverable is dived in two main Chapters: Chapter 1 provides an overview of the methodology and framework adopted for stakeholder identification and engagement within the RHHs, while Chapter 2 provides concrete information and agreed requirements for the selection of the stakeholders for the establishment of the Hubs. The stakeholder database, performed by each RM and R and identifying key local actors to be involved in the Hub activities, will be released at M10 to comply with Milestone No 10 of the Grant Agreement.

1. Methodology for stakeholder identification and engagement

Within this deliverable, task leader CE and RMs and Rs, with the overall coordination of UNIBO, ICLEI, NMBU and CRS, have undertaken a comprehensive stakeholder analysis, drawing upon the resources and support of RURITAGE RMs and Rs. In this deliverable a network of stakeholders that will serve as the cornerstone of the activities of the RHHs has been identified per each RM and each R. Such stakeholders list will be considered as a 'live' database that will be improved, tailored and increased until M10 and, whenever possible, even beyond thanks to the partners dissemination activities.

Developing, maintaining and drawing fullest benefit from such a stakeholder network requires a structured approach.
Based on the experiences of past EU-funded projects[1], the 'I-CEE' (Identifying, Connecting, Engaging, and Enabling) Stakeholder Engagement Approach for the RURITAGE project is set below in Figure 1.

The methodology, called I-CEE, has four stages, which collectively have the aim of identifying and engaging with potential 'multipliers' i.e. stakeholders who can directly and indirectly increase levels of engagement and take up with the RURITAGE project, and in particular with the work of the RHHs. The present methodology has been adapted to RURITAGE needs and specificities and thus mapped around organisations belonging to those categories of stakeholder groups that are relevant to the work and objectives of the project.
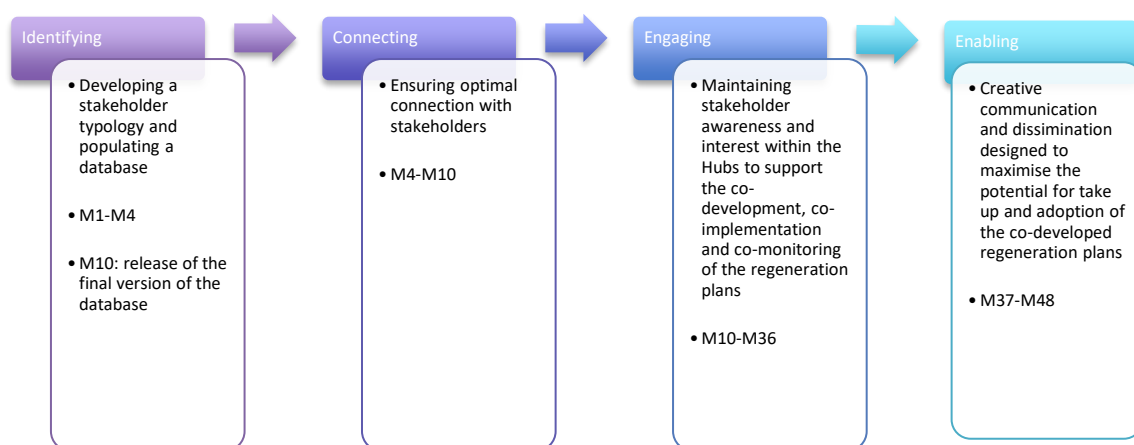
Identifying	Connecting	Engaging	Enabling
• Developing a stakeholder typology and populating a database • M1-M4 • M10: release of the final version of the database	• Ensuring optimal connection with stakeholders • M4-M10	• Maintaining stakeholder awareness and interest within the Hubs to support the co-development, co-implementation and co-monitoring of the regeneration plans • M10-M36	• Creative communication and dissimination designed to maximise the potential for take up and adoption of the co-developed regeneration plans • M37-M48

Figure 1. I-CEE Approach

---

[1] Durham E., Baker H., Smith M., Moore E. & Morgan V. (2014). The BiodivERsA Stakeholder Engagement Handbook. BiodivERsA, Paris (108 pp).
Calabro' M., Khan U., Hameleers M., Kabamba Y., Rubtsove N., D5.1 – Dissemination and Communication Strategy. IC-Health, 2018.

1.1 Identification

The first 'identification' stage has two distinct parts, developing a typology of stakeholders and secondly populating the database. To help focus the typology development it is first necessary to consider how to categorise different stakeholder groups and to consider those that are most relevant for Hub activities and, more in general, for project objective.

Typology Development

The Typology process is designed to ensure that the Stakeholder Mapping process is appropriately targeted. The typology has been built around a 'theory of change' informed by the wider study rationale and which set out the study team's understanding of which stakeholders need to be engaged with and how to do so as to maximise the potential take up and implementation of the heritage-led rural regeneration plans. To attain the best results for the RURITAGE project, four complementary functional areas are identified as seen in the figure below.
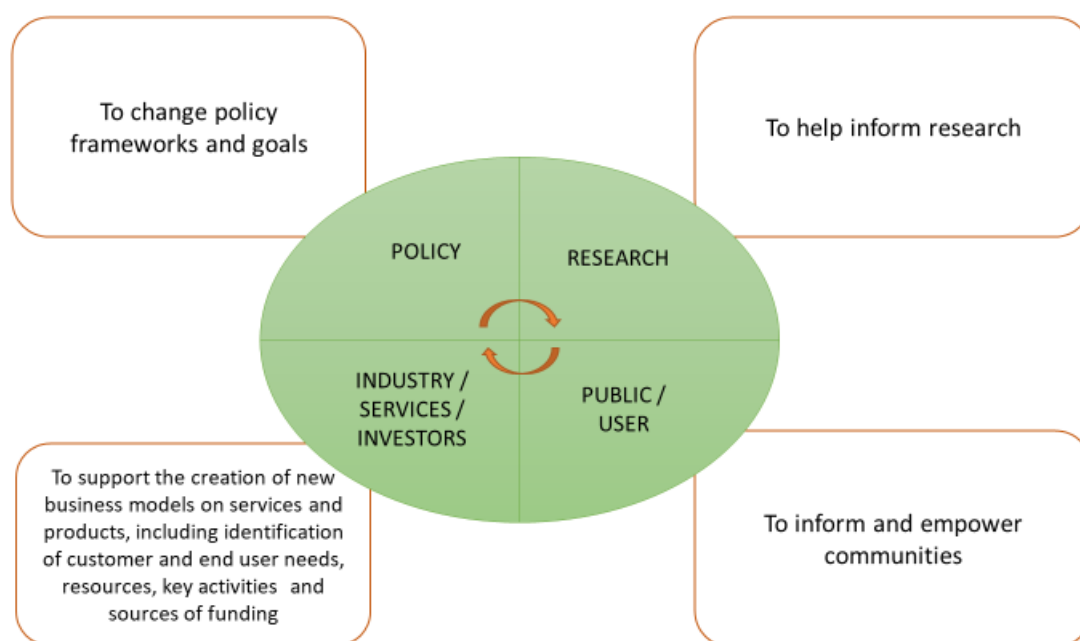
Figure 2. Core areas for dissemination and stakeholder engagement

Corresponding to these functional core areas a series of categories of stakeholders have been defined as key groups to be mobilized and involved in RHH activities. The primary groups (please see the Communication and Dissemination Plan) that need to be engaged within the RHHs are the following:

Policy

- Regional and local governing bodies and institutions with responsibility for territorial development, territorial planning, urbanism, management of CNH sites/buildings, tourism , education, culture, innovation, environment, employment/work, disaster risk management, etc.

Public/User

- Schools and other education and training centres.
- Civil society organizations, especially those focussed on management of CNH sites/buildings, art and performance, tourism, education, environment, youth, etc.
- Local Action Groups.
- Museums and libraries.
- Individual citizens interested in the management of CNH, tourism, education,

Research

- Universities and/or research institutes engaged in research relevant for the project such as CNH governance/management, territorial development, territorial planning, architecture, regeneration processes, earth sciences, economics, governance, sustainable planning, cultural and historical studies, social sciences, applied sciences, applied business research, etc.

Industry/Services/Investors

- Representatives of key value chains according to the SIA's specificities, such as tourism value chain, cultural and creative industries value chain, food value chain, arts and crafts etc.
- Public investors, such as institutes or centres for territorial development, heritage,
- Private investors, such as banks, sponsors, foundations, etc.
- Key service providers in rural areas, like transport, education, health, leisure, mass media, telecommunication and ICT etc. Service providers differentiate from representative of key value chains since those can include both for profit and no profit organizations. Even in the case of for profit organizations, in most cases the main aim of service providers is not profit making or profit maximization (this is the case for instance of hospital and other public health providers, schools or other education organizations).

The mapping based on the above-mentioned categories is described in detail in the next Chapter and it also needs to be tailored and shaped with specific consideration of the needs and objectives of the different RMs and Rs and their SIAs of interest.

1.2 Connecting

1.2.1 Scope of the connecting phase

In this second stage the primary aim is to make stakeholders aware of the RURITAGE project, its aims, objectives, methods and timescales. The aim of this step is, on one side, to recruit stakeholders for the RHHs of each R and RM and, at the same time, build awareness of the project.

The I-CEE process involves contacting each potential organisation, setting out the terms of reference for the RURITAGE project and clarifying the expectations for the organisations in terms of Hub activities, calendar, key steps and outputs. It ensures that the contact for each organisation is the most appropriate for the needs of the project and clarify any other aspects regarding Hub activities and on-going communication.

When connecting with potential stakeholders, Rs and RMs need to provide them as much information as possible on the process of co-development of heritage-led regeneration plans and on the minimum activities that will be organised within the Hub spaces. A useful (and suggested) method to provide clear information on the Hubs' activities would be, when contacting with stakeholders, to hand them out a dedicated info sheet outlining the purposes, methods, actions and results of the RHHs. A model of info sheet is provided in Annex II of the present deliverable.

Partners start to connect with relevant groups of stakeholders from Month 2 (July 2018) and inform them about the project. The final list of stakeholders engaged in the Hubs of Rs and RMs will be included in the final stakeholder database released in Month 10. Also, in Month 10 Rs and RMs will officially launch their Hubs by organising an open public event to present RURITAGE objectives and open the physical space of the RHHs.

1.2.2 Steps for connecting with stakeholders

With the support of the RURITAGE partner in charge of project dissemination, a number of steps to approach local communities were defined. The proposed measures are developed based on suggestions provided in subsection 5.3.2.(i) of deliverable 7.1 'Communication and Dissemination Plan'.

Step 1. Prepare an initial information set in the local language

The starting point of communication with local stakeholders must be the preparation of information materials in the local language. This set could include the following materials:

- a leaflet providing general information about RURITAGE and the role of RHHs in the project (the project leaflet prepared in Task 7.2 can be adapted and translated into the local language for this purpose)
- a leaflet or flyer outlining how the local RHH will function, e.g. location, coordinating organisation, what kind of involvement it will require from stakeholders, what the potential benefits for the region will be (and, if possible, for stakeholders)
- a list of potential questions that stakeholders might ask and detailed answers to those questions

The first two leaflets will be used in communication with potential stakeholders for providing them with the information about the project. Even more importanlty, they will serve as handout materials that potential stakeholders will have at hand when conveying information about the RHH to their colleagues and making decision about joining the RHH. These leaflets should be actively used in activities described in steps 2—4 below.

The list of potential questions and answers about the RHH should be used as an internal document which ensures that everyone who contacts potential stakeholders has complete information and conveys the same messages.

The background information for such an information set can be prepared within WP3 and further adapted and translated to local languages by the RMs and Rs. The leaflets can be used both in printed and electronic forms.

Step 2. Identify and engage local multipliers

At the initial stage of the stakeholder mapping conducted in task 3.1, RMs and Rs should identify several 'multipliers', i.e. partners that have the capacity to reach out to a wide number of local stakeholders. Among such multipliers might be a local NGO, a citizens' association, local/regional mass media, relevant departments of the local authority, a business organisation, etc. (It should be noted that the involvement of the local mass media in the RHH is highly recommended, see 'Dissemination through the media' subsection under 5.3). The local multipliers should be approached directly, and sufficient efforts should be invested in engaging them into the RHH (as participating stakeholders or at least as supporters). Once such partners share the vision and goals of the RHH, they will contribute to RHH formation by distributing information through their channels and inviting their contacts to join the RHH.

It is important that each RM/Rs establishes contact with several multipliers, and that multipliers represent different target groups (ideally, four target groups as identified in section 3). This will ensure that they will further reach different kinds of stakeholders.

Step 3. Reach out through existing actors and channels

The RMs and Rs should rely on channels and actors that already exist in their areas. That is important for two reasons. First, at the beginning of the project implementation, the local stakeholders will have little awareness about the project-level communication channels. Hence, the use of local channels would be more efficient. Second, if communication is conducted via the channels that are familiar to stakeholders, it will significantly increase the credibility of conveyed information.

For identifying such local channels, the RMs and Rs are encouraged to rely on own local experience. Furthermore, informal communication with the members of stakeholder groups would be very helpful, (i.e. simply asking them what the best way to reach out to their organisations/institutions is).

Some general suggestions could be made for reaching out to local residents as well as organisations and institutions:

- Local residents: it would be much more efficient to contact those residents that are already interested in CNH matters than to target the public in general. Such interested residents can be approached through local NGOs, social service organisations (e.g. a community centre) or citizens associations.
- Local organisations and institutions: when contacting an organisation or institution, it will be useful to specify the most relevant department within it and to communicate with this department first-hand. It is recommended that organisations and institutions are contacted either via a direct contact or through local multipliers engaged in the previous step.
- An important method would be to identify 'local leaders' – well-known and respected representatives of local communities – and to invite them as the RHH stakeholders and local multipliers. They can potentially reach both local residents as well as local organisations and institutions.

- The role of social media: the RMs and Rs should identify which social media are most popular in their regions as there are significant regional differences in this regard. Generally, it should be considered that social media could be a too 'informal' tool for the initial engagement in RHHs those stakeholders that represent organisations. At the same time, they would be a very useful tool for the maintenance of communication once the first contact with stakeholders is established, e.g. keeping them updated about the activities within RHHs.

Step 4. Organise Info Days

When contacting stakeholders as presented above, it is recommended to invite them to an Info Day where detailed information about RHHs will be presented (instead of directly inviting them to join the RHH). It is very unlikely that a local stakeholder will be ready to make a decision about joining the RHH when receiving information about the RHH for the first time. Hence, the second contact will be needed in any case, and the organisation of an Info Day would be an effective way to have the second contact with multiple stakeholders simultaneously. It will also create an opportunity to meet the potential stakeholder in person and establish a stronger contact with them.

For geographically widespread areas, the possibility to have several Info Days in different locations should be considered. The programme of the InfoDays could be structured in the same way as in the information set described in step 1. During the Info Day, the stakeholders should be invited to join the RHH.

1.3 Engaging

1.3.1 Barriers to stakeholder engagement in rural areas

Researchers argue that the major challenge in rural areas derives from unequal positions of power, which stem from differences in social class, knowledge and expertise, societal position, and other educational and occupational advantages. Williamson and Fung[2] refer to 'information gulfs' that separate different groups in the community, and knowledge that separates 'outsiders' from locals.

Considering this, Kilpatrick[3] argues that in the rural context strong governance to bridge gaps is a necessary step for meaningful community participation. However, evidence of governance models to support community participation is limited in the rural context. Inclusion and representation are challenges in this sense, and in rural communities this may prevent key community leaders in developing an effective governance framework. As Morgan[4] highlights, the problem is to develop governance frameworks that support community participation arising from inside and occurring spontaneously rather than from outside or above.

Moreover, even when governance models are established, government regulations, for example, that require community organizations to acquire formal bureaucratic processes such as working with

---

[2] Williamson A, Fung A. Public deliberation: where we are and where can we go?. National Civic Review, 2004.
[3] Kilpatrick S. Multi-level rural community engagement in health. Australian Journal of Rural Health, 2009.
[4] Morgan L. Community participation in health: perpetual allure, persistent challenge. Health Policy and Planning, 2001.

children checks, food handling and insurances, present challenges that conflict with how rural communities have traditionally governed themselves. This can serve to de-legitimize the communities' own forms of self-organization.

In this sense, when thinking of community participation in rural areas, a series of challenges might arise to prevent the development of the spontaneous engagement of local actors ensuring effective governance environment.

Tensions may exist between newcomers, seasonal residents and established residents and reconciling the views of these distinct groups might be difficult; also in some rural communities, residents without deep local roots can be viewed as outsiders. Another challenge lies on the fact that the level of interest amongst residents is often diminished because of the lack of a personal connection with their place of residence.

Furthermore, other more practical issues might also play a role in preventing successful community engagement. In fact, rural communities often face logistical problematics organizing community engagement sessions, particularly given the large geographical areas they cover and the fact that they usually lack public transport.

1.3.2 Engagement of rural local communities in the RHHs

The active participation of members of the RHHs are one of the most important factors for the project's success and effectiveness. Therefore, Hub coordinators, in charge of managing the Hubs and communicating with stakeholders, shall invest in a thorough identification of potential Hub members participants and invitation and recruitment process. The main stages of this process are illustrated in the figure below. Of course, specific adaptations will be made to each case according to the features and organisational aspects of the RMs and Rs, if needed.
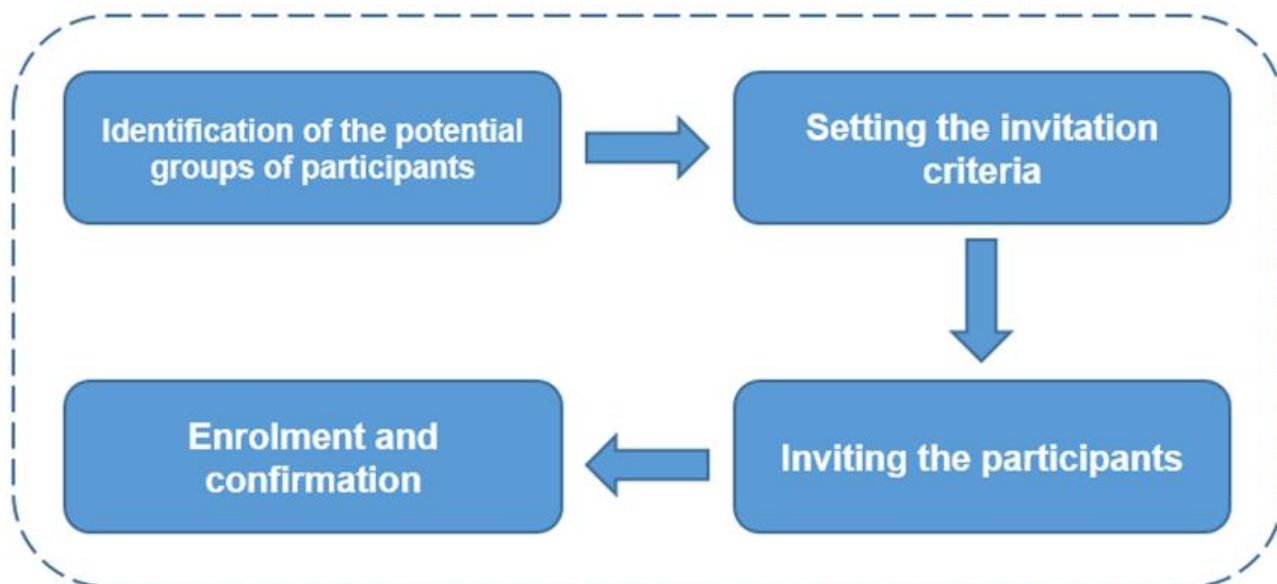

Figure 3. Recruitment process

Based on the common requirements established in the present deliverable each Hub coordinator, in collaboration with the project coordinator (UNIBO) and the WP and task leader (UNESCO and CE

respectively), will define the profile of their Hub members and draft a list of the potential organisations to be contacted. Those will feed the stakeholder database. For set up invitation criteria, RMs and Rs shall consider the criteria established within this document, and in particular in section 2.2.

Once the groups of stakeholders to be engaged are identified, invitations will be sent either at an institutional level or directly to the potential identified participants. In the case of organizations, Rs and RMs shall exploit a range of recruitment and engagement methods:

- Publish a call for stakeholders;
- Direct engagement actions through the organisation of dedicated multilateral / bilateral meetings with potentially interested stakeholder organisations, along with participation in conferences and networking events;
- Reach usual collaborators they are already in contact with;
- Disseminate RURITAGE activities and the Hub establishment through institutional channels, in particular through publication of relevant information on local press and media (newspaper and TV), social media, dedicated event, institutional newsletter and website.

When it comes to citizens and local individuals, the approach should be slightly different, and Rs and RMs shall rely on the use of a mix of project tools (e.g. website, social media), partners' networks and tools (e.g. partners' newsletters), newspapers, local televisions and radios, and participation in local events, posters placed in public spaces, building and at private premises, whenever possible (i.e. restaurant, bars, etc.). Furthermore, as described in the section above, at this stage Rs and RMs could identify 'local leaders' within their communities to engage them in the project. Local leaders refer to well-known and respected representatives of local communities, such as the (local) priest, the school teacher, the doctor, the pharmacist, successful farmers or any other respected and recognised person at local level. This could be an effective method to ensure the engagement of local residents: in fact, local leaders can participate themselves in the Hub activities while they can potentially reach other local residents as well as local organisations and institutions.

Direct contact, by email and/or by phone, shall be also considered to reach both potential organisations and citizens, with whom Rs and RMs have an already established relationship. In such cases, for contacting organisations, invitations (for what exactly?) shall be sent out mainly by email or in paper version (i.e. by post), while for citizens the preferred way to reach them is by email. In addition, people whose participation is essential will also be contacted by phone.

Invitations will be sent out well in advance so that stakeholders have spare days in their calendars and will be accompanied with essential information regarding the project, the Hubs' objectives and structure. Additional background material on the project must be provided (e.g. information sheet, summary of the projects' activities, information regarding the community engagement process and co-creation tools) as thought-provoking material that will generate a common basis for the subject of the Hub activities.

Organisers might also investigate the chance to foresee a sort of "benefits list" and present it to participants. In case such benefits exist, they will be mentioned in the invitation as they could act as additional motivation for participation. Benefits can include publishing on the partner's corporate

website information about the collaboration with the organization or other actions that can promote and give visibility to the organization collaborating in the Hub (for instance the publication of an article on the collaboration on local newspapers, or an interview in the radio). Other type of benefits can include make a physical space available to the partnering organization.

1.3.3 Principles for stakeholder engagement's success

A number of principles for success shall be considered when recruiting participants for the Hubs.

First of all, it is worth highlighting that **motivation, feedback and follow-through are critical for stakeholder recruitment and engagement**. When engaging stakeholders within the Hubs, individual motivation is the strongest element that should be considered. Thus, one of the main criteria to consider when recruiting participating and, afterwards, when dealing with them on a regular base, is motivation: motivated people are indeed more likely to decide to join the Hub and ensure their participation throughout the whole process of co-development of the heritage-led regeneration strategies. Participants of the Hubs shall be people / representatives of organisations that are interested in the topics and aims of the project due to their job, population cohort or social circle.

Second, RMs and Rs shall always use multiple channels for engagement to capture a diversity of perspectives and reach all corners of their communities. Partners shall identify the most appropriate tool / channel for each of their stakeholder groups, taking into consideration the advantages of online technologies too. Social media shall be used for each type of stakeholder: Instagram and Facebook are the most adequate instruments to reach citizens but not the best channels to reach organizations (Linkedin and Twitter are probably the best instruments). Beside the social media, partners shall also rely on other channels, since not all people use social media. In this regard, we highlight the relevance of local press and media (newspaper, radio and TV), participation in dedicated events, information material - such posters or leaflets placed in public spaces, buildings and at private premises (i.e. restaurant, bars, etc.), use of institutional newsletter and website.

When it comes to citizens and local individuals, the approach should be slightly different, and Rs and RMs shall rely on the use of a mix of project tools (e.g. website, social media), partners' networks and tools (e.g. partners' newsletters), newspapers, local televisions and radios, and participation in local events, posters placed in public spaces, building and at private premises, whenever possible (i.e. restaurant, bars, etc.).

Moreover, organizational and political leadership can contribute to successful community engagement. Having political leaders visibly involved in the project and Hub's activities helps dispel the common perception that politicians may withhold information and allows for the engagement to be more sincere, open and transparent. Local officials are also able to set clear objectives and goals to help guide public participation and engagement that is aligned with other activities. If Rs do not have public authorities involved in their Hubs, it is fundamental that they organize a meeting with regional and local authorities to explain the project and agree on how to get the support from

those for the development and implementation of the heritage-led strategies and how the project could best benefit the authorities.

Successful community engagement also requires public leadership. Utilizing local social capital is vitally important and allowing citizens to take on such roles not only increases the level of public impact, but frees up local staff to take on other projects. Moreover, in some cases, smaller scale efforts can often achieve greater results since citizens or key stakeholders may only have an interest in certain aspects of a project. In this sense, if relevant, Rs and RMs shall consider organising targeted, smaller scale events/activities within the Hubs.

One element to ensure engagement is to provide rewards or benefit for the participant. In RURITAGE we suggest defining a set of benefit for partners. However, rewards do not achieve long-lasting effects, as they lose their effectiveness after discontinuation and can cause a saturation effect if application is prolonged. For this reason, we suggest providing benefits, which can positively influence participants' decision to engage with the Hub activities but avoiding the above mentioned long-lasting effects.

Once they are engaged, it is important to remember **that the public wants to know that their voices mean something and that the time they have invested has made a difference and has had an impact**. Participants should always be kept informed about the stage of the project implementation they are stepping into, so they can provide appropriate input. This also helps to manage expectations around how much the community can affect the outcome.

Finally, to ensure successful recruitment within the Hubs, RMs and Rs might consider exploiting specific techniques and/or offering tangible and intangible benefits to the organisations and local residents they would like to engage.

For stakeholder organizations, tangible benefits should be part of a written agreement otherwise they are not considered seriously neither from the partner nor the stakeholders involved. This could be a memorandum of understanding or a public-private agreement which the R/RM and the relevant organisation sign to express the activities and the incentives they commit to. Examples of tangible incentives for the engagement of stakeholder organisations are:
-   Publications of organizations logo in the project website and RM/R's corporative website;
-   Access to infrastructure/buildings: possibilities to use the Hub space for other activities;
-   Additional criteria in calls for tenders or expression of interests of RMs/Rs for specific services (for instance a criterion could be participation in EU projects or in H2020 projects).

Intangible benefits need to be explained/commented during a first meeting or during preparatory events to recruit stakeholders or in bilateral talks. These can include, for example, the possibility to gain inside information or affect legislative/bureaucratic procedures or to establish partnerships for regional/national/European co-funded projects.

As far as local residents/citizens are concerned, rewards/benefits might be more difficult to apply without having a written agreement. However, if Rs and RMs decide to consider them, tangible

benefits might include some sort of prizes to ruffle among Hub participants or the possibility for groups of citizens to access the Hub space to organize relevant activities; while intangible incentives, as for organisations, could include the possibility to gain inside information or affect legislative/bureaucratic procedures.

1.4 Enabling

1.4.1 Maximise potential for Hubs' activities

The fourth and last phase of the proposed I-CEE methodology will ensure that this final stage of the stakeholder engagement process maximises the potential for the take-up of learning from the Hubs' activities and from the regeneration strategies that will be co-developed with the stakeholders. The dissemination process (WP7) may be bespeaking for particular stakeholder groups (e.g. policy-makers) and the dissemination activities and communication means used to engage policy stakeholders may be different to those sent out to user group organisations. To make the most of the 'Enabling' phase and maximise the potential for Hubs' activities and for the knowledge generated from those, the project will stress on the dissemination of a new innovative heritage-led rural regeneration paradigm, which is up-scalable and replicable, and which will offer also new economic and investment opportunities, new products and services. Hence, in the medium-long term period, the RURITAGE consortium expects to produce new products (the RURITAGE brand, the ToolBox-DSS, the Atlas, and the My Cult-Rural Toolkit), new services, such as improved accessibility in buildings, WIFI coverage extension (where needed), walking routes, and it will try to reduce administrative and regulative barriers by publishing documents and reports influencing policy makers. In addition, the key message to be transferred to policy-makers and other relevant stakeholder in the 'Enabling' phase will stress on the promotion of innovative governance adopting trans-disciplinary and participatory approaches with a view to create new skills and jobs in tourism, agriculture, industrial and other direct sectors, based on the 6 Systemic Innovation Areas identified by the project.

The 'Enabling' phase will happen thus at local level through the dedicated actions foreseen in the Local Communication Plans to be drafted by each Replicator, but also at a wider level (EU and international) thanks to the project dissemination and communication strategy. Dedicated actions, such as engagement with independent production companies for television and radio broadcasts, participation in conferences and initiatives at EU and international level, organisation of information sessions/knowledge transfer events by dedicated project partners, will ensure that the outcomes and knowledge generated by the Hubs will reach a wider audience and promote the uptake of the lessons learnt by other regions and organisations in Europe and beyond.

1.4.2 Communication tools and use of social media for effective outreach of stakeholders

The mechanisms for outreach and engagement have expanded, thus social media and other channels can act as a complement to rather than a replacement for traditional outreach and engagement techniques, especially in rural areas.

In communications we refer to digital communication whenever online media, tools or channels such as website, newsletter, social media and webinars are used. The rise of digital communication has allowed to build online communities and to communicate in a more targeted way. Digital communication is part of the overall communication. Traditional communication should be combined with digital or online media, tools and channels for effective and integrated communication. For example, when an offline event takes place it is promoted and reported via digital communication as well.

Social media refers to the web-based tools and media that allow users to personally and informally interact, create, share, retrieve, and exchange information and ideas in virtual communities and networks. Social media includes social networking sites, blogs and micro blogs, online forums, discussion boards and groups, wikis, socially integrated text messaging services, videos and podcasts, and many more. Social media make it easy for non-professional users to produce and share content, which is held to contribute to a more level playing field when it comes to shaping the public agenda. Social media have been particularly powerful in connecting individuals, providing an infrastructure for political communities and supporting their coordination. Also, social media are held to reduce transaction and coordination costs, making it easier for citizens to come together.
RMs and Rs can consider social media as a key way to connect with stakeholders for engagement and enabling phases. Partners do not have to be on every social media channel, but they should identify the best tool to be used for each type of stakeholder. Instagram and Facebook are the most adequate instruments to reach citizens but not the best channels to reach organizations (Linkedin and Twitter are probably the best instruments).

Twitter is used by many professionals, enterprises, policymakers and journalists; thus it is a more adequate tool to reach organisations and policymakers and inform them and get informed quickly. When using Twitter, it is recommended to include media content such as videos/pictures, follow others (people/organisations interested in the same issue as the project), make use of hashtags and be active and tweet regularly.

Facebook is a relevant tool to be exploited to reach general public. It has almost 2 billion users and it is a very measurable tool providing precise insights in terms of fans, post-performance, etc. On Facebook, the tone is more personal than on Twitter and in order to get followers and reach a wider audience you shall invite friends, connect with RURITAGE website and FB account, and target followers of your institutional account. Additionally, you should post regularly and be active (like, share, comment, reply, tag @), create a buzz around your events and share interesting content accompanied with pictures, short texts and relevant links.

When it comes to LinkedIn, people use actively this tool to consume business content and to exploit it as a networking tool. Some tips for the use of this social media channel can be joining groups dealing with project topics, participating in discussions, and sharing content that is professionally useful for your audience.

Moreover, videos and podcasts could be also considered as effective tools. On one hand, videos have the ability to effectively share information and impact audiences widely and they are also visually attractive. Those are great advantages, especially in digital communication. On the other hand, podcasts Beneficiaries have names, lives and personal stories to tell. Social media, web-documentaries, and certainly the policy learning platforms will be excellent means to monitor, engage, extract and report/inform to ensure a wider reach to the (new) target audience.

Other relevant media/digital channels that shall be taken into account by partners include press releases, announcements of local televisions/online newspapers/radios, news on institutional websites and newsletters. A robust digital strategy through institutional channels of Rs and RMs and local media (radio, television, online newspapers) can play indeed a key role in order to a) provide as much relevant information as possible to stakeholders and b) to build an online community, creating links among similar groups who otherwise may not have the chance to meet, discuss and exchange. In such cases, especially when dealing with the press, the advice is to find a balance between storytelling and content. Storytelling refers to taking what is inside the project and the Hubs, i.e. the people, the positive feedback, the actual impact as main focus point for the digital communication. Obviously, this should be balanced with proper content which must be relevant for the target audience. Content should be often focused around benefits (why should you participate in the Hub's activities and what can you learn/get from it), testimonials (positive stories) and, when possible, statistics (numbers talk).

2. Concrete guidance for stakeholders' identification and engagement in RHHs

To ensure that the research and resulting strategies for heritage-led rural regeneration embed the experience and knowledge of all stakeholders, RURITAGE aims at involving all members of society and motivate them to participate in civic, social, economic and political activities at local level. For this, a local RHH will be established in each RM and R to be the main ground of innovation and discussion with stakeholders to develop, implement, and monitor the heritage-led rural regeneration plans.

RHHs are social spaces, communities of stakeholders at local level, embedded in physical spaces where knowledge transfer and sharing and other project related activities will take place. Physical spaces have already been defined for Replicators at proposal stage. The final locations of the Hubs for both RMs and Rs will be included in the CHPM deliverable due at Month 6.

One coordinator per Hub has been appointed and will be responsible for smooth running of the Hubs' activities and permanent contact with the engaged stakeholders. The RHHs will have slightly different objectives and functions for Rs and RMs:

RMs	Rs
The Hub shall gather together key actors at local and regional level, following the typology development proposed in this deliverable, and shall engage those stakeholders that contributed to the success of the strategies already in place with the objective of: - better understanding key success factors and encountered difficulties, and - further enhance ownership of cultural heritage by learning from other RMs.	The Hub shall involve key actors at local and regional level, following the typology development proposed in this deliverable, with the aim of co-developing and co-implementing heritage-led rural regeneration plans. Particular attention will be dedicated to the involvement of residents.

Table 1. Aim of the Hubs in RMs and Rs

The typology development proposed in the previous Chapter of this deliverable encompasses very diverse categories. This choice is aimed at ensuring wide coverage of stakeholders potentially interested in the activities of the Hubs and later on in the uptake and exploitation of the RURITAGE regeneration strategies and other key project results from different perspectives and point of views. Considering the groups' diversity and the wide prospective exploitation potential of RURITAGE, the stakeholder identification has to be matched with tailored engagement paths. They will have to be shaped considering the adequateness of tools or channels and, at the same time, bearing in mind specific focuses on the different 'selling points' and core aspects of the project work.
The selection of stakeholders shall be made starting from the analysis of the ones already identified at proposal stage and who expressed their support to the project (Annexes 6 and 8 of the project proposal); then it shall continue from a mapping of other stakeholders active on the territory and, especially in the case of Rs, building upon the needed capacity and vision for a heritage-led development plan.

Also, when selecting the stakeholders for the RHHs, peculiarity of the rural area of each RM and R and key value chains established in the territory shall be taken into account. Moreover, the greatest diversity of participants within the Hubs in terms of gender, age, education and professional background, disability shall be ensured.

Once stakeholders are identified and engaged, the official launch of the RHHs will take place at M10 and since then Hub coordinators will be in charge of carrying out activities, events, round tables, etc within the Hub space to consul stakeholders, exchange knowledge and co-create with them the RURITAGE heritage-led rural regeneration plans. The figure below shows the different steps to be taken during the life time of the project.

Figure 4. RURITAGE approach and timeline

Action	WP/Task	Responsible	Reference Partner	Timeline (shaded period)
Guidelines for stakeholder identification and engagement	WP3	CE, UNIBO, CRS, ICLEI, UNESCO, Savonia, Rs, RMs	CE	June–Sept 2018
Determining profile of participants for each RM and R within their area	WP3	RMs & Rs	CE	Sept 2018
Inviting and recruiting participants	WP3	RMs & Rs	CE	Oct–Dec 2018
Establishment and launch of the RHHs	WP3	RMs & Rs	CE	Mar 2019
Organisation of face-to-face activities	WP3	RMs & Rs	CE, UNIBO	Abr 2019 – May 2022
Co-development, co-implementation, co-monitoring of regeneration strategies	WP3, WP4	RMs & Rs	UNIBO	Abr 2019 – May 2022
Co-creation of business models	WP3	Rs	Savonia	Jan–Jul 2019
Dissemination of results	WP7	RMs & Rs	ICLEI, UNIBO	Jan 2020 – May 2022

With this general picture in mind, in the sections below, the key groups of stakeholders to be involved in the Hubs are identified and the reasons behind such choice explained, along with the description of the minimum requirements set for stakeholder recruitment and establishment of the Hubs. The list of activities does not mean to be exhaustive, but a first attempt to define the activities of the RHH for the whole project duration and will be updated according to the development of the project activities.

2.1 Key groups of stakeholders

To ensure a wide range of visions and opinions in the discussion within in the Hubs, as described before, four functional areas – Policy, Research, Public/User, Industry/Services/Investors - have been outlined and, according to these, a list of the most important groups of stakeholders to be involved in the Hubs defined:

- Regional and local governing bodies and institutions
- Universities and research institutes
- Schools and other education and training centres
- NGOs / Civil society organizations
- Key service providers in rural areas
- Peculiar representatives of SIAs relevant for RMs and Rs
- Public and private investors
- Local residents

Regional and local governing administrations

Regional and local administrations are considered a key target group for RURITAGE project and Hubs' activities. Public authorities require innovative solutions for the promotion of Cultural and Natural Heritage in their areas, which clearly contributes to social inclusion, economic growth and environment balance. In the last decades rural areas have been facing constraints of depopulation, reduced service provision, ageing, reduced accessibility, decline of agriculture income, loss of biodiversity, climate change impacts. Considering this, the role of cultural and natural heritage becomes even more important since such areas are cradles for civilization, repositories of old dialects, languages, uses, handcrafts skills, and social practices.

Local and regional administrations can thus play an important role in searching and implementing new ways to improve the position of their rural territories by mobilizing citizens and local resources, increasing their reliance, reinventing more innovative governance frameworks. Furthermore, these institutions could and should also be able to provide funding and additional expertise to ensure the sustainability of the heritage-led regeneration plans in the case of Rs and the implementation of new innovative actions to foster ownership of cultural heritage in the case of RMs.

Public authorities that represent key groups to be involved in the Hubs' activities are regional and provincial governments/councils and local authorities such as municipalities. Rs and RMs also might consider the involvement of national authorities, depending on their capacities and contacts. Public authorities' stakeholder group is a target relevant for all the RURITAGE SIAs, thus each RM and each R will have to foresee the involvement of such group.

Universities and/or research institutes

Academic perspective should be ensured within all the Hubs by involving a research centre or a university of reference in the area of the RM or R. Departments carrying out research on relevant topics for the project such as architecture, earth and environmental sciences, law, economics, innovative governance, sustainable planning, cultural and historical studies, social sciences, marketing and tourism, could be involved in the Hubs' activities. In particular, if looking at the SIAs considered by the RURITAGE project, if possible, Rs and RMs shall involve departments/researchers that are relevant to their field of action. Examples per SIA are provided below:

SIA	Research fields
Pilgrimage	Cultural and historical sciences, economics, architecture, social sciences, marketing and tourism
Sustainable local food production	Earth and environmental sciences, agronomy, veterinary, architecture, social sciences, economics, marketing and tourism
Migration	Humanities, social and political sciences, economics, law, sustainable planning
Art and festivals	Arts, cultural and historical sciences, social sciences, economics
Resilience	Engineering, earth sciences, architecture, sustainable
Integrated landscape management	planning, economics, social sciences

Bearing in mind the limited capacities of some of the Rs, whose territories are quite small and isolated, partners might foresee to engage at least one researcher from the nearest research institution within their territory. Academic point of view shall be ensured within the Hubs to support the digestion of the information coming from stakeholders' exchanges within the Hub and ensure the co-development of evidence-based regeneration strategies, besides the support of the Knowledge Facilitator Partners involved in RURITAGE.

Schools and other education and training centres

Schools and colleges (or other education centres) – depending on the different education systems – play an important role within the local communities, considering the potential of primary and secondary education in developing new and enhanced skills and competences and in fostering sense of ownership and safeguard of their territory's cultural and natural heritage.

For some SIAs, school engagement is highly recommended, in particular for Resilience and Migration SIAs where education plays a central role. For the other SIAs, school target might be less relevant, thus in these cases it is up to Rs and RMs to decide whether to engage this group of stakeholders or not.

NGOs / Civil society organizations

Such organisations aim to improve and protect the rights and engagement of citizens at local level. Although organisations and their focus can vary within this stakeholder group (e.g. environmental associations, groups for territorial development and promotion, youth organisations, etc), it is

possible to identify some clear common points that define their role in the Hubs' activities and results. For instance, these organisations can support and advocate for co-development and co-implementation of the regeneration plans while facilitating the involvement of public institutions and the private sector. At the same time, they can facilitate the recruitment for Hubs' establishment and increment the audience by informing about project activities and main results.

Examples of types of civil society organisations that might be present in rural environment and potentially interested in project activities, considering RURITAGE SIAs, are reported in the table below:

Types of organisation	Related SIA(s)	Why to involve them in RHHs
Religiously rooted associations and groups	Pilgrimage, Art and festival	Such organisations often work with local communities and citizens; moreover for them cultural identity occupies a central position.
Organisations engaged in rural development	All SIAs	These informal groups and associations are involved in raising the voice of local residents and they are well aware of the opportunities and constraints of rural areas.
Organisations engaged in the reception scheme and in human rights related activities	Migration	The participation and point of view of such organisations should definitely be taken into consideration for Migration SIA.
Environmental organisations	All SIAs	Such organisations play a key role developing strategies that include sustainable development within their priorities
Organisations working with CNH and fostering cultural identity	All SIAs	Traditional cultures are often perceived as positively associated with sustainable development.
Youth groups	All SIAs	Limited young population and youth migration from rural to urbanised areas are constraints of rural areas. Views of youngsters should be taken into account within the Hubs, for all SIAs.
Tourism organisations	All SIAs	Sustainable local tourism represents an opportunity for rural areas and such organisations should be involved for all SIAs.
Organisations of local farmers, peasants and local producers	Rural food, Resilience, Landscape, Migration	Such organisations represent producers, farmers and peasant groups in rural areas.
Organisations working on emergencies and natural disasters	Resilience	Civil protection

Service providers in rural areas

Representatives of those organisations providing key services to the rural local communities represent another important group of stakeholders to be involved within the RHHs.

By definition, the service sector encompasses the economic activity concerned with the exchange and consumption of goods and services. It is also known as the 'tertiary' sector, the 'first' being agriculture and other ways of extracting resources from nature and the 'second' being manufacturing and construction. Here and inspired by Moseley and Owen (2008) services are categorized as follows:
- Social care (i.e. child or elderly care facilities, voluntary associations)
- Education and training (i.e. specialized professional training, private schools, organisations for vocational training)
- Retail service (i.e. supermarkets, farm outlet, specialized shops, charity stores)
- Health care (i.e. hospitals, health professionals, health groups, patients' associations)
- Postal and delivery services
- Passenger transportation / Mobility providers
- Emergency services (i.e. road assistance, ambulance service, fire brigade, coast guards)
- Business advisory services (private business consultants, law firms, local social workers, business centres, voluntary aid services, citizens advice services)
- Leisure and recreation facilities (local and regional mass media, communication services providers, sport clubs, leisure associations)

RMs and Rs are encouraged to include representatives of the service sector that play a key role in their territories, also according to their SIA(s) of interest, as suggested in the table below.

SIA	Service providers
Pilgrimage	Accommodation establishments, bars and restaurants, tour operators, health centres, signage displays
Sustainable local food production	Farmers, restaurants, local markets, transport services, retailers
Migration	Migrant rights advocacy, NGOs, civic centres
Art and festivals	Organizers of festivals, cultural commissions at regional/local level, animation service providers
Resilience	IT services, health centres, teaching centres, risk prevention construction systems,
Integrated landscape management	Landscape design, landscape maintenance, consultancy in urbanism and landscape management

Representatives of value chains relevant for RMs and Rs

A value chain "describes the full range of activities that are required to bring a product or service from conception, through the intermediary phases of production, delivery to final consumers, and final disposal after use". This includes design, production, marketing, distribution and support services leading up to consumption (and often beyond, when recycling processes are considered).

These activities can be contained within a single firm or divided among different firms, as well as within a single geographical location or spread over wider areas. The term 'value chain' refers to the fact that value is added to preliminary products through combination with other resources (for example tools, manpower, knowledge and skills, other raw materials or preliminary products). As the product passes through the stages of the value chain, its value increases.

As described above, such actors provide significant potential for improved and increased employment and economic returns for the rural area concerned. Rural areas have valuable resources that still remain untapped, and improving value chains and addressing bottlenecks can unleash economic potential and generate employment. For these reasons, value chains relevant for each RM and R shall be considered for community engagement and establishment of the Hubs.

The main value chains that shall be considered by RURITAGE Replicators are:

VALUE CHAIN	RELEVANT SIA
Tourism value chain	All SIAs
Cultural and creative industries value chain	Art&Festival, Migration, Pilgrimage
Agricultural and food value chain	Rural food, Resilience, Landscape, Migration
Crafts value chain	Art&Festival, Migration
Construction value chain	Landscape, Resilience

Public and private investors

Public and private investors usually fund partnerships and consortia to develop projects covering research, education and engagement activities with citizens. Moreover, the financing of these projects and the promotion of such actions could easily fall under Corporate Social Responsibility activities. Taking into full consideration the potential issues concerning funded sustainability, it is necessary to keep this category of stakeholders at the centre of the project activities.

Public investment shapes choices about where people live and work, influences the nature and location of private investment, and affects quality of life. When done right, public investment can be a powerful tool to boost growth and provide right infrastructure to leverage private investment. Public investment is a shared responsibility across levels of government. Whether through shared policy competencies or joint funding arrangements, public investment typically involves different levels of government at some stage of the investment process. For RURITAGE purposes, partners might consider regions, provinces, and municipalities, as well as public institutes - such as centres for territorial development and growth – as key target of project and Hub activities.

Concerning private investors, budget availability and – usually – quicker decision-making compared to complex public authorities can facilitate the development of exploitation projects through private funding. Private partnerships could also help bring different perspectives and new actors and experts within the co-development process of the regeneration plans. Examples of private investors that could be involved are LAGs, foundations or relevant associations (i.e. tourism associations), banks, entrepreneurs.

Local residents

Citizens play a critical role in advocating and helping sustainable local development and contributing innovative solutions to complex development challenges. In particular in the case of rural areas, which are more isolated and sparsely populated areas, local communities are the engines for fostering the promotion of cultural and natural heritage. For this reason, it is important that all Rs and RMs engage local residents within their Hub spaces, irrespectively their SIA of pertinence. Residents to be involved can be teachers, shopkeepers, farmers, craftsmen, drivers, construction workers, youngsters, elderly people, families with children. Also, 'local leaders' of the rural communities should be reached.

2.2 Minimum requirements to comply with for Hub establishment

A minimum number of requirements have been set for stakeholders' recruitment in each RM and R. Those criteria are summarized in the table below:

Requirement	Specification
• Involve representatives of all the 8 different stakeholder categories identified in these guidelines.	Minimum number of participants to be recruited for the Hubs: 30 people
• Through the recruitment of stakeholders in the Hub, be able to reach indirectly a wider community in the considered rural area.	Coherent with the case study area defined in WP1.
• Participants from diverse backgrounds and social classes shall be privileged. • A wide sampling, in terms of cultural and economic background, age, level of education shall be sought as much as possible. • Particular attention shall be paid to the involvement of disabled people.	Non-discriminatory principles in the recruitment process will ensure gender balanced participation. Please refer to Par 2.4 for further clarifications.

Table 2. Minimum requirements

Based on the list of key actors described in the previous section, the types of compulsory stakeholder groups to be involved in RHHs' activities per each SIA are outlined subsequently.

SIA	Regional and local governing bodies and institutions	Universities and/or research institutes	Civil society organizations	Service providers in rural areas	Representatives of value chains	Public and private investors	Local residents	Schools and other education and training centres

Pilgrimage	X	X	X	X	X	X	X	
Rural food	X	X	X	X	X	X	X	
Migration	X	X	X	X	X	X	X	
Art and festivals	X	X	X	X	X	X	X	
Resilience	X	X	X	X	X	X	X	X
Landscape	X	X	X	X	X	X	X	

2.3 RHH Coordinators

The role of the Hub coordinators will be fundamental to ensure the effective and smooth organisation and implementation of the activities and events of the RHHs. One coordinator is established in each Hub and she/he will be responsible for providing inputs for discussion and to guiding stakeholders towards the co-development of the heritage-led rural regeneration plans. In particular the functions of Hub coordinators include:

- Coordinating the recruitment of the stakeholders of the Hub
- Launching the physical and social Hub space at M10
- Coordinating all the logistics of the Hub (meetings, invitation, reports, etc)
- Collecting agreements and informed consent forms of participants
- Knowledge brokering
- Maintaining constant dialogue and contact with the stakeholders and informing them about project progress and main results
- Creating trust in the project and in the consortium and to maintain it for the entire duration of the project
- Data Privacy and ethics requirements.
- Coordinating communication and dissemination activities of the RHH

To ensure good communication and exchange of knowledge and experiences within the Hub, the Hub coordinator shall have:

- ✓ Critical appraisal skills: capacity to appraise evidence to evaluate its quality, importance and applicability to a particular context. In addition to traditional critical appraisal skills, national coordinators should have a minimum knowledge of the sector, the broader environment, its key players and controversies – and use this to gauge the applicability and adaptability of new evidence to users' contexts.
- ✓ Communication skills: strong oral and written communication skills. Coordinators should use active listening skills to gain insight into the interests, issues and innovation of the Hub members.

✓ Mediation skills: capacity to assemble teams and foster collaboration amongst individuals and groups who would not normally work together.

The list of the Hub coordinators is included in D8.1 – Management and Coordination Plan.

2.4 Ethics and data protection for stakeholder recruitment and Hub management

DISCLAIMER

These are basic notes you may use as a support when managing contacts with stakeholders.

However, please remember that they are basic, standard and not exhaustive. You should customise them on the basis of your specific case and national legislation. Please check that all applicable rules – even if not mentioned here – have been complied with.

This section is not to be intended as legal advice.

The rules on personal data protection

When you involve stakeholders in the project, you necessarily have to process some of their personal data. In doing this, you must comply with the EU and national rules on data protection.

The most important legislation you should refer to is the EU General Data Protection Regulation, you can find the full text here: https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32016R0679&from=En

Here you can find a useful infographic https://ec.europa.eu/justice/smedataprotect/index_en.htm with a general overview.

Personal data:

a) are exclusively those of natural persons, not of legal persons,
b) include both "common" data, such as name, telephone, address, as well as "sensitive" data (e.g. data concerning religious or sexual orientation, ethnic origin or health). You should pay special attention when processing these latter.

Please always remember to check your national legislation on data protection, which may provide specific rules to be applied.

How to manage the involvement of stakeholders

First contact

If you contact a stakeholder for the first time (for example via e-mail):

1) Legal person (company, public body)
   The name and form of a legal person, as well as contact details of a company or institution are not considered personal data (e.g. info@company.com), so, as a general rule, you can use them.[i]

2) Natural person (individual)

If you have found the person's contact details on the Internet and use them to write an e-mail, you should provide also a brief description of data processing containing the fundamental information (e.g. who will process the data, what data will be collected, for what purposes, for how long, who may have access to them, what are the person's rights). Please provide also a link to your full text privacy information, which may also be on your web site. This may be placed, for example, at the bottom of your e-mail.

If you have received the e-mail contact from a partner, or from any other source (e.g. a mailing list, a database), please check first that the contact has been lawfully acquired and lawfully communicated to you and that the person may in fact be lawfully contacted. Then, please remember to provide data protection information as explained above.

Participation to events

The first aspect that you should consider is transparency: stakeholders should be informed about what is going to happen with their data before their involvement, before their data are recorded, not after.

The very first time that a person registers at an event (e.g. via an on-line form, or directly at the meeting), you should provide him/her a data protection information with all the content foreseen the law[ii].

This may be quite lengthy and complex, so you may provide a stratified information: a brief information with all the relevant details and a link to the full information. Please keep the whole information available for participants and print some copies so that you can provide them to stakeholders upon their request.

Please pay particular attention to the consent to the use of the participant's image: you should take pictures of participants and video-record or interview them only if they have expressly provided their consent thereto.

Consents should be separated! You cannot get a one consent for everything (e.g. participation to events, newsletter, video recording, etc.).

<u>What to do next</u>

Once you have lawfully acquired the stakeholders' data you should adopt adequate technical and organisational measures to protect them. Security is fundamental, especially if you have collected special categories of data.

You should use data only for the purposes for which they have been collected, and communicate them only to those entities listed in the data protection information.

You should be able to promptly and efficiently manage requests from data subjects (e.g. updating of data, withdrawal of consent, request for cancellation of data, etc.).

<u>Vulnerable persons</u>

Vulnerable persons (e.g. migrants, refugees) may have difficulties in understanding data protection information documents, data protection rules, etc.

Providing non-understandable information equals to not providing information at all. It is not a formal but a substantial matter.

Thus, you should always take special care:

1) They may have linguistic difficulties, so please verify they fully understand what you are telling them.
2) Check the documents together with them, stimulate them to ask questions and provide all the explanations they need.

Please also check out the section on vulnerable persons provided in RURITAGE Deliverable 9.1, reported below for your convenience.

<u>Measures to protect vulnerable individuals/groups that will be involved and to minimize the risk of their stigmatization</u>

The RURITAGE project will also involve vulnerable groups/individuals, such as migrants and refugees living in the rural areas, which are the target of project activities.

Vulnerable individuals and groups will take part in the project on the basis of the **principles** set by the **Charter of Fundamental Rights** of the European Union, in particular:

- **non-discrimination** (art. 21)

- **respect of cultural, religious and linguistic diversity** (art. 22)

- **integration of persons with disabilities** (art. 26)

The RURITAGE research teams will also act in compliance with the **European Commission Directorate-General for Research and Innovation** "**Guidance note on Research on refugees, asylum seekers and migrants**".

In particular, in interacting with project participants, researchers will:

- treat them with **care** and **sensitivity**;

- be **objective** and transparent in performing project tasks;

- **avoid ethnocentricity** and show **respect** for **different ethnicity, language, religion, gender and sexual orientation**;

- rigorously safeguard the **dignity**, **wellbeing**, **autonomy**, **safety** and **security** of their **family and friends**;

- respect their **values** and the right to **make their own decisions**;

- give **special protection** to **participants with diminished autonomy**, for example, by providing indications for legal advice, psychological support, language interpreting and/or legally appointed supervision.

Project participants will also consider including researchers with a refugee or migrant background, or from the same culture. This may mitigate potential risks of coercion or power differentials between researchers and participants.

The RURITAGE project partners will act so as **not** to create **unjustified expectations** in participants with reference to:

- **future residence in the EU** or the determination of their **refugee status** by any national authorities

- **how** the **research** will **help to improve the situation of their group** and how participants will be **recognized** or **rewarded**

- the **avoidance** of **undue inducement**.

Researchers will also provide adequate explanations to justify why **certain volunteers cannot be recruited**, to avoid concerns about favouritism and unfair exclusion.

The possible risk of stigmatization is very limited and will be minimised in relation to different reasons:

- the very nature of the project is grounded on the consolidation of a common culture for rural areas and **supports integration**;

- the involvement of vulnerable persons will be based on **standard guidelines** agreed by the partners, to be shared in D2.1 "RURITAGE methodology for Community based Heritage Management and Planning (CHMP), due in M6 and the above-mentioned D3.1. It will be focused on **issues** related to the **rural cultural heritage** without unduly entering into unnecessary personal or sensitive details;

- in case of linguistic difficulties, the assistance of a **translator** or **cultural mediator** will be requested;

- in case of **disabilities**, the support of **personnel with specific competence** will be requested (e.g. knowledge of sign language);

- the project partners include associations and institutions that already deal with persons from different cultures and religions and their teams include **personnel specifically trained** to this aim; their **experience in this field** as RMs will be transferred to the Replicators through the RURITAGE knowledge transfer process;

- each partner engaged in actively involving vulnerable persons will act in **compliance** with its national and local **regulations** and **internal rules** concerning vulnerable persons.

Such policies will be kept in consideration throughout the RURITAGE project.

2.5 Activity calendar

Activity	Deadline
Identify RRH Coordinator	31 July 2018
Contact relevant stakeholders for their engagement using the ethics guidelines provided by UNIBO	1 July 2018 – 15 February 2019
First draft of the stakeholder database released	30 November 2018
Final version of the stakeholder database released	28 February 2019

Informed consent sheets signed and collected from stakeholders	28 February 2019
Official launch of the Hub and organisation of the first activity	31 March 2019
Organise a dedicated meeting with regional and local authorities to agree on how to get their support and their involvement	February – March 2019
Activities, events, round tables, etc within the Hub space to consul stakeholders, exchange knowledge, co-develop, co-implement and co-monitor with them the RURITAGE heritage-led rural regeneration plans.	March 2019 to end of project

Annex I -Database Population Template

It is of crucial importance that the initial stakeholder mapping process is undertaken in a structured and systematic manner. This has been achieved by firstly developing the Stakeholder Typology. The Typology has been then transferred over onto a database, ready for population by each RM and R.

The first version of the stakeholder database is delivered in Month 6 and an updated version is planned at M10 to comply with milestone No 10 of the GA. Moreover, given the significant lifespan of RURITAGE and of the activities of the Hubs and the evolving nature of organisational change, the stakeholder analysis will be treated as a living document throughout the course of the project. This means that the document might be incrementally updated and adjusted as and when relevant changes occur in the stakeholders' involved, or in circumstances where new stakeholders are identified.

The database itself has fields that enable precise and targeted involvement of relevant organisations and individuals including:

- *Organisation Name*
- *Organisation Level (international, European, national, regional, local)*
- *Organisation Form (Public/Private, Profit/Non-profit)*
- *Value chain (for profit entities)*
- *Sector of activity (for non-profit entities)*
- *Brief description of the organisation*
- *Organisation address*
- *Website*
- *Generic organisation email*
- *Gender of the representative*
- *Age of the representative*
- *Residence of the representative*
- *Twitter/Facebook handle of the organisation to be used in social media campaigns*
- *Additional comments*

The first version of the database, filled in by each R with a provisional list of key local stakeholders, is provided subsequently. As defined in the ethics guidance, no personal contact details (name, surname and contacts) of the people participating in the hub should be transmitted.

Annex II – Info Sheet Template

RURITAGE Information Sheet

[NOTE: This is a template to inform participants about the RURITAGE project. It may be adapted according to each partner's communication needs and can be provided in the form of information sheet, covering letter or leaflet. It should be printed on the partner headed paper, (where appropriate) or in any case bear the partner's logo with full contact details. Please consider that it should normally contain at least the following information]

What is RURITAGE?

The RURITAGE project is **funded by the European Commission** within the H2020 programme and it will last for 4 years from June 2018 till May 2022. RURITAGE is led by the University of Bologna and counts 38 partners coming from 14 EU countries, Iceland, Norway, Turkey and 1 South American country (Colombia). The partners represent a very diverse range of actors encompassing local and regional authorities, universities and research centres, international networks and organizations, non-profit associations, and innovation centres.

RURITAGE aims at establishing a **new rural regeneration paradigm** able to turn **rural areas** in **sustainable development demonstration laboratories**, through the **enhancement** of their unique **Cultural and Natural Heritage potential**.

To do so, RURITAGE has identified **6 Systemic Innovation Areas** (pilgrimages; sustainable local food production; migration; art and festivals; resilience; and integrated landscape management) which showcase **heritage** potential as a **powerful engine** for **economic, social and environmental development of rural areas**.

The project has selected 13 **Role Models**, as **good practices to be analysed and studied**, to **replicate** those in **6 Replicators case study** selected within the project. Those 6 case studies will have to **develop** their **heritage-led regeneration strategies** based on the 6 SIAs mentioned above.

To do so each Role Model and Replicator will establish a **Local Rural Heritage Hubs** (RHH) as the main innovation place of the case studies involved, **gathering stakeholders and civil society**. Within Replicators, Rural Heritage Hubs will work as **living labs** where heritage-led rural regeneration **strategies** will be **co-created and implemented**, while in Role Models they will reinforce the ownership of cultural and natural heritage.

Would you like to be part of RURITAGE?

We would like to invite you to take part in the [NAME OF THE CASE STUDY] Rural Heritage Hub. 12

Your role is crucial since you will be supporting us in the definition of the strategies and the particular actions to be promoted in our territory. Moreover, you will be part of a local community of stakeholders that aim at finding sustainable ways to regenerate our territory.

Before you decide whether or not to take part, it is important for you to understand why the research is being done and what it will involve. So, please take a bit of your time to read the following information carefully.

First of all if something is not clear, please don't hesitate to ask explanations to [NAME OF THE RHH COORDINATOR] from [NAME OF THE ORGANIZATION]. He/she will be pleased to support you. RURITAGE aims at involving various participants in the local Rural Heritage Hub in the process of understanding, defining, implementing and monitoring heritage-led regeneration strategies that will be put in place in [NAME OF THE CASE STUDY].

You have been invited to this study because RURITAGE aims at involving very different stakeholders to get an inclusive and shared strategy to be implemented.

What does it mean for you?

If you wish to participate in our Rural Heritage Hub you will be invited to attend meetings, workshops, public events or focus groups that will be implemented in our territory from now and for the following months. Most of the activities will be implemented in Spring 2019, and the overall process will last until May 2022.

Your participation is absolutely voluntary and you can decide to withdraw from the project at any moment you would like to, without any consequence at all.

Which are the expected project results and participants' benefits?

Major impact will be obtained by co-developing tailored regeneration strategies to preserve and promote the cultural and natural heritage of the rural territory you live in.

The project will establish 19 Rural Heritage Hubs in different countries of Europe and beyond. Around 400 people will be involved in those Hubs to co-develop with the project partners and Hub facilitators tailored heritage-led regeneration actions and measure to support the sense of ownership of cultural and natural heritage in rural areas.

With your participation you will also make a substantial contribution in promoting a sense of ownership of cultural and natural heritage of rural areas across Europe and empowering individuals across large sections of society to take a greater responsibility for their own territories, traditions and cultures.

After the end of the study you can contact the Hub Coordinator and ask them to provide you with the overall outcomes resulting from the research activities, in case you are interest in having further details on project results.

Your privacy is important to us!

Your personal data will be processed by [*NOTE: insert name of partner who will collect the data] only* for the purposes of the RURITAGE project and will not be disclosed to any external sources, except for project partners and technology and service providers, where needed. Video-recordings and

photographs taken during meetings, photo sessions and interviews will be published on the RURITAGE and the partners' web sites, only if you have expressly agreed.

Data will be used in accordance with the EU General Data Protection Regulation (GDPR) and [*NOTE: INSERT NATIONAL LEGISLATION OF THE PARTNER IN CHARGE OF COLLECTING DATA*], both available at [INSERT LINK]

You have the right to request access, modification and cancellation of your data, as foreseen by the GDPR.

Full data protection information is available here [INSERT LINK] and will be handed to you with a leaflet you may consult at any time.

You will be able to request modification or removal of your data at any time by writing at (**INDICATE E-MAIL).**

For any further information, please refer to **NAME AND E-MAIL**

Date and place

CONSENT FOR THE VOLUNTARY PARTICIPATION IN THE PROJECT

I confirm that I have read and understood the RURITAGE information sheet dated (version XX) concerning my involvement in the RURITAGE project. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.	☐
I understand that my participation is absolutely voluntary and that I am totally free to withdraw at any time without giving any reason.	☐
I agree to take part in the RURITAGE project.	☐

I declare that I have read and understood the information on data protection and that I have been able to solve any doubts with the help of the RURITAGE team, who has provided all the explanations I have requested.	☐
I give my consent to the processing of my personal data as explained in the privacy information, in relation to my involvement in the RURITAGE project.	☐
I agree in particular that my image and voice be recorded in the RURITAGE project videos (e.g. at meetings, workshops, interviews, etc.) and that such videos be published on the project's and on the partners' websites.	☐

RURITAGE

Name

……………………………..

Date

……………………………..

Signature

……………………………..

References

Eversole R, editor; Martin J, editor. Participation and Governance in Regional Development: Global Trends in an Australian Context. Hampshire: Ashgate, 2005

Huttlinger K, Schaller-Ayers JM, Kenny B, Ayers JW. Research and collaboration in rural community health. Online Journal of Rural Nursing & Health Care, 2004; 4: 10

ILO. Value Chain Development for Decent Work: A Guide for Practitioners, Government and Private Sector Initiatives , 2009

Johns S, Kilpatrick S, Whelan J. Our health in our hands: building effective community partnerships for rural health service provision. Rural Society, 2007; 17: 50–65

Kenny A, Farmer J, Dickson-Swift V, and Hyett N. Community participation for rural health: a review of challenges, 2015

Kilpatrick S. Multi-level rural community engagement in health. Australian Journal of Rural Health, 2009; 17: 39–44

Lutz C, Hoffmann C. The Impoact of Social Media on Stakeholder Engagement, 2013

Morgan L. Community participation in health: perpetual allure, persistent challenge. Health Policy and Planning, 2001; 16: 221–230

Organisation for Economic Co-operation and Development, Strategies to Improve Rural Service Delivery. Paris: OECD Publishing, 2010

Williamson A, Fung A. Public deliberation: where we are and where can we go?. National Civic Review, 2004; 93: 3–15

http://www.ilo.org/wcmsp5/groups/public/---ed_emp/---emp_ent/---ifp_seed/documents/publication/wcms_161156.pdf

http://www.vitalruralarea.eu/scientific-articles/238-service-provision-in-rural-areas-concepts-from-vital-rural-area

https://www.jstor.org/stable/1239024?seq=7#page_scan_tab_contents

https://pdfs.semanticscholar.org/1978/b5244041a0feff198b4f4d67193bf208bb8e.pdf

https://journals.muni.cz/socialni_studia/article/viewFile/6232/5593

https://cor.europa.eu/en/engage/studies/Documents/EPRS_BRI(2016)583831_EN.PDF

<hr>

[i] *The protection afforded by this Regulation should apply to natural persons, whatever their nationality or place of residence, in relation to the processing of their personal data. This Regulation does not cover the processing of personal data, which concerns legal persons and in particular undertakings established as legal persons, including the name and the form of the legal person and the contact details of the legal person. (GDPR, whereas No. 14).*

[ii] Please check in particular art. 12, 13 and 14 of the GDPR.