



GREENGAGE

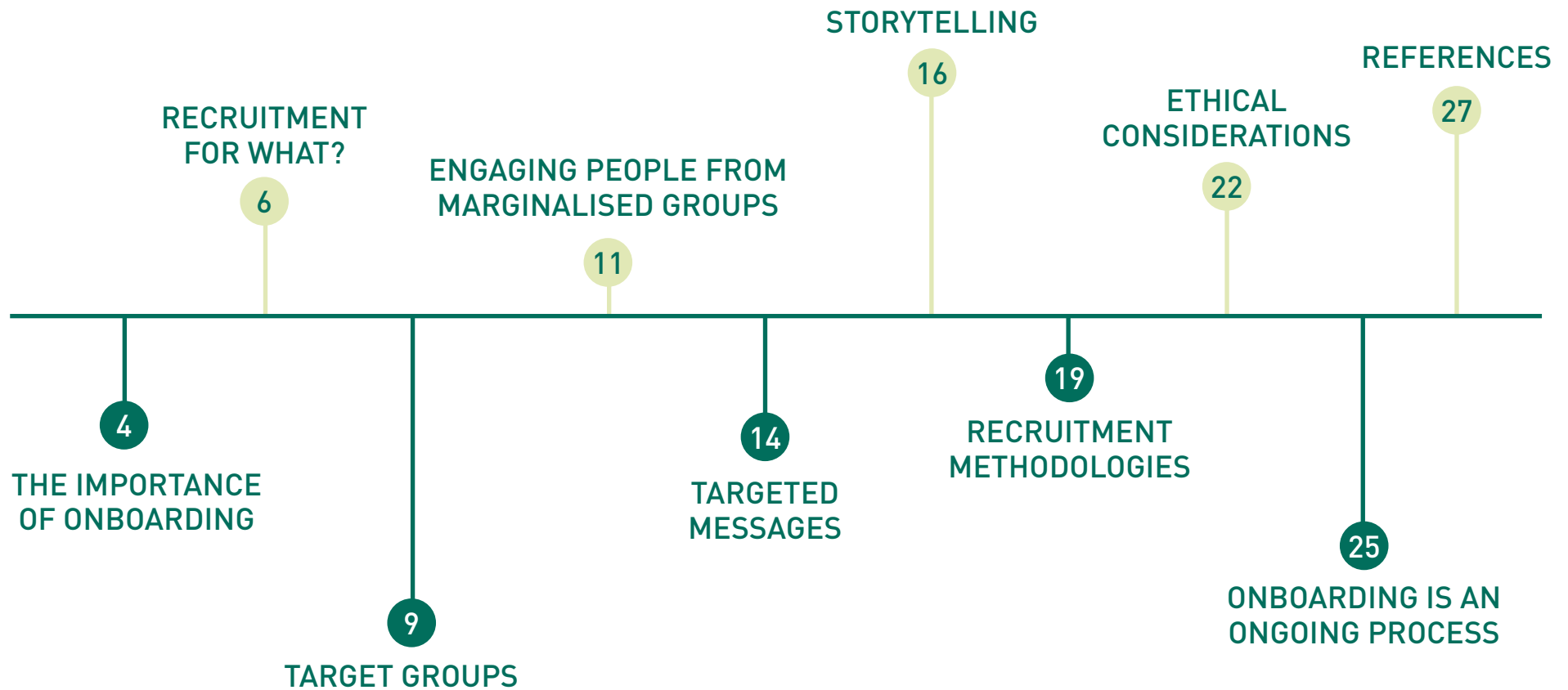
ENGAGING CITIZENS - MOBILIZING TECHNOLOGY - DELIVERING GREEN DEAL

GUIDELINE ONBOARDING

WHO IS THIS
MATERIAL
INTENDED
FOR?

Pilot owners, pilot leaders or anyone interested in knowing about recruitment and onboarding for a GREENGAGE observatory.





1

THE IMPORTANCE OF ONBOARDING

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In this material, we will use the term onboarding rather than recruitment as it better suits the co-creation and ethical approach that informs GREENGAGE and its methodological framework. Onboarding is when target groups learn about the GREENGAGE observatory (GO) and how they can actively participate. It implies engaging identified groups in a joint endeavour. With the onboarding, we want people to decide to join the GO activities.

Understanding and foreseeing barriers to participation and the different possible participant motivations is crucial. The onboarding of participants is not just a step but a vital process that lays the foundation for fruitful collaboration and sustainable relations in a citizen science initiative. These activities set the base for future engagement in the GREENGAGE observatory activities and set the ground for building interest through future engagement activities.



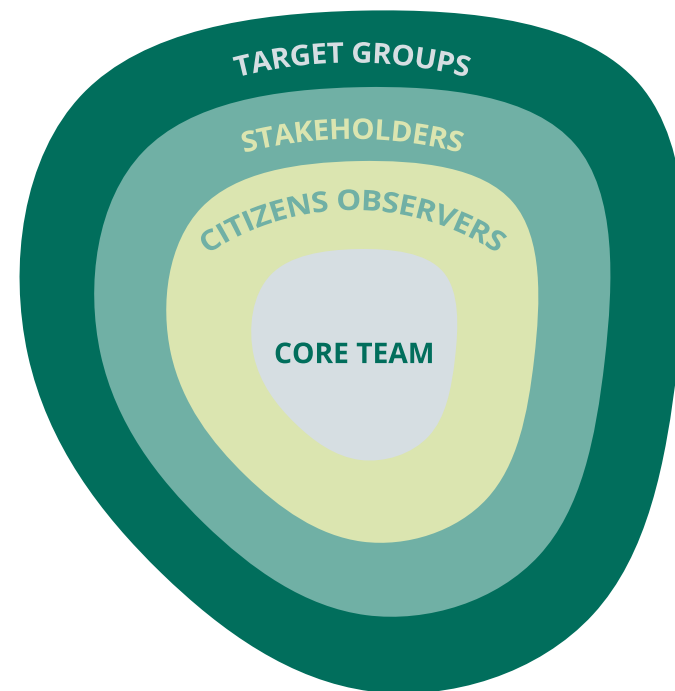
2

RECRUITMENT FOR WHAT?

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It is important to let potential observatory participants know about the various ways they can participate and the time they might need to commit in the future for each option. An understanding of the barriers, concerns, and expectations of participants about the goals and activities might help participants make informed decisions regarding their commitment to the observatory (Land-Zandstra et al., 2021). An essential part of the onboarding is to find the correct task that fits participants' interests, skills, and time availability so participants can understand how they can contribute and what they may expect as a result of their participation.

The initial onboarding activities aim to bring the participation of a core team. *A core team in a GREENGAGE observatory refers to members who enable and lead the observatory's operation. This is why the recruitment and composition of the core team need to be carefully prepared. On one side, it needs to onboard people with skills and knowledge that suit the GREENGAGE observatory's objectives. On the other hand, it must ensure that it includes all the perspectives relevant to the planned citizen science initiatives.*



The core team provides more in-depth analysis and is involved in strategic direction. The composition and roles of the core team can vary depending on the specific goals and focus of the GREENGAGE observatory. Some of the possible functions of the core team of an observatory are:

- Engaging and involving more community members and facilitating participation and data collection.
- Help to ensure that data collection, analysis, and reporting activities are organised and on track.
- Help manage data collection, ensuring its quality, security, and accessibility for analysis and reporting.
- Communicating observatory findings to citizens' observers, public opinion, policymakers, and other stakeholders.
- Developing and implementing governance structures and guidelines for the observatory operations and initiatives.

Some intended participants might find it more suitable to join the observatory as citizen observers. That is perfectly fine. By citizen observers, we mean those participants who will primarily have a central role in specific data collection, monitoring, analysis and/or communication activities. This might imply, among other activities:

- Monitoring, reporting and documenting events, situations, or changes in their community or environment.
- Assisting in verifying the accuracy and reliability of data collected by other observers.
- Engaging with the local community to raise awareness about the observatory's work and encourage participation.
- Engaging in advocacy efforts based on their observations and data to influence policies or actions by relevant authorities or organisations.



Some helpful questions to guide you in the initial onboarding activities are:

- What are the tasks to be done in the GO at this stage?
- What skills do you need in the GO at this stage?
- What roles could the core team members take on? (e.g. managers, researchers, citizen scientists, communication) Are there different roles for each use case?
- How will you communicate with the core group?
- Will the recruitment be ongoing, or will there be different phases when people can be onboarded?



3

TARGET GROUPS

TARGET GROUPS

The Quadruple helix stakeholder engagement is a common approach to identifying relevant target groups. It mingles public institutions, private organisations, academia and citizens. The specific selection of pertinent target groups responds to the objectives and opportunities identified in the local context.

Start by identifying the target groups you want to bring on board primarily. When doing so, determine the skills, qualifications, and commitment level you're looking for in potential volunteers.

Each target group might have different motivations and interests. Understanding citizens' motivations, aspirations, and attitudes will help you define and adjust the onboarding strategies.

Motivation is typically described as intrinsic and extrinsic. Intrinsic motivation is enjoyable, fulfilling, and satisfying, while extrinsic relies on external rewards. Different motives usually coexist, as participants might have various reasons for participating in a campaign. You can see other ways to understand motivation, as described by Nov, Arazy, & Anderson (2011).

Further reading

[Maximizing engagement in citizen science, moving to seventh level](#)

[A methodological approach to co-design citizen science communication strategies directed to quadruple-helix stakeholders](#)

Collective motivation	The participants see the project aims as significant.
Hedonistic/intrinsic motivation	Participation is enjoyable, fun, and brings pleasure.
Norm-related motivation	The participant hopes for positive responses from friends, family or workmates.
Motivation based on reward / extrinsic motivation	Participant joins for concrete benefits (reputation, contacts).
Collective identification	The participant identifies with the group, its norms and its values.

Taken from: Veeckman, C., Talboom, S., Gijssels, L., Devoghel, H., Duerinckx, A. (2019). Communication in Citizen Science: A practical guide to communication and engagement in citizen science. SCIVIL, Leuven, Belgium.



4

ENGAGING PEOPLE FROM MARGINALISED GROUPS

Engaging people from marginalised groups

Onboarding people from marginalised groups is a priority that aligns with equity, diversity, and inclusion principles, living in the GREENGAGE observatory spirit. Therefore, who belongs to a marginalised group and should be particularly considered in the onboarding activities needs to be defined when shaping the citizen science initiative. Diverse perspectives and experiences can enrich its activities and make it more representative of the community you aim to serve.

Research has shown that a generic approach in onboarding (e.g., open calls) does not always result in a more diverse group of participants (Brouwer & Hessels, 2019) (Dyke et al., 2016). A more nuanced onboarding strategy that tailors messages to specific target audiences aligns better with explicit inclusive onboarding.



You might decide to work with a singular underrepresented group, a case in which you will have to build in their expectations, knowledges and needs as part of the design. You might also find local partners to reduce participation barriers. You could search for social, communitarian or welfare local organisations and local gathering places (coffee places, communitarian centres, libraries, language courses) where an identified underrepresented target audience might convene or attend.



Further reading

[Citizen science – engagement and empowerment](#)

[Inclusivity in Citizen Science Workshop](#)

Some helpful questions to check on the engagement of marginalised groups are:

- Who are usually marginalised groups in the context of your aim, use case or geography?
- Who are the anchors or community organisations working with groups from diverse backgrounds in the area of interest?
- How do we consider equity, diversity and inclusion when onboarding a specific group? (e.g. achieve equal representation in different roles).
- How can you attract those not engaged in environmental debate, citizen science or civic action?
- What are these people's concerns and priorities for themselves, their families, and their communities?
- Have we used inclusive language in words and imagery that makes people feel represented?

Is there anything we can do to include those who are still excluded? If you or your team doesn't have the capacity (e.g., resources and people) to support onboarding people with respect to their specific life situations, you need to reflect on the ethical and practical implications for your observatory.



5

TARGETED MESSAGES

Further reading

[Communication in Citizen Science: A practical guide to communication and engagement in citizen science](#)

TARGETED MESSAGES

In GREENGAGE, communication starts with profoundly understanding who we want to engage with. Your key messages should convey the purpose, benefits, and importance of the GO for each identified target group. Communication should have a precise framing and be transparent.



When developing clear and compelling messages, you might find it helpful to explain the unique aspects and benefits of participating in the GREENGAGE observatory. These messages should resonate with your target audiences.

When creating engaging messages, consider to:

- Appeal to values important to your target audience (e.g., livelihood, sustainability, mobility, heritage).
- Create a sense of belonging by conveying that participation in the GREENGAGE observatory means becoming part of a larger, supportive community with shared goals and values.
- Sketch a vision of the future by describing a compelling vision of what the community could become with the active participation of its members.
- Foster a sense of local pride by highlighting what makes the community unique and why it's worth investing in.
- Appeal to curiosity, entertainment and fun. Create a story.

If possible, test your messages with a sample audience to ensure they evoke the desired response before launching a full-scale campaign.

6

STORYTELLING

STORYTELLING

Storytelling is the art of telling catchy stories, using narrative elements like characters, atmosphere and conflicts to convey a remarkable message to the target audience. The main goal is to connect emotionally with the audience through the story so they can grasp the message more deeply. The following are the most common elements to consider when creating storytelling in a specific context.

HISTORY

History is used to describe the critical moments of an event that people can recognise as part of their history. You can also describe a neighbourhood, region, or city and, through a narrative, expose the problems they want to solve and how they affect their inhabitants, the environment, or other identified actors.

Values highlight the daily actions and the evolution of the project on a day-to-day basis, with its difficulties and achievements. It is vital to emphasise the values identified as most relevant for each context.

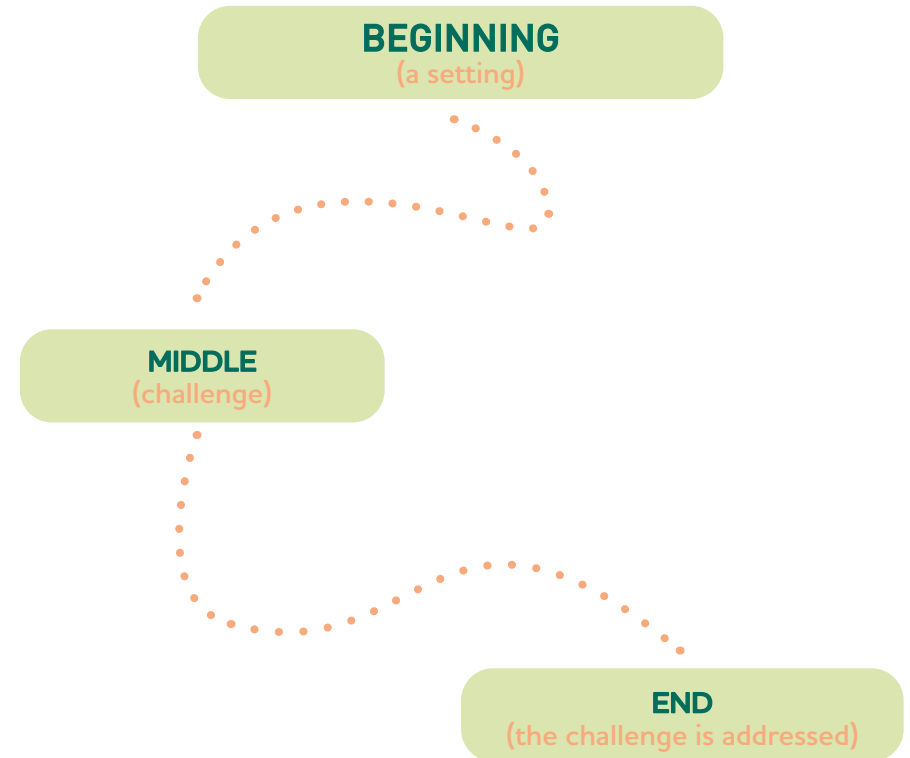
VALUES

CHARACTERS

Characters are a means of including personal stories. The introduction of characters in storytelling tells the lives and experiences of people close to the local scenario to make readers identify with them and motivate them to participate.

Crafting a narrative structure is a fundamental step in storytelling for citizen science projects. It usually has a beginning (a setting), a middle (where a challenge is displayed) and an end (where the challenge is addressed, and the journey makes sense). Compelling stories need a conflict or challenge. You can describe the obstacles or issues your citizen scientists face. This could be the problem you want to address a scientific question, a significant barrier to achieving the project's goals. This conflict creates tension and keeps your audience engaged.

Further reading
[Storytelling for citizen science](#)



7

RECRUITMENT METHODOLOGIES

RECRUITMENT METHODOLOGIES

Each recruitment methodology has its strengths and weaknesses, and the choice of methods should align with your observatory's goals, target demographics, and available resources. Combining multiple methods may provide a more well-rounded and effective recruitment strategy. Also, ongoing assessment and adaptation are essential to ensure the success of your recruitment efforts.

For any strategy, you might want to craft a compelling call to action, a clear, engaging, and concise message that seeks to motivate potential participants to join the observatory. You can highlight the benefits of volunteering (i.e., personal development or gaining new skills) or stress more collective benefits (e.g., contributing to a joint cause). There are different strategies for inviting participants, and you might want to choose several of them to maximise the overall impact of the onboarding.

Encourage current members to refer friends, family, and acquaintances. This is useful when already having contacts with local organisations or existing members.

Organise recruitment events where current members can invite potential new participants.

- Relies on personal connections and trust.
- Can attract people who are already interested in the observatory's mission.
- Limited reach compared to other methods.
- May lead to a less diverse group of recruits.

WORD-OF-MOUTH

OPEN CALLS

They are used to reach a broad audience. Some of the most common channels are social media, websites, and local community bulletin boards.

- These strategies are widely accessible to the public.
- May result in a high volume of applications that require further screening.
- There is limited control over the demographic makeup of applicants. It is vital to encourage people from diverse backgrounds to apply, as mentioned earlier in the section devoted to the engagement of minorities.



EVENTS AND WORKSHOPS

Host informational sessions to introduce the observatory's goals and activities. Organise face-to-face activities such as workshops or informational meetings. You can also create a shared social experience by doing something together in the locality (walking, biking, visiting a significant place). Consider a webinar or a podcast, for example, if you are interested in online events.

These events attract individuals who are specifically interested in your observatory's mission. Consider where people would like to meet and find the best setting to talk.

- Allows for direct engagement and education about the observatory's work.
- Attracts individuals with a strong interest in the topic.
- Requires planning and resources to organise events.
- Limited to individuals who attend the events.

Further reading

[Engaging volunteers](#)

[UNICA – Eutopia Train webinar & workshop:](#)

[“How to engage citizens in your research?”](#)

Write press releases and contact local media outlets for coverage. It can be helpful to share success stories and highlight the expected outcome of your observatory in the community.

- Provides visibility for the observatory.
- Attracts local community members who may not have known about the opportunity.
- Limited reach compared to online platforms.
- May not be effective in all communities or regions.

LOCAL MEDIA AND PRESS RELEASES

COMMUNITY EVENTS

You might organise or participate in already planned events, such as local events or festivals, where you can set up information stands.

- Direct engagement with the local community.
- Attracts people with an interest in community activities.
- Limited to the availability of relevant events.
- May require resources to set up and staff booths.



8

ETHICAL CONSIDERATIONS

ETHICAL CONSIDERATIONS

Adhering to ethical principles helps ensure fairness, transparency, and respect for all participants. Here are some essential ethical principles to keep in mind for the onboarding:

NON-DISCRIMINATION

Ensure that the recruitment process is free from any form of discrimination, including but not limited to discrimination based on race, gender, age, sexual orientation, disability, religion, or socioeconomic status.

Make a conscious effort to actively promote inclusivity and diversity in your observatory. Strive to engage underrepresented and marginalised groups to ensure equal participation opportunities.

INCLUSIVITY



TRANSPARENCY

Be transparent about the objectives, roles, and expectations of members in the observatory. Continuously evaluate the effectiveness of your recruitment process and make improvements based on feedback and emerging ethical standards.

PRIVACY AND DATA PROTECTION

Safeguard the privacy and personal data of participants. Collect only necessary information and ensure that it is used in compliance with relevant data protection laws. Inform participants of data handling practices. Ensure that sensitive or personal data is protected and only shared with authorised individuals.

Obtain informed consent from all participants, clearly explaining the observatory's purpose, the roles and responsibilities, and data collection or sharing practices. Participants should understand what they agree to. Ensure that participation in the observatory is voluntary, and participants can withdraw at any time without adverse consequences. Remember, however, that withdrawing collected data can be different. Because of the nature of GREENGAGE's research activities, it is impossible to extricate data after certain moments. Participants must know when the collected data related to them can be withdrawn.

INFORMED CONSENT



9

**ONBOARDING
IS AN ONGOING
PROCESS**

ONBOARDING IS AN ONGOING PROCESS

Onboarding is not a single static phase or activity. The onboarding process occurs gradually by generating interest and diversifying participation options through continuous engagement initiatives. Providing different entry points with varying degrees of commitment, identifying participation barriers, and diversifying and updating modes of participation are some critical tasks to keep a creative and living observatory space. To engage with people with respect to their situation, we introduced the idea of situational onboarding (Costa Carneiro et al., 2023, p. 17). Situational onboarding is sensitive to context, time, capacities, and other variables that impact citizens' ability to actively participate in GREENGAGE observatories. It seeks to meet people where they are, be inclusive, and extend and diversify participants' contributions at different stages of the co-creation process. The GREENGAGE engagement methodology suggests reflexive questions to prepare engagement initiatives for various stages.



These questions should be answered before onboarding to activate the GO.

- Which target groups do you need in the core group because they have knowledge and/or will be affected by the outcomes of your GREENGAGE observatory?
- What do you expect from the core group and what from the citizen observers at the beginning of your GREENGAGE observatory?
- Have you considered the ethical and practical implications of providing or not providing entry points to meaningful participation in the core group for a particular target group?
- Can you tell (a story) why they would invest their time and what you can offer to participants in response to their contribution?
- Are you clear about the purpose of the first gatherings and which forms can help you achieve your goals?
- Can you use digital communication platforms/applications and locations where those you want to onboard feel safe and comfortable interacting?
- Which tools, materials, forms, and technologies do you need to support your onboarding activities?



10

REFERENCES

REFERENCES

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