

Navigating the just transition: A manual for effective capacity- building events

Based on the experiences of CEE Bankwatch Network member groups in organising events in just transition regions (2020–2023)



Photo: CEE Bankwatch Network

With contributions from Miłka Stępień and Joanna Jakubowska (CEE Bankwatch Network), Krzysztof Mrozek, Alina Pogoda, Mateusz Kowalik, Magda Bartecka (Polish Green Network), Eszter Galambos, Alexa Botar (National Society of Conservationists – Friends of the Earth Hungary), Maris Pedaja (Estonian Green Movement), Zuzana Vondrová (Centre for Transport and Energy Czech Republic), Maksis Apinis (Green Liberty Latvia), and Lenka Ilčíková (Friends of the Earth – CEPA Slovakia).

For more information:

Miłostawa Stępień

Just Transition Coordinator
CEE Bankwatch Network
miłoslawa.stepien@bankwatch.org

Joanna Jakubowska

Just Transition EU Policy Officer
CEE Bankwatch Network
joanna.jakubowska@bankwatch.org

Learn more:
bankwatch.org



INTRODUCTION

This manual provides an easy-to-use and concise overview of the key elements involved in organising capacity-building events in just transition regions. It addresses the common questions you're likely to ask when planning your own event.

PREPARING CAPACITY-BUILDING EVENTS

What kind of topics are suitable for capacity-building events?

Your event should focus on a topic that is both valuable for the target audience and has the potential to drive the just transition process forward.

Since 2020, the Bankwatch Network has organised a wide range of events on the just transition process. These include both general and specific topics, such as:

- ❖ general introductory workshops on the just transition;
- ❖ European funds with a focus on just transition regions;
- ❖ energy efficiency;
- ❖ energy-efficient building renovations;
- ❖ re-employment strategies;
- ❖ the circular economy and communal waste;
- ❖ funds available for small and medium-sized enterprises;
- ❖ mine site reclamation and restoration;
- ❖ writing project proposals; and
- ❖ establishing energy cooperatives as a means of employment.

This is by no means an exhaustive list. Your choice of topic will be dependent on a wide range of factors. The following questions will help you get started:

- ❖ What group do you want to work with?
- ❖ What group do you want your workshops to target?
- ❖ What information does this group currently not have?
- ❖ What knowledge do they need to gain or develop?

- ❖ What might help to move the transition process forward?

It's a good idea to begin with more general events, during which information can be gathered about more specific needs and knowledge gaps.

USEFUL TIP: Take note of information you gather during informal conversations

Based on the experiences of the Polish Green Network, most of the information about the needs for specific types of events is gathered through informal conversations during various meetings on the ground. With this in mind, we recommend that you attend as many local events as you can, make the most out of 'coffee breaks', build up contacts, and make mental notes of what you hear during these meetings. Take written notes as soon as you can after the event, so that you can easily refer back to them when making decisions about organising your next event. Remember that people often don't want to admit during official meetings (even in surveys) that they're having problems with a certain issue or lack knowledge on a topic. However, they will more readily mention this during an informal conversation.

What topics are most popular?

In Poland, the most popular topics tend to be those that deal directly with accessing project funding. These include presentations on the availability and requirements of funding opportunities, project writing workshops, and information meetings on the type of funding accessible to specific stakeholders, such as municipalities, civil society, rural communities, and small and medium-sized enterprises, or indeed for other purposes.

However, any workshop can attract a decent number of participants if the topic is relevant to the target audience and information about the event is provided to the right people. The most important aspect to take into account when selecting the topic is its relevance, both for the participants as well as for the just transition goals in the region.

What format should the event take?

Definitions of events vary, but it's important to be clear both internally and externally about what format yours will take. Is it to be a conference, a congress, a workshop, a seminar, or some other form of capacity-building event? When choosing your preferred format, make sure you understand the differences in people's expectations of your event, how you want it to be organised, what information you want to present, and how you want it to be communicated.

The choice of format will depend on many factors, but it's always a good idea to ask yourself what you aim to achieve by organising it in the first place. Do you want to provide a large number of people with more general information? Then maybe a congress or conference is most appropriate. Or do you perhaps want to focus on a specific topic with a smaller group? A workshop is probably better for this kind of meeting. Ask yourself what target group you'd like to see attend and what level of knowledge they're likely to have on the topic. Answering these questions will help you to choose the most suitable format for your specific audience.

Who is the event for?

Events can be tailored to any group that you feel is relevant to achieving the just transition goals. The Bankwatch Network has organised events with specialised audiences in mind as well as events open to anyone with a general interest in the topic. The groups you might reach out to include:

- ❖ local and regional authorities in just transition regions;
- ❖ representatives of relevant institutions or those working on a particular topic;
- ❖ non-governmental organisations;
- ❖ rural communities;
- ❖ representatives of local and regional small and medium-sized enterprises;
- ❖ specific groups within the local community, such as young people, women, and older people;
- ❖ representatives of trade unions, and
- ❖ any other groups you consider worth targeting.

However, the typical audience tends to be made up of a mix of different people, including various representatives of the groups mentioned above.

One important thing to be aware of is the effect of bringing diverse groups together in one room. While a gathering of local authorities, business representatives and employees can result in fruitful discussion, it can also create the potential for less transparency. For example, employees might be hesitant to speak freely in front of their employers. Bear in mind that people may also disagree on key issues during the event. In such cases, make sure the moderator is well prepared to handle these situations (more on this later).

How do you select the right topic for your event?

Be mindful of people's needs and preferences when planning your event. What interests you may not necessarily be as appealing for your target group. As mentioned above, the sky's the limit when choosing your final topic, but always remember to:

- ❖ adjust the topic to meet local needs and the target audience;
- ❖ avoid overly technical language (but don't overgeneralise either);
- ❖ keep EU jargon to a minimum when discussing EU-related topics;
- ❖ choose the topic for the first workshop yourself, but expect future topics to come from the participants themselves.

Once you've conducted your preliminary research, talked and listened to people, and brainstormed ideas for your workshop, the right topic will come naturally.

Regardless of topic, familiarise yourself with the main challenges, the prevailing issues, and the overall situation facing the region and the people that make up your target audience.

Useful tip: Think about the long-term goals of the region and how to overcome the challenges preventing the region from moving forward

We recommend preparing a theory of change analysis, however brief, for the region in question. You should ask yourself:

- ❖ *What challenges have you identified that stand in the way of the region achieving its goals?*
- ❖ *How can these obstacles be overcome? For instance, what knowledge and skills are needed?*
- ❖ *Who do you need to target with the actions identified?*
- ❖ *How can you spark people's interest in what you want to share with them?*

Insider's tip: Even when preparing a workshop on a general topic, such as the availability of EU funding, try to focus on environmentally friendly solutions. By weaving green options into a more general presentation, you can plant the seed for these choices to be considered.

How do you make sure enough people attend?

As long as the workshop is attended by representatives of the groups you want to reach, the number of participants should not be the most important determining factor. From our experience, attendance varies depending on the topic and the promotion of the workshops. Here are some useful tips to make sure you reach the right people.

Send emails and prepare registration forms

To reach as many people as possible, send multiple emails to regional and municipal offices. Developing a working relationship and exchanging ideas with these offices can be beneficial in spreading your message to a larger audience. For example, the Polish Green Network cooperates closely on events with the Agency of Regional Development in charge of the Eastern Wielkopolska just transition process.

You should also send emails to anyone you know who might be interested in the topic. Personally ask people from the region that you already know to forward your messages to other potentially interested parties. There is more of a chance that people will open and read emails if they receive them from a person or institution they know personally and work with on a daily basis.

Even though you should remember that emails are not enough, it's worthwhile sending a few emails ahead of the event to increase the chances they will catch someone's eye.

It's always a good idea to attach an online registration form, which will give you a general estimate of the number of attendees so that you can plan accordingly. For instance, if it looks like you'll have a low turnout, this will give you time to work out how to attract more participants. Unfortunately, the actual number of attendees will usually fall short of the number registered, a factor that should be considered when making the final orders for catering.

Personal contacts work best

Building upon already established personal contacts and making direct phone calls to well-connected people can be the decisive factor in making sure your desired participants attend. People frequently only glance through emails, especially if they don't know the person writing to them. That's why it's always worth connecting with a network of local action groups, such as non-governmental organisations, and reaching out to local partners. For example, the Polish Green Network, while organising a workshop for rural communities on water-related issues, reached out to a local mayor who proved to be a great help with promoting the event among the target group. It's also important that when contacting the people you know directly, specifically ask them to reach out to their own contacts and spread the word.

Work with local partners

It's always beneficial to involve a local partner in organising your event, as they will be much more familiar with the situation and people on the ground than you are. For example, the Polish Green Network arranged a meeting between energy and mining trade unions and local companies. However, the Polish organisation involved had limited previous contact with these groups. To solve this issue, they asked local chambers of commerce to invite regional companies to attend. Because they received the invitation from someone they already knew, this increased turnout at the event and contributed to more productive outcomes.

A useful strategy for increasing the direct involvement of local partners is to ask them to serve as co-organisers, patrons or speakers at the event. Allowing them to take ownership of the preparation and organisation of the programme for the event will generate ideas, solutions and approaches you hadn't even thought of. Remember that they know the region best and will have already established their own contacts, networks and experiences. This collective store of knowledge can only add to the richness of your event.

You should also try to deviate from your typical social bubble. Avoiding the 'usual suspects' will force you to send invitations to those you may not ordinarily consider, increasing the chances of a higher turnout. What has worked well for CEE Bankwatch Network organisations over the years is to collaborate with other organisations that might not necessarily have a climate or environmental focus, such as libraries, active citizens, local and regional schools, universities, senior citizen organisations, women's and youth groups, artists, activists, architects, urban planners, and anyone else who is active locally.

For example, in Jiu Valley in Romania, during one of the just transition events organised by local non-governmental organisations in cooperation with JTP Groundwork, breaks between sessions were used to showcase a robotics presentation by local schools in the area in partnership with the University of Petrosani. Delighted to be able to present their skills to an international crowd, the students also attended some of the

sessions. At another event in Eastern Wielkopolska in Poland, we asked local photographers to present their photos of the town, providing them with an opportunity to promote their work and contribute to the discussion.

With regard to event logistics, consider partnering with local companies, institutions and service providers. Not only is this likely to be cheaper than bringing someone in from the capital, it's also a way to support the local economy, promote new ideas, and involve members of the community. For example, you can arrange to have your materials printed locally, invite a moderator from the local media, or hire a local partner to organise the venue, catering and other aspects of the event. We often book the equipment and venue through the municipality or companies established by the municipality, county, or non-profit organisations. Fostering this kind of local cooperation often results in their representatives joining us at our meetings and at future events.

For larger international or national organisations and institutions, remember that local partners should be adequately compensated for their contributions, as smaller companies and non-governmental organisations often struggle to make ends meet. In recent decades, just transition regions have undergone economic regression, resulting in a lack of regular access to funds. Additionally, smaller non-governmental organisations typically receive grants that fail to meet their day-to-day operational needs.

Keep a list of contacts

It's useful to keep a detailed list of all the contacts you've established to date, including numbers, emails and general information about each person, such as field of activity, professional interests, expertise, and social circles. You and your colleagues can refer back to this list when planning future events. That said, remember to ensure compliance with data protection regulations: you can store contact information on publicly available email addresses or telephone numbers without any restrictions. But for private contact information, you should send a request for processing data in accordance with the GDPR act and relevant country regulations.

Finally, when organising your next event, stay in contact with, and actively reach out to, the people who attended your previous events. If they felt the previous one was interesting and useful, they're sure to be interested in attending the next one too!

Promoting your event

For some events, public promotion might not always make sense, especially if it's a workshop aimed at a specific target audience. Other events, however, should be accompanied by public promotion online and in the local media. Just remember that if you want to publicise your event among the local community in a region you're not overly familiar with, carefully consider your approach to promotion. This undertaking can often prove challenging, especially if the event is located far from where you're based.

Social media

If you decide to promote your event on social media, choose a platform that's popular in the country and among the target group you want to reach. For instance, if your goal is to attract young people, it probably doesn't make much sense to promote your event on Facebook. Instead, opt for Instagram or TikTok. It's also best practice to ask someone from the region who has a lot of local followers to share the event. Again, it's very

difficult to reach the right regional target group if your organisation is based in a capital city. Otherwise consider targeted advertising!

Media

Reaching out to local media is a must. In our experience, they are frequently very interested in promoting the event, talking about it on local TV and radio stations, and covering it on their news sites. Having a local co-organiser on board is a great asset in these situations, as they can readily give interviews, provide information to local journalists, and act as a contact point. Additionally, always have a press release to hand, featuring an eye-catching visual and all the most important information about the event. Ideally, it should be distributed to all local media outlets. It's not unknown for local online news outlets to even livestream your event or give it more in-depth coverage. We've also had success with inviting local journalists to moderate our events, which can result in more information about the topic being shared in the local media long after the event is over.

After-event promotion

After-event promotion is equally as important as promotion before the event. A couple of social media posts about the event's topic, participants and conclusions can help to engage with those who were unable to attend. Social media posts might contain a couple of photos from the event, key takeaways, and an invitation to connect with you for additional information. Alternatively, you can share a recording of the event. If you have the time and resources, you could post a short video on social media featuring one of the participants discussing the main highlights. Always think about who you want to reach with these posts.

What should you remember when organising your meeting?

Choose the right experts and moderator

Once you've selected your topic, choose people who are not only experts in the field, but who also have experience in conducting workshops. They should know how to lead an engaging meeting and adjust it accordingly to the subject and the audience. Depending on capacity, availability and your preferences, these can be either internal or external experts.

You can also task a moderator with running the workshop itself, while giving experts the floor to present specific aspects of the topic being discussed. Both options are fine, as long as the workshop has a clear structure and, if possible, strikes a balance between presentations and interactive workshop elements.

Whoever you decide to hire in the role of moderator (even if it's your good self), make sure the person in charge is experienced in, and assertive at, moderating competing views. There's always a chance the workshop will be attended by some disruptive elements. Even a person who goes off on a long-winded monologue that barely relates to the topic discussed can spell disaster for your event, as we all probably know from experience! That's why it's really important to have a confident person in charge who can cut them off when needed! Having a moderator who knows the topic and can navigate the discussion is invaluable. There's nothing worse than having to listen to a rambling presentation that the moderator has no ability to control.

To avoid a similar situation in which a well-known and charismatic moderator ‘steals the show’ and steers the conversation away from the main workshop objective – for instance, amplifying the discussion on security of supply concerns when the main goal is to highlight the benefits of energy decentralisation – it’s always useful to agree on the desired outcomes with the moderator in advance. There are multiple ways to do this, a preparatory call with the moderator being a good option.

If more experts and/or panellists are involved, arrange a preliminary group call or set up an email thread involving all parties, especially if the moderator hasn’t already taken the initiative to do so. Additionally, it’s a good idea to prepare an information sheet for the moderator with all the main background information and potential questions for the panellists or experts. In our experience, this increases the likelihood of getting all the crucial points across.

Make sure you know who is in the audience! When a senior expert is in attendance, their attitude can be sceptical at first, as if to say, ‘I know all this already. What can you tell me that I don’t already know?!’ This is especially true when the audience comprises officials or high-level experts. In these cases, pre-empt the situation by proactively involving them in the debate. Otherwise they may purposefully find faults with what the presenter is saying, or even resort to ridicule. The best way to deal with such cases is to quickly pick them out of the audience and ask a question along the lines of, ‘What do you think about ...?’ or ‘In your experience, what is the best way to ...?’ Their special status needs to be recognised for them to engage productively.

Many of these events are attended by people from diverse backgrounds. That’s why it’s crucial for the various local sectors to understand each other’s viewpoints and interests. Don’t forget that your objective is to generate constructive debate on concepts, projects and plans. This will put people at ease and make them feel like they’re in ‘the same just transition boat’.

Organising regular multi-stakeholder meetings and forums is equally important. At these events, the roles of co-organisers and speakers should be assigned to local or regional organisations representing different stakeholders, such as municipalities, non-governmental organisations, development agencies, small and medium-sized enterprises, and local associations. Additionally, these mixed-sector organisations usually have at least some level of shareable experience with the planning and implementation of multi-sector EU projects. We try to adapt to their schedule when needed by coordinating events to coincide with their existing commitments. For example, a forum can be organised on the same day as a general assembly or another widely attended event.

Certain topics, such as general information on the availability of EU funding, are not conducive for a workshop scenario and will mostly involve presentations. However, don’t make them too long or wordy! Ask speakers to send their presentations ahead of time to make sure they don’t ramble or stray off topic. Obviously, interactive workshops make it easier to keep the audience engaged and interested, whereas it can be harder to maintain focus on a presentation that’s unpacking a complex topic. For diversion, add some lighter elements in between presentations, such as discussing a specific case study or providing an example illustrating the matter being discussed.

Additional material

A PowerPoint presentation is recommended, but it should not be the focal point of the meeting. Make it brief, to the point, relevant, interesting and memorable. Infographics, charts and images are generally welcome as people tend to lose focus if there's too much text. Also, remember to send the presentation in a follow-up email after the workshop together with some recommended materials. An email of this kind is a great opportunity to share your publications, briefings, brochures, and anything else related to the main topic.

The meeting itself gives you an opportunity to hand out more detailed materials. Just make sure they're not overly technical. An easy-to-read brochure will do the job, allowing participants to leaf through the most relevant details during the meeting or after the event.

A lot of the material for the workshop is frequently prepared by the expert, so make sure you have access to it ahead of time to avoid surprises. If the topic of your workshop is complicated or new, hand out a factsheet containing concise informative material or infographics to simplify the message.

Although there is likely to be an abundance of information on your particular topic, you may still need to create content for a workshop that has to be rewritten, shortened or translated into your local language. We therefore recommend that you research and plan for this eventuality ahead of time, perhaps in cooperation with the invited expert.

How do you keep the audience engaged?

The range of activities you can introduce during your event is enormous, so we won't go into detail. Just make sure that whatever activity you end up choosing gets the audience engaged and active. Whether it's world cafes, polls, or working in groups to develop ideas or comment on something being discussed, inspire people to think about what they're there to learn about. This also helps people to get to know each other and develop networks.

It's also important to give participants space to ask questions, make comments and share ideas. So don't skip the Q & A part after the presentation. Aim to shorten the presentation or panel discussion part, because people are never fully engaged by talking heads.

You could also avail of the wide range of digital engagement tools on the market, such as Slido or Mentimeter. These tools can be used to provide the audience with general information or gauge their level of interest. If you are going to use digital methods, make sure the Wi-Fi name and password at the venue is made available to the audience.

But don't go overboard with interactive activities! Even in workshops, aim to strike a happy balance between fun and games and getting some concrete knowledge across.

Lists of participants and name tags

For project reasons, remember to print out participant lists. Make sure they're signed during the event and stored appropriately. Ask for email contacts in accordance with GDPR regulations. These are the first people you should invite to your next event. Signed participation lists are often also required for project reporting.

Distributing name tags can foster communication between participants. These can be prepared in advance in the case of confirmed participants. Also, have some empty name tags or stickers to hand so that they can be completed upon registration, recording names and affiliations where relevant. Some participants may know one another, but this is not always the case. A clearly labelled name tag can help people to break the ice during the event.

Length and timing

The meeting should last a few hours at most. Based on the experiences of Polish Green Network, morning meetings should finish at around 14:00. However, remember that morning meetings will only work if you know that most of the participants have been specifically delegated to the meeting and don't have to take a day off work to attend.

If you're targeting people who haven't been specifically delegated to attend, you should think about organising afternoon (starting at around 16:00 or 17:00) or even weekend workshops when most people are off work. Obtain information about the availability of potential participants ahead of time when planning for specific groups. This is especially true when targeting non-governmental organisations and civil society members active in smaller municipalities, as they usually carry out their activities after work hours.

Translations

For workshops, don't engage someone who doesn't speak the national language, as translation slows things down and detracts from getting the message across. If this cannot be avoided, try to arrange a simultaneous translation, but bear in mind that this is usually quite costly. If there is to be a translated part of the meeting, have the presentations and relevant material translated and distributed to attendees before the meeting starts.

However, communicating your message should be a priority to make sure your event reaches the intended audience, so there are circumstances in which simultaneous translation is unavoidable. For example, in the Ida-Viru region in Estonia, the target audience typically consists of multiple minority language groups, including a large Russian-speaking group. If the budget is tight but simultaneous translation is a priority, explore options for making budget cuts, such as reducing compensation for transport or catering.

Venue

When choosing your venue, consider the following: location, accessibility, working conditions, the availability of equipment such as projectors and writing boards, representativeness, and of course, cost. Although not always guaranteed, free venue options in public institutions or buildings often crop up, especially if you've already established a network of contacts and partners in your region. Venues could be town council buildings, public libraries, non-governmental organisation centres, EU institution buildings, schools or universities.

In the experience of the Polish Green Network, it's helpful to provide a 'neutral ground' for discussions. While municipality officials may not be happy to appear in a restaurant for a workshop during office hours, citizens may not feel comfortable in a town hall. On this point, libraries are always a good compromise.

Catering

If the meeting is to be a few hours long, plan some coffee and snack breaks, and perhaps a lunch or other meal depending on the length and timing of the workshop. The cost of catering can also be quite substantial, so plan accordingly. Given that the numbers attending are usually over- or underestimated, catering can be hard to plan. Usually, however, there is too much food, not too little.

In rural areas, finding vegetarian or vegan catering can prove challenging. Fortunately, Polish Green Network have had the experience of local restaurants taking the initiative to deliver inspired menus!

TIP: Use breaks to develop relationships and gather information

Coffee- and lunch-breaks are a great opportunity for informal conversation, so don't hesitate to give people ample time to stretch their legs and chat about relevant issues. You're likely to get the most important information at this time of day. Who knows, striking up conversation with a 'person in the know' could have a huge impact on the future of your organisation!

Friends of the Earth–CEPA Slovakia has had great success offering fruit from local farms or cakes from local patisseries. At one of their events, they ordered food from a vocational high school focused on supporting apprenticeship programmes, with pupils serving coffee and lunch during the breaks. They were also invited to listen to the workshop presentations and offer their opinions.

When providing more extensive catering (more than just coffee and a few snacks), which is often the case for longer events involving a small group of people, make sure the registration form includes a question on food allergies. Usually, at least one person will be, for example, gluten-intolerant. Pass this information on to the caterer so that they can arrange special meal options and provide more information on what their dishes contain.

There is often some food left over after the event. We'll often reach out to a local food sharing organisation to collect and distribute to people who can benefit.

How to plan for breaks

Breaks can be fun and educational too! At our different events, we've organised additional attractions, ranging from art or photography exhibitions by local artists, through dance and music performances by local groups, to presentations by interesting student clubs, such as the robotics team presentations mentioned above. Feel free to play videos in the main room during the break for those who want to stay put and watch material related to the event topic.

Review equipment and facilities at the venue

Ensure that the venue has all the equipment you need, such as a projector, microphones, a sound system and internet access. Also, bring a laptop adaptor. A frequent issue we encounter is that newer laptops have only USB ports at best, while most projectors have HDMI ports. If an adaptor isn't readily available, this can create needless stress before the event or even delay the beginning. Also, review the availability of simple items that

often get overlooked such as flip charts, paper and markers. Last-minute shopping for office supplies is something you can do without!

Small ways you can ‘green’ your event

When it comes to waste, lead by example. For instance, don’t buy mineral water in plastic bottles or coffee milk in disposable containers. Avoid giving unnecessary or impractical gifts, which will probably be tossed right after the event. And, as mentioned above, don’t order too much food and make sure that leftovers are collected by a food sharing organisation.

Make sure there are clearly marked waste separation bins throughout the venue, especially in the refreshment areas. This is easier said than done, as we’ve often had to convince and negotiate with less-than-willing staff in advance.

Most of our organisations have a strict policy of using public transport where possible to reach an event. In the first instance, we offer train connections to speakers travelling from afar and promote public transport or walking to get around town. However, some of the regions in which we work are not easily accessible by train or lack adequate public transport.

What should you avoid?

First of all, avoid any last-minute planning and remember to arrange everything in advance. As we’ve learned, meetings of this kind require a lot of preparation. In terms of scheduling, we recommend you begin prepping at least two months in advance. For a new workshop or a topic you have less knowledge about, we recommend starting even earlier, at least three months in advance.

TIP: Spend time developing the concept behind the workshop

The concept behind every workshop, especially one on a new topic, should be developed before you even begin organising it. First and foremost, establish the goal of the meeting and the target audience. Hold some internal brainstorming sessions over the course of even a few weeks, during which you should discuss the following questions:

- ❖ *What exactly do you want to organise?*
- ❖ *What do you want to achieve and how will you go about it?*
- ❖ *Who do you want to target and how will you get these people to attend?*
- ❖ *What format is best for your event?*
- ❖ *What content should it include?*

The success of your workshop will largely depend on the quality of the concept behind it and how well you prepare. After the event, return to these questions and evaluate to what extent you achieved your goals!

When choosing an external expert, remember that their presentation and social skills are sometimes just as important as their knowledge on the topic. Avoid picking someone who does not tick all of these boxes. Similarly, agree possible fees and other conditions in advance, including what transportation costs you can cover. Don't put yourself in a situation where an expert travels by car, only to discover that your grant doesn't allow you to reimburse this means of transport.

Avoid using the same language and style of presentation for every event. In other words, adapt the events to your target audience. While discussing EU funds, for example, ditch unnecessary EU jargon, which can bore and even irritate those not familiar with technical vocabulary of this kind. Overuse of abbreviations seems to be one of the most common mistakes. Abbreviations are frequently used in very small circles and even people working in similar fields are not consistent with these terms. So it's better to explain something you think is obvious than to leave people with more questions than they had before the meeting.

What are the main costs involved?

Usually, the most substantial outlay will go on renting the venue and catering. If you decide to hire external experts and/or a moderator, adjust your budget accordingly and agree fees in advance. Additionally, take into account travel and hotel costs, especially for events taking place in more remote areas. If necessary, translation services should be factored in as an extra expenditure. As mentioned above, simultaneous translation can be extremely costly.

Checklist

We recommend completing our checklist to ensure you prepare properly. Feel free to modify as needed to suit your particular event. Review each item on the list with a colleague to ensure all essential tasks have been accomplished.

CHECKLIST

Bankwatch manual on capacity-building events

This checklist accompanies our capacity-building manual. It's designed to make sure you don't leave anything to chance when organising your event. Tick each box as you go and double-check the list with a colleague. Best of luck!

Choosing the topic

- ❖ Conduct initial research
- ❖ Talk to a diverse group of people
- ❖ Listen and note needs
- ❖ Brainstorm all ideas
- ❖ Familiarise yourself with the main challenges, prevailing issues, and overall situation faced by the region and your target audience, regardless of the subject
- ❖ Prepare a theory of change analysis for your region

Reaching the target group

- ❖ Choose the best format for the type of event you want to organise, e.g. workshop, conference, etc.
- ❖ Send multiple emails to regional and municipal contacts in advance
- ❖ Send follow-up emails closer to the date
- ❖ Call well-established contacts or reach out to them through social media
- ❖ Work with local partners and make sure they're an integral part of the event
- ❖ Prepare a detailed list of all relevant contacts. Include numbers, emails, and general information on each person, such as field of activity, professional interests, scope of influence, etc.
- ❖ Ensure your contact list complies with the GDPR act

Promoting the event

- ❖ Weigh up the need for external promotion in addition to invitations

- ❖ Choose the right social media strategy for your target audience and prepare material best suited to your target platform(s)
- ❖ Reach out to local and regional media to maximise coverage
- ❖ Keep promoting your event after it ends

Hiring experts and moderators

- ❖ Book suitable experts and, if needed, a moderator who's familiar with your topic and has experience in conducting workshops
- ❖ Hold prep calls to make sure you're all on the same page for the event

Additional materials

- ❖ Prepare a PowerPoint presentation: keep it short, to the point, relevant, interesting and memorable with a focus on infographics and visual elements
- ❖ Add some lighter elements in between presentations, e.g. discuss a case study or illustrate a relevant example
- ❖ Add a Q & A session and gather input on the topics discussed
- ❖ Use digital engagement apps to gauge reactions to the event and content discussed
- ❖ Send a follow-up email after the workshop, attaching presentations and recommended materials
- ❖ Hand out more detailed material during the meeting itself
- ❖ Prepare all materials in advance
- ❖ Create a registration form to estimate numbers and plan in response
- ❖ Print a sign-in sheet with the full list of participants
- ❖ Prepare and distribute name tags

Length and timing

- ❖ Schedule your event to last at most a few hours
- ❖ Aim to finish by 14:00 if a morning event
- ❖ Gather availability information beforehand, especially when targeting officials

- ❖ Consider the limited availability of civil society activists, who often only have time at weekends or after work

Translations

- ❖ Choose experts who speak the national language (if this is not possible, arrange for a quality simultaneous translation)
- ❖ Hire a translator if your event is being held in a region where multiple languages are spoken

Venue

- ❖ Consider location, accessibility, working conditions, the availability of equipment such as projectors and writing boards, representativeness, and cost
- ❖ Prioritise venues that are free and publicly available, such as libraries and non-governmental organisation centres

Catering

- ❖ Plan coffee and snack breaks, and perhaps a lunch or other meal depending on the length and timing of the workshop
- ❖ Err on the side of caution when it comes to food – e.g. if 25 people are confirmed for your event, only order 20 meals, especially if you're planning a buffet.
- ❖ Partner with local providers
- ❖ Arrange for a food sharing organisation to redistribute leftover food

PRACTICAL CHECKLIST

(before and after the workshop)

Before:

- ❖ Identify and onboard partners
- ❖ Complete and double-check registration form
- ❖ Identify and send invitations to:
 - key stakeholders,
 - local contacts, and
 - the wider public
- ❖ Add GDPR data protection clause to your invitation
- ❖ Add grant-maker disclaimers to your invitation (if required)
- ❖ Prep local partners on their tasks for the event
- ❖ Invite local/regional media to promote the event
- ❖ Book and prep experts and moderators in advance
- ❖ Find and book venue
- ❖ Find and book catering company
 - Check whether vegetarian and/or vegan options are available
 - Provide refreshments if nobody's eating until lunch

On the eve of the event:

- ❖ Print attendance list featuring relevant logos and disclaimers
- ❖ Prepare printed publications to be handed out on the day
- ❖ Book photographer or colleague to take photos if needed (in compliance with GDPR)
- ❖ Book a streaming/recording service provider if needed (in compliance with GDPR)
- ❖ Arrange travel for organisers, experts and moderators and send reimbursement forms

- ❖ Prep presentations
- ❖ Check you've received all speaker presentations and there are no technical issues
- ❖ Ensure the availability of computers, projectors, screens, microphones, and a working internet connection (as required)
- ❖ Ensure the availability of paper, pens, flip charts, markers, post-it notes, name tags and tape (as required)
- ❖ Bring business cards if useful

After the event:

- ❖ Send a thank-you letter to participants, enclosing relevant materials
- ❖ Follow up with emails promoting your upcoming events

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