

GREEN
DIGITAL
CHARTER



GuiDanCe

Support the coordination of cities' activities
via the Green Digital Charter

Work Shadowing visits

A practical guide

growth



Work shadowing visits

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Task 3.2.2

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CONTENTS

| | | |
|-------|---|----|
| 1 | Introduction | 4 |
| 1.1 | Green Digital Charter | 4 |
| 1.2 | GuiDanCe project | 4 |
| 1.2.1 | Objectives | 4 |
| 1.2.2 | Training activities | 5 |
| 2 | The basics of work shadowing visits | 6 |
| 2.1 | What is work shadowing? | 6 |
| 2.2 | Why join a work shadowing visit? | 6 |
| 2.3 | Why host a work shadowing visit? | 6 |
| 2.4 | The five steps strategy | 6 |
| 2.4.1 | The initiation | 6 |
| 2.4.2 | The matchmaking | 7 |
| 2.4.3 | The preparation of the visit | 7 |
| 2.4.4 | The visit | 7 |
| 2.4.5 | After the visit | 8 |
| 2.5 | Tips for a successful work shadowing visit | 9 |
| 3 | Organising a GuiDanCe work shadowing visit | 11 |
| 4 | Reimbursement procedure | 12 |
| 5 | Templates | 14 |
| 5.1 | Annex A: Work shadowing visit application form | 14 |
| 5.2 | Annex B: Final agenda of the work shadowing visit | 16 |
| 5.3 | Annex C: Work shadowing visit fiche | 17 |
| 5.4 | Annex D: Study Tour Feedback Report - VISITING | 18 |
| 5.5 | Annex E: Study Tour Feedback Report - HOST | 20 |
| 5.6 | Annex F: Expense claim form for work shadowing visit hosts and visitors | 21 |

1 INTRODUCTION

This booklet gives you guidance and support on how to use the peer learning method of 'work shadowing' as a tool for improving the implementation of your city's policies. It explains what work shadowing is and how you can successfully organise a work shadowing visit.

This booklet aims to shortly introduce the work shadowing methodology to city experts and decision makers. After reading this booklet you should be able to initiate, organise and conduct a work shadowing visit. For more information, resources and project examples, you can always visit the Green Digital Charter website and online-toolkit at: www.greendigitalcharter.eu

1.1 Green Digital Charter

The Green Digital Charter aims to improve the quality of life in cities through the use of digital solutions. It was first launched in 2009 by EUROCITIES, drawing on preparatory work by the city of Manchester and Clicks and Links Ltd. A large number of European cities - home to over 26 million people - have already committed to work together towards the aims and objectives of the Green Digital Charter. The charter is also supported by the European Commission.

Given the widely recognised need for technology and infrastructure-driven changes, it is even more important to highlight and exploit the social benefits of the digital economy. As the cities are entering a new stage in their evolution, they need to work towards becoming 'smart cities', where innovative technology applications are used to address the societal, economic and sustainable development challenges, improving the quality of life for all citizens.

The Green Digital Charter is a strategic initiative with the support of the GuiDanCe project in its current phase. The initiative adapts to current trends and in particular to the impact of information and communication technologies (ICTs) on the lives and needs of citizens.

1.2 GuiDanCe project

1.2.1 Objectives

The main aim of GuiDanCe is to support the coordination and further development of the Green Digital Charter (GDC) initiative. GuiDanCe works towards three main objectives:

1. Strengthen the engagement of GDC signatories to create a club of cities that work together towards their GDC commitments
2. Improve existing tools and services and their impact to GDC signatories
3. Promote GDC signatories' activities in and outside the EU

1.2.2 Training activities

GuiDanCe training events consist of both on-site and online training with the participation of experts from signatory cities. Training events focus on specific technical and organisational drivers and barriers for the implementation of the GDC and train city practitioners on selected topics, projects or challenges common to GDC signatory cities. Three different categories of training (with different characteristics) will be organised:

1. On-site training
2. Work shadowing visits
3. Online training (webinar)

For the work-shadowing visits, themes will be chosen during the course of the project in close consultation with the EURO CITIES Knowledge Society Forum members and according to the expressed needs of the signatory cities. External trainers or experts (maximum 1 per pair of visits) can be invited in an effort to increase the level of knowledge exchanged. From an organisational point of view:

- Visits content: The detailed content of the work shadowing visits will be decided by the cities involved;
- Target group: Local government representatives (mainly technical officers) as well as their local implementation partners (e.g. City owned companies);
- Trainers/Experts: Key technical and political persons from the two cities will participate in these events. Financial resources have been earmarked for fees for external experts;
- Place: Work shadowing visits will be organised in the selected signatory cities;
- Size and timing: Two/three-day events in the host city with up to 5 participants each.

2 THE BASICS OF WORK SHADOWING VISITS

2.1 What is work shadowing?

Work shadowing is a method to learn and exchange professional experience and knowledge. It involves one or two persons from one city spending a period of time with one (or more) expert(s) from another city working in the same field or on a similar project, observing what they do in their professional role. The aim is to facilitate a transfer of expertise by *observing first-hand how things are done elsewhere, thus, providing inspiration and new ideas of working methods*.

The key information and best recommendations for organising a successful 'work shadowing visit' can be summarised in an easy to follow five steps strategy:

1. Initiation
2. Match-making
3. Preparation of the visit
4. The visit
5. After the visit

2.2 Why join a work shadowing visit?

Work shadowing allows the visitor to work alongside a person with similar responsibilities in another city. The possibility to observe directly, ask promptly and discuss ideas on site makes you gain experience and fresh insights into specific professional roles and the methods employed therein. This can be useful when new tasks or methodologies are introduced in a professional field. By observing a host city with greater experience and/or in a different institutional setting, the work shadowing method allows 'to see behind the curtain' into a single professional role. Due to the intense time the participants spend together, the visitor can develop a deeper understanding of the methods and strategies used by the host.

2.3 Why host a work shadowing visit?

Although a work shadowing visit is usually focused on the host assisting the visitor, there are many benefits for the host as well. Introducing your field of work, explaining your tasks and how things work in your institution you develop your own skills and reflect on your day-to-day work. Answering your visitor's questions, discussing different possibilities might give you ideas how to improve your strategy, your projects and/or your methods.

2.4 The five steps strategy

2.4.1 The initiation

A work shadowing visit could be initiated by either host or visitor. A city willing to share its experience in a specific field could offer a work shadowing opportunity to other peer

cities. However, it might be the visitor contacting another city/professional experienced within a field of interest asking for a work shadowing possibility.

You can find the right shadowing partner by contacting a city, that - as you know - is working successfully on a similar topic like you do, within networks you are a member of (e.g. EUROCITIES), or by searching for expertise in a specific topic.

2.4.2 The matchmaking

The right visitor-host matchmaking is essential for a successful and fruitful work shadowing. As mentioned before, this peer-learning method is used where two parties spend most time with each other and therefore, personal chemistry will play a greater role than in other methods. Ideally, the parties are already familiar with the work of each other and might even know each other personally. However, this is not a pre-requisite for a successful work shadowing. What is important is that the professional roles and responsibilities, the institutional framework and the level of expertise are a close match. It is also helpful to consider the language barrier: understanding the language of the host will obviously aid in achieving beneficial outcomes. Furthermore, it might be beneficial if the parties define a concrete topic or project to discuss during the visit together as discussions otherwise might be rather broad and general.

2.4.3 The preparation of the visit

It is important that the visitor describes as thorough and specific as possible the initiatives/projects they need help with. To achieve this, a two to four page document outlining professional challenges and learning objectives should be prepared and submitted to the host adequately before (ideally two months prior to) the visit.

For the host, it is essential to understand the visitor's needs and aspirations. The document sent by the visitor should be used to tailor the programme of the visit as much as possible.

A work shadowing can last three days on average, but the duration can vary depending on the visitor/host team's needs and time constraints. A work shadowing involving politicians for example could be much shorter because of busy schedules.

To facilitate the visit for the visitor, the host should provide a travel and accommodation guide as well a draft agenda prior to the visit and give organisational support. The visitor should have the possibility to prepare in detail questions or issues to be discussed. Therefore, it is necessary to get in advance information about other persons, departments or external stakeholders involved in host city's energy and climate policies.

2.4.4 The visit

In case visitor and host don't know each other the programme should allow an initial introduction, describe ones skills, tasks and responsibilities and further clarify the visitor's needs.

The following days can look very different from visit to visit as the programme is fully dependent on the topic/of the visit. It might cover an introductory presentation by the host of the specific topic/project, the visitor's participation in relevant meetings, site visits, personal meetings between the visitor and other stakeholders, to give just some examples. The final programme is up to the host's creative ideas and the visitor's needs.

During the visit, the visitor should take advantage of the host's experience: ask questions, ask for more information, and explore new ideas and ways of working in his/her home city. This will help to get as much as possible out of the visit. However, it is of great importance that the visitor is an attentive listener as well.

For the host, it is important to be as accommodating as possible: answer questions, describe clearly and thoroughly roles, responsibilities and working methods, help the visitor to explore new ways and options of working adaptable to the situation at home.

The other way round, the host should also remember to take advantage of the visitor's experience and ask for recommendations to improve his/her city's projects and ways of working.

2.4.5 After the visit

Back home, the visitor might need some time to digest the new ideas, information and the knowledge gained. Therefore, it might be helpful to minute the shadowing visit and draw conclusions regarding the integration of experiences into the work of his/her own city. It might be a good idea to present these findings and ideas to relevant colleagues, institutions and departments through bilateral meetings or a workshop. Last but not least, a short summary of the visit sent to the host shows that the visitor appreciated the visit.

As said before, the exchange with the visitor could provoke new ideas on the host's side as well. If that is the case, you should discuss them with your colleagues and think about how they might improve your city's work.

In order to apply the new knowledge gained in their local context the cities need to carry out 'transferability analyses'. In other words, they have to investigate whether it is possible to 'transfer', the new organisational structures and working methods as such or just certain aspects and elements of them. For this purpose they could, as an example, use transferability methodologies like the ones adopted in the TIDE transport project (<http://www.tide-innovation.eu/en/Results/TIDE-Transferability-handbook/>) and the EPOMM platform (<http://www.epomm.eu/index.php?id=2693>). TIDE project has developed a method for assessing the transferability of innovative transport measures, while EPOMM has established a standardised policy and best practice transfer process, through which exchange partners build a transfer roadmap for the successful transfer of the policy from the 'exporting' partner to the 'importing' partner.

2.5 Tips for a successful work shadowing visit

Tips for visitors

- Describe your need for support as thoroughly and detailed as possible, while keeping in mind the time constraints of the host.
- Prepare questions and aspects you want to talk about, ask for stakeholders you want to meet and/or sites you want to visit.
- Think about possible improvements of the work you observe and discuss it with the host.
- Make sure you take new insights and ideas home with you, take notes and pictures, ask for informational material, etc.
- Work-shadowing can be the start of a close cooperation. Keep the host updated not only regarding the results and improvements from the visit, but about your work on climate and energy issues in general.

Tips for hosts

- For the success of the visit it is essential that you understand the needs of the visitor. In case you are not sure if you got it right, get back to the visitor and ask for clarifications.
- Try to put together an interesting programme that addresses the visitor's needs. Discuss the agenda prior to the visit with the visitor to make sure you both agree on the content and its contribution to the visitor's questions.
- Select a date with regards to the availability of colleagues and/or other stakeholders and/or meetings held in case you think this might contribute to better answering visitor's questions.
- Encourage questions and feedback from the visitor on the work you present, ask for recommendations for improvements.
- Take advantage of the visitor's experience to get a new insight of your own work.
- Work-shadowing can be the start of a fruitful cooperation. Keep the visitor updated with your work in climate and energy issues.

Checklist

Eight weeks prior to the visit

- Visitors(s) and host(s) have been identified and contacted each other.
- The visitor prepared a short description of central issue(s)/project(s) for the visit and sent it to the host.
- The host sent out a travel and accommodation guide.

Six weeks prior to the visit

- The host prepared a list of participants and draft agenda that suits the needs and focus of the visit and sent it to the visitor.

Four weeks prior to the visit

- Visitor booked travel and accommodation.
- Host assured availability of other persons participating in the visit (if any).
- Host checked that meeting venues, restaurants, interpreters (if needed) etc. are booked and available for the visit.

Two weeks prior to the visit

- Agenda is finalised and sent to the visitor.

After the visit

- Visitor elaborated a short summary of the visit and presented findings and ideas to relevant colleagues, institutions and departments.

3 ORGANISING A GUIDANCE WORK SHADOWING VISIT

In the frame of GuiDanCe project, organising a work shadowing visit consists of the following steps:

| Steps | | Related documents | Actions |
|---|---------|--------------------|---|
| Apply for a work shadowing visit | | Annex A | Experts in both visiting and host city fill in an application in which the cities explain the date and purpose of the visit as well as the indicative programme and expected outcomes. <i>The application must be submitted for approval to the GuiDanCe project.</i> Approval will depend on the content and expected outcomes of the requested visit and is subject to the availability of funds for training in the project. |
| Finalise the agenda of the visit | | Annex B | As the date for the work shadowing visit approaches, the two cities finalise the programme of the visit. <i>The final programme of the visit must be submitted to the GuiDanCe project for reporting reasons.</i> |
| The work shadowing visit takes place | | Annex C | The experts from both hosting and visiting cities must keep all original documents and invoices that <i>will be submitted to GuiDanCe project for the reimbursement procedure.</i> Experts must fill in the participants list and attach a couple of pictures from the visit. <i>The list and pictures must be submitted to the GuiDanCe project for reporting reasons.</i> |
| Report about the results of the visit - Ask for reimbursement | Visitor | Annex D Annex F | Visiting city will be requested to <i>submit to the GuiDanCe project together the visitor feedback form and the expenses claim form along with the supporting documents and invoices.</i> Visiting cities can claim up to 700 euros per work shadowing visit for costs relevant to it: airplane/train tickets, hotel, lunch/dinner, local transportation, etc. |
| | Host | Annex E Annex F | Host city will be requested to <i>submit to the GuiDanCe project together the host feedback form and the expenses claim form along with the supporting documents and invoices.</i> Host cities can claim up to 100 euros per work shadowing visit for costs relevant to it: lunch/dinner, local transportation, etc. |

4 REIMBURSEMENT PROCEDURE

GuiDanCe project will be able to reimburse up to €800 to contribute to the organisational costs such as catering, room rental or local transportation (up to €700 to the visiting city experts and up to €100 to the host city and/or host city experts).

Once a visit has been agreed, the GuiDanCe team is available to discuss if proposed costs are eligible or non-eligible. The cost of the staff time is not eligible and must be covered by the participating cities.

Please remember:

Before and during the visit, ask for and keep all your invoices, in particular:

- Ask for an invoice when purchasing your flight.
- Make sure to keep your boarding passes (for **electronic boarding passes**, save them or make a print screen).
- Local transports and dinner: keep all your invoices and tickets.

What we DO NOT cover: changes in your travel plans, extra accommodation costs, extra luggage, parking at the airport, travel agency costs, internet or phone costs, personal expenses.

After the visit, fill in the expense claim form attached with the correct figures of your invoices. For *currency translation*, please use the official European Commission website (http://ec.europa.eu/budget/contracts_grants/info_contracts/inforeuro/inforeuro_en.cfm).

- Fill one form per person if the expenses were incurred personally.
- If you have to present your personal expenses to your municipality, the municipality will reimburse you according to its ordinary procedure and will later have to claim cost to EUROCITIES in the expenses claim form.
- If the municipality assumes your expenses directly, the municipality will also have also to claim costs to EUROCITIES (specifying details of participants).

Since the costs will be directly assumed by one individual or the municipality, they don't need to be invoiced to EUROCITIES. EUROCITIES will pay the eligible expenses you will state in the expenses claim form.

- Attach all the scanned version of your invoices (including boarding passes and tickets) to the form. Do not forget to indicate your **IBAN and BIC/Swift code (no bank account number) and to sign the expenses claim form.**
- Send an electronic copy of the form + invoices by email to the GuiDanCe team (Nikolaos.Kontinakis@eurocities.eu, Edith.Recourt@eurocities.eu) for validation (within the 10 days after the study visit) **together with your feedback report.**

- Once you have received validation, send the original expense claim form and the original or certified copies of the invoices by mail to the following address:
EUROCITIES, Nikolaos Kontinakis, Square de Meeus, 1 - 1000 Brussels, Belgium.

The payment will take place around 3 weeks after the validation of the electronic version of the form.

5 TEMPLATES

These forms can be found online in: <http://bit.ly/26jm0YK>. Each time the respective forms are completed, please email them to the GuiDanCe team (Nikolaos.Kontinakis@eurocities.eu, Edith.Recourt@eurocities.eu).

5.1 Annex A: Work shadowing visit application form

This form should be completed at least a month ahead of the visit. The participating cities will draft the final agenda on the basis of this form and their correspondence and share it with the GuiDanCe project team.

(Visiting city)

is interested in visiting

(Host city)

1. Reflection of the situation in visiting city

Please describe in a few lines the situation in the visiting city, the challenges you are facing, why you think a work shadowing visit would be beneficial, and preliminary plans you have for implementing change.

2. Thoughts on situation in host city

Please describe in a few lines what attracted you to the host city and its initiatives, what you think you can learn from them, differences between the visiting and host cities and how this may pose a challenge in the transfer/adoption of their best practice examples.

3. Main learning interests

Please describe in a few lines the reasons for requesting this visit (motivation, knowledge needs, any particular project or programme from the host city you would like to learn from, desired outcomes and results and indicate how you will apply the results in your own city upon your return).

The more details you provide the easier it will be for the host city to prepare an agenda that responds to your interests and needs.

4. Questions

Please propose at least 3 questions you have for the hosting city. For example: how is the project financed? What are the evaluation criteria?

-
-
-


5. Persons involved

Please provide an indicative list of the persons (name and title) that will participate in the work shadowing visit from both cities

| Visiting | Host |
|--|---|
| <ul style="list-style-type: none"> • • | <ul style="list-style-type: none"> • • • |


6. Additional comments

7. Names and signatures of the applicants

| Visiting | Host |
|---|------|
| | |
|  GuiDanCe has received funding from the EU's Horizon 2020 research and innovation programme under Grant Agreement No. 653640 | |

5.2 Annex B: Final agenda of the work shadowing visit

Each agenda line should contain a brief description of the work that the experts from the two cities will perform together or the topic that will discuss or the project/site/building they plan to visit.

| | | |
|--|------------------|--|
|   GuiDanCe Support the coordination of cities' activities via the Green Digital Charter | | Agenda of the work shadowing visit <V city> visiting <H city> <Dates> |
| Day 1 | <i>Morning</i> | |
| | <i>Afternoon</i> | |
| | <i>AOB</i> | |
| Day 2 | <i>Morning</i> | |
| | <i>Afternoon</i> | |
| | <i>AOB</i> | |
| ... | | |
| | | |
| | | |
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5.3 Annex C: Work shadowing visit fiche

This fiche is necessary for the reporting purposes of GuiDanCe project to the services of the European Commission. For the event pictures, please provide a short caption for each one and send the files as image files.

| | | | |
|--|---|--|-----------|
|   GuiDanCe Support the coordination of cities' activities via the Green Digital Charter | | Work shadowing visit <V city> visiting <H city> <Dates> | |
| Visiting experts | Name | Organisation | Signature |
| | | | |
| | | | |
| | | | |
| Hosting experts | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| External experts | | | |
| Event pictures (to be sent separately) | Picture 1: ... Picture 2: | | |
|  GuiDanCe has received funding from the EU's Horizon 2020 research and innovation programme under Grant Agreement No. 653640 | | | |

5.4 Annex D: Study Tour Feedback Report - VISITING


This short report can help you debrief the visit to your organisation, inform us of the usefulness and the results of the work shadowing visit and is necessary for the reporting of GuiDanCe project to the European Commission.

(Visiting city)

visited

(Host city)

| | | | | | | |
|---|-----------|------|--------------|------|-----|----------|
| Dates of the visit | | | | | | |
| Content: | | | | | | |
| Sessions | Very good | Good | Satisfactory | Poor | N/A | Comments |
| Day 1 | | | | | | |
| Day 2 | | | | | | |
| ... | | | | | | |
| Objectives: taking into account your objectives, did the visit meet your expectations? | | | | | | |
| Outcomes: what are the main outcomes of the visit? Which policies or projects did you find most interesting? | | | | | | |
| Follow-up: are you thinking of following-up this visit? How? | | | | | | |
| Transferability | | | | | | |
| What will be the impact of the visit in your city? | | | | | | |
| Which practice from the host city could potentially be applied back home? | | | | | | |

| | |
|---|------|
| Short action plan: Can you describe at least one action that you are going to implement back home in order to transfer what you learned during the work shadowing visit? | 1... |
| | 2... |
| Additional comments: | |
|  GuiDanCe has received funding from the EU's Horizon 2020 research and innovation programme under Grant Agreement No. 653640 | |


5.5 Annex E: Study Tour Feedback Report - HOST

This short report can help you debrief the visit to your organisation, inform us of the usefulness and the results of the work shadowing visit and is necessary for the reporting of GuiDanCe project to the European Commission.

(Visiting city)

visited

(Host city)

| | |
|---|--|
| Dates of the visit | |
| Number of participants | |
| Main topic/s covered during the visit | |
| Taking into account the stated objectives of the visiting city, do you think the visit met their expectations? | |
| What were your general impressions of hosting this visit? What would you do differently next time? | |
| As the hosting city, did you learn anything from the visiting city? If yes, will you be able to apply such knowledge and information in your work? | |
| As the hosting city, did you have any objectives for the visit (e.g. learning or cooperation objectives)? If so, were these objectives met? | |
| Additional comments | |
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