

D.T2.4.1 HOCARE2.0 KNOWLEDGE PACK

06.2020

FINAL VERSION

https://www.interreg-central.eu/Content.Node/HoCare2.0.html

Central Transdanubian Regional Innovation Agency Ltd.

06.2020







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1. The HoCare 2.0 project and objective of knowledge pack

The HoCare 2.0 project aims to deliver customer centered home care solutions by the use of co-creation method. Our partnership of 11 partners believes, the importance of home care is rapidly increasing, as by 2060 every third European citizen will be over 65 age. This means the "Silver Economy" is one of the fastest growing economic domains. However, a challenge for the sector is to deliver digital based innovative solutions that answer to real needs and are accepted by the older people. In many cases, these solutions are simply not used by seniors.

The HoCare2.0 project sees **co-creation** as a usefull method to overcome the above challenges. The co-creation method empowers **end-users** and allows them to be **involved in the development process** of the product or service. Involvement of end-users also ensures acceptance.

To reach our goal - delivering of innovative solutions - we work closely with Quadruple Helix actors, 1) we work closely with SMEs, Service providers, Academia and Seniors, through our established **Territorial Co-Creation Labs**; 2) developed **two Tools** that serve as guidance **for implementing** co-creation approach in product or service development with the elderly.

The present guidebook is the primary educational material for knowledge advancement of stakeholders about adopting co-creation approach. The Knowledge Pack should be used jointly with the HoCare 2.0 SME and Policy Tools.

The core objective of the knowledge pack is to prepare representatives of SMEs and Public service providers for initiating their pilot activities.

Therefore, the aim of the Knowlede Pack is to:

- ensure the basic understanding of stakeholders about co-creation





- strenghten knowledge of stakeholders about the co-creation process
- create awareness about the possibilities and challenges of the involvement of older people into the product or service development
- provide an overview for applying co-creation process step-by-step
- strenghten cooperation of Quadruple Helix actors (SME, Academia, Service providers, Seniors) through mutual learning

2. Co-creation

Co-creation gathered special attention from companies that aim to bring better solutions for customers. Thus, many co-creation initiatives have been launched and some have been successful, but for most companies in Central Europe, co-creation is a new phenomena.

But what is co-creation? (FMI: $Part\ 1\ Ch.1^1$). It is a new way of innovation management, a process which is characterized by the involvement of people into the development of new services and products, their ideas and feedbacks are welcomed. Although, opening up the innovation process of a company is scary, but the result that counts: new products, higher profit, new ways of thinking, new energy.

Co-creation can be divided into several stages.



¹ This refers to the relevant part and chapter of the SME and Policy Tools. FMI stands for "for more information"

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It starts with **preliminary activities**, where the creative environment is prepared and the team is selected. It is followed by **sharing**, where interpersonal links are created and knowledge is gathered. The second stage is **exploration**, where solutions are delivered. The last stage is **creation**, which is the realization of the idea and the designing of a prototype. The process is closed by **follow-up acitivites**. The present HoCare2.0 project adjusted the above structure to our specifc needs.

Altough, the process seems linear from this point of view, however, knowledge sharing and the creation of the outcomes are based on **constant reviewing** of what we delivered **and refinement** of it to bring better and more fitting outcomes. Therefore, the constant refinement always takes us a step closer to the desired product.

But **why** co-creation is beneficial for your organization? (*FMI: Part 1 Ch.2*) In the following table we summarize our arguments.

For SME's	For Service providers	
Create better products and services	Deliver better services to citizens	
Ensure your work is valued by and valuable for customers	Ensure the satisfaction of users of the services	
Help partners work with you more easily	Increase the transparency of the institution	
Increase participation of end users in the creation of products and services	Increase participation of end-users in the creation of the services, therefore, contributing to the participative goals of EU strategies.	
Become more transparent about roles, direction and progress	Increase the understanding of citizens and other stakeholders the roles, responsibilities and possibilities of the institution	
Increase the speed of response and delivery	Increase the speed of response and delivery	
Tackle your toughest strategic challenges	Tackle your hardest stategic challenges	

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Get a fresh perspective on your business	Receive users perspective on the new services	
det a fresh perspective off your business	Receive users perspective on the new services	
Get in touch with key trends and business	Get in touch with key trends and drivers of the	
drivers	provided services	
Extend your development team with specific	Ensure citizens satisfaction with the institution	
users	and its services	
Connect and bond with partners, customers	Reduce risks of the newly delivered services as	
	it was tested and developed with users	
Develop breakthrough new ideas	Bring cultural change to the organization	
Reduce risks; test products while developing	Have cost-effective services	
them		
Bring cultural change to the organization	Involve service users in the transformation of	
	your organization.	

Although we presented some really convincing reasons why to start a co-creation process with QH actors above, we suggest to consider some points before actually initiating a co-creation process (FMI: Part 1 Ch.3).

- Co-creation is usually applied when complex products are delivered. Therefore, we suggest that a company must overview ehether they have the proper management skills to mitigate the risks resulting from the complexity of involving multiple stakeholders.
- In addition, we provide some questions that should be answered before starting the process. If you think that your co-creation project is too far from the company's sweet spot, then maybe external support or externalization is needed. Sweet spot refers to the scope of a company's business routine. Six key areas must be evaluated:
 - Strategic domain: Is the project's outcome is in your company's current or future strategic domain? Is the project located within your organization's comfort zone?
 - Core competencies: Does your company has enough expertise than your competitors? Can you hire a new expert quickly enough to start the project?

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- Budget focus: Does the project has enough support from the management to back it financially? Do you have enough founding to bring the project to the end?
- Existing organizational structure: Do you have existing teams that focus on this market or technology?
- o Investment magnitude: Can your organization manage failure? Can you invest in this project without burdening other projects?
- Access to the distribution channel: Is your organization ready to distribute the project's outcome? Can you do it in a pace that will give you market advantage?
- The further the project goes from the organization's sweet spot, the better it is to involve external players to it.

Once decision is made to apply co-creation, one must overview what will be the roles of QH actors in the future co-creation process (FMI: Part 1 Ch.4).

Public service provider

- Refer to those who are implementing the services or products developed in the present project. They are the most important buyers of the innovation.
- Key responsibilities:
- Provision of access to the public market through public procurement Setting high level criteria to ensure the innovation will be also accepted by other actors of the demand side.
- Key engagement factors:
- Proving the benefits of the outcome product or services - for example better and more cost-effective service provision - can motivate them to engage with the project.

Industry/SME

- Refer to those who will eventually develop the product and will be responsible for supplying the market. The industry has also an important role in meeting customers of the market

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- Key responsibilities:
- Delivering a product that fits to the needs of the market and service providers
- Ensuring the transferability of the innovation to the market
- Key engagement factors:
- Access to market, for example through public procurement of innovation approaches
- Ensuring the intellectual property rights

Academia

- Refers to those who are researchers, engineers and other professionals with high level of specific knowledge in a certain field that is relevant for the product development
- Key responsibilities:
- Providing scientific solutions to problems that occur during the product or service development
- impact and effects objectively

- Key engagement factors:
- Access to each phase of product development

End-users

- Refers to those who will ultimately use the product or services developed.
- Users are the most important group to engage if we want long term success.
- Key responsibilities:
- Informing SMEs what they, and people like them, need from the products and services developed
- Participation in co-creation workshops, interviews, and others
- Identifying problems with existing solutions; generating ideas; testing prorotypes; diffusing product in market.

- Key engagement factors:
- Users can be difficult to reach, so engagement will often require collaboration with organizations of users
- Do not expect them to have an understanding of the details of management structures, project processes, etc except where this conflicts on their experience as users.

Although we have already provided overview about why it is beneficial to do cocreation for SME-s and Service providers, it is important to detail also what are the

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benefits and challenges of the co-creation process itself. Here, we summarized it as well (FMI: Part 1 Ch.5).

Benefits	Challenges	Solutions
Some groups and individuals	Size complexity: due to the	Experienced leader and
who do not normally have a	large number of stakeholders.	dedicated decision
'voice' become involved in	This may negatively influence	making discussions
negotiations and dialogue.	the management of the process.	
Different stakeholders can gain	The large number of players	Explain participants the
greater responsibility for	involved can lead to challenges	possibilities of your
various stages of a project	for the managerial team and for	organization, inner
development process; this	the organizational structure.	procedures to come to
increases their commitment.		common understanding
Greater opportunities for	Co-creation needs full	A lot of communication,
discussion and reflection with	transparency.	dedicated information
different stakeholders.		sharing platform
Being able to form links and	Co-creation is socially complex:	Emphatic leader
networks more easily, which	the personal characteristics of	equipped with effectice
will allow developers to share	stakeholders is complex.	team managing
information better than before.	Differences can counteract	measures
	collaboration.	
Being able to establish a	The skills for managing	Creation of authentic
dynamic course design process	collaborative design projects	space were all ideas are
as new linkages and lines of	are very specific and often	welcomed
communication are set up,	actors do not have experience in	
resulting in greater satisfaction	opening themselves to	
with your training programs.	collaboration.	

3. Co-creating with seniors

During the co-creation process, SME's and Service Providers must work closely with end-users. The seniors are considered as a challenging target group, therefore one

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must plan their involvement in advance. The challenges related to the senior's involvement can be experienced in three aspects: *involvement and selection*; *understanding the project*; *and structuring the process*.

Involvement and selection

- Early invovlement. Involve the eldery from the very beginnings to the process. This ensures they will have an understanding of what is going on, what are the objectives, what is their role and what we expect from them. However, they might lose motivation if they do not see why their engagement is necessary. In this case, explain mutual benefits.
- Mobility. It may be hard for seniors to attend to regular meetings far from their home.
- The right social networks should be used to recruit the elderly, if possible through organizations. Make sure the project is also explained to the organization as well.
- Seniors has limited capacity to work on the project. For those that have problems with motor or cognitive skills might be difficult to fully participate in the sessions.
- Access to advanced communication channels is often a barrier. Therefore, selection should be based on proximity and access to communication technologies.
- Involvement of specialists might be helpful.

Understanding the project

- Explain the project in the simplest way possible, use stories.
- Inform the elderly clearly what is expected from them. They may think that they are attending to a conference where passive participation is needed.
- Senior citizens might think that the co-creation process serves the interest of an SME to find new markets. Mutual benefits must be explained.
- Misunderstandings can happen, therefore participants should be encouraged to ask if they do not understand something.

Structuring the process

- It is difficult to mobilise the seniors on daily basis. This can be overcome by organizing





several shorther meetings and inviting them only to specifc work sessions. Then you must ensure they will catch up with what was happening in the meantime.

- We suggest to combine shorter work sessions with longer breaks or invite seniors to actively participate only in specific aspects of the journey.
- Inform the elderly in advance about the schedule of co-creation session. A clear structure at the beginning of the session assures less problems during the process.
- Each session should be structured with enough breaks to maintain attention.

In addition, general advices were also collected as well (FMI: Part 2 Ch.4).

General advices

- First, build trust. You can do it by asking questions about their life, how they live, what they worked etc. This will help you to understand them better as well.
- Seniors will feel empowered if you listen to their opinion. Value their contribution to the process. This increases their engagement.
- Stimulate group interaction. This helps seniors to understand better the other participants and vice versa which increases mutual trust.
- The facilitator should pay attention to group dynamics, as some people are more dominant than others which could lead to unilateral outcomes. In this case, the faciltiator should intervene more often by involving other participants more actively. (Campisi et al. 2018).

Applying the above suggestions will ensure that seniors will be valuable members of the co-creation process.

4. Applying co-creation methodology

The present chapter is the summary of activities of the *Part 3* in the Tools. For more details discover the Tools. Process map for SMEs and Public service providers is located in the Annex of the present Knowledge Pack (Annex 1; 2).





4.1. Preparation

Before starting the process, developers must carry out preliminary activities. These activities have been categorized into three steps: *preparing the environment* for knowledge creation and social bonding, *preparing the facilitator for leading* and *starting the process* and setting it on track including identifying goals, measures and outcomes.

Setting the environment:

The first step of co-creation is to set the right environment in which the team will work together. Ideally, the physical space is equipped with the right elements and a good atmoshpere that supports creativity. Rituals are introduced to form the symbolic space to foster authentic speaking and safe environment for discussion and idea generation.

Creativity is often killed by the form of space. Usual work spaces mimic the school class rooms, which distance "leaders" and "learners". However, a good environment supports social bonding, ensures smooth communication and maximizes interactions. Consider the following example:

Good practice example – Cocreate spaces of Philips

- Philips realized the importance of spatial design in innovation. They have created inspirational spaces which are dedicated co-creation areas. These spaces are designed to inspire people to think differently, while promoting creativity and collaboration. The environments have flexible areas, stimulating materials, and tools for different needs.
- Their CoCreate Space is designed for rapid prototyping. Their facilities offer everything necessary to challenge stakeholders in the early stages of innovation and encourage follow-through that results in complete concepts. The space also enables rapid prototyping by using various technologies.
- Building on the existing CoCreate spaces experiences, Philips also can recreate pop-up temporary cocreative spaces. Therefore, it provides place for creative thinking, building, testing and learning.

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- https://www.philips.com/a-w/cocreatorlab/homepage.html
- What we can learn from this? The right spaces are stimulating, peaceful, bright with natural light, spacious have flexible furniture, round tables, mix work and resting areas, equipped with ICT and prototyping tools

The experience of any environment is also a psychological one. We suggest to introduce rituals to establish an authentic, open and trusting environment. Rituals have positive effect on the team as well. How to do it? Organize chairs in a circle, and encourage participants to explain their concerns with honesty. These discussions help to express opinions and reflect. This creates a sense of sharing, mutual respect and empathy. These events become rituals once they are organized regularly.

Preparing the facilitator for leading:

Facilitators play a key role, they select participants, ensure team building, encourage discussions, be informed of all activities and outcomes, manage conflicts and the process. Therefore, they must be prepared for leading.

A good facilitator has the ability to lead the co-creation process with **PACE**. PACE stands for *presence*, *authenticity*, *courage* and *eco-centered mindset*. It is a general attitude that facilitators must practice during the co-creation process.





PACE, THE FUNDAMENT OF A SUCCESSFULL CO-CREATION PROCESS

Tips for practicing PACE:

- Assess the situation before acting. If something happens during the process, the best is to not react immediately. You may even let it go for a while, then when you see the events it triggers, act and steer back the process to the right direction. Then evaluate again whether the process is on track or not.
- Speak always honest with the team. Honesty, even if it means you may need to explain difficulties of the process, cultivates trust and increases engagement.
- Do not hide information from any parties, ensure transparency and communicate the goals.
- Ensure that every participant can contribute. Allocate tasks according to their capacities.
- Think always of the process goal, evaluate everything from that perspective. Encourage participants to do the same as well.

Dialogical practices have a great impact on the process. Having an effective dialogue is difficult. Dialogue is the combination of talking and listening. If our opinions and ideas, or prejudices or our background dominate in listening, we hardly listen at all. Therefore, one must listen with full attention, and in a state of silence.





Tips for ensuring high level of dialouges:

- Always speak with empathy and respect. If participants see that you are trying to understand their position they will accept your suggestions.
- Encourage participant to participate in discussions, do not let anyone out. Although, accept that sometimes people just simply do not have an opinion of a specific thing.
- Ensure that participants do not attach too much to their ideas. Just show them you can also through in ideas and do not care whether eventually that will be the solution for a problem or not. But this ensures participants will not feel discouraged, if their idea is not selected.
- Be patience with people, listen to their opinion always, and try to understand them.

Starting the process:

Co-creation is a like a small project. It has its participants that work together towards a goal. Therefore, the facilitator must select participants, create from it a team and define the scope of the project.

A project can't go on without participants. Finding the right participants is crucial for the process. Therefore, the facilitator must firstly carry out a *stakeholder analysis*. The Tools detail in depth how to select QH representatives and especially the seniors. As the team is selected, the facilitator must *understand their need*. It is necessary because this is how the facilitator can ensure the process will be beneficial for all parties. For this purpose various methods are suggested, from *stakeholder interviews* to *observation* and *focus group meetings*.

Building rapport with the participants is the next step. This is the first step of team building. But it is equally important to **socialize the team** as well.

As co-creation is a project the team the project's *success criteria* and *boundaries*. These factors can be also predefined by the leadership who initiated

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the process itself. Once the success criteria and boundaries are set, it is easier to navigate people through the process, as there is a frame in which they work. An additional taks can be to *create a mission statement* (can be also predefined) to reach a higher level of engagement and motivation of participants. It might be also usefull to define the *rules of engagement*. Facilitators can also start initiating the first *rituals* as well.

Preparation stage of the process closes with *holding an open speach*. It is necessary for setting the mood and mindset of participants towards the joint work ahead.

4.2. Knowledge creation

The actual work starts in the knowledge creation phase. The stage aims to identify end-user's requirements to answer what are the needs of seniors. After that, the user requirements are analysed. At the end of the stage, the team will know what needs should be addressed and a development path is set.

Co-creation is about gathering knowledge from external stakeholders. Therefore, the first step is to create a collective knowledge which will be the bases for prototyping.

The section is divided into 2 parts, *Identifying user requirements* and *Analysing user requirements*. We also provide *tips for facilitators* how to manage the process of collecting knowledge with the team and the users.

Identifying user requirements:

The purpose of this activities is to inspire the product designers at the starting phase of a project.





The first step is to define where the future solution is going to be used. *Mapping existing user journey* enables the team to identify how an already used product or service can be improved. This is done theoretically where a user persona is created with all the attributes of a typical user. Another technique is *shadowing*. Shadowing refers to the observation of end-users in their "every day" setting.

Good practice example – Shadowing (VitalTech)

- VitalTech worked on developing a solution that provides a more subtle way to monitor falls of the elderly but also tracking vital signs (heartrate, oxigen saturation, physical activity and sleep quality).
- They have examined products that were already in use on the market, by following elderly's activities and attitudes towards these other solutions. They have discovered, that a solution used in a specific senior center was actually not used, because the elderly felt embarrassed by it. This solution was designed as a pendant and reminding them to their health condition.
- Therefore, the team decided to take a special care of the look of the product that they design. The team created a smart watch that would be easier for seniors to use, while monitoring for falls.



Consider the following example for shadowing:

Another method for discovering the context of use is *diary study*. The drawback of this method is that it is self-reported. Therefore, one must explain to seniors what should be recorded.

Once the context is discovered it is time to deepen the knowledge and *explore the user's requirements*. This stage is based on quality interaction with the end-users.





First, we suggest holding an *ideation workshop*, where all participants are present. Here, the findings related to the context of use must be explained to foster understanding. As the initial ideas were collected, *interviews* can be organized with users, experts and others to have a better understanding of the need. In addition, having *focus group meetings* where the topics are discussed can be also organized.

Survey can be used to explore better what are the needs of the target group. To have a successful survey, involve a high number of target groups. Another method for exploring opinions beyond the team members is to **engage with extreme users**. The opinion of those users who are somehow specific can bring special perspective to the table and support the creation of better service or product.

The facilitator's role:

The facilitator's role

- The facilitator must ensure that every participant of the team will have something to contribute and their contribution is valued.
- Trust the team that they can work out every challenge on their own.
- Intervent only when its really needed, for example when interpersonal or process related conflicts emerge. However, it is adviced to not do that immediately.
- When tensions raise, the team might work even better as creative tension brings them forward.
- Have an open attitude towards problems and communicate that anything can be solved.
- Solving the issues should be generally done within the group, it cultivates trust.
- Monitor the process in three levels: emotions, team balances and process activities. The
 facilitator should take a supporting role in any of the dimensions, direct actions to change
 should be considered twice before acting.

Analysing user requirements:



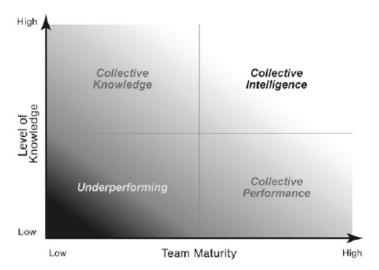


Once enough knowledge gathered, it is time to overview and analyse it. This enables designers to define a development path for possible solutions.

The facilitator should *evaluate the team's performance* in the performance/knowledge matrix. The matrix will enable the facilitator to asses how effective was the knowledge gathering stage and whether it is time to move on with analysing the results. According to the matrix, there are four scenarios for a team:

1) the team works well as a team and gathered enough knowledge (best case);

- 2) the team works well as a team, but not enough knowledge is gathered;
- 3) there is enough knowledge but the team does not cooperate well together;
- 4) the team is underperforming as a team and the produced knowledge is not enough either.



Each of the scenario requires from the facilitator different steps. However, the only truely negative scenario is no. 4, when radical interventions are needed, and the team can't "just" go on.

Once the team is ready to move on, the Tools provide a number of *methods* to be used *for analysing the user's needs*. End-users might be involved, but it is

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typically done internally with designers. The suggested methods are: *sticky notes on wall, mind maps, diagrams, affinity diagrams, asset maps* and *mood boards* which are common measures, and presented in more details in the Tools. For Public service providers we recommend *user requirement notation* method, to model and analyze user requirements in a graphical way.

4.3. Prototyping

Delivering a prototype is the main goal of the co-creation process. In general, prototypes can be used for **three different purposes**: communicating the outcome of the process; experimenting the features of the future solutions; and testing the conceptual models.

We suggest, before jumping into prototyping the future product, trying to look around in the field and *identify good practices* (benchmark). Examine products that are already in use and get inspired. The following methods are detailed in the Tools: *good practices*, *service safari* and *drawing up personas*. *Good practices* can bring solutions to some of the problems that the team faces with. *Service safari* means testing products, which can help to explore what is not convinient about and what is a usefull function of the solution. *Personas* can be useful once more to think through what features our product should have and how it should be reached.

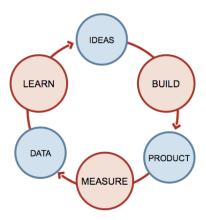
Both SMEs and public service providers need to deliver a *low-fidelity prototype*. Here, we detail seperately how they should do it, as service providers need to deliver a more refined concept, while SMEs should be able to create the actual product.

SME prototyping





SMEs should follow the *Lean start-up methodology* to develop the 1st prototype. Lean start-up is a non-linear product or service development process in which the designer team builds the first prototype after the ideas are generated. Then the product features and usability is scientifically measured from which data is generated. The analysis of data is leading to new knowledge and ideas, which restarts the loop for product development. Therefore, Lean start-up is a circle in which a product is constantly measured and refined.



When lo-fi prototype is delivered, involve the end-users to the evalutation. *Contextual interviews* and *citizen walkthroughs* are useful methods to do so. *Contextual interviews* are made in the environment in which the new solution or product is going to be used. *Citizen walkthroughs* are guided tests in not home setting, where the end-users are encouraged to make reflections on the product.

After end-user reviews prepare the second, *high-fidelity prototype*. The second prototype should be overviewed once more with users with similar methods.

Policy prototyping

Public service providers should prepare only a *low-fidelity prototype*. The reason is that evenatually the supplier will deliver the solution based on the prototype.





Low-fidelity prototyping enables service providers to turn concepts into simple tangible outcomes. The aim of this prototype is to present and test the main functions, the structure and processes of the future product, and it is also low-cost. The lo-fi prototype enables to clearify what evantually the team wants to be delivered, it is a lot easier to explain the needed solution or service once there is something visual prepared. We suggest to prepare paper based prototypes.

Involve participants to the evalutation process. *Contextual interviews* and *citizen walkthroughs* can be used to better understand the shortcomings of the lo-fi prototype. *Contextual interviews* are made in the environment in which the new solution or product is going to be used. *Citizen walkthroughs* are guided tests in not home setting, where end-users are encouraged to make reflections on the product.

4.4. Evaluation

Follow up activities are essential to the process as they ensure all conclusions are recorded and the process is jointly overviewed with the team. Therefore, it has two objectives:

- 1) Harvesting the knowledge. All the relevant discoveries and results are recorded.
- 2) *The refinement of the shared experience*. The team will remember to the positive outcomes of the process.

Three methods are used to evaluate the process. *Debrief* and *wrap-up* are done by SMEs and Service providers as well, while *follow-through* only for service provider.

Debriefing aims to explore the process from the perspective of individuals and the team. It takes place shortly after the process closes. The goal is to reflect on the three dimensions of the process (knowledge, interpersonal relations and emotional). Individual debriefs provide a channel to express participants' concerns

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without the team pressure. Team debrief is about validating the conclusions and reboot the interpersonal relations. When doing the team debrief, start with the negative factors and move towards the positive ones. Create a process map and identify key moments which helped the team reach the end of the process.

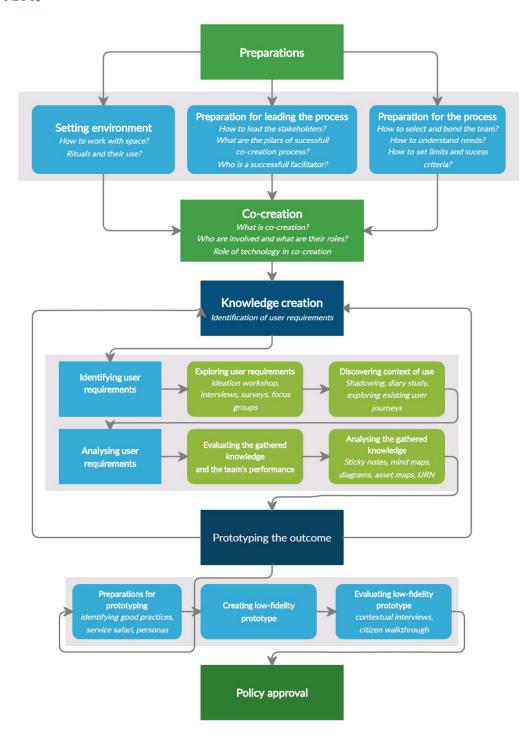
Wrapping up is the final discussion of the team after the process. A few approaches can be used, such as dialogue cirlces, peer feedbacks, intuition walks, and I like I wish methods. Each activity aims to support the conclusion of the process and having the final casual talks as a team. Wrap up also supports the refinement of the experience.

Follow through. Follow through activities connect the outcomes to the organization. The aim is to identify best practices, learning opportunities and relevant outcomes that can be used to integrated to the organization's culture. Follow through is based on the debriefs, the facilitator should analyse them to identify key individuals, best practices and transferable practices. It is equally important to identify what did not work well and what was challenging. The outcomes should be collected in a final report that can be provided to the organization's executive level. We also suggest to plan the implementation and create a strategic agenda.





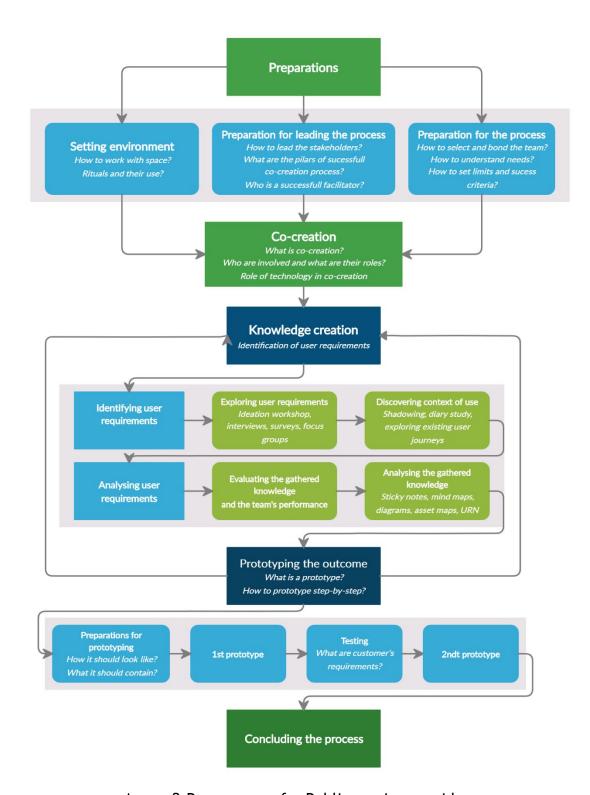
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Annex 1: Process map for Public service providers







Annex 2: Process map for Public service providers





Contacts

How to get invovled? Join the European community of innovators and develop products and services of tomorrow. Feel free to contact your local Co-creation Lab.

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[&]quot;The project is funded by Interreg Central Europe, supported by the European Regional Development Fund, co-financed by the European Union and Hungarian State."





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