Social Innovation in Marginalised Rural Areas

Call: H2020-ISIB-2015-2
Innovative, Sustainable and Inclusive Bioeconomy

Work Programme: Topic ISIB-03-2015. Unlocking the growth potential of rural areas through enhanced governance and social innovation

Report D5.2
Training Material for Data Collection at CS Level

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Date: 22/01/2018

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Date: 26/01/2018

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The training workshop teams acknowledge the assistance of the staff at the venue, all those in project activities who contributed to the planning and implementation of the workshop. Thanks also to all the participants for their commitment, level of engagement and very positive approach to the event. This project has received funding from the European Union’s Horizon 2020 Research and Innovation Programme under Grant Agreement No 677622.
Executive Summary

Deliverable D5.2 presents the rationale and structure of the SIMRA training workshop and the content of the sessions which were run. It took place in Bolzano, Italy between the 10th and 12th January 2018. It was attended by 11 of the 12 case Study partners, comprising 32 people (17 of whom were women), plus 4 organisers.

The workshop lasted for two full days for the regular Case Study teams, some extra time for the Pioneer Case Studies, and time for planning and reflections by the organisers.

Day 1 was primarily a plenary session at which presentations were made on the main aspects of the Social Innovation theory and methodologies developed in Work Packages 2, 3, 4 and 6, as well as the approach to the data collection and reporting on the Case Studies, developed in Work Package 5. Day 2, consisted mainly of bilateral meetings between the Case Study teams and the leaders of Work Packages 4 and 6 to deal with the specific methodological issues to be analysed in each example of Social Innovation. Common sessions and exercises were also run on methodological aspects of the interest for the data collection and reporting.

The Programme for the workshop, the survey run in preparation of the training sessions, the Powerpoint template used to present the Case Studies, and the evaluation form are provided as Appendices. All the documentation is also provided on the project intranet for access by all partners and local training by the partner not able to attend.
1. Introduction and Rational and Objectives of the Deliverable

1.1 Scope of the Document

This document presents the steps for preparing the training workshop for the SIMRA Case Study data collection, the rationale behind its related activities, and reports on its implementation. The training workshop was planned as a key face-to-face meeting at which Case Study teams would learn from the leaders of the relevant Work Packages about the techniques and requirements for collecting data in a harmonised and sound manner.

The training workshop was planned to ensure comprehension of the process, data items, schedule, practice of new techniques for data collection, and data reporting. An expected outcome of this workshop is a high level of consistency across Case Studies and the quality of the data captured. It also provided a platform to consolidate the community of Case Study teams, which will aid the shared understanding and collective efforts when developing joint academic articles.

The Deliverable includes the structure and contents of each workshop session, with materials used in the training provided in the Appendices. Figure 1 shows the interdependencies between Work Packages tackling theoretical background and methodological approaches (WPs 2 and 4), and the work on the Case Studies (WPs).

Figure 1. Scheme of the interdependencies between Work Packages on relevant theoretical backgrounds and the Case Studies. Inputs are shown from the Work Packages necessary to design the Case Study training workshop prior to data collection.

1.2 Structure of the Document

This Deliverable is structured into four main sections, as follows:

- Section 2 presents the workshop rationale;
- Section 3 describes the tasks to be done in preparation for the training workshop;
- Section 4 describes the activities undertaken during the training workshop;
- Section 5 indicates the steps to be undertaken after the training workshop.
2. Workshop Objectives and Rationale

The objectives of the training workshop were:

1) To ensure that all Case Study teams understand the methods for Social Innovation evaluation (WP4), and Social Innovation related policies (WP6); the concepts, data collection techniques, data reporting (database entry), and the analysis.

2) To ensure that all Case Study teams understand and follow the ethical clearance procedure.

3) To ensure that all Case Studies have a protocol developed for their specific circumstances of tailored research questions and hypotheses, operationalisation of the Social Innovation impact evaluation, research quality.

4) To ensure that Case Study and Work Package 5 teams created the basis for a continuous and efficient communication throughout the period of data collection and data analysis for the SIMRA project.

5) To ensure the understanding of the different Case Study categories and confirm the data collection requirements.

To meet these objectives, the workshop consists of a set of pedagogic activities (Table 1).

Table 1. Workshop activities and means of verification.

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Activities</th>
<th>Verification means</th>
</tr>
</thead>
<tbody>
<tr>
<td>To ensure that all Case Study teams understand the methods for Social</td>
<td>• Session on Social Innovation evaluation framework and steps</td>
<td>Programme (Appendix 1)</td>
</tr>
<tr>
<td>Innovation evaluation (WP4), and Social Innovation related policies (WP6);</td>
<td>• Session focused on Social Innovation evaluation</td>
<td>Presentations: available on project Intranet</td>
</tr>
<tr>
<td>concepts, data collection techniques, data reporting (database entry),</td>
<td>• Session focused on policy analysis</td>
<td></td>
</tr>
<tr>
<td>and the analysis</td>
<td>• Session on data collection techniques</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Session on data reporting</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Session on analysis</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To ensure that all Case Study teams understand and follow the ethical</td>
<td>• Session on ethics and reading of project procedures</td>
<td>Programme (Appendix 1)</td>
</tr>
<tr>
<td>clearance procedures</td>
<td></td>
<td>Presentation available on project Intranet</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To ensure that all Case Studies have a protocol developed for their</td>
<td>• Reading of D5.1 prior to workshop</td>
<td>Questionnaires read Case Study protocols developed (Report R5.2)</td>
</tr>
<tr>
<td>specific circumstances of tailored research questions and hypotheses,</td>
<td>• Preparation of Case Study protocol before the training; finalisation</td>
<td></td>
</tr>
<tr>
<td>operationalisation of the Social Innovation impact evaluation, research</td>
<td>during the workshop</td>
<td></td>
</tr>
<tr>
<td>quality</td>
<td>• Translation of questionnaires into the interview language</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To ensure that Case Study and WP5 teams set up the basis for a continuous</td>
<td>• Dynamic conversations during the training, facilitation to ensure active</td>
<td>Evaluation form (Appendix 5 and Section 5.1.1)</td>
</tr>
<tr>
<td>and efficient communication throughout the period of data collection and</td>
<td>engagement of all Case Study teams</td>
<td></td>
</tr>
<tr>
<td>data analysis for SIMRA</td>
<td>• Group-work activity</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>To ensure the understanding of the different Case Study categories and</td>
<td>• Presentation during the workshop Introduction</td>
<td>Reorganised list of Case Study categories (Deliverable D5.1)</td>
</tr>
<tr>
<td>confirm the data collection requirements</td>
<td>• Follow-up during the bilateral session on Case Study protocols and recall</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
3. Before the Training Workshop – Preparatory Work

Successful implementation of the training workshop required a preparatory work concerning its logistics, communication with Case Study teams and preparation of materials. This Section presents the preparatory work undertaken by partners EFI and EURAC for the organization of the training workshop on the SIMRA data collection methodology.

3.1 Logistics

During the full partner project meeting in Barcelona, Spain, May 2017, EFI asked the Case Study teams about the possibility of one of their organisations hosting the training workshop. EURAC (Bolzano, Italy) offered its premises for the event. During August and September 2017 a Doodle Poll was circulated to fix the date of the workshop. Once the date was set (11th and 12th of January 2018), EURAC sent all Case Study partners some early logistical information concerning Bolzano, accommodation availability, and travel.

Table 2 summarises the participants and their roles at the training workshop. In total, 32 people attended (17 of whom were women), from 11 Case Study partners, plus 4 organisers (Figure 2). The partner which was not able to attend (University of Cairo) has access to the training materials through the project intranet and separate engagement with the organising partners.

Table 2. Training workshop participants.

<table>
<thead>
<tr>
<th>SIMRA Partner</th>
<th>Number of People</th>
<th>Role</th>
<th>Women</th>
</tr>
</thead>
<tbody>
<tr>
<td>EFI</td>
<td>2</td>
<td>Workshop organizers, trainers</td>
<td>1</td>
</tr>
<tr>
<td>EURAC</td>
<td>5</td>
<td>Workshop organizers, trainers, Pioneer CS</td>
<td>4</td>
</tr>
<tr>
<td>UNIPD</td>
<td>3</td>
<td>Trainers</td>
<td>2</td>
</tr>
<tr>
<td>BOKU</td>
<td>2</td>
<td>Trainers</td>
<td>1</td>
</tr>
<tr>
<td>CTFC</td>
<td>1</td>
<td>Pioneer CS team</td>
<td>1</td>
</tr>
<tr>
<td>HUTTON</td>
<td>1</td>
<td>Regular CS team</td>
<td>1</td>
</tr>
<tr>
<td>CETIP/IFE SAS</td>
<td>4</td>
<td>Regular CS team</td>
<td>2</td>
</tr>
<tr>
<td>RDC</td>
<td>1</td>
<td>Regular CS team</td>
<td>0</td>
</tr>
<tr>
<td>UNIFG</td>
<td>3</td>
<td>Regular CS team</td>
<td>0</td>
</tr>
<tr>
<td>ICREB</td>
<td>2</td>
<td>Regular CS team</td>
<td>1</td>
</tr>
<tr>
<td>AWI</td>
<td>2</td>
<td>Regular CS team</td>
<td>2</td>
</tr>
<tr>
<td>DLO</td>
<td>2</td>
<td>Regular CS team</td>
<td>1</td>
</tr>
<tr>
<td>FAOSNE</td>
<td>1</td>
<td>Regular CS team</td>
<td>1</td>
</tr>
<tr>
<td>OULU</td>
<td>1</td>
<td>Regular CS team</td>
<td>0</td>
</tr>
<tr>
<td>UBERN</td>
<td>1</td>
<td>Regular CS team</td>
<td>0</td>
</tr>
<tr>
<td>SAB</td>
<td>1</td>
<td>Regular CS team</td>
<td>0</td>
</tr>
<tr>
<td><strong>Total participants</strong></td>
<td>32</td>
<td></td>
<td>17</td>
</tr>
</tbody>
</table>
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Figure 2. A group photograph of the training workshop participants (Photographic credits: EURAC).

3.2 Communication with Case Study Teams

The leaders of the tasks in Work Package 5 planned and initiated a programme of communications with Case Study partners aiming at:

- circulating an early draft of the training programme (Appendix 1);
- starting an ad hoc communication with the pioneer Case Studies (Skype and bilateral meetings);
- starting an ad hoc communication with regular Case Studies (Skype and bilateral meetings with EURAC in December 2017).

Table 3 contains a summary of the meetings planned and organized on preparatory work for the Case studies, between October 2017 and the training workshop in January 2018.

Table 3. Schedule of preparatory interactions with Case Study teams, October 2017 to January 2018.

<table>
<thead>
<tr>
<th>Meeting title</th>
<th>Date</th>
<th>Participants</th>
<th>Meeting Actions and Outputs</th>
</tr>
</thead>
</table>
| Virtual meeting with Pioneer Case Studies - Protocol presentation | 16th October 2017 | EFI, EURAC, CTFC, HUTTON | Protocol presented to Pioneer Case Study teams  
Pioneer Case Study teams started translating questionnaires  
Pioneer Case Study teams started filling in the templates for the individual protocols to be reporting in Annex to D5.1  
Pioneer Case Study teams started identifying Social Innovation agents and focus group |
| Virtual meeting with Pioneer Case Study teams - Focus group training | 23rd October 2017 | EFI, UNIPD, EURAC, CTFC | Focus group technique presented to Pioneer Case Study teams  
Focus group questions analyzed section by section  
Q&A on focus group common issues  
Pioneer Case Study teams started organizing focus groups |
<table>
<thead>
<tr>
<th>Event Description</th>
<th>Date</th>
<th>Participants</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bilateral virtual meeting with EURAC - Focus group Q&amp;A</td>
<td>26th October 2017</td>
<td>EFI, UNIPD, EURAC</td>
<td>Q&amp;A on focus group specific issues and questionnaire</td>
</tr>
<tr>
<td>Bilateral virtual meeting with CTFC - Focus group Q&amp;A</td>
<td>27th October 2017</td>
<td>EFI, UNIPD, CTFC</td>
<td>Q&amp;A on focus group specific issues and questionnaire</td>
</tr>
<tr>
<td>Virtual meeting with regular Case Study teams – Protocol presentation</td>
<td>8th November 2017</td>
<td>EFI, EURAC, UNIFG, ICREB, FAOSNE, AWI, RDC, CETIP, IFE SAS</td>
<td>Protocol presented to Regular Case Study teams</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Regular Case Study teams started reading D5.1, recording issues to be discussed at the training workshop</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Regular Case Study teams started preparing a draft translation of the surveys for the training workshop and recording issues to be addressed</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Regular Case Study teams started identifying who to interview</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Regular Case Study teams started preparing a 5 minute presentation for the training workshop</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Regular Case Study teams started filling in the Specific Case Study procedure for their Case Study, to be sent to EFI</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Regular Case Study teams started arranging logistics for the training workshop</td>
</tr>
<tr>
<td>Virtual meeting with regular Case Study teams – Protocol presentation (follow up with missing Case Study partners)</td>
<td>9 to 15th November 2017</td>
<td>EFI, UOULU, UBERN, DLO</td>
<td>Same as above</td>
</tr>
<tr>
<td>Communication between EFI and the Case Study teams</td>
<td>15th to 22nd November 2017</td>
<td>EFI, Case Study teams</td>
<td>Refinements to D5.1 v1 using the first set of inputs (Nov. 15th)</td>
</tr>
<tr>
<td>Virtual meeting with Pioneer Case Study teams – feedback after the Focus Groups</td>
<td>22nd November 2017</td>
<td>EFI, UNIPD, EURAC, CTFC</td>
<td>Feedback on the Focus Group process</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Next steps</td>
</tr>
<tr>
<td>Virtual meeting with Pioneer Case Study teams – feedback of the structured interviews</td>
<td>1st December 2017</td>
<td>EFI, UNIPD, EURAC, CTFC</td>
<td>Feedback on the structured interview process</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Next steps</td>
</tr>
<tr>
<td>Communication between EFI, EURAC and Case Study teams</td>
<td>1st to 14th December 2017</td>
<td>EFI, EURAC, Case Study teams</td>
<td>Refinements to D5.1 v1 using the second set of inputs (December 1st)</td>
</tr>
<tr>
<td>Bilateral virtual meetings with regular Case Study teams – update on the protocol preparation</td>
<td>4th to 8th December 2017</td>
<td>EURAC, UNIFG, ICREB, FAOSNE, CU, RDC, CETIP, IFE SAS, AWI, UOULU, UBERN, DLO, (EFI)</td>
<td>Progress on the individual Case Study protocols</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Progress on the initial contacts with local stakeholders</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Steps towards preparing the Focus Group</td>
</tr>
<tr>
<td>Virtual meeting with Pioneer Case Study teams – feedback after the semi-structured interviews</td>
<td>13th December 2017</td>
<td>EFI, UNIPD, BOKU, EURAC, CTFC</td>
<td>Feedback on the semi-structured interview process</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Next steps</td>
</tr>
</tbody>
</table>
3.3 Preparatory Work by Case Study Teams

Case Study teams were asked to start preparatory work on the data collection protocol materials. This was to enable participants in the training workshops to have prior knowledge of the terminology, conceptual framework, and data collection techniques developed in Deliverable 4.2 (Secco et al., 2017) and compiled in Report 5.1 (Górriz-Mifsud et al., 2018).

Pioneer Case Study teams started the implementation of the set of methods to enable feedback to be provided to UNIPD, and relevant refinements to be made.

3.3.1 Pioneer Case Study teams - Preparatory work

The Pioneer Case Study teams were aiming to refine the data collection procedure, as developed in WP4, based upon the experience of the piloting of the data collection protocol (refer to D5.1, Section 4.1 for more detailed specifications). During November and December 2017, each Pioneer Case Study organised a focus group and conducted five interviews with at least one with of each type of Social Innovation agent and a key expert. Feedback on the experience of using the tools available was provided to WP4 to inform the streamlining of the data collection procedure for all Case Studies. The final set of methods was presented at the training workshop in Bolzano in January 2018.

The preparatory work for the Pioneer Case Study teams is summarised in Table 4.

<table>
<thead>
<tr>
<th>Item</th>
<th>Further explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading D5.1 v1</td>
<td>Reading D5.1 v1 and recording any issues to be discussed at the training workshop</td>
</tr>
<tr>
<td>Piloting use of the set of methods included in D4.2</td>
<td>Focus group organization, and conducting at least 5 interviews and feedback sent to WP4 following a a standardized format</td>
</tr>
<tr>
<td>Preparing a draft translation of the surveys</td>
<td>Any issues to be addressed at the training workshop were recorded</td>
</tr>
<tr>
<td>Filling in the specific procedure for their Case Study (Tool 1)</td>
<td>Refers to D5.1, Report R5.2</td>
</tr>
<tr>
<td>Arranging logistics for the training workshop</td>
<td>Travel, accommodation, etc.</td>
</tr>
<tr>
<td>Preparing a 20 min presentation for the training workshop</td>
<td>See Appendix 3</td>
</tr>
</tbody>
</table>

3.3.2 Regular Case Study teams - Preparatory work

Regular Case Study teams were contacted to inform them about the contents of D4.2 and D5.1 v1, and to develop an early assessment of their Case Study and the imbedded Social Innovation.

The preparatory work for regular Case Study teams is summarised in Table 5.
Table 5. Preparatory work for Regular Case Studies.

<table>
<thead>
<tr>
<th>Item</th>
<th>Further explanation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reading D5.1 v1</td>
<td>Reading D5.1 v1 and providing feedback on issues to be discussed at the training workshop</td>
</tr>
<tr>
<td>Preparing a draft translation of the surveys</td>
<td>Any issues to be identified and discussed at the training workshop</td>
</tr>
<tr>
<td>Filling in the specific procedure for their Case Study (Tool 1)</td>
<td>Refer to D5.1, Report R5.2</td>
</tr>
<tr>
<td>Identifying who to interview</td>
<td>Experts, clique, network, project partners, beneficiaries</td>
</tr>
<tr>
<td>Verifying if there is an internal procedure for ethical clearance</td>
<td>Refer to D5.1, Report R5.2</td>
</tr>
<tr>
<td>Arranging logistics for the training workshop</td>
<td>Travel, accommodation, etc.</td>
</tr>
<tr>
<td>Preparing a 5 min presentation for the training workshop</td>
<td>See Appendix 4</td>
</tr>
</tbody>
</table>

3.3.3 Survey on Case Study training needs and interests

EFI consulted the Case Study teams to identify their needs and interests for five possible training sessions on specific methodological techniques (Appendix 6). This survey enables the assessment of the expertise in each Case Study team prior to the training workshop. The results of this survey, presented (Figure 3) were used to organize properly the side training skills session at the workshop (Section 4.3.2.3). The respondent rate was 12 over 14 CS teams: 86%.

![Figure 3. Frequency of interest of Case Study teams in the five training sessions (0 no interest, I have already that skill; 5: very interested, I lack that skill and I need to develop it).](image-url)
4. Training Workshop: Activities and Presentations

4.1 Day 0, 9th January 2018

Work Package 5 Task Leaders (EURAC and EFI) held a preparatory meeting the day before starting the training workshop, to address the final details of logistics, presentations and coordination for the next steps within WP5. In the afternoon, the meeting included the leader of Work Package 4 (UNIPD), to discuss next steps of Deliverables D5.1 and D5.2, the workshop programme, materials and presentations, implications of the new Case Study categories, changes in the data collection tools and related procedures for the Case Studies.

4.2 Day 1, 10th January 2018

The first day of the workshop served as an introduction to the Case Studies and their expected work (Table 6). Each Case Study team was asked to prepare a short introductory presentation focused on the main issues that might be faced during the data collection. The presentation was based on a standardized template (Appendices 3 and 4). The set of methods developed in WP4, and information on the data collection and data entry were also presented.

Table 6. Workshop programme for Day 1.

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30</td>
<td>Welcome to EURAC and Bolzano</td>
</tr>
<tr>
<td>08:40</td>
<td>Introduction to the workshop</td>
</tr>
<tr>
<td></td>
<td>- Structure of the workshop &amp; schedule</td>
</tr>
<tr>
<td></td>
<td>- Workshop objectives</td>
</tr>
<tr>
<td></td>
<td>- SIMRA Case Study categories</td>
</tr>
<tr>
<td></td>
<td>- Questions</td>
</tr>
<tr>
<td>08:50</td>
<td>Set of methods to assess Social Innovation – overall framework and theory</td>
</tr>
<tr>
<td></td>
<td>- Overview of the data collection steps</td>
</tr>
<tr>
<td></td>
<td>- Population and sampling: agents’ types</td>
</tr>
<tr>
<td></td>
<td>- Q&amp;A</td>
</tr>
<tr>
<td>10:00</td>
<td>Case Studies Intro. (3 teams, 5 min / Case Study, 8 min if more than 1 Case Study; Q&amp;A)</td>
</tr>
<tr>
<td>10:30</td>
<td>Coffee break</td>
</tr>
<tr>
<td>10:50</td>
<td>Data collection procedure</td>
</tr>
<tr>
<td></td>
<td>- Data collection procedure: Focus Group: explanation</td>
</tr>
<tr>
<td>11:05</td>
<td>- Semi-structured interviews, Q&amp;A</td>
</tr>
<tr>
<td>11:30</td>
<td>- Data collection procedure: Structured interviews, Q&amp;A</td>
</tr>
<tr>
<td>12:00</td>
<td>Set of methods – Policy document analysis, Q&amp;A</td>
</tr>
<tr>
<td>12:30</td>
<td>Case Studies Intro. (3 teams, 5 min / Case Study, 8 min if more than 1 Case Study; Q&amp;A)</td>
</tr>
<tr>
<td>13:00</td>
<td>Business Lunch</td>
</tr>
<tr>
<td>14:00</td>
<td>Data collection procedure</td>
</tr>
<tr>
<td></td>
<td>- Data collection procedure: Focus Group: practical exercise</td>
</tr>
<tr>
<td>15:30</td>
<td>Case Studies introduction (4 teams, 5 min / Case Study, 8 min if more than 1 Case Study, 5 min Q&amp;A)</td>
</tr>
<tr>
<td>16:00</td>
<td>Coffee break</td>
</tr>
<tr>
<td>16:15</td>
<td>Case study database</td>
</tr>
<tr>
<td></td>
<td>- Database presentation (15 min)</td>
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<tr>
<td></td>
<td>- Database population (15 min)</td>
</tr>
<tr>
<td></td>
<td>- Q&amp;A - Task 5.2 (15 min)</td>
</tr>
<tr>
<td>17:15</td>
<td>Presentation of Pioneer Case Studies (20 min each)</td>
</tr>
<tr>
<td>17:55</td>
<td>Questions dynamic</td>
</tr>
<tr>
<td></td>
<td>Translation &amp; terminology check – Questions</td>
</tr>
<tr>
<td>18:15</td>
<td>END OF DAY 1</td>
</tr>
<tr>
<td>19:30</td>
<td>Networking dinner – Wirtshaus Vögele. Via Johann Wolfgang von Goethe, 3</td>
</tr>
</tbody>
</table>
4.2.1 Welcome and workshop introduction

Duration: 20 min

Trainer(s):
Elena Górriz (EFI), Thomas Streifeneder (EURAC) and Cristina Dalla Torre (EURAC)

Objectives
To welcome participants and present the structure of the training workshop

Conccepts and procedures to learn
- Recall the objectives of SIMRA Case Studies
- Clarify the purpose and structure of the training workshop. Schedule of the two days
- Logistical remarks
- SIMRA Case Study categories
- Questions

Learning means
- Powerpoint presentation
- For the questions dynamics: a poster is hanging in the plenary room and Post-it notes are distributed to the Case Study teams. During the day the Case Study teams can write questions on topics that are unclear. At the end of the day, questions will be clustered by the organisers and resolved in a plenary session (if applicable), or the next day bilaterally.

Baseline documents required
- Deliverable 5.1_v2 (Górriz-Mifsud et al., 2018) - section on the Case Study categories
- Report R3.1 (Valero et al., 2017)
- Workshop programme
- Poster and Post-it notes

Figure 4 shows the introductory session of the training workshop in Bolzano, Italy on 10th January 2018.
4.2.2 Set of methods to assess Social Innovation – overall framework and theory

Duration: 70 min

Trainer(s):
Laura Secco, Elena Pisani and Riccardo Da Re (UNIPD)

Objectives
To present a detailed overview of the theory behind the set of methods for data collection (D4.2) reviewed after the feedback from Pioneer Case Studies, and to clarify the terminology used in the questionnaires.

Concepts and procedures to learn
The Case Study teams were required to be acquainted with the theoretical background underlying the different data collection tasks, so that they understand the methodological requirements, and the analysis to conduct afterwards. This understanding provides them with the background to handle possible contingencies, issues to be resolved by the interviewees, as well as adapting the methodological approach to their specific Case Study without compromising the underlying scientific research question. For this purpose, the following points were addressed in this session of the training workshop:

- Rationale of SIMRA data collection process: steps and interdependencies
- Explanation of the SIMRA Evaluation Framework and its key dimensions (D5.1, Figure 2): triggers, needs, perceived context, agency, reconfiguring and reconfigured, project activities, outputs, outcomes, and learning processes
- Population and sampling: describing the key actors to involve in the surveys, according to their role within the Social Innovation initiative
- Project to analyse within the Social Innovation example
- Clarifying the terminology used in the questionnaires (afternoon session, additional 15 minutes)
- Summary of issues and additional examples from the Pioneer Case Studies.
Learning means

- Dynamic ice breaking exercise (20 min) (Figure 5)
- Power point presentation (30 min)
- Q&A and discussion (20 min)

Baseline documents required

- Deliverable 4.2 (Secco et al., 2017)
- Deliverable 5.1 (Górriz Mifsud et al., 2018)

**Figure 5.** The ice breaking exercise on SIMRA terminology at the training workshop (Photograph credits: Valentino Marini Govigli, EFI).

### 4.2.3 Case Studies introduction

<table>
<thead>
<tr>
<th>First time slot</th>
<th>Second time slot</th>
<th>Third time slot</th>
</tr>
</thead>
<tbody>
<tr>
<td>10:00-10:30</td>
<td>12:30-13:00</td>
<td>15:30-16:00</td>
</tr>
<tr>
<td>Duration: 30 min</td>
<td>Duration: 30 min</td>
<td>Duration: 30 min</td>
</tr>
<tr>
<td>HUT, RDC, CETIP 1 &amp; 2</td>
<td>UNIFG, ICRE8, AWI, DLO 1 &amp; 2</td>
<td>FAOSNE 1 &amp; 2, OULU, IFE SAS, SAB and UNIBE 1 &amp; 2</td>
</tr>
</tbody>
</table>

**Trainer(s):**
Valentino Marini G (facilitator first slot), Elena Górriz (facilitator second slot), Cristina Dalla Torre (facilitator third time slot), and regular Case Study team representatives.

**Objectives**
To create a community of practice among the Case Study teams, by becoming aware of the different Social Innovation initiatives to be analysed within SIMRA. Therefore, Case Study teams were asked for a brief presentation of the Social Innovation they were planning to study.

To be useful for the developers of the methodology (WP4 and WP6) as well as for the WP5 Task Leaders, the presentations focused on the critical issues which were foreseen for the data collection process (e.g. data availability, actors’ identification, direct implications in using SIMRA sampling techniques).

**Concepts and procedures to learn**
- Case Study presentation
- Identification of common issues concerning data availability, actors’ identification and direct implications in using SIMRA sampling techniques
Learning means

- Case Study presentations (5 min if the team has one Case Study, 8 min if the team has more than one Case Study)

Baseline documents required

- Powerpoint template for regular Case Studies (D5.2, Appendix 4).

Figures and 6 and 7 show the presentations of case studies by FAOSNE and RDC on Day 1 of the training workshop.

![Figure 6. FAOSNE presenting its case studies to the audience (Photograph credits: EURAC).](image1)

![Figure 7. RDC presenting their case studies to the audience (Photograph credits: EURAC).](image2)

### 4.2.4 Data collection procedure: Focus Group

<table>
<thead>
<tr>
<th>Morning time slot</th>
<th>Afternoon time slot</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Duration</strong>: 15 min</td>
<td><strong>Duration</strong>: 1hr 30 min</td>
</tr>
</tbody>
</table>

**Trainer(s):**
Riccardo Da Re (UNIPD)

**Objectives**
The focus group was the first data collection tool presented. It is a crucial tool in the process of data collection as it provides the basis for subsequent steps. Given the unequal experience of the Case Study teams with this technique, and the training relating to the focus groups, this session comprised a general presentation of the focus group technique and instructions for its operation (morning time slot), followed by a practical exercise (afternoon time slot).

**Concepts and procedures to learn**
The basic theory regarding the focus group technique and related instructions for its use were presented in the morning, followed by a role-play exercise of a focus group in the afternoon (Figure 8).

- **Morning time slot:** introduction to the focus group technique, objectives of the focus group within the SIMRA data collection, blocks, participants, instructions.
- **Afternoon time slot:** the participants were split into groups to perform a practical exercise based on the SIMRA focus group training, tips for moderators and assistants, time management, and reporting.
Learning means

- Morning presentation (15 minutes)
- Afternoon focus group simulation (1 hour and 30 minutes)
- Materials for the role-play: poster, flipchart, variable cards, markers

Baseline documents required

- Report 5.1, Tool 2.

![Figure 8. Scenes of the focus group role-playing exercises (Photograph credits: EURAC).](image)

### 4.2.5 Data collection procedure: Semi-structured interviews

**Duration:** 25 min

**Trainer(s):**
Alice Ludvig and Gerhard Weiss (BOKU)

**Objectives**
To present the qualitative interview guidelines and the related practical steps for data collection (Figure 9).

**Concepts and procedures to learn**

- Brief on semi-structured interviews, recording memos, transcription and reporting
- Semi-structured interviews for innovators and policy experts
- Summary of issues and examples from the Pioneer Case Studies

**Learning means**

- Powerpoint presentation on data collection steps
- Questionnaires presentation and examples (Powerpoint presentation and/or practical exercise)
- Q&A and discussion

**Baseline documents required**

- Report 5.1, Tools 7, 8 and 9
4.2.6 Data collection procedure: Structured interviews

**Duration**: 30 min

**Trainer(s)**:
Laura Secco, Elena Pisani and Riccardo Da Re (UNIPD)

**Objectives**
To present the four questionnaires for structured interviews included in the Report R5.1 (Figure 10), and reviewed after the feedback from Pioneer Case Studies.

**Concepts and procedures to learn**
- Phases of the SIMRA data collection process
- Structured interviews organization for clique, network, partners and beneficiaries
- Summary of issues and examples from the Pioneer Case Studies

**Learning means**
- Powerpoint presentation on data collection steps (10 min)
- Questionnaires presentation and examples (Powerpoint presentation and/or practical exercise) (15 min)
- Q&A and discussion (5 min)

**Baseline documents required**
- R5.1 (Górriz-Mifsud et al., 2018).
4.2.7 Set of methods to assess Social Innovation: Policy analysis (theory and practice)

Duration: 30 min

Trainer(s):
Alice Ludvig and Gerhard Weiss (BOKU)

Objectives
To present a detailed overview of the policy analysis and its data collection, included in Deliverable D4.2, and reviewed after the feedback from Pioneer Case Studies. The main objective of this part of data collection was the collection of policy support and influences during all stages of the Social Innovation project or initiative. The emphasis was on the qualitative policy impact analysis in terms of financial impacts and other support through policies, and the role of the policy reports.

Concepts and procedures to learn
This session ensured a baseline of knowledge amongst the Case Study teams on the language of policy analysis, policy support tools for Social Innovation, and the methodological features of a semi-structured interview. The following points were covered:

- Phases and rationale of the data collection for the analysis of policy processes during the initial phase of the Social Innovation project or initiative to date, and future outlook with a specific focus on future needs.
- Organisation of semi-structured interviews: The benefit of semi-structured qualitative enquiry as a method for in-depth questions of “why” and “how”?
- Data processing and analysis (document and interview based): How to obtain what you want to know from the data?
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

- Summary of issues and examples from Pioneer Case Studies: Outlook on preliminary results on policy influences, policy support, possible policy gaps and necessities and needs for Social Innovation from policies.

Learning means
- Powerpoint presentation (20 min)
- Q&A and discussion (10 min)

Baseline documents required
- Deliverable 6.1 (Ludvig et al., 2017)
- Report 5.1, Tool 10

4.2.8 Database of case studies on Social Innovation

Duration: 60 min

Trainer(s):
Cristina Dalla Torre (EURAC)

Objectives
To present the database developed for storing the data collected by Case Study teams. To explain, in detail, the procedure of data entry using the online OPINIO tool.

Concepts and procedures to learn
- Phases of the data entry process: OPINIO, MS Excel sheets and MS Word templates
- Usage of OPINIO: interface and options
- Data validation process
- Database creation and data output from the SIMRA database
- How to manage data emergency issues

Learning means
- Power point presentation on the database and the data entry process (20 min)
- Power point presentation on OPINIO online tool (20 min)
- Q&A and discussion (20 min)

Baseline documents required
- None required

4.2.9 Pioneer Case Studies presentations

Duration: 40 min

Trainer(s):
Valentino Marini Govigli (facilitator), Carmen Rodríguez (CTFC), Cristina Dalla Torre and Verena Gramm (EURAC)

Objectives
Become acquainted with the procedure of data collection, learning from the experience of the Pioneer Case Studies.
Concepts and procedures to learn
The Pioneer Case Studies started their work in mid-October 2017, and provide a know-how which is valuable for the regular Case Studies. Therefore, this session started with a brief description of the Social Innovations with which they dealt, followed by the explanation of how they carried out the different data collection steps, the challenges encountered and the solutions employed. The outline comprised:

- Pioneer Case Studies presentation: the Social Innovation activities, objectives, Social Innovation conceptual framework
- Experience from the data collection: difficulties and tips in preparatory deskwork, organization of the focus groups, semi-structured interviews and structured interviews
- Timeline and steps for data collection from a practical perspective.

Learning means
- Presentation of Pioneer Case Studies (20 min each)
- Q&A

Baseline documents required
- Powerpoint template for Pioneer CSs (Appendix 3).

Figure 11 shows a joint engagement activity on Day 1 of the training workshop.

Figure 11 (a) and (b). Participant (CTFC) adding a piece to the human tower representing the conjoint effort of all case studies (Photograph credits: Elena Gorriz, EFI).
4.2.10 Translation and terminology check: Questions

Duration: 20 min

Trainer(s):
Elena Górriz (facilitator), with the participation of partners in Work Packages 4 and 6

Objectives
To resolve remaining specific questions collected to the plenary including those relating to the translation of the questionnaires, the overall SIMRA concepts, and the Case Study data collection procedures and analysis.

Concepts and procedures to learn
The Case Study teams were given a set of Post-its in the morning and during the day, for recording any questions that were not tackled during the plenary sessions. During the final coffee-break the workshop organisers checked the questions and clustered them into similar topics. The facilitator then made a final clustering at the beginning of this session.

The questions posed were read out (Figure 12), explaining which are relevant for all the plenary (i.e. for all the Case Study teams) and which are relevant for particular Case Study teams and were to be dealt with in the bilateral meetings on Day 2.

Then the competent partner (UNIPD, BOKU, EFI or EURAC) responded to the plenary questions.

Learning means
- Poster to hang the Post-it questions, colour pens
- Clustering of the Post-its by the facilitator
- Commenting the Post-its in plenary
- Questions and Answers

Baseline documents required
- None required.

Figure 12. Questions: clustering and resolving topics (Photograph credits: Valentino Marini Govigli, EFI).
4.3 Day 2, 11th January 2018

The second day of the workshop went into depth regarding the data collection protocol for Case Studies. Individual sessions for each of the Case Study teams were organized as face-to-face meetings with Work Packages 4, 5 and 6 (Table 7). Additional techniques for data collection and data analysis were also presented in detail.

**Table 7. Workshop programme for Day 2.**

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30</td>
<td><strong>Social Innovation impact evaluation</strong></td>
</tr>
<tr>
<td>09:00</td>
<td>Ethical clearance procedures, Q&amp;A</td>
</tr>
<tr>
<td>09:15</td>
<td><strong>Bilateral discussions</strong> between the Case Study teams with more than one Case Study, UNIPD and BOKU (Task 5.1): HUT, RDC, IFE SAS/CETIP, UBERN&amp;SAB, DLO and FAOSNE. 40 min/Case Study team. Other Case Study teams: joint activities to improve data collection skills (EFI, EURAC, IFE SAS). Coffee.</td>
</tr>
<tr>
<td>10:00</td>
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<tr>
<td>10:15</td>
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<td>10:30</td>
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<tr>
<td>11:00</td>
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<tr>
<td>11:15</td>
<td><strong>Lunch break</strong></td>
</tr>
<tr>
<td>14:15</td>
<td><strong>Bilateral discussions</strong> between the CS teams with one CS and UNIPD and BOKU: ICRE8, UO, UNIFG, AWI, EURAC, CTFC. Other Case Study teams: joint activities to improve data collection skills (EFI, EURAC, IFE SAS). Coffee.</td>
</tr>
<tr>
<td>15:00</td>
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<td>15:15</td>
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<td>15:30</td>
<td></td>
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<tr>
<td>16:00</td>
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</tr>
<tr>
<td>16:15</td>
<td><strong>Plenary: Questions &amp; Answers</strong></td>
</tr>
<tr>
<td>16:30</td>
<td><strong>Wrap-up and closing</strong></td>
</tr>
<tr>
<td>16:45</td>
<td><strong>END OF DAY 2. Case Study partners starting to leave</strong></td>
</tr>
</tbody>
</table>
4.3.1 Social Innovation impact evaluation: Data analysis

Duration: 30 min

Trainer(s):
Laura Secco, Elena Pisani, Riccardo Da Re (UNIPD)

Objectives
To explain quantitative counterfactual analysis. To present the steps that Case Study teams will have to follow in order to perform a feasibility assessment of a quantitative counterfactual analysis implementation.

Concepts and procedures to learn
- Indices and indicators
- Quantitative counterfactual analysis: overview of the concept
- Steps for performing a feasibility assessment of a quantitative counterfactual analysis implementation
- Timeline of the counterfactual analysis

Learning means
- Powerpoint presentations including examples (20 min)
- Q&A and discussion (10 min)

Baseline documents required
- Deliverables D4.2 and D5.1 (Górriz-Mifsud et al., 2018).

4.3.2 Data collection procedure: Ethical clearance procedures

Duration: 15 min

Trainer(s):
Cristina Dalla Torre

Objectives
To present a detailed overview of the practical steps of data collection provided in Deliverable D5.1, revised following feedback from Pioneer Case Studies.

Concepts and procedures to learn
- Ethical clearance procedures
- Translation check and glossary

Learning means
- Powerpoint presentation on ethical clearance procedures (15 min)
- Translation check exercise (30 min)
- Q&A and discussion (15 min)

Baseline documents required
- Deliverable D5.1, Appendixes 3, 4 and 5 (Górriz-Mifsud et al., 2018)
- Case Study partner ethical clearance documentation (if available).
4.3.3 Bilateral discussions

The bilateral discussions were organized as parallel rotating sessions, 30 to 40 minutes long, during which each Case Study team attended one of the following sessions:

- a bilateral session with UNIPD to discuss the set of methods to be applied in their example of Social Innovation;
- a bilateral session with UNIPD on the practical implementation of the Focus Group (Figure 13);
- a bilateral session with BOKU to discuss qualitative data collection (Figures 14 and 15);
- a training module.

Several presentations were also organized for those Case Study teams who were not attending any meeting. These sessions were in-depth training modules for some of techniques to be used by Case Study teams during the data collection process and the data analysis.

Figure 13 (a) and (b). Bilateral sessions on implementation of the Focus Groups, with UNIPD (Photograph credits: EURAC).

Figure 14. Bilateral session on qualitative data collection, with BOKU (Photograph credits: EURAC).

Figure 15. Side session on social network analysis (Photograph credits: EURAC).
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

4.3.3.1 Who and When?: Focus Groups and questionnaires

Duration: 6hr 30 min, devoting 40 min for Case Study teams with more than one Case Study (morning), and 30 min for Case Study teams with one Case Study (afternoon)

Trainer(s):
Riccardo Da Re (UNIPD)

Objectives
To become acquainted with the four structured interviews and the evaluation concepts to be applied to the specific issues of each Case Study. Also, to resolve issues about identifying actors, specific applications of the questionnaires in the Case Study contexts, and perceived difficulties.

Concepts and procedures to learn
The aim of this face-to-face meeting was to confirm, amend and find pragmatic solutions together with those who have designed the data collection procedures. Therefore, the Case Study teams use the guidelines for focus group implementation (Tool 2), and the protocols initially developed for the Case Studies (especially the identification of stakeholders), and the list of questions not resolved in the plenary sessions because they were specific to individual Case Studies. In addition, they received feedback from UNIPD on the strategy planned for data collection.

Learning means
- Q&A and discussion (40 min for each Case Study team with more than one Case Study, 30 min for those with one Case Study)

Baseline documents required
- Deliverable D4.2 (Secco et al., 2017)
- Deliverable D5.1 (Górriz-Mifsud et al., 2018)
- Report R5.1, Tools 1 and 2
- List of doubts to pose to UNIPD.

4.3.3.2 What?: Evaluation framework and approach

Duration: 6 hrs 30 min, devoting 40 min for Case Study teams with more than one Case Study (morning), and 30 min for Case Study teams with one Case Study (afternoon)

Trainer(s):
Laura Secco and Elena Pisani (UNIPD)

Objectives
To resolve issues on the Social Innovation conceptual framework and arising from the focus group training, the materials required, its specific application in the context of Case Studies, and perceived difficulties.

Concepts and procedures to learn
The aim of this face-to-face meeting was to confirm, amend and find pragmatic solutions together with those who designed the data collection procedure. Therefore, the Case Study teams used the Social Innovation conceptual framework and the protocols initially developed for the Case Studies, and the list of issues not resolved in plenary sessions because they were specific to individual Case Studies. In addition, they received feedback from UNIPD on the planned strategy.
Learning means
- Q&A and discussion (40 min for each Case Study team with more than one CS, 30 min for those with one Case Study)

Baseline documents required
- Deliverable 4.2 (Secco et al., 2017)
- Deliverable 5.1 (Górriz-Mifsud et al., 2018)
- Report R5.1, Tool 1, especially the conceptual framework
- List of doubts to pose to UNIPD.

4.3.3.3 Policy support data collection with BOKU

Duration: 6 hrs 30 min, devoting 40 min for Case Study teams with more than one Case Study (morning), and 30 min for Case Study teams with one Case Study (afternoon)

Trainer(s):
Gerhard Weiss and Alice Ludvig (BOKU)

Objectives
To become acquainted with the set of methods for data collection (policy documents and interviews) applied to the specific circumstances of each Case Study, and the terminology specifically used in the policy analysis.

Concepts and procedures to learn
The aim of this face-to-face meeting was to confirm, amend and find pragmatic solutions together with those who had designed the data collection procedures. The Case Study teams used the translated versions of the semi-structured interview guidelines, the list of policy documents of interest to be analysed, the policy analysis report, and the list of questions not resolved in plenary sessions because they were specific to their Case Study. They received feedback from BOKU on the strategy planned for data collection.

Learning means
- Q&A and discussion (40 min for each Case Study with more than one Case Study, 30 min for those with one Case Study)

Baseline documents required
- Deliverable 4.2 (Secco et al., 2017)
- Deliverable 5.1 (Górriz-Mifsud et al., 2018)
- Report R5.1, Tools 7 to 10
- List of doubts to pose to BOKU.
4.3.3.4 Side training skills: Semi-structured interviews and processing

Duration: 1 hr

Trainer(s):
Alice Ludvig (BOKU), with support from Elena Górriz (EFI)

Objectives
To become acquainted with the techniques proposed for data collection and data analysis in Deliverable D5.1, including the data entry procedure.

Concepts and procedures to learn
This session started with the peculiarities of semi-structured interviews and their utility. This was followed by the use of an interview guideline within semi-structured interviews, and an exercise of note-taking while interviewing and drafting memos after the interview. The presentation included tips for conducting a semi-structured interview, instructions of how to transcribe, and how to report the findings of the interviews using the SIMRA template.

Learning means
- Powerpoint presentation
- Exchange of experiences amongst participants.

Baseline documents required
- Deliverable 5.1 (Górriz-Mifsud et al., 2018), especially Appendixes 13, 14 and 15 translated (the interview guidelines).

4.3.3.5 Side training skills: Hypotheses for diverging paths

Duration: 10 min

Trainer(s):
Martin Spacek (CETIP), Stanislava Brnkalakova (IFE SAS)

Objectives
To present the hypotheses for Social Innovation diverging paths elaborated within Deliverable D2.2 (Kluvánková et al., 2017), and to clarify their related variables and analysis.

Concepts and procedures to learn
The Case Study teams should be acquainted with the practical implementation of the Social Innovation diverging path concepts. For this purpose, the following points were dealt with:

- What is a Social Innovation diverging path: concept?
- Five suggested diverging paths for SIMRA
- Scientific queries: Hypotheses regarding the diverging paths
- How do the diverging paths affect the work of the Case Study teams?: how to test them?

Learning means
- Powerpoint presentation

Baseline documents required
- Deliverable 2.2 (Kluvánková et al., 2017).
4.3.3.6 Side training skills: Database and OPINIO data entry

**Duration:** 70 min

**Trainer(s):**
Cristina Dalla Torre and Martin Angler (EURAC)

**Objectives**
To become acquainted with the OPINIO online system for data entry.

**Concepts and procedures to learn**
The difference with the lecturing session was that in this time slot the participants used the database on their computers, trying to enter data for themselves for each step of the data collection, using a “fake” case study exercise. This meant that Case Study teams handled the user interface for data reporting, mainly OPINIO, and also the MS Word and MS Excel formats when required. They also learnt advice for the data entry.

**Learning means**
- Powerpoint presentation
- Computers for the practical exercise

**Baseline documents required**
- Deliverable D5.1 (Górriz-Mifsud et al., 2018).

4.3.3.7 Side training skills: Social Network Analysis

**Duration:** 80 min (morning), 30 min (afternoon)

**Trainer(s):**
Elena Górriz (EFI), with support from Valentino Marini Govigli (EFI)

**Objectives**
To understand the rationale of the Social Network Analysis tables within the structured interviews, including the data entry procedure and some insight on their analysis.

**Concepts and procedures to learn**
The training workshop was not a deep course on Social Network Analysis. Instead, the Case Study teams acquired basic knowledge to understand the aims and use of Social Network Analysis, and how it would be applied within the SIMRA evaluation. The participants become acquainted with social network concepts, namely: nodes, ties, matrixes, i.a. the session included a short introduction to the analytical processes and outputs, such as indexes (centrality, periphery) and a practical exercise.

**Learning means**
- Powerpoint presentation
- Interactive example to build a network

**Baseline documents required**
- Report RS.1, Tool 5.
4.3.3.8 Side training skills: Protocol queries and feedback

Duration: 80 min

Trainer(s):
Elena Górriz (EFI), with support from Valentino Marini Govigli (EFI)

Objectives
To become acquainted with the requirements to finalise the Case Study protocols to be applied in each case study. If Case Study teams are very advanced, this session was to help in identifying possible additional research questions. Where time was available, this session started grouping the Case Study teams by topic of other possible cluster for posterior cross-Case Study analyses and publications. The dataset on Marginalised Rural Areas variables prepared Price et al., 2017 (D3.1) was presented to Case Study teams. This dataset would be made available by the teams to complement the information gathered for their individual protocols.

Concepts and procedures to learn
- Get acquainted with the protocol for each case study
- Typical problems encountered
- Marginalised Rural Areas dataset

Learning means
- Powerpoint presentation
- Exchange of experiences among participants
- Marginalised Rural Areas dataset in MS Excel

Baseline documents required
- Deliverable 5.1 (Górriz-Mifsud et al., 2018).

4.3.4 Plenary: Questions & Answers

Duration: 20 min

Trainer(s):
Laura Secco, Elena Pisani, Riccardo Da Re, Alice Ludvig, Gerhard Weiss, Elena Górriz, Cristina Dalla Torre, Valentino Marini Govigli, Elena Górriz (facilitator)

Objectives
To clarify final pending issues from Case Study teams

Concepts and procedures to learn
- Solution for common issues of Case Study teams

Learning means
- Q&A and discussion (20 min)

Baseline documents required
- Notes from the previous sessions.
4.3.5 Wrap-up and closing

Duration: 10 min

Trainer:
Elena Górriz

Objectives
To summarize next steps of the Case Study data collection, and to assess the training workshop.

Concepts and procedures to learn
- Summary of common and relevant issues of Case Study teams
- Feedback on the organisation and implementation of the workshop
- Timeline for the next steps of data collection
- To do list for Case Study teams

Learning means
- Powerpoint presentation (20 min)
- Evaluation form (Appendix 5)

Baseline documents required
- Deliverable D5.2, Appendix 5 (Górriz-Mifsud et al., 2018).
4.4 Day 3, 12\textsuperscript{th} January 2018

The third day of the workshop was reserved for the Pioneer Case Study teams and the Leaders of Work Packages 4, 5 and 6. The aims of this half-day meeting were:

i) to finalise the work done in the Pioneer Case Studies;
ii) to identify the tasks remaining for completing the data collection;
iii) to plan the meetings after the incorporation of the feedback (Table 8).

The structure of the meetings that follow receipt of the feedback will follow that of the bilateral discussions (Section 4.3.3).

Lastly, an interim meeting of WPs 4, 5 and 6 will take place concerning Case Study data analysis and the development of protocols for the assessment of Social Innovation for use in the SIMRA Innovation Actions.

\textbf{Table 8. Workshop programme for Day 3.}

<table>
<thead>
<tr>
<th>Time</th>
<th>UNIPD (WP4 set of methods)</th>
<th>BOKU (qualitative aspects of policy support functions)</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:15</td>
<td>CTFC</td>
<td>EURAC</td>
</tr>
<tr>
<td>09:15</td>
<td>EURAC</td>
<td>CTFC</td>
</tr>
</tbody>
</table>

10:15 Coffee break

10:40 Meeting of WPs 4, 5 and 6 regarding the training workshop and next steps for Case Study analyses c.3 hrs EFI, UNIPD, BOKU, EURAC

13:30 END OF DAY 3

\subsection*{4.4.1 Bilateral discussions with Pioneer Case Study teams}

The bilateral discussions were organized as parallel rotating sessions, scheduled for 40 minutes, during which each pioneer Case Study team:

- attended a bilateral session with UNIPD to discuss the final set of methods;
- attended a bilateral session with BOKU to discuss the final qualitative aspects of the data collection protocol.

\subsubsection*{4.4.1.1 Bilateral discussions with UNIPD}

\textbf{Duration:} 2 hrs (1 hr with each Case Study)

\textbf{Trainers:}
Laura Secco, Elena Pisani and Riccardo Da Re

\textbf{Objectives}
To get to know the difference between the pilot and the final set of methods for data collection. Identify the research questions and fine-tuning of the data samples.
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

Concepts and procedures to learn

- Final questionnaires and techniques for data collection in SIMRA (Tools 1 to 6 of Report R5.1)
- Feedback from UNIPD

Learning means

- Q&A and discussion (40 min for each Case Study)

Baseline documents required

- Deliverable D4.2 (Secco et al., 2017)
- Deliverable D5.1 (Górriz-Mifsud et al., 2018)
- Final draft of the set of questionnaires (Tools 1 to 6 of Report R5.1)
- List of questions to pose to UNIPD.

4.4.1.2 Bilateral discussions with BOKU

Duration: 2 hrs (1 hr with each Case Study Team)

Trainers:
Alice Ludvig and Gerhard Weiss

Objectives
To get to know the difference between the pilot and the final set of methods for data collection specifically used in the policy analysis.

Concepts and procedures to learn

- Final questionnaires for data collections and policy analysis (Tools 7 to 10 of Report R5.1)
- Feedback from BOKU

Learning means

- Q&A and discussion (40 min for each Case Study)

Baseline documents required

- Deliverable 4.2 (Secco et al., 2017)
- Deliverable 5.1 (Górriz-Mifsud et al., 2018)
- Final draft of the set of questionnaires (Tools 7 to 10 of Report R5.1)
- List of questions to pose to BOKU.
4.4.2 Meeting Work Packages 4, 5 and 6 regarding the training workshop and next steps in Case Study analyses

Duration: 90 min

Participant(s):
Laura Secco, Elena Pisani, Riccardo Da Re, Alice Ludvig, Gerhard Weiss, Elena Górriz (Moderator), Cristina Dalla Torre and Valentino Marini Govigli (Minute-taker)

Objectives
To assess the performance of the training workshop, to identify future steps for Case Study interactions and data collection, and to set the basis for the Case Study analysis (individual and cross-Case Study level).

Agenda:
- Reflections on the training workshop: feedback forms, internal discussion, attention to particular Case Study teams
- Finalisation of Deliverables D5.1 and D5.2
- Next steps (data collection coordination, 3rd Full Partner meeting in Padova (Italy) prospects for Case Study analysis).
5. Tasks Following the Training Workshop

5.1 Workshop Organisers and Trainers

The workshop organisers (EURAC, EFI) collected all the presentations and have made them available for all project partners via the SIMRA intranet (SIMRA Meetings/Case Studies Training workshop in Bolzano, 2018). These partners evaluated the feedback received from Case Study teams about the training workshop, and prepared a news item to be distributed through the SIMRA blog and social media. Finally, a report on the development of the workshop and main questions arising was prepared as a basis for possible amendments to methodologies, and shared with BOKU and UNIPD.

Partners EFI and EURAC will maintain close contact for finalising the individual Case Study protocols, and finalisation of the final version of D5.1. Partners BOKU and UNIPD will also be consulted for updating the set of tools with the additional feedback obtained from the training workshop, and for resolving specific queries from the Case Study teams.

Task 5.2 commences once the individual Case Study protocols are complete and agreed with the relevant SIMRA partners. These partners are the Case Study teams carrying out the data collection, UNIPD, BOKU EFI and EURAC.

5.1.1 Workshop feedback from participants

During the final session of the training workshop, an evaluation form was distributed to all participants, excluding the organisers and hosts (leaders of WPs 4, 5 and 6 and EURAC) (Appendix 5). Feedback was provided by 18 of 20 participants (90%). All Case Study teams perceived their participation in the SIMRA training workshop as useful or very useful for the upcoming work on data collection (Figure 17). There was general agreement concerning the high quality of EURAC facilities (100% agreed with this statement), trainers preparation (94%), and clarity, relevance, and ease of engaging in the workshops to achieve its objectives and topics (respectively: 95%, 89%, and 95%) (Figure 18).

Overall the Case Study teams felt more confident (89%) in undertaking the data collection which will be required. There was some disagreement in relation to the time allocated to the workshop, with 22% of participants of the opinion that insufficient time had been available (17).

![Figure 17. Overall evaluation of the training workshop (N=18).](image-url)
Concerning knowledge acquired, the majority of the participants felt that their knowledge on the different steps of the SIMRA data collection had improved overall (Figure 19). Higher improvements were recorded for the process of database data entry (89% of the participants reported improvements in knowledge), the focus group (89%), and the policy analysis (83%).

In terms of the most positive features of the workshop, participants mentioned the friendly atmosphere (stated by 39% of participants), the use of practical and interactive demonstrations (22%), and the peer-to-peer learning process from other Case Studies (17%).

Lastly, in relation to the main aspects of training that could be improved, participants reported the overall limited time of the event (mentioned by 33% of the participants), both in terms of practical sessions and on the bilateral discussions for each Case Studies.
5.1.2 Summary of feedback

Overall, the feedback from the participants in the training workshop were very positive: the workshop was perceived as a valuable event by practically all Case Study teams. The most significant added value of the workshop (i.e. “strongly improved knowledge”) was reported for the sessions on the focus group, policy analysis, and OPINIO database.

The feedback from participants identified three principal criticisms:

- **Time management.** The timetable of the workshop was intense, the bilateral sessions of which were felt to be too tight and complex to control the movement between groups. Possibly, a workshop lasting two and a half days would have been preferable. However, the trade-off was minimising the travelling time and costs to the participants. Given those restrictions, the overall opinion was that the length of the training workshop was a practical compromise.

- **Lack of time for open discussion and for Case Studies to report issues in the plenary.** This feeling may be due to not having completely clarified the methodology to be used in the Case Studies. The relevant objective of the training workshop was not to question the set of methods or the overall approach, but rather the details of their implementation. Opportunities for discussing the methods were at a different stage of the project, chiefly during the period of developing Deliverable D4.2 (Secco et al., 2017).

- **Case Studies teams were not asked for feedback on the final set of tools developed by WP4.** This was due to time restrictions. The feedback from the workshop was noted by UNIPD and BOKU, who will improve the set of tools accordingly. The Work Package Leaders highlighted the need to support the Case Study teams to collect the data according to the set instructions, in order to fulfil the project’s commitments.

Finally, a shared perception was that for the first time, the Case Study teams were the principal protagonists at a SIMRA event, where they have been able to show their plans, ideas, and have had a specific time slot to discuss about their specific interests and challenges.

Moreover, the most significant point reported was the friendly atmosphere of the training workshop. This characteristic was crucial for creating the basis for a continuous and efficient communication between Case Study teams and the teams of Work Package 5 throughout the period of data collection and analysis.

5.1.3 Dissemination of workshop activities

The workshop has been reported through social media to share information about this key activity in the overall progress of the project, as shown in Twitter and Facebook (Figures 20 and 21).
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

Figure 20. Coverage of the SIMRA Training Workshop published on social media (Twitter and Facebook).

A blog news item about the Training Workshop has been published on the project WWWsite (www.simra-h2020.eu/index.php/2018/01/19/simra-training-workshop-for-case-studies-team/).
12 case study teams covering European and Mediterranean regions participated in a training workshop, which formed the data collection phase of the NO2020 project SIMRA. The workshop, organized by VWS, took place on 10th-11th January at the DUSAC Research premises located in Bari, Italy.

An important input initiatives for SIMRA, the workshop provided sound and uniform knowledge concerning the Social Innovation conceptual framework, related terms and the qualitative-quantitative framework for data collection developed by VWS and VWS.

Alternatively between theoretical and dynamic sessions, case study teams were immersed in all aspects of the data collection strategy. At the end of the training, participants had explored the procedures behind the identification of social innovation triggers, agenda activities to reassess social networks, and the outputs and outcomes of these activities. In-depth sessions were dedicated to the different SIMRA data collection tools, namely focus groups, policy documents, semi-structured and structured interviews.

Case studies in SIMRA were purposely chosen, spanning agriculture, forestry and rural development sectors. The rural social innovations that SIMRA partners will analyse include examples of forest fire volunteer groups in Catalonia (Spain), an innovative online platform for supporting young farmers (the Vasco project in Aquila, Italy), grassroots cooperatives for human and environmental wellbeing (the Noderokoska case in Finland), social farming and community supported agriculture. The case studies constitute fundamental pieces of the puzzle that SIMRA is researching to understand the local and development of social innovation in rural Europe and beyond. "At the traditional honey towers in Galicia (Spain), the team work of each member, exclaimed Elena Gorri, one of the workshop participants, similarity SIMRA’s knowledge pool is built upon the data collected in each case study working together."

The tools developed establish the basis for an in-depth analysis of the social innovations as both process and project, including the efforts that might have on the society. Following the workshops, each case study team will proceed with collecting data that will later be analysed both at individual and cross-country scale. During the next General Assembly of the project, CS teams will have the chance to update the whole SIMRA consortium on the progress done.

Photo credits: DUSAC Research and Elena Gorri.

Figure 21. Coverage of the SIMRA Training Workshop published as a blog on the SIMRA project Website.
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622.

The European Forest Institute has published coverage of the Training Workshop on its website (Figure 22; www.efimed.efi.int/portal/news/?bid=3033), and plans to include an article in its regular newsletter.

Figure 22. Coverage of the SIMRA Training Workshop published as a blog on the EFIMED Website.
5.1.4 Workshop presentations

The presentations made during both days are accessible from the project Intranet, as shown in Figure 23, in the folder:

SIMRA meetings > CS training workshop in Bolzano 2018 > Day 1 / Day 2

![Intranet folders](image)

Figure 23. Location of the presentations in the SIMRA intranet.

5.2 Case Study Teams

In the second half of January 2018, the Case Study teams provided the final version of their individual protocols, to be agreed with the relevant SIMRA partners (UNIPD, BOKU, EFI and EURAC). This will constitute their final contribution to Task 5.1, for which EFI is the main contact.

Once the individual protocols are agreed, the data collection (Task 5.2) starts, under the supervision of EURAC. The Case Study teams will identify the logistical needs for launching the focus groups (by early February 2018), and undertake the interviews in the months that follow.

As long as they collect the diversity of the data required, the Case Study teams should use the relevant data reporting mechanisms (either OPINIO online tool or Word reporting). EURAC will maintain regular contact with these teams to ensure assistance is available where required.

At the full partner project meeting in Padova, Italy, the Case Study teams will be requested to present their work. A session at the meeting will be allocated to addressing the next steps, which will focus on the analyses.
6. References


Appendix 1. Programme of the Training Workshop

Venue: EURAC premises, Bolzano, Italy
Dates: 10-11-12 January, 2018
Participants:
- WPs 4-5-6 (EFI, EURAC, UNIPD, BOKU)
- Pioneer Case Study teams (CTFC, EURAC, HUTTON)
- Case Study teams (UNIFG, CETIP, CU, FAOSNE, OUOLU, ICRE8, UBERN, DLO, AWI, RDC)
- Voluntarily: other interested SIMRA partners


Objectives
- To ensure that all Case Study teams understand the methods for Social Innovation evaluation (WP4), and Social Innovation related policies (WP6): concepts, data collection techniques, data reporting (database entry), and the analysis.
- To ensure that all Case Study teams understand and follow the ethical clearance procedures.
- To ensure that all Case Studies have a protocol developed for their specific circumstances: tailored research questions and hypotheses, operationalisation of the Social Innovation impact evaluation, research quality.
- To ensure that Case Study and WP5 teams set up the basis for continuous and efficient communications throughout the period of data collection and data analysis.

Information circulated to Case Study teams before the workshop (early December)
- D4.2
- D5.1_v1 read sections 1, 2 and 3 – including the Ethical clearance procedure for Case Studies
- The updated questionnaires, sent in early January
- Template for 5 min presentation (Case Study teams)
- Template for 20 min presentation (pilot Case Study teams)

Homework to CS teams to prepare for the workshop
- Translate the questionnaires (advanced draft)
- Start identifying who to interview (to be discussed)
- Prepare a 5’ presentation of their Case Study, relevant to the data collection activities, highlighting what are or are expected to be critical issues in terms of data availability, identification of interviewees, or difficulties in method application, etc.
- Only Pioneer CS teams: 20 min presentation on feedback from data collection
- Read the above-mentioned documents

After the training workshop (all Case Study teams, WPs 4 and 6)
- Feedback to WP5 leaders on the possible amendments or further details in the Case Study protocols after the bilateral discussions
- Bilateral meetings for regular checks on the data collection with EURAC (and EFI)
- Data collection finished by September 2019
# SIMRA Training Workshop - Programme

## Tuesday 9th January

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>12-13:30</td>
<td>WP5 Preparatory meeting</td>
<td>EFI, EURAC</td>
</tr>
<tr>
<td>Afternoon</td>
<td>WPs 4 &amp; 5 Preparatory meeting</td>
<td>EFI, EURAC, UNIPD</td>
</tr>
</tbody>
</table>

## Wednesday 10th January

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30</td>
<td>Welcome to EURAC and Bolzano</td>
<td>Thomas</td>
</tr>
<tr>
<td>08:40</td>
<td>Introduction to the workshop</td>
<td>Elena G., Cristina</td>
</tr>
<tr>
<td>10:00</td>
<td>CSs introduction (three teams, 5 min single Case Study, 8 min if more than one Case Study; Q&amp;A)</td>
<td>HUT, CETIP, RDC</td>
</tr>
<tr>
<td>10:30</td>
<td>Coffee break</td>
<td>Riccardo</td>
</tr>
<tr>
<td>10:50</td>
<td>Data collection procedure</td>
<td>Alice</td>
</tr>
<tr>
<td>11:30</td>
<td>Structured interviews, Q&amp;A</td>
<td>UNIPD</td>
</tr>
<tr>
<td>12:00</td>
<td>Set of methods – Policy document analysis, Q&amp;A</td>
<td>Alice</td>
</tr>
<tr>
<td>12:30</td>
<td>Case Studies introduction (four teams, 5 min single Case Study, 8 min if more than one Case Study; Q&amp;A)</td>
<td>UNIFG, ICRE8, AWI, DLO</td>
</tr>
<tr>
<td>13:00</td>
<td>Business lunch</td>
<td>FAOSNE, IFE SAS, OULU, SAB/UNIBE</td>
</tr>
<tr>
<td>16:00</td>
<td>Coffee break</td>
<td>EURAC / CTFC</td>
</tr>
<tr>
<td>16:30</td>
<td>Case study database</td>
<td>Cristina, Elisa, Martin</td>
</tr>
<tr>
<td>17:15</td>
<td>Pioneer Case Studies</td>
<td>EURAC / CTFC</td>
</tr>
<tr>
<td>17:55</td>
<td>Questions</td>
<td>UNIPD, BOKU, EFI, EURAC</td>
</tr>
<tr>
<td>18:15</td>
<td>END OF DAY 1</td>
<td></td>
</tr>
<tr>
<td>19:30</td>
<td>Networking dinner – Wirtshaus Vögele. Via Johann Wolfgang von Goethe, 3</td>
<td></td>
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</table>
### Social Innovation impact evaluation

- **Time:** 08:30
- **Duration:** 30 min
- **Facilitators:** Laura, Elena P, Riccardo

### Ethical procedures, Q&A

- **Time:** 09:00
- **Duration:** 15 min
- **Facilitator:** Cristina, Elisa

### Bilateral discussions

- **Time:** 09:15
- **Duration:** 30 min
- **Facilitators:** Laura, Elena P, Riccardo

**Joint activities** to improve data collection skills.

### Coffee

**Time:** 09:45

### Bilateral discussions

- **Time:** 10:15
- **Duration:** 15 min
- **Facilitators:** Laura, Elena P, Riccardo

### Business Lunch & Group Photograph

- **Time:** 13:15
- **Duration:** 1 h

### Other Case Study Teams

- Joint activity to improve data collection skills.

### Coffee

**Time:** 14:00

### Bilateral discussions

- **Time:** 14:15
- **Duration:** 30 min
- **Facilitators:** Laura, Elena P, Riccardo

### Four parallel sessions with representatives of WPs 4, 5 and 6

<table>
<thead>
<tr>
<th>Time</th>
<th>WHAT: evaluation framework &amp; approach</th>
<th>WHO AND WHEN: focus groups &amp; questionnaires</th>
<th>Policy analysis</th>
<th>Tools for data collection and database</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:30</td>
<td>Social Innovation impact evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:00</td>
<td>Ethical procedures, Q&amp;A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:15</td>
<td>Bilateral discussions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:45</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>09:15</td>
<td>HUT1 (&amp;2)</td>
<td>DLO 1 (&amp;2)</td>
<td>CETIP &amp; IFE SAS 1&amp;2 (&amp;3)</td>
<td>Social network analysis</td>
</tr>
<tr>
<td>09:55</td>
<td>UBERN &amp; SAB 1&amp;2</td>
<td>HUT1 (&amp;2)</td>
<td>DLO 1 (&amp;2)</td>
<td></td>
</tr>
<tr>
<td>10:35</td>
<td>RDC 1(&amp;2)</td>
<td>UBERN&amp;SAB 1&amp;2</td>
<td>HUT1 (&amp;2)</td>
<td>10’ Diverging paths hypotheses</td>
</tr>
<tr>
<td>11:15</td>
<td>FAOSNE 1 (&amp;2&amp;3)</td>
<td>RDC 1(&amp;2)</td>
<td>UBERN &amp; SAB 1&amp;2</td>
<td>Database exercise I</td>
</tr>
<tr>
<td>11:55</td>
<td>CETIP &amp; IFE SAS 1&amp;2 (&amp;3)</td>
<td>FAOSNE 1 (&amp;2 &amp;3)</td>
<td>RDC 1 (&amp;2)</td>
<td>Protocol queries and feedback</td>
</tr>
<tr>
<td>12:35</td>
<td>DLO 1(&amp;2)</td>
<td>CETIP &amp; IFE SAS 1&amp;2 (&amp;3)</td>
<td>FAOSNE 1 (&amp;2&amp;3)</td>
<td></td>
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<tr>
<td>13:15</td>
<td>Business Lunch &amp; Group Photograph</td>
<td></td>
<td></td>
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<tr>
<td>14:15</td>
<td>Bilateral discussions</td>
<td></td>
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</tbody>
</table>

**Time:** 14:45

**Time:** 15:15

**Time:** 15:45

**Time:** 16:15

**Time:** 16:45

---

3 hr (30 min/CS team)
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Duration</th>
<th>Location(s)</th>
</tr>
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<tbody>
<tr>
<td>17:15</td>
<td>Plenary: Questions &amp; Answers</td>
<td>20 min</td>
<td>EURAC, UNIPD, BOKU, EFI</td>
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<tr>
<td>17:35</td>
<td>Wrap-up and closing</td>
<td>10 min</td>
<td>EFI &amp; EURAC</td>
</tr>
<tr>
<td>17:45</td>
<td>END OF DAY 2. Case Study partners starting to leave (only Pioneers CSs and WP 4-5-6 stay)</td>
<td></td>
<td>EURAC, UNIPD, BOKU, EFI, EFI</td>
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</table>

**Friday 12th January – ONLY PIONEER Case Studies and WPs 4-5-6**

08:15 Meeting with Pioneer CS: next steps and bilateral discussions with WP4 and WP6. WP5 as an observer.

<table>
<thead>
<tr>
<th>Time</th>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>08:15</td>
<td>UNIPD</td>
<td>UNIPD (WP4 set of methods)</td>
</tr>
<tr>
<td>08:15</td>
<td>BOKU</td>
<td>BOKU (qualitative aspects of policy support functions)</td>
</tr>
<tr>
<td>09:15</td>
<td>EURAC</td>
<td>2hr (1hr per Case Study) Two parallel sessions with representatives of WPs 4 and 6</td>
</tr>
<tr>
<td>09:15</td>
<td>CTFC</td>
<td>Two parallel sessions with representatives of WPs 4 and 6</td>
</tr>
</tbody>
</table>

10:15 Coffee break

10:40 Meeting WPs 4, 5 and 6 regarding this workshop and next steps

13:30 END OF DAY 3

Lunch at EURAC canteen
Appendix 2. List of Participants

<table>
<thead>
<tr>
<th>Name</th>
<th>Surname</th>
<th>Institution</th>
<th>10-01-18</th>
<th>11-01-18</th>
<th>12-01-18</th>
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<tbody>
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<tr>
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<td>Carla</td>
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<td>Antonio</td>
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<td>UNIFG</td>
<td>UNIFG</td>
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<tr>
<td>6</td>
<td>Stanislava</td>
<td>Brinkalakova</td>
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<td>HAIDER</td>
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Appendix 3. Pioneer Case Studies Template Presentation

Powerpoint template for Pioneer Case Study teams presentation as to standardize their feedback in the training. Estimated length: 20 min

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**Pilot test overview**

Summarize in one slide (1 min max) the basic structure of the pilot, giving a timeline of the main event. Add pictures of the event but please do not add any sensible interviewees’ information.

In the next sections you will focus on all the different sampling stages. Please present any criticalities that has arisen during the realization of the step. Use photos to illustrate the activities.

---

**Preparatory desk work**

In this and the next sections you will focus on all the different sampling stages.

Please present any criticalities that has arisen during the preparatory desk work (e.g. identification of agents). Summarize in one-two slides (2 min approx.) the actors of your SI using the terminology of D4.2 (innovators, followers, transformers, implementers, and beneficiaries).

Highlight the main critical issues that can arise concerning this matter (e.g. difficulty in identifying innovators, beneficiaries are a very large sample unit, etc.)

Focus also on glossary and translation issues that you feel could be relevant for all CSs.

Use 2-4 slides for this, 4 min max.
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622.
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622.

Focus group

Please present any criticalities that has arisen during the development and implementation of the structured interviews for all type of interviewees.
Use photos to illustrate the activities.
Use 2-3 slides for this, 3 min max

Focus group

Please present any criticalities that has arisen during the data entry phase.
Use 1 slide for this, 2 min max
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

**Data availability**

SIMRA data collection includes different data sources, namely: interviewees, experts, policy documents, literature review and reports, geographical and socio-economic indicators.

Use this slide (1 min approx.) to summarize in a bullet list the key issues you faced concerning data availability in your region, indicating any criticalities you might foresee for other CSS (e.g. no available literature on the SI topic).

MAXIMUM 3 POINTS!

**Methods for data collection**

D4.2 presented several methods to be used in your data collection. (e.g. semi-structured interviews, structured interview, focus groups, Q methods, etc.).

Use this slide (1 min approx.) to summarize in a bullet list the key direct implications of using these methodologies in your case study and any difficulties you might think can arise (e.g. some vulnerable sector of the population are more reluctant in responding to structured interviews, in organizing a focus groups we need to apply for ad hoc authorizations, etc.)

MAXIMUM 3 POINTS!
Conclusion

Summarize in ONE BULLET POINT the take home message that you feel other CS teams and WP4-5-6 should reflect upon on the upcoming days. BE CONCISE, AND STRAIGHT TO THE POINT!

e.g.

- In CS XX we face a lack of beneficiaries as the SI has only been implemented this year!
Appendix 4. Regular Case Study Presentation Template

Powerpoint template for regular Case Study team presentations to standardize their feedback in the training.

Estimated time duration: 5 min
Data availability

SIMRA data collection includes different data sources, namely: interviewees, experts, policy documents, literature review and reports, geographical and socio-economic indicators.

Use this slide (1 min approx.) to reflect on the availability in your region of such data, indicating any criticalities you might foresee (e.g., no available literature on the SI topic).

Actors identification

Summarize in one-two slides (2 min approx.) the actors of your SI using the terminology of D4.2 (innovators, followers, transformers, implementers, and beneficiaries).

Highlight the main critical issues that can arise concerning this matter (e.g., difficulty in identifying innovators, beneficiaries are a very large sample unit, etc.)
This project has received funding from the European Union’s Horizon 2020 research and innovation programme under Grant Agreement No 677622

Methods for data collection

D4.2 presented several methods to be used in your data collection. (e.g. semi-structured interviews, structured interview, focus groups, Q methods, etc.).

Use this slide (1 min approx.) to reflect on the direct implication of using these methodologies in your case study and any difficulties you might think can arise (e.g. some vulnerable sector of the population are more reluctant in responding to structured interviews, in organizing a focus groups we need to apply for ad hoc authorizations, etc.)

Conclusion

Summarize in ONE BULLET POINT the take home message that you feel other CS teams and WP4-5-6 should reflect upon on the upcoming days. BE CONCISE, AND STRAIGHT TO THE POINT!

- In CS XX we face a lack of beneficiaries as the SI has only been implemented this year!
Appendix 5. Evaluation Form

Handed out to participants after the training workshop.

10-11 of January, 2018
EURAC, Bolzano, Italy

TRAINING WORKSHOP FOR CASE STUDY TEAMS ON SIMRA METHODOLOGY

OVERALL EVALUATION

1. In general, how did you find the training workshop?

☐ Very useful   ☐ Useful   ☐ It has not provided me with new knowledge   ☐ Not useful at all

2. Please indicate your level of agreement with the statements listed below:

<table>
<thead>
<tr>
<th></th>
<th>Strongly agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>The objectives of the training were clearly defined.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Participation and interaction were encouraged.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The topics covered were relevant for me.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The contents presented was well organized and easy to follow.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>The material distributed beforehand (D4.2, D5.1) was helpful.</td>
<td>☐</td>
<td>☐</td>
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<tr>
<td>The time allocated to the workshop was sufficient.</td>
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</tr>
<tr>
<td>The meeting rooms and facilities were adequate and comfortable.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>Trainers were overall well prepared and knowledgeable about the topics presented.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>I fell more confident in undertaking the future data collection in the CS.</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
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ACTIVITIES AND TRAINERS EVALUATION

3. How much has your participation in the training affected your knowledge on the following steps of the SIMRA data collection for Social Innovation evaluation?

<table>
<thead>
<tr>
<th>Step</th>
<th>Strongly Improved</th>
<th>Improved</th>
<th>Neutral</th>
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<tr>
<td>Ethical clearance procedures</td>
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<tr>
<td>SIMRA Evaluation Framework and its key dimensions (e.g. triggers, needs, agency, etc.)</td>
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<tr>
<td>Data collection methods: Focus group</td>
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<td>Data collection methods: Structured interviews</td>
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<td>Data collection methods: Semi-structured interviews</td>
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<td>Data collection methods: policy analysis</td>
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<td>Database and OPINIO data entry</td>
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<tr>
<td>SI impact evaluation: Counterfactual analysis</td>
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</table>

4. What did you like most about this training workshop?

5. What aspects of the training could be improved?

6. Any other comments?

-
Appendix 6. Survey of Case Study Training Needs and Interests

On October 16th, the CS teams were sent an email with the preliminary programme and an online survey to capture their preferences and/or training needs. The questions are reflected below.

What training do I want?

This explorative quick survey aims at understanding the CS teams preferences/necessities for certain skills related to data collection and analysis as to streamline the programme of the training workshop accordingly.

Please rate your interest on the following proposed activities on a scale from 0 (not interesting, I already have that skill) to 5 (very interesting, I lack that skill and I need to develop it).

ADD ONLY ONE REPLY FOR CS TEAM!

* Mandatory
Email: ______________ *

Name of the CS team (use the official acronym of SIMRA project)* (open question)

How much would you be interested in a training session on Focus groups and Q method? *
☐ 0  ☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5

How much would you be interested in a training session on semi-structured (qualitative, open ending) interviews? *
☐ 0  ☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5

How much would you be interested in a training session on structured (close ending) interviews and processing (transcription & reporting)? *
☐ 0  ☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5

How much would you be interested in a training session on Social Network Analysis? *
☐ 0  ☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5

How much would you be interested in a training session on policy document analysis? *
☐ 0  ☐ 1  ☐ 2  ☐ 3  ☐ 4  ☐ 5

Additional comments (open question)