

Toolkit



Introduction

Purpose of the SSH Valorisation Toolkit

About the programme

The REVALORISE+ Researcher Training is a 3-month European programme which will help you extend the reach of your Social Sciences & Humanities (SSH) research beyond academia. The programme will take place in a blended format with some activities taking place online and others in-person at your HEI.

What is the SSH Valorisation Toolkit?

The SSH Valorisation Toolkit provides an overview of tools and canvases used for the valorisation process of research – such tools and canvases are used in the delivery of the HackTheResearch Valorisation Training Programme for researchers.

The HackTheResearch Valorisation Training
Programme consists of 10 modules that will help
trainers teach SSH researchers how to create societal
impact from their work.



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Storytelling Canvas

Description

The canvas allows to design stories . It is a method for strategic storytelling and can also be used collectively. It is a structured method to develop one's story. Especially for beginners it is an easy way to develop a story step by step and align it with one's communication goal.

How to use it

Keep a specific communication tool and goal in mind when using it. Go through the canvas step by step and fill in

When to use it

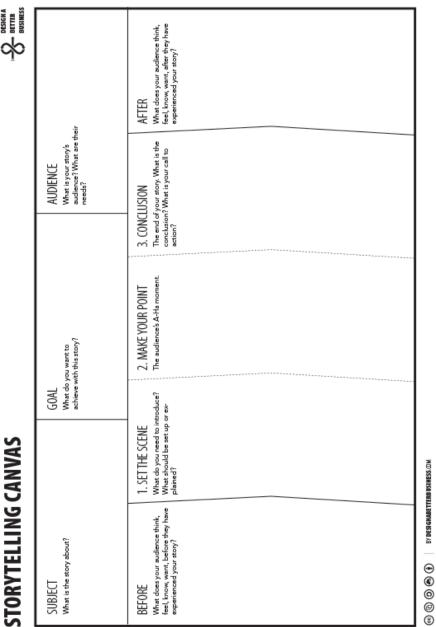
When wanting to advance ones communication activities. When one has a specific communication goal in mind.

When one needs inspiration and ideas.

In which module is it used in the training

SSH research valorisation communication





University-Business Collaboration (UBC) Ecosystem Framework

Description

A tool for researchers, managers and policymakers to gain a better understanding of how UBC works and supports the process to foster, promote and strengthen it.

A framework for understanding and managing the elements affecting University-Business Cooperation(UBC)

How to use it

The framework identifies (1) Inputs – resources to undertake UBC activities; (2) Activities which bring intended outcomes in education, research, valorisation and management areas; (3) Results - outputs, outcomes and impacts. As well as the supporting mechanisms of UBC, influencing factors – including barriers and motivators, and the context in which UBC occurs.

When to use it

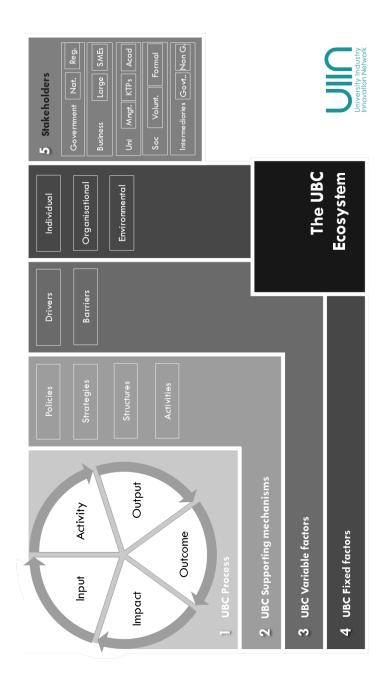
Researchers can apply the framework to their own valorisation work to be able to identify the most important elements of UBC and gain a better understanding of how UBC works.

The UBC Ecosystem Framework provides:

- Simplification of reality
- · Concrete elements and their relationships
- Common definitions/concepts
- · Structure to analyse your own environment

In which module is it used in the training

Collaboration with External Partners in SSH Valorisation



Scanning Template

Description

The scanning template helps to map internal assets and that of the external ecosystem that can be utilised to support the development of SSH research valorisation activities.

The internal and external mapping is a synthetic representation capturing all the key strengths and roles that have an influence on the university-business collaboration ecosystem.

How to use it

Describe the different assets (internal and external) that can support the development of valorisation activities.

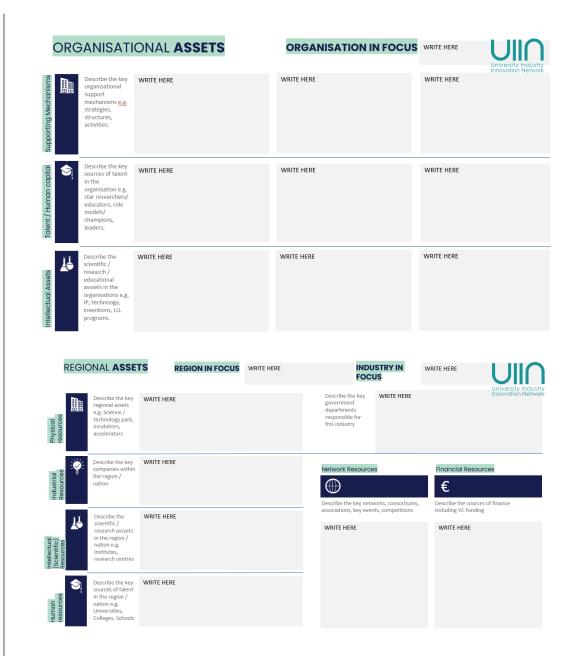
When to use it

A researcher needs to better understand their environment and find support

and find support.

In which module is it used in the training

How to Scan Your Environment



Impact indicators

Description

The model shows a general overview over the different indicators that can be used to measure impacts in SSH research.

How to use it

Serves mostly as an inspiration to participants who can form an idea of which indicators can be used to "measure" impacts created from their own projects.

When to use it

The impact indicators should be a part of impact planning from the beginning of projects as it gives a clearer view of which groups / users to target when developing ideas.

In which module is it used in the training

Module 6

HSS research has impacts on:

Academic impacts

SCHOLARSHIP

that can be measured using indicators such as:

- · Bibliometric indicators
- · Downloads from Open Access repositories
- · Citations in grant applications
- Acknowledgements
- · Prizes and awards
- · Reputation as measured by survey
- Post-publication peer review (book reviews, dedicated symposia)
- · Juried exhibitions and performances

CAPACITY

through teaching and mentoring at the graduate and undergraduate levels that can be measured using indicators such as:

- Number and quality of experiential learning/ research opportunities for students
- · Surveys of students and alumni
- Employer surveys
- Integration of research as a learning outcome in courses

Impacts on society

PRACTICE AND POLICY

that can be measured using indicators such as:

- Invitations to participate as an expert witness, an advisor, on an expert panel or committee
- Citations in government documents
- Consulting for governments or think tanks
- Commissioned reports

SOCIETY AND CULTURE

that can be measured using indicators such as:

- Number and quality of partnerships between researchers and community groups
- Requests for consultancy/advice from community groups
- Media coverage of research (newspapers, TV, online)
- · Requests for media appearances
- Engagement of the public at events
- Research-related social media
- Public use of research-based web resources on social and cultural issues

ECONOMY

that can be measured using indicators such as:

- Advisory roles and board memberships
- Revenue opportunities and cost savings in the public, private and not-for-profit sectors resulting from research applied in practice
- Income derived from patents, patent licensing, copyright and trademarks
- Consulting contracts

This framework illustrates a key characteristic of HSS research: its impacts are felt broadly across society in many direct and indirect ways. This reality has important implications for any effort to assess the impacts of this work. This Federation report builds on the findings of the 2014 working paper, focusing on identifying the key factors that will determine the success of impact assessment efforts and presenting a set of recommendations that describe a positive approach to impact assessment.

Impact action plan

Description The impact action plan is a template that researchers can

use to visualize the steps on the way to creating impact. It is included here because it provides a better base to be able to

set up impact indicators for a project.

How to use it When initiating a project researchers should fill out the plan

in order to systematize the activities they need to engage in

towards creating impact.

When to use it In the beginning of projects – evaluating as they go.

In which module is it used in the training

Module 6

Impact Action Plan:

Barriers What could prevent this from happening?	
Support What do you need to achieve this?	
When? Activities may need to happen at specific times	
Evidence What will success look like? How can it be demonstra- ted?	
Pathway to Impact What steps/activities need to happen and who will do it?	
Impact What change will occur? Who will benefit?	

Focusing on your valorisation possibilities

Description

The chart will be used to explain different valorisation possibilities and to make the distinction between STEM and SSH disciplines.

How to use it

The presenter will explain different channels and will ask participants to discuss in groups:

- What are the possible channels they can use as valorisation possibilities and
- •What would be the most suitable valorisation possibility for their specific case study?

When to use it

25 – 45 min – Focusing on your valorisation possibilities

 Practical application of valorisation possibilities for different research data focussing on participants' own environment

In which module is it used in the training

Introduction to Research Valorisation

Common channels for STEM & SSH

Scientific publications,
Newsletters/Brochures, Seminars,
Webinars, Workshops, Presentation of
results at conferences, Demonstrations,
Sharing information in media including
social media, Sharing results on online
repository (research data, software,
reports), Engagement of citizens, public
bodies and societal actors

STEM channels

Entrepreneurial advice and training,
Academia-industry joint activities,
Academia industry joint research and
mobility schemes, Intermediaries and
knowledge transfer professionals
support, Intellectual property
management, Standardization and
knowledge dissemination and policy
uptake, Open labs, Research driven spinoffs and start-ups, Innovation hubs and
incubators, Science/techno parks

SSH channels

Consultancy-related services, Seminars, Placements, Informal discussions, Voluntary work to engage with stakeholders, Evaluation of local area and its inhabitants, Dialogue and joint cooperation with local community, Compliance with public policies and regulations, Creation of knowledge hubs incorporated within a network of active and linked stakeholders
Transfer of research materials to local stakeholders & policy makers

Identification of barriers and drivers for valorisation in SSH

Description

The table explains different drivers and barriers for

valorisation of SSH research data

How to use it

A presenter will explain different drivers and barriers and will ask participants to:

- Map these drivers and barriers (below) into the categories defined in the table.
- Discuss how barriers can be overcome and how the drivers can be supported?
- Discuss what are the main drivers important for their specific case study

When to use it

65 – 85 min – Identification of barriers and drivers for valorisation in SSH (exercise)

- Practical steps –exercise with a focus on mapping the barriers and drivers for valorisation
- [BREAKOUT ROOMS] Group exercise (2-3 people)

In which module is it used in the training

Introduction to Research Valorisation

	Driver	Barriers
Relationship		
Access		
Research		
University		
mission		

Drivers

- A clear policy of the institution
- Infrastructure and supporting structures
- A benchmark
- Support for valorisation through official recognition
- Trustful, transparent and close cooperation with stakeholders
- Interests of academic to make an impact

Barriers

- Ineffective communication between university and industry
- Ineffective university procedures for valorisation
- Financial issues and access to venture capital
- Long term process of valorisation
- Lack of time for supporting valorisation
- Lack of knowledge and skills to practically apply research findings

Focusing on actors important for valorisation

Description

This chart helps the participants analyse the stakeholders in

the process of valorisation

How to use it

The presenter explains different stakeholders in the process of valorization and asks participants to discuss in group

stakeholders relevant for their specific case study and map

them into the chart.

When to use it

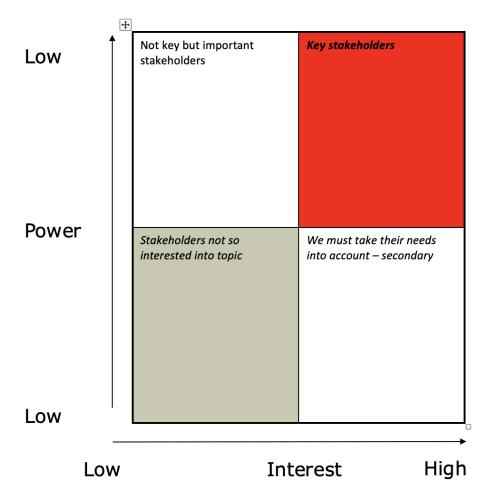
25 – 50 min – Focusing on actors important for valorisation

 Practical exercise - How to define what actors are important for valorisation. [BREAKOUT ROOMS] -

Group exercise (2-3 people)

In which module is it used in the training

Valorisation of SSH Research



Identification of stages in the valorisation process

Description

The chart explains the Stage Gate approach that is used to understand the valorisation cycle of the research data.

How to use it

The presenter will explain the stage-gate approach and will ask participants to think about different stages and apply it to the case studies of research valorisation they are using. Therefore, participants will be asked to discuss in group and answer the following questions:

- In which phase is the research idea (case study) they are using?
- What are the challenges of that specific stage for that research idea?
- What are the different stages would include for that specific case to move forward to the following stage?
- What would be the steps to move the research idea into the next stage?

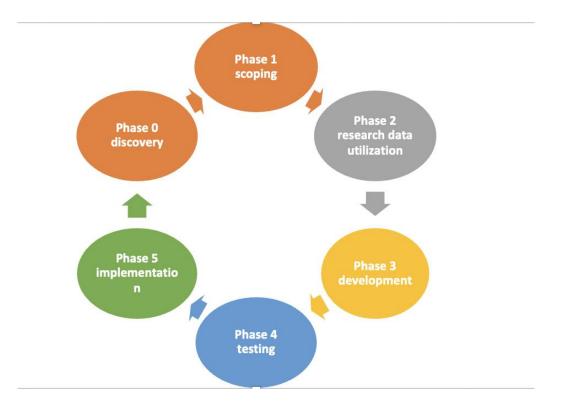
When to use it

80– 110 min – Identification of stages in the valorisation process

 Practical steps – focussing on defining stages in valorisation process and phases of valorisation cycle, [BREAKOUT ROOMS] – Group exercise (2-3 people)

In which module is it used in the training

Valorisation of SSH Research



Scope the search: the scope wheel

Description

When scoping, we aim to define where to search for signals of change. The exercise supports the creation of a strategy for the search, the scope serves as an action map and a guiding compass for the research.

How to use it

The first step is to define the relevant domains to the research. In the visual, there are four domains. However, you can select as many as you might need. For wider scopes, it might be relevant to use the STEEPV as domains: social, technological, economic, environmental, political, and values.

Once the domains are defined, you can start filling them up with what you know about them, or what you think you should explore more about.

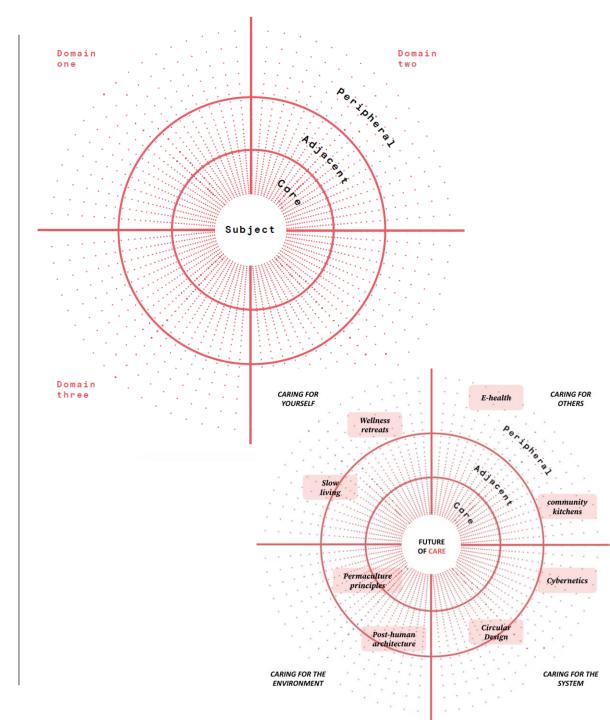
Tip: use the scope wheel collaboratively, with your team, and try to set a time limit per each domain. For example, try to use 2-5 minutes per domain and then move to the next one.

When to use it

The scope wheel should be used at the beginning of a research process, to map out what you know about your research area and create a guiding compass of which area you want to research more about.

In which module is it used in the training

Module 9: Tools and Methods for Products and Service Development



Agile Experiment Canvas

Description

Agile Experiment Canvas is a tool to plan and execute experimental culture in practice. Experimental culture responds to the accelerating pace of change in society and encourages the creation of new solutions. It also challenges over-planning and makes sure fine words are translated into real action. Experimental culture revolutionizes new creation by encouraging practice already in the early stages of the concept. Experiments can also be used to answer problems that have risen during the process. Experimental culture allows uncertainty, risks and failures to occur only if you don't learn from the experiments.

How to use it

Agile Experiment Canvas starts by defining the bigger goal (1). What is the wider context and a goal of the experiment? For example, "How to make the city of Amsterdam more sustainable?"

Then, define a possibility / problem which does not have a clear answer yet but testing it will help to promote achievement of a bigger goal (2). Plan and test the premise in practise in a real world with real users. Act agile and on a small scale at first. (3)

Measuring your success is important! Learn from the experiment. Analyse what works and what does not (4). You only fail if you don't learn.

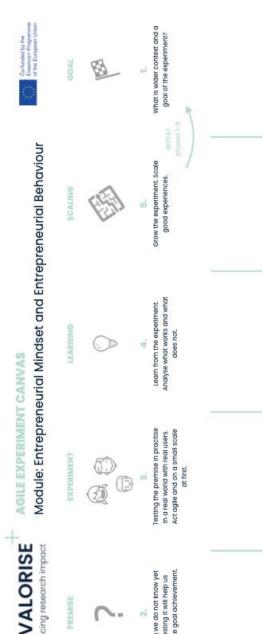
After first positive indicators of your experiment, scale it up. Grow the experiment. Scale good experience. (5)

When to use it

This canvas is useful when you already know things you need to know more about. Some assumptions about a new idea to be tested. By experimenting, you gather evidence and inspire others to join. Many new ideas fail because they are not tested with customers in a timely manner. Fail at the beginning as quickly and cheaply as possible - "Fail fast, learn fast."

In which module is it used in the training

Entrepreneurial Mindset and Entrepreneurial Behaviour



From idea to proposition: triangulation

Description Basic model for valorisation of a certain research result /

idea: defining the problem or job-to-be-done, the

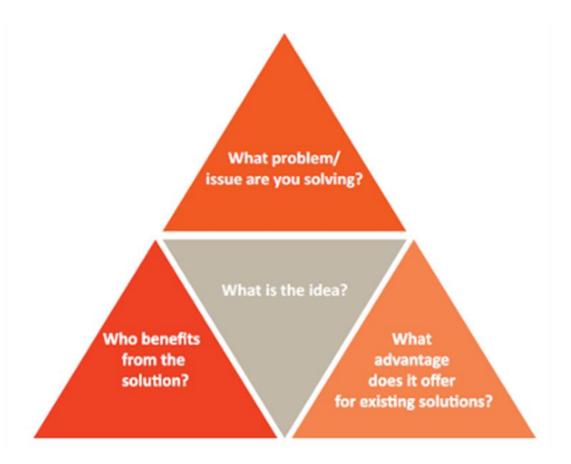
stakeholders and competition.

How to use it In groups or individually: define the three elements named

above of your idea on paper, present to others.

When to use it Early stage, when the research project is ongoing, but it's

clear what research assets are to be expected



Canvas

Go-to-market roadmap

 Map the actionable steps to be taken to bring your final offer to market

Description

- Understanding the roles, responsibilities and dedication required for the team to do so
- Make sure to understand the effort and task that are priorities for this plan to work
- Align the team internally and externally, by providing your stakeholders with a clear action plan for the release and management of your solution

How to use it

Step 1

Go through each row first, making sure to list every important and relevant element of a go to market plan.

Step 2

Distribute tasks along a timeline (columns) to ensure continuity. Be mindful of how much can be done, while considering the dedication each team member is able to provide for their attributed task.

Step 3

Google some examples of go-to-market roadmaps, there's plenty of inspiration out there!

When to use it

You use this tool when considering your path from invention to exploitation



Stakeholder mapping

Description

- The "Stakeholder Mapping tool" helps you to identify and map out the key influencers related to your challenge.
- By plotting them out in this matrix, you can define each stakeholder's level of influence and interest in your challenge.
- Based on this potential impact, select the best approach on how to engage with them moving forward.

How to use it

Step 1: list all potential stakeholders for your venture

Step 2: map them on the matrix

Step 3: for each stakeholder develop a plan of engagement

Step 4: follow up

When to use it

When seeking insights into key stakeholders and their

potential willingness to engage with your venture

In which module is it used in the training

Add title of the module







