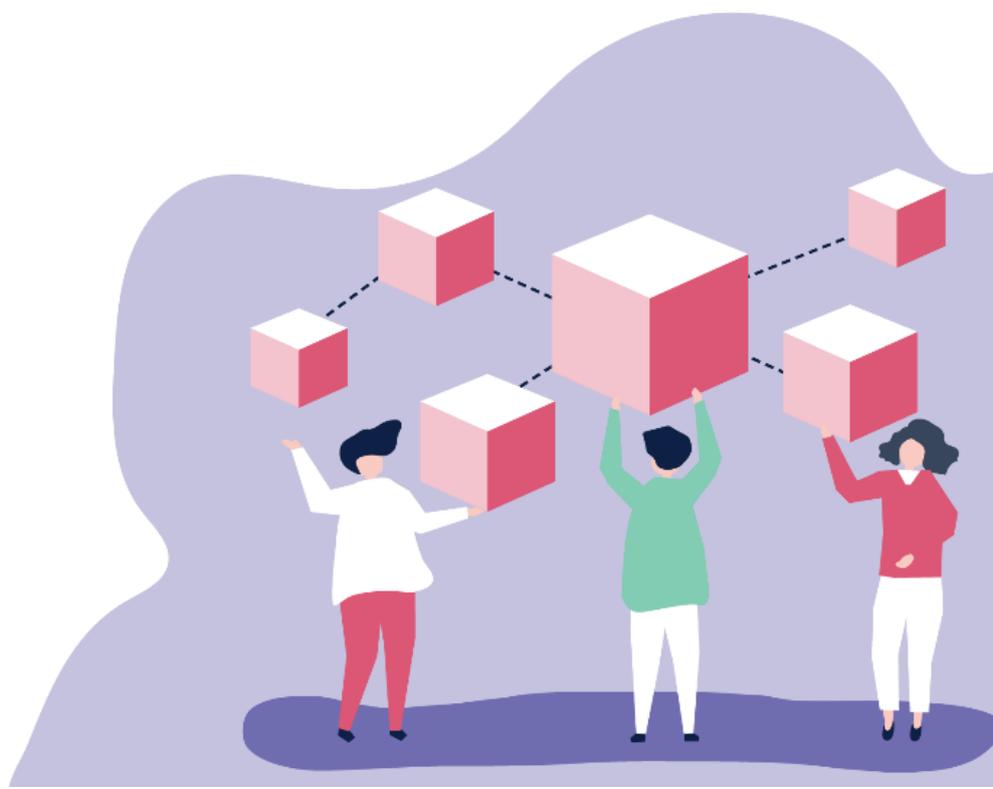




GATE KEEPER

D2.4 Open Innovation and Co-creation workshops

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History

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09/12/2019	0.1	Script and template co-creation workshops (UU)
13/12/2019	0.2	Initial Revisions (contact persons pilot sites + internal review by CERTH and MDT)
16/12/2019	0.3	Updated version of Script and template co-creation workshops (UU) Integrated feedback of internal review (CERTH + MDT) and feedback from the 9 pilot sites participating in GATEKEEPER
17/12/2019	0.4	Added initial planning of pilot sites for organisation of events (UU)
20/12/2019	1.0	Final quality review by UPM and TEC

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Abstract

In the GATEKEEPER project two cycles of open innovation and co-creation workshops will be organised to elicit dynamic positions at the pilot sites towards needs and values. This document provides an initial background information and a baseline scenario for these workshops (template and the script). The organisation of these workshops will contribute to the mapping of Dynamic User Needs and Values through a Responsible Research and Innovation Framework (developed in T2.2). The template and script are included to enable the organisation of similar workshops at pilot sites throughout Europe in order to ensure the quality and easy correlation of the feedback collected.

During the workshops, both initial and future positions towards needs and values in relation to technologies for smarter living homes will be explored. The script and template facilitate dialogues about specific needs and values, such as trust and privacy. The aim is to guide workshop organisers in setting up and performing the workshops. The workshops will be further tailored to the specific pilot sites / use cases in collaboration with the partners who are involved as workshop organisers. A focus group about stakeholders' requirements will be organised in T2.3. This focus group can be integrated in the workshop program as suggested in the planning included in this draft, if preferred by workshop organisers. The D2.3 will include a detailed guideline (template and script) for the organisation and management of focus groups to be followed by pilot sites.

Statement of originality

This deliverable contains original unpublished work except where clearly indicated otherwise. Acknowledgement of previously published material and of the work of others has been made through appropriate citation, quotation or both.

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1. Draft for the organisation of open innovation and co-creation workshops towards Dynamic User Needs and Values through a Responsible Research and Innovation Framework

DISCLAIMER:

- THIS DOCUMENT INCLUDES A TEMPLATE AND SCRIPT FOR THE ORGANISATION OF OPEN INNOVATION AND CO-CREATION WORKSHOPS IN THE GATEKEEPER PROJECT.
- THE AIM IS TO GUIDE WORKSHOP ORGANISERS (RESPONSIBLE PARTNERS AT THE PILOT SITES) IN SETTING UP AND PERFORMING THE WORKSHOPS.
- THIS DOCUMENT SHOULD BE CONSIDERED AS A BASELINE SCENARIO. ALL WORKSHOPS WILL BE FURTHER TAILORED TO THE SPECIFIC PILOT SITES / USE CASES, IN COLLABORATION WITH THE PARTNERS INVOLVED AS WORKSHOP ORGANISERS.
- WHO THE STAKEHOLDERS ARE AND WHAT SPECIFIC NEEDS AND VALUES EACH OF THE WORKSHOP FOCUSES ON, DEPENDS ON THE USE CASE AND PILOT SITE.

IN THE FIRST CYCLE OF WORKSHOPS WE ONLY INCLUDE (PROFESSIONAL) STAKEHOLDERS, NOT CITIZENS.

1.1. Introduction

This document provides a template and script for the organisation of open innovation and co-creation workshops. Two cycle of workshops will be organised by the pilot sites within the GATEKEEPER project. The aim of the workshops is to elicit dynamic positions of stakeholders at the pilot sites towards needs and values. Trust and privacy are examples of values that will be discussed during the workshops. The underlying idea is that these workshops will facilitate pilot sites to anticipate on dynamic positions towards values during and after the project period and to contribute to the creation of a common vision at the pilot sites. In the next paragraphs the background is described and a baseline scenario for the workshops is described.

The workshops will be adapted to the pilot sites in collaboration with (the workshop organisers at) the pilot sites.

1.2. Background: towards a Responsible Research and Innovation Framework for Dynamic User Needs and Values

European healthcare systems are facing problems in detecting conditions and risks timely and in managing them once they are detected. Previous projects and studies demonstrated major barriers and challenges for active and healthy ageing at home (see for instance Neighbourhoods of the future roadshow¹) and for innovations / pilots to realise scale (Lehoux et al. 2008; Memon et al. 2014; Pacifico Silva et al 2018; Sixsmith 2013). Healthcare providers, businesses, entrepreneurs, older citizens and the communities they live in need to work together, to achieve innovations that enable and improve personalised healthcare and smarter living at home. Matching [stakeholders] ideas, technologies, user needs and processes in a trust-based arena and aiming to ensure healthier independent lives for the ageing populations is the focus of the platform that will be developed in the GATEKEEPER project.

However, needs and values are not static, they are likely to change over time, and can be considered as dynamic concepts. The development of a Dynamic User Needs and Values through a Responsible Research and Innovation Framework (T2.2) will help to explore these dynamic positions to ensure sustainable development. To develop such a framework input from stakeholders is crucial. The organisation of open innovation and co-creation workshops is important to explore these positions. Additional fieldwork will be done to further inform the framework. Positions towards (technical) requirements, privacy and trust are examples of dynamic needs and values and will be explored in the workshops at -at least- two different points in time, so that we can capture developments along with the evolving GATEKEEPER platform (e.g. trust is considered a "pre-condition for reliable data sharing, knowledge creation and value generation and propagation").

1.3. Open innovation and co-creation workshops at GATEKEEPER pilot sites

At the pilot sites of the GATEKEEPER project, a first cycle of open innovation and co-creation workshops will be organised in the first half of 2020 (Jan-Jun). These are designed by Utrecht University (UU) together with TECNALIA and the partners at the different pilot sites. The Open innovation and co-creation workshops reflect the expertise of stakeholders involved in each pilot, resulting in a better understanding of requirements, needs and values (such as trust and privacy) in relation to health, ageing and smart(er) living homes. During this first cycle, initial and future positions will be explored and during

¹ See: <https://ec.europa.eu/digital-single-market/en/news/final-report-recommendations-european-reference-framework-age-friendly-housing>

a second cycle (year 2/3 of the project) another series of workshops at the same sites will be organised, to explore how these positions have evolved over time.

The first cycle of workshops aims to contribute to:

- Getting an overview of the positions of important stakeholders towards needs and values in the development and embedding of digital technologies / health innovations.
- To draw up an inventory of imaginaries and create a common ground or understanding of needs and values on which to build further collaboration and co-creation at the pilot site.

A second cycle in year 2 or 3 will be organised:

- To collect experiences and explore / re-evaluate positions towards needs and values.
- To finetune the framework.

The specifics of the second cycle will be defined after the first cycle of workshops, drawing on experiences from the first cycle. After the last workshop of the first cycle, a (virtual) dialogue session will be organised with all workshop organisers to share experiences and elicit specific challenges, opportunities and best practices (for the pilots and for the second cycle of workshops. The organisers will also be asked for input from participants).

The workshops are designed to facilitate the creation of the GATEKEEPER eco-system, mainly as they will map relevant stakeholders for the different pilots (T2.1), and for this we need an initial input from the pilot sites about the specific use cases and the stakeholder ecosystems that these imply. For a variety of reasons, the workshops will be organised with (professional) stakeholders only, not with citizens. Both cycles of workshops can contribute to building momentum among relevant stakeholders, needed to support the implementation, upscaling and assessment of the specific pilot site innovations, and of the GATEKEEPER platform.

Imaginaries will be used to facilitate the exploration of different perspectives. Because most pilots have just started (or are starting up), we have chosen to not involve citizens (as potential users) in the first cycle of workshops. Instead, we ask professional stakeholders to carefully imagine positions of older citizens as (potential) users as well as their own as future users, thereby giving voice to the citizens' perspective. Of course, each pilot site is free to organise additional workshops with citizens.

It is important to explore perspectives from different stakeholders to get an overview of (dynamic) positions in the four project spaces that will be considered during the workshops (Healthcare, Business, Consumer, and Ecosystem Transaction). A tentative, although not exhaustive, list of expected stakeholders includes: health and social care organisations (public and private), city council, community council, research institutes, insurance companies, third parties, associations of patients; this needs to be further specified per pilot site.

1.4. Pilot sites

The workshops will follow comparable designs, but will be tailored to meet specific contexts, backgrounds and aims of the different pilot sites. To ensure a high-quality input to the Responsible Research and Innovation Framework for Dynamic User Needs and Values, the approach described in this document will serve as a guideline.

Following the baseline scenario described in this document, partners at the pilot sites will organise a workshop at their site at two different moments in the project period. Each workshop focuses on one use case, a representative spread of the different use cases in the project is pursued. The aim is to focus on each use case at least once in a workshop.²

- Spain (Aragón and Basque Country)
- Cyprus (Nicosia)
- Greece (Attica and Central Greece)
- UK (Milton Keynes)
- Poland (Lodz)
- Italy (Puglia)
- Germany (Saxony)

Central themes and questions in workshops:

- Participants will be challenged to think and rethink innovations and technologies in relation to needs and values, such as (technical) requirements, trust and privacy.
- Define needs and values deriving from the (proposed) innovation or technology central in the pilot (in case more technologies are part of the pilot, each subgroup can choose one technology to work with in the workshop).
- Consider how to embed these (dynamic) needs and values in future developments.

² THE PILOT SITES ARE SPREAD OVER EUROPE BUT WILL ALL CONTRIBUTE TO ONE OR MORE OF SEVEN SHARED USE CASES (UC): 1. LIFESTYLE-RELATED EARLY DETECTION AND INTERVENTIONS 2. COPD EXACERBATIONS MANAGEMENT 3. DIABETES: PREDICTIVE MODELLING OF GLYCAEMIC STATUS 4. PARKINSON'S DISEASE TREATMENT DSS 5. PREDICTING READMISSIONS AND DECOMPENSATIONS IN HF 6. PRIMARY AND SECONDARY STROKE PREVENTION 7. MULTI-CHRONIC ELDERLY PATIENT MANAGEMENT INCLUDING POLIMEDICATION. (AT POTENTIAL NEW PILOT SITES SIMILAR WORKSHOPS CAN BE ORGANISED FOLLOWING THE SAME DESIGN, FACILITATED BY THE PEOPLE INVOLVED IN THESE PILOTS)

1.5. Practicalities

- Per pilot site one contact person is needed who is responsible for the organisation of the workshop, and who is in contact with UU (for the workshops T2.4) and TEC (for the focus groups T2.3).
- Check instructions in template and script (if anything is unclear, contact UU). If needed, the template and script will be further customised to the pilot site, in collaboration with the workshop organiser, UU (dynamic needs and values) and TEC (health management related needs and values).
- Pilot sites invite relevant stakeholders (related to the use case, to be defined in tailoring the workshop to the pilot site).
- Estimated duration: half a day.
- Preparation is requested from participants. An assignment will be given before the workshop.
- Provide all participants with the assignment (provided by UU) 1-2 weeks before the workshop takes place.
- Collect logbooks (the answers to the three questions per item / photograph chosen) that come with the assignment before the workshop (via email, include s.v.vanhees@uu.nl in the cc:)
- If the workshop is organised in another language than English, an appropriate translation service into English should be present. Details will be discussed between UU and the pilot site.
- Summaries are required of all workshop parts (subgroups and plenary sessions), in English. Ask 1 participant / person per session / group, to write a short summary, including the most important discussion points / remarks.
- Audio recordings are required for all plenary parts of the workshops.
- Arrange an inspirational speaker to open the workshop. In tailoring the workshop to the pilot site this will be discussed with the workshop organisers. The pilot sites will choose a person from their region who they consider as inspirational (for their pilot). For instance a mayor, local entrepreneur or academic with a particular vision on the future of healthcare and who is able to speak about this in an engaging way.
- If the workshop organiser is not moderating the workshop: arrange a moderator. A moderator preferably has knowledge about topics discussed, who is able to both lead a dialogue / discussion and keeps track of the program. In addition, the moderator is able to explain the details of the program and, if no other facilitators are available, to give some guidance to participants if required.
- Invite relevant stakeholders for the pilot. (The pilot sites will identify and invite approximately 10-20 stakeholders in the pilot, such as policymakers, physicians, community managers, engineers).
- Arrange a location for the workshop, including opportunities for break-out sessions (making and doing + reflection). We recommend circle seating if possible.
- Arrange equipment for audio recording (to enable all plenary sessions can be audio-taped)
- A beamer, laptop, screen, mic etc.

- Flipchart(s), paper, scissors, markers, tape, additional materials for making and doing part.
- Ask participants for their (written) informed consent (form will be provided by UU).
- Registration is important → we need a signed list of participants for each of the workshops.
- This template includes a stakeholders focus group about requirements, which is part of T2.3, coordinated by TECNALIA. Pilot sites can choose to organise the focus group as part of the workshop (with all the stakeholders being present), or to organise a separate focus group.

2. Planning

2.1. Agenda open innovation and cocreation workshops

2.1.1. Preparations

Workshop preparations

WHEN	WHAT	WHO
1/ 2 weeks before the workshop	<p>Assignment</p> <p>Aim: get insight in participants' individual perspectives on (future) needs and values when it comes to ageing / digital technologies / health innovations (with an emphasis on trust and privacy)</p> <p>Ask participants (stakeholders involved in the pilot, like policymakers, physicians, community managers, researchers, engineers):</p> <ul style="list-style-type: none"> - to bring <i>something tangible</i> (an attribute, a photograph, drawing) that symbolises what they consider to be important in terms of <i>trust</i> and <i>privacy</i>, from three different perspectives: The (imagined) perspectives of: <ol style="list-style-type: none"> a) <u>their future older self</u> b) <u>an older (>65 years) relative</u> c) <u>their current professional perspective.</u> - to bring <i>something tangible</i> related to what they consider important when it comes to their <i>health management</i> (devices they can use, info they want to know, help they foresee could be helpful...)³ <p>Answer per item the following questions:</p>	Participants, assignment given by workshop organisers

³ THIS WILL BE INPUT FOR THE FOCUS GROUP DIALOGUE IN PART 3 ABOUT REQUIREMENTS. INPUT COLLECTED WILL CONTRIBUTE TO TASK 2.3: REQUIREMENTS CAPTURING AND BASELINE TAXONOMY (TECNALIA)

	<ul style="list-style-type: none"> a) What have you chosen? b) Why do you consider this important (in relation to the topic of the workshop)? c) What does it mean for you personally? 	
Before the workshop	<p>Collecting the logbooks (via e-mail / on paper, collected by workshop organisers)</p> <p>Checking for similarities and differences</p>	Workshop organisers, UU will be informed via email
At least an hour before the workshop	Final instructions for the workshop organiser / moderator(s)	Workshop organisers and UU

Illustration - what a workshop at one of the pilot sites could look like

Different workshops will help to explore positions towards different needs and values in the use cases of GATEKEEPER. Milton Keynes, for instance, is planning on implementing robotics in a small village as part of a community services, enabling (among others) early interventions. In their workshop participants can, for instance, discuss their positions towards needs and values affected by robotics, and how their as well as the positions of others could change over time: What could robotics mean from a professional perspective versus what could it mean if robotics were introduced in the home or community of their parents / neighbours / their older selves?. From previous studies we know how meanings of place change when care, service and / or technology is introduced (e.g. Milligan, Roberts and Mort, 2011). When care enters the home, residents have to give up some of their privacy i.e. the home becomes a less private place, changing into a place of care.

The positions of professional stakeholders will probably differ from each other, but also from those of (future) older citizens. By exploring these different positions stakeholders can endeavour to anticipate such varying and changing future needs and values and what this would mean for the introduction, use and development of their innovation.

In asking participant to bring something tangible, they are triggered to visualise different positions. For instance, they could bring a picture of a private place where robotics can enter and thereby enable earlier detection and intervention. Or a key, to symbolise the need to remain able to keep some places private, to keep robotics out, or on the contrary, how giving up some privacy by letting robotics in enables remaining at home. These tangible things will be used to start a dialogue about positions towards needs and values, providing participants an opportunity to get an overview of anticipated positions, but also as input for an assignment during which participants will work towards solutions for potential challenges created by these needs and values.

2.1.2. Workshops

Part 1 Imagine

DURATION	WHAT	WHO
	Welcome (coffee / tea registration etc.)	Workshop organisers
10-15 min (plenary)	Introduction, explanation program and project. (First imaginaries, then more practical, technical requirements coming from the	Workshop organiser

	needs and values that will be distinguished in the first session, the making and doing session)	
15 min (plenary)	Short talk / imaginary (mindset)	to be defined by workshop organiser
Making / doing session 60 min (20 minutes per step) (subgroups)	<p>Future scenario, to enable participants to discuss how the innovation proposed / developed in the pilot will play out in the future / for an ageing society.</p> <ol style="list-style-type: none"> 1. Ask participants to build, as a group of maximum four participants, a plausible future living environment. 2. Include the specific technologies introduced within the pilots 3. Add the items collected before the workshop design (related to needs, values and requirements) <p>(Visualise how the needs and values of stakeholders will be affected (in any preferred way by participants (e.g. write, draw, cut & paste, 'build') → for instance – what does it mean for daily practices, such as cooking, shopping, caring. Distinction between a possible, ideal and plausible/probable scenario: what is a plausible scenario, rather than an ideal?)</p>	Participants (moderator/ facilitators walk around, take photographs, summary by one participant per group)
10-15 minutes (plenary)	<p>Summarise to each other</p> <p>Describe from a specific stakeholder's perspective (based on the four project spaces) what is build / the rationale behind these.</p>	Participants (NB audio recordings of summaries)

Part 2 Reflect

DURATION	WHAT	WHO
Reflection session (subgroups) 30 minutes	<p>Choose a visualisation / building (not the own) and reflect on these. Use the following questions (cf. Guggenheim, Kraeftner and Kroell, 2013 and workshop Guggenheim and Wilkie 2018) to guide this reflection:</p> <ol style="list-style-type: none"> 1. Think about a possible disruption, what could happen that harms the ideal in the sense of requirements, 	(audio recordings of discussions, summary by one participant per group)

	<p>trust or privacy? And subsequently, how could this be solved?</p> <p>.2. What do the visualisations / buildings represent, what are the hidden messages?</p> <p>What do they tell us about the world in which the proposed innovations / digital technologies will be applied? How do the technologies fit in the buildings (or not)? What or who do these designs / ideas include and what do they exclude?</p>	
<p><i>Short break</i> 15-30 minutes</p>	Break can also be scheduled before the <i>reflect</i> part	
<p>15 min (<i>plenary</i>)</p>	Summary of findings, lessons learned.	(audio recordings, summary by one participant)

Part 3 Act

DURATION	WHAT	WHO
<p>30 minutes (<i>plenary</i>)</p>	<p>Dialogue with all, addressing key challenges and opportunities for the pilot / project</p> <p>Distinguishing important needs and values (write this down on flipchart) related to trust, privacy and requirements.</p>	(audio recordings, flipchart)
<p>30-45 minutes (<i>plenary</i>)</p>	<p>Dialogue with all [stakeholders focus group], addressing their needs and values about the management of their health (this will be input for T2.3): what info they would like to have, how they foresee the usage of medical/IoT devices and the impact on their daily life.</p> <p>Distinguishing important needs and values (write this down on flipchart) related to user requirements.⁴</p>	(audio recordings, flipchart)

⁴ THE STAKEHOLDERS' REQUIREMENTS WILL BE CAPTURED AS PART OF TASK 2.3: REQUIREMENTS CAPTURING AND BASELINE TAXONOMY (TECNALIA). IT IS SUGGESTED HERE TO INTEGRATE THE FOCUS GROUP IN THE WORKSHOP PROGRAM, AS BOTH WORKSHOP AND FOCUS GROUP PROBABLY HAVE THE SAME STAKEHOLDERS. IT IS POSSIBLE TO ORGANISE WORKSHOP AND FOCUS GROUP SEPARATELY, IF PILOT SITES PREFER.

15 minutes (plenary)	Round-up, final thoughts and ideas. What happens now? (within pilot)	(audio recordings)
Total time needed: 4-4.5h (short break included)		

2.1.3. Afterwards

Evaluation and Rounding up

WHEN	WHAT	WHO
Within two weeks after the workshop has taken place	Summary (for participants), also as important input for framework (D2.2.) and user needs and requirements (D2.3.) Further instructions about the summary will be provided by UU (for the workshops, T.2.4) prior to the workshops. (and by TEC for the requirements focus group, T2.3).	Workshop organiser / facilitator(s)
After the last workshop of the first cycle, in June / July 2020 (duration 60-90 minutes)	(Virtual) dialogue session with workshop organisers: lessons, challenges, opportunities and best practices to implement in the second cycle of workshops and the pilots (including feedback or suggestions from organisers and participants).	Organised by UU
September 2020 (M12)	Report open innovation and co-creation workshops, 1 st cycle of workshops (D2.4.V2).	UU
September 2022 (M36)	Report open innovation and co-creation workshops, 2 nd cycle of workshops (D2.4.V3)	UU

3. Planning

Initial planning pilot sites for organisation of focus groups (T2.3.) and workshops (1st cycle, T2.4.)

Pilot sites	Preliminary dates for workshop and focus groups
Milton Keynes (UK)	February / June 2020
Nicosia (Cyprus)	May 21st 2020 (third day of the GATEKEEPER meeting)
Aragon (Spain)	To be scheduled
Basque Country (Spain)	Between February and March 2020
Lodz (Poland)	Second half of June 2020
Saxony (Germany)	By the end of April / end of June (workshop)
Puglia (Italy)	To be scheduled
Attica (Greece)	To be scheduled
Central Greece (Greece)	To be scheduled

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