Project Acronym: CO-CREATE

Project title: Setting up a network of COmpetitive MED Clusters with the contribution of CREATive industriEs

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D.3.2.1.

Training methodology

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Executive Summary

The objectives of the training activities are to educate operators and managers of intermediary organizations from traditional and creative sectors in the field of Design Thinking, Co-Creation, Cross-Innovation, Cross-fertilization and Gamification. In addition to this operator will be trained also in organization of local trainings for local intermediary organizations. The objectives (deliverables) in the scope of the Co-Create projects are:

- Training methodology (D.3.2.1)
- 1 set of training course materials (D.3.2.2)
- 12 Reports on Local trainings organized (D.3.2.3)

leading to 50 operators and 30 managers of local intermediary organizations fully trained.

Contents

1 General framework of project training activities

1.1 Co-Create project: Objectives overview

The objective of Co-Create project is to support cross-fertilization processes between creative industries and traditional clusters through contributing to test co-design and creative methods applied to entrepreneurs and clusters managers with the support of IPR instruments for their management. The project promotes cooperation among partners using new methodologies and tools addressed to clusters managers, SMEs and policy makers. Main outputs will consist of a cross-fertilization toolkit as instrument to favour innovation of Clusters and SMEs, 380 SMEs supported on innovative projects, the setting up of a transnational innovation network between traditional and creative industries and a Manifesto to promote cross fertilization and to enlarge the network. Co-Create will also contribute to the development of more competitive clusters at MED level, through the elaboration of a cross fertilization methodology and toolkit to support and manage cross-clusters initiatives.

The main activities performed within the Co-Create project will be:
- A SET OF TRAINING ACTIVITIES,
- PILOT ACTIVITIES.

This deliverable focuses on the training activities, through which project partners and cluster managers will get educated on the methodology to a level high enough, that would enable them to adopt a practice-based approach with local pilot actions. Through such pilot actions the project will be able to identify new paths for the improvement of the innovation in traditional clusters through cooperation with Creative Industries.

The general aim of these later project activities will be the real development of new products and services for the markets according to the social and technological trends and involving customized and case tailored IPR support. The project pilot actions methodology, which will be proposed by the Co-Create project, will thus also baseline on the activities of the past European projects and experiences but with an innovative way of application and integration.

The general aim of this present Methodology for the Training activities however, is more limited, and it focuses on the entrance point – the training of the future activities operators.

In this deliverable the methodology, the activities and the target groups for the set of training activities will be explained.

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The aim of this Methodology is to give enough information, advice and content on the process of training different groups of participating representatives in the activities of the project Cocreate to carry out all and any necessary activities. The previewed and expected most likely user groups are:
- "managers of intermediary organizations"
- "Project Partner's Operators"
- "SME representatives".

For consistency, the term "managers of intermediary organizations" is used in the Methodology , but can and should be replaced by any other term as of above, describing groups of participating representatives, where necessary to carry out the project goals. In such cases the Methodology should be used accordingly.

1.2 Contents, tools/methods and approaches to be used within Co-Create activities (Trainings or Pilot Actions)

The aim of the training activities at the level of SMEs and Creative industries in Co-Create is to transfer basic knowledge on design thinking and co-creation method in order to generate the ground of skills and competences necessary to develop innovation processes of cross innovation and cross fertilization with tangible results (Pilot Actions).

The training activities will serve as a bridge for the real engagement of intermediary organizations from traditional and creative sectors, and SMEs in the pilot actions (creative camps), thus these participants to the training actions will need to become skilled in the methods and approaches further used within the Pilot Action activities.

The Co-Create training content (Design Thinking, Co-Creation, Cross-fertilization, Cross-Innovation and Gamification) can be rearranged in the way to support Pilot Actions which will be framed with the following content, tools/methods and approaches:

Contents: Design Thinking, Co-Creation

The main contents of the training activities will be design thinking and co-creation. Design Thinking and Co-Creation are also to be seen as the core content for the Pilot Actions.

Tool/ Method: Gamification

The pilot actions will implement a **gamification approach** in order to improve the engagement of the target groups (in combination with Design Thinking and/or Co-Creation method) and the real impact of the activities in the innovation capacity of SMEs and creative industries.

Approaches: Cross-innovation, Cross-fertilization

In particular two <u>core approaches able to drive innovation processes</u> will be addressed:

1- **cross-fertilization** (mutual exchange of ideas from different fields for mutual benefit)
2- **cross innovation** (collaborative and user-driven innovation that happens across sectoral, organizational, technological and geographic boundaries)

The core approaches will drive the training activities creating a ground of knowledge for the pilot actions. These approaches have substantial indirect value, because of their attractiveness and motivational potential for use.

To be able to drive the Pilot Actions, the Methodology to properly educate the Operators of these actions is introduced in this deliverable. These contents, tools, methods and approaches will be discussed into the detail more in the following chapters and can be seen in overview in the table below.

Table 1: A summary of training contents and Pilot Action tools/methods and approaches to be used within Co-Create project.

	Co-Create approach	Main point	Usefulness
	Pilot Action Content		
Co-Create project's Training CONTENTS	Design Thinking	Emphasize (with the customer) – Define – Ideate – Prototype - Test	An organized procedure of innovation, related to customers, providing problems to be solved, repeatedly brings new products and a higher added value to the customers and to the organizations.
	Co-creation	Organizations can decide what they wish to collaborate on, they agree on topics, implement it and benefit on it.	Main directions are well jointly defined. Movements in defined directions are organized, planned and communicated. Therefore planned results are more relevant and more probable.
	Pilot Action Approach		
	Cross-fertilization	Cross-fertilization is mutual exchange of ideas from different fields for mutual benefit.	Ideas, approaches and tools from one filed can be useful applied in the other.
	Cross innovation	Cross innovation is collaborative and user-	Organizations can freely communicate within

		driven innovation that happens across sectoral, organizational, technological and geographic boundaries. Each organization defines what its core knowledge is and tends to supplement it, whereas the rest of the knowledge can be exchanged with other organizations.	themselves as each one has previously defined its internal crucial knowledge which is not to be shared. Thus every member can benefit without being harmed.
	Pilot Action Tool		
	Gamification in combination with Co-Creation and/or Design Thinking method	Transfer knowledge and / or skills using attractive way with inclusion of content in gaming environment	With gamification participants get embedded into the process, they see benefits for themselves and want to continue with their participation.

1.3 Target groups of the Co-Create project (for the Training activities and Pilot Actions)

The main target groups of the training activities are the potential training operators, members of the following groups:

1- Project partners Operators are project partner's staff not directly involved in Co-Create project activities
2- Intermediary organizations from traditional sectors (like Cluster Managers, Chambers of commerce, industry, crafts; Technology parks and from Creative sector (like incubators, Fab Labs, Co-Working etc.) from the target industrial sectors
3- Other important stakeholders in the field in the regions

To complete the picture it should be notified that the target groups of the pilot actions, based on the outcome of the trainings, are:

Creative industries (culture, arts and entertainment, media and cultural industries, services as architecture and engineering, design, advertising, business communication, software consultancy and supply, craft and related activities),

SMEs in the target industrial sectors (construction, mechanic and furniture) will in the frame of the project activities receive inputs and explore potential of cross-sector services from the creative industries based on the mentioned core approaches.

1.4   Capitalization of approaches from past experiences and a historical view

In the frame of Co-Create project, project partners will capitalize on the outcomes and experiences from other European Projects. A part of Co-Create approaches, methods and tools will be adapted and delivered (WP3.1) based also on the results of five EU projects CCALPS, SILMAS, IP-SMEs, FIREMED and FIDIAS that were implemented in the 2007-2013 period.

2   Detailed objectives of training activities in Co-Create

The objectives of the training activities are to educate operators and managers of intermediary organizations from traditional and creative sectors in the field of Design Thinking, Co-Creation, Cross-Innovation, Cross-fertilization and Gamification. In addition to these operators will be trained also in organization of local trainings for local intermediary organizations. The objectives (deliverables) in the scope of the Co-Create projects are:
-   Training methodology (D.3.2.1)
-   1 set of training course materials (D.3.2.2)
-   12 Reports on Local trainings organized (D.3.2.3)
 leading to 50 operators and 30 managers of local intermediary organizations fully trained.

2.1 Types of Training Activities

There are two different types of training activities in Co-Create:

1- TRAIN THE TRAINERS: these training activities will be addressed to (local) 2 operators from each project partner organization (staff of project partners organizations or manager of intermediary organizations PPs are involving in Co-Create). The methodology proposes a 2 day training, where:

Day1: INSPIRATION. The first day should be dedicated to transfer the basic knowledge on the main contents (Design Thinking, Co-Creation), introducing the main Tool/ Method (Gamification) and the main approaches Co-Create would stimulate in the development of the innovation projects (Cross-fertilization, Cross-Innovation).

Toolkit on capitalization of previous projects (outcome of WP3.1) and guidelines for organization of local workshop for intermediary organizations will be introduced.

Day2: IDEATION. Day2 should be dedicated to practical approach of core Co-Create project concepts (Design Thinking, Co-Creation, Cross-fertilization, Cross-Innovation, Gamification) or to simulation of Creative Camps (which should not be confused with creative camps Pilot Actions). The second day will thus be a workshop day where operators (project partners'' staff members and/or theirs external experts) will work with the support of experts in the ideation and planning of the local pilot actions (Local training and Creative Camps) and will try to simulate the execution of such a Camp (Pilot Action) either through Case Studies or through Real Case Examples (the Current Innovation Assessment in Appendix) collected prior to the Workshop (more details on collection of those in the practical part of the Methodology). The purpose of both is to get the participants as involved as possible and personalization of the

issues addressed in the Training.

The ultimate goal of the training methodology should be enabling project partners to understand the core Co-Create concepts and to be aware of the projects task ahead of us, which are in connecting of Creative and Traditional Industries thus by applying/implementing Pilot Actions bringing the added value to SMEs originating from matching of the two sectors. Details can be seen in Figure 2.

2- LOCAL TRAINING ACTIVITIES: Operators involved in the train the trainers course will be equipped for the organization of local training course. The target groups of this activities will be project partner's operators (and possibly involve intermediary organizations (incubators, fab labs, co-working organizations, clusters, Chambers of commerce, industry, crafts, Technology parks…), anyone that would like to later on be in a position to manage the Creative Camps as a follow-up consequence of the Training activities (not the Pilot Actions, but the Actions done outside of the project, with lasting effect).

Main objective of local training are:
- Training activities are the first step of engagement of the target groups (managers of local intermediary organizations) in the project training activities;
- to transfer the basic knowledge on design thinking and co-creation (and methods, tools, approaches used) to the participants – managers of intermediary organizations
- to enable managers of local intermediary organizations for the effective implementation of the core Co-Create methods (Design thinking, Co-Creation, Cross-fertilization, Cross-innovation and Gamification).
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The general Logical Framework of activities within the 2-day Train the Trainers event of the Co-Create project can be seen in the Picture Below.
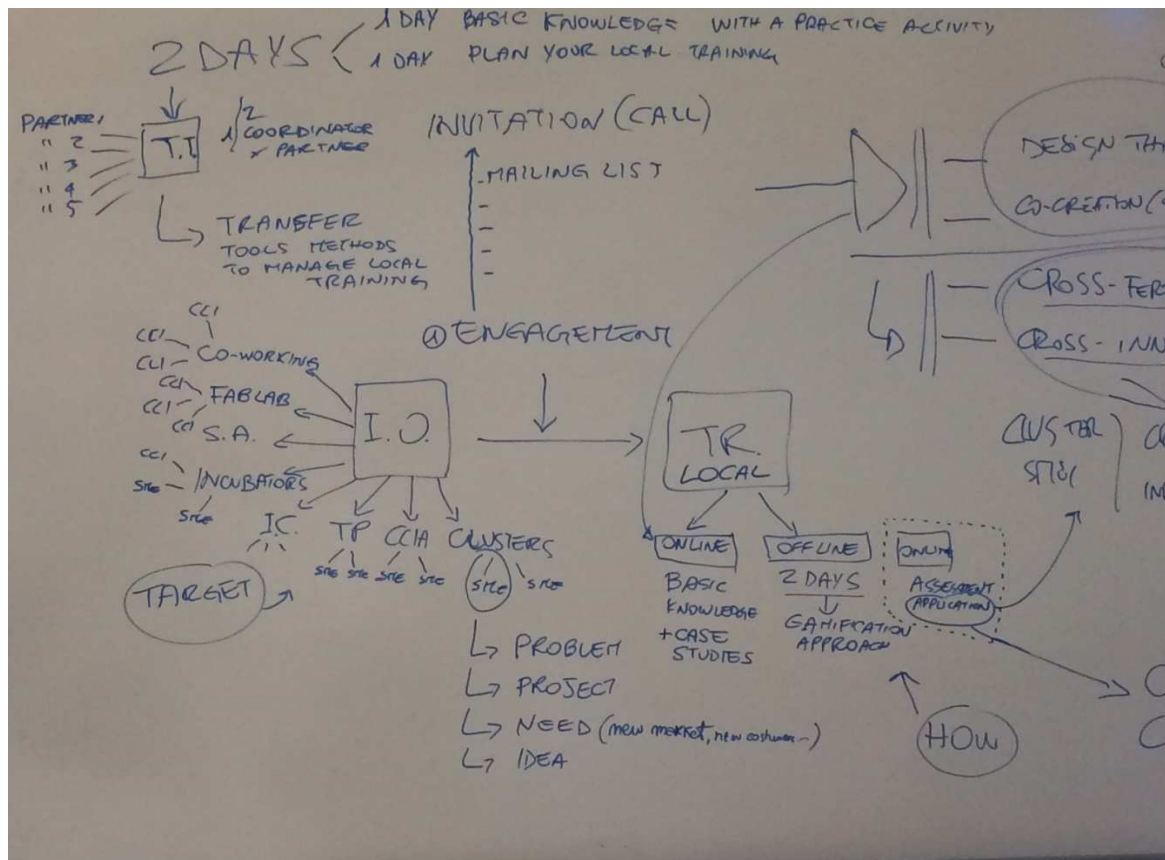
Figure 1: The overall Logical Framework of the 2-Day Train the Trainers event

Both levels of the Training activities are functional to the implementation of the Pilot Action that will take place in later stages of the project. The objective of the WP3.2, however, is to develop a Training methodology for Operators and Local Intermediary Organizations (the task of this deliverable.The overall objective of both trainings is to transfer knowledge about core Co-Create methods: Design Thinking, Co-Creation, Corss-fertilization, Cross-innovation and Gamification.

2.2 The Logical Framework

The logical framework for developing such Trainings in the overall Framework of the Pilot Actions as a goal is described in the Figure Below.

Train the trainer's event for operators is a precursor to the trainings for managers of local intermediary organizations in all partner Regions. In this respect the Methodology with a different set of clientele is to be used (with local intermediary organizations) to establish links and operational connections, based on common understanding of problems, issues, tools/methods/approaches.

Through local trainings and implementation of Pilot Actions (in the later stages of the Co-Create project), these activities will overgrow the Co-Create project and become a seed for organized collaboration between the two sides of the table (traditional field SMEs and designers), through concrete design 2 business meetings, supported by IPR consulting.

It should however be emphasized that this Deliverable is focusing on the Train the Trainers part of Trainings and the Trainings for managers of local intermediary organizations Phases.

Figure 2: The overall logical framework of the Co-Create project (some are outside of the scope of this deliverable, focusing on the Training activities of Train the Trainers and Local Operators)

2.3 Expected Outcomes of the training that have to be accomplished

A number of Outcomes of the training will have to be accomplished as specified in the project proposal.
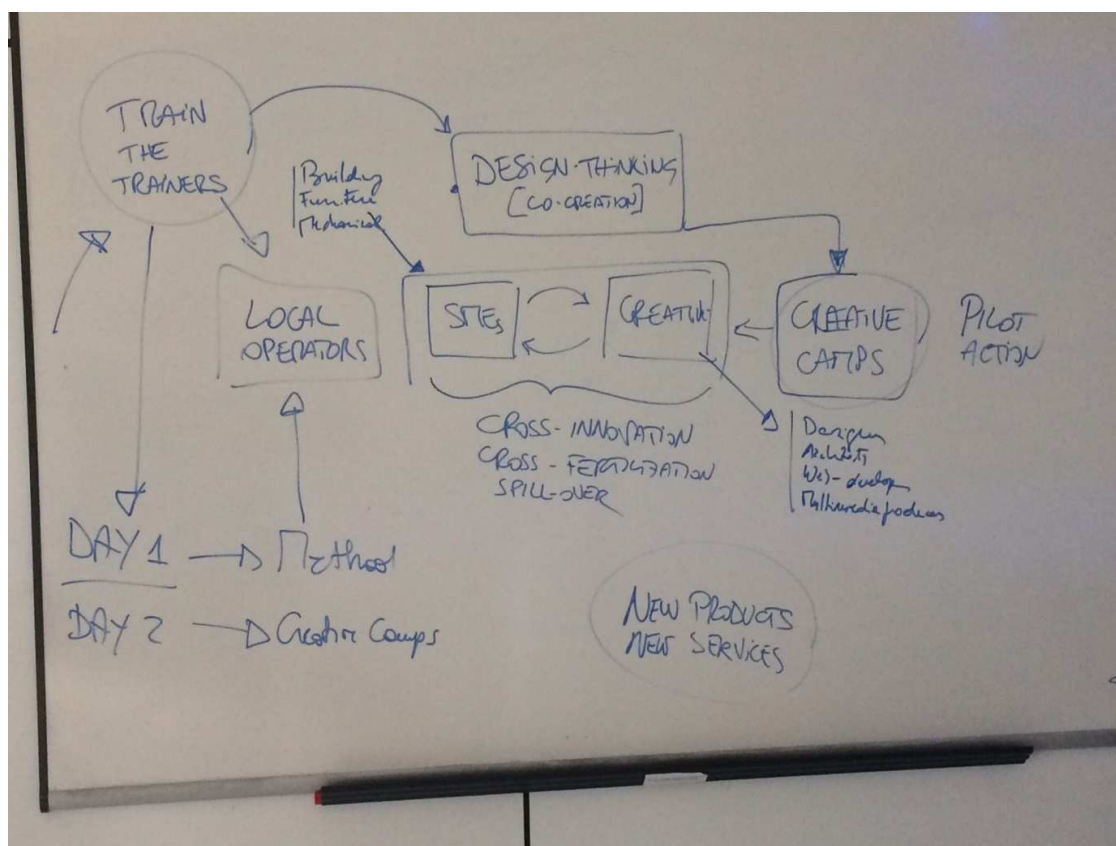
In the training a total of 50 project partners' operators and 30 managers of intermediary organizations will be involved and fully trained. The training will consist of a 1 transnational step (train the trainers) and 12 Local trainings for managers of intermediary orgranizations. 30 managers of intermediary organizations will be trained through the training course and other 120 beneficiaries (SMEs managers mainly from target industrial sectors) are estimated to be further reached by transferring activities.

Participants of the trainings will be trained on cross-fertilization, cross innovation, design thinking, co-creation and gamification. Operators will be additionally trained on set of support contents like, how to organise local trainings for intermediary organization with training materials, invitation letters, agendas, webinar guidelines, feedback questionnaires after the trainings etc.

Based on the implemented training activities the number of results should be accomplished as specified in the Table Below:
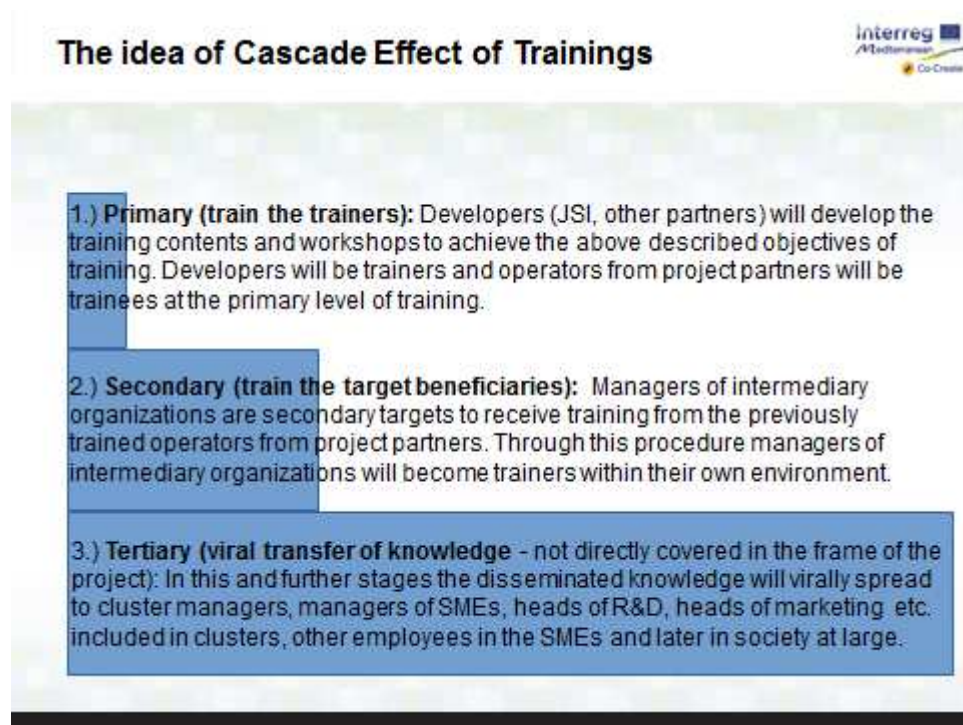
Table 2: Results of the training courses and toolsets

TRAINING CONTENT	Deliverables/RESULTS OF THE TRAINING
- core approaches: design thinking and co-creation with gamification, support approaches; cross-fertilization and cross innovation, gamification, - support contents: how to organise trainings, monitor results..., - knowledge related to practical transfer of core concepts in praxis, - how to motivate and empower managers of intermediary organizations in the next step of training (only for the primary step of training).	- 1 training methodology (D.3.2.1) - 1 set of training course materials (D.3.2.2) - 12 training reports (D.3.2.3) - 50 (minimum) project partners operators fully trained - 30 (minimum) managers of intermediary organizations fully trained.

Trainings can also be seen as organized in Stages or Cascades as shown by Illustration 3.

Figure 3: Stages of Cascade Trainings

The idea of Cascade Effect of Trainings

1.) Primary (train the trainers): Developers (JSI, other partners) will develop the training contents and workshops to achieve the above described objectives of training. Developers will be trainers and operators from project partners will be trainees at the primary level of training.

2.) Secondary (train the target beneficiaries): Managers of intermediary organizations are secondary targets to receive training from the previously trained operators from project partners. Through this procedure managers of intermediary organizations will become trainers within their own environment.

3.) Tertiary (viral transfer of knowledge – not directly covered in the frame of the project): In this and further stages the disseminated knowledge will virally spread to cluster managers, managers of SMEs, heads of R&D, heads of marketing etc. included in clusters, other employees in the SMEs and later in society at large.

Interreg
Mediterranean
Co-Create

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3 Core Contents, Tools/Methods and Approaches for the Trainings (and Pilot Actions)

3.1 General Approaches

Co-Create training will help participants of the trainings to use the learned approaches for tackling complex problems that are ill-defined or unknown and to solve the problems by re-framing the problem in human-centric way, by creating many ideas in brainstorming sessions, and by adopting a hands-on approach in prototyping and testing. Additionally, the Co-Create approach will enable participants of the trainings to create products and services that people want and that have real potential to become useful and can be easily or conveniently built in terms of technology.

Basic focus of this deliverable (D.3.2.1) is to develop a model that will be used and tested in training of project partners operators (train the trainers – D.3.2.2) and training of managers of intermediary organizations (they will be trained from the side of project partners operators – D.3.2.3).

The training methodology (as seen in Appendices) defines operational objectives, contents of training, training procedures, action plan of implementation and monitoring and evaluation of results.

Managers of intermediary organizations will attend a training course and will receive a consolidated mix of information on how to deliver products and services according to new trends and markets to the managers of the traditional MED Clusters. Other Clusters and other related organisations will be reached in a later stage during the transferring activities (WP4). Managers trained will be supported to set up a transnational network of traditional and multimedia/digital competence providers to support innovation.

3.2 Contents

Co-creation

Co-creation is a two-way, open and dialectical process of interaction, collaboration and knowledge sharing between an organisation and its stakeholders, whereby the participating parties engage in a dialogue to jointly define and solve problems in shared distributive environment. [1] Co-creation is essentially the process of involving a third-party in the processes and ideation segment of product development. Before co-creation, organisations handled all of these responsibilities in-house, which led to a more narrow idea pattern and less customer-facing innovation. Co-creation has allows suppliers, customers and third-party dealers and companies to become more involved in the development process, which contributes to more user-friendly products, more innovative design and a more approachable business model.

Using Co-creation organisations can decide what they wish to collaborate on, they agree on topics, implement it and benefit on it. Main directions are well jointly defined. Movements in defined directions are organized, planned and communicated. Therefore planned results are more relevant and more probable.

Design Thinking

Design thinking is a valuable method to tackle a problem. Design thinking methodology is a process or method to tackle the problem in a strategic way. The process has five very clear phases:

- **Empathy: Empathic** understanding of the problem we are trying to solve
- **Define** : Define the problem as a problem statement in a human-centred manner.
- **Ideate**: Ideation techniques to help investigate and test generated ideas to find the best way to solve a problem.
- **Prototype:** Iterative generation of artefacts intended to find answers to your final solution.
- **Test**: testing the complete product using the best solutions identified during the prototyping phase.

Understanding these five stages of design thinking will solve complex problems that occur around us in our organisations, our countries, and even our planet. The main goal of the design thinking process is to create a product, service, or experience that people want, has

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[1]   http://www.igi-global.com/dictionary/co-creation/4101

real potential to become useful and can easily or conveniently be built in terms of technology.

Support Content

Apart from the core knowledge also support content needed for final success will be passed to the training participants. This content will be the following:

- How to organize the trainings, how to use the instruments capitalized from past projects, how to monitor results.
- Knowledge related to practical transfer of core concepts in praxis – presentation of cases, practical advices, tips & tricks.
- How to motivate and empower managers of intermediary organizations in the next step of training (only for the primary step of training).

Gamification

Gamification training originates from the computer games industry and is the use of game thinking and game mechanics in a non-game context in order to engage users, solve problems and drive behaviour. The four Gamification Process areas are:

- ➢ **Points** – In order to earn points, team members have to complete tasks.
- ➢ **Rewards** - reward and a reason for having done the task
- ➢ **Badges** - Badges symbolize an individual's ability to perform and can be permanently attached to a player's profile, serving as a visible record of achievement.
- ➢ **Leader boards** - The recognition that follows that collect points and badges can within the project team extend to senior management

Gamification taps into the basic needs and desires of individuals to be competitive, active and more self-expressed. This gives gamification the potential to be such an effective tool within the project team and wider workplace.

Gamification techniques will be in Co-Create project used mostly as support tool used for motivation and better inclusion of training participants especially in combination with Design Thinking and Co-Creation.

3.3   Approaches

Cross-fertilization

Cross-fertilizations is the ability to search and build new relationship by importing and mixing ideas from different places, markets or people to produce better products and

services. Importing a technology from another industry, or hiring people from a different company are examples of this.[2]

Cross-fertilization is a new way to search for market opportunities, especially when there are already regional clusters present. In this case it could be of advantage to bundle the management activities under one umbrella organization, to foster cross-fertilization in day-to-day routine. The result of successful implemented cross-fertilization/cross-cooperation is the generation of new products or services that answer societal challenges and boost innovation and economic growth.[3]

In the Co-Create project will be used principle of cross-fertilization by exploiting the potentials of the cross-sector services from Creative industries, to be used in the target industrial sectors.

Cross-innovation

Cross-innovation process facilitates interdisciplinary entanglement of products, services and trends. The process transfers existing technologies, systems, concepts or general principles from one industry to another industry in order to solve problems or answer questions experienced in that industry. Cross-innovation is a specific form of open innovation which means that in order to benefit from this approach companies need to revisit their innovation processes to make sure that both internal and external ideas are considered when developing new products, services and processes. There are two forms of cross innovation each linked to a specific process:

- **Outside-in process:** transfer of solutions or ideas from outside the industry;
- **Inside-out process:** search for novel applications of own ideas and solutions in other industries.[4]

Cross Innovation promotes collaborative and user-driven innovation that happens across sectoral, organisational, technological and geographic boundaries.

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[2]http://www.amadeus.com/nablog/2016/08/3-ways-cross-fertilization-leads-to-innovation/technology-2

[3]http://www.friulinnovazione.it/progetti/clustrat-2013-boosting-innovation-through-new-cluster-concepts-in-support-of-emerging-issues-and-cross-sectoral-themes/i-risultati-di-clustrat/at_download/file

[4]http://www.eciaplatform.eu/wp-content/uploads/2014/06/Thematic-paper-Cross-Innovation-Nantes.pdf

Cross- innovation is a clever way to jump-start innovation efforts by drawing analogies and transferring approaches between contexts, beyond the borders of own industry, sector, area or domain. These analogies can be drawn at various levels, from products to services, to processes, to strategies, to business models, to culture and leadership.

4 Capitalization on past experience

In the frame of Co-Create project, project partners will capitalize on the outcomes and experiences from other European Projects. A part of Co-Create approaches, methods and tools will be adapted and delivered based also on the results of five EU projects CCALPS, SILMAS, IP-SMEs, FIREMED and FIDIAS that were implemented in the 2007-2013 period.

The Co-Create activities of knowledge and skills transfer have a long history in the European perspective, as can be seen from the Table below.

Table 3: A timeline of developments in the past decade, connected to the Co-Create topics

Project Acronim	Duration	Main Transfer to Co-Create project	Co-Create Deliverable
CCAlps	10.2011 - 12.2014	Creative Camps methodology and tools using design thinking methods and game techniques to develop new products and/or services.	D3.1.1 Fine-tuning study to launch the pilot action D3.5.1 Methodology to support to SMEs involved in the 18 creative camps D3.5.3 Transnational Creative Camp in Milano Output 3.1 Cross-fertilization Methodology Output 3.3 Cross-fertilization innovative services
SILMAS	09/2009 - 08/2012	online-games	D3.1.1 Fine-tuning study to launch the pilot action D3.4.1 App for gamification methods addressed to cluster managers D2.6.1 Communication training through gamification techniques
ALPCLUSTERS2020	09/2013 – 12/2014	20 recommendations offering different solutions to get an answer and to have insights for policy intervention.	D3.1.1 Fine tuning of the Methods and the toolset D5.1.1 Capitalisation methodology D5.1.2 Capitalisation kit addressed to policy makers
CLUSTRAT	10/2011 - 09/2014	new cluster concepts	D3.1.1 Fine tuning of the Methods and the toolset
CREAMED	06/2010 – 05/2012	open book	D3.1.1 Fine tuning of the Methods and the toolset

FIREMED,	5/2013-6/2015	IT Platform with the aim of supporting the provision of services and transferability of the results, upgrading the operators and supporting the work of LRAs addressed to financial operators, LRAs and SMEs.	D3.1.1 Fine tuning of the Methods and the toolset
FIDIAS,	10/2012-6/2015		
EVLIA	10.2012-12.2014		

Basic focus of this deliverable is to develop a model that will be used and tested in training of project partners operators (train the trainers) and training of managers of intermediary organizations (they will be trained from the side of project partners operators). Concepts, tools and methods of the model will be partly used from the past Interreg projects CCALPS, SILMAS, IP-SMEs, FIREMED, FIDIAS, EVLIA, ALPCLUSTERS2020, CLUSTRAT and CREAMED. Pilot actions will be implemented with the support of operators trained by the developed methodology, also basing on the tools, developed in the past and Training sources of methods and tools and other useful outputs developed by previous project will be used. It should be noted however, that the purpose of this Deliverable is not to specify into the detail the Tools and their exact use, as this will be done within a separate deliverable (WP3.1) in Co-Create project.

As most important training content methods and tools and other useful outputs developed by previous projects will be used, as presented in the Table 2.

Table 4: List of methods and tools and other useful outputs developed by previous projects

PROJECT TITLE	PROJECT DESCRIPTION
CCAlps	CCAlps Creative Camps developed networking between cultural and creative industries, SMEs in traditional and advanced industries, local institutions, universities and research centres. CCAlps deliverable will be integrated in CO-CREATE deliverable called "Pilot Action step2 report" that is related to cross-fertilization activities addressed to SMEs. CO-CREATE will use Creative Camps methodology and tools using design thinking methods and game techniques to develop new products and/or services.
SILMAS	SILMAS online-games helped Alpine lake managers advancing in the project thematic issues. Managers and relevant stakeholder received new knowledge by attending an innovative training course. The SILMAS deliverable will be integrated in CO-CREATE deliverable called "1 app for the gamification method" addressed to cluster managers and also to "Pilot Action step1 report" that is related to the cross-fertilization activities addressed to Clusters.
ALPCLUSTERS2020	The project presents 20 recommendations offering different solutions to get an answer and to have insights for policy intervention. Although these recommendations target especially Alpine Space Programme policy makers, even cluster managers and business representatives could be inspired to

	design new innovative projects. For this reason CO-CREATE will use the deliverable to conduct the preliminary activities and fine tuning of the model and the deliverable "Fine tuning of the Methods and the toolset".
CLUSTRAT	The CLUSTRAT joint strategy is about new cluster concepts complemented by recommendations to policy makers and an action plan to introduce the latter into the regional and national systems. CO-CREATE will use the deliverable to conduct the preliminary activities and the deliverable "Fine tuning of the Methods and the toolset".
CREAMED	CREAMED open book works as a tool for SMEs, presents and analyses the different creative initiatives done in the Mediterranean Region. CO-CREATE will use the deliverable to conduct the preliminary activities and the deliverable "Fine tuning of the Methods and the toolset".
FIREMED, FIDIAS, EVLIA	The development and implementation of the IT Platform was a common activity of the three projects FIREMED, FIDIAS, EVLIA with the aim of supporting the provision of services and transferability of the results, upgrading the operators and supporting the work of LRAs addressed to financial operators, LRAs and SMEs. CO-CREATE will use the deliverable to conduct the preliminary activities and the deliverable "Fine tuning of the Methods and the toolset".

5   Target groups, their needs and goals

5.1 Target Groups of Training Activities

The main target groups of the training (Train the Trainers and Local Training) activities of this deliverable are the potential training operators, members of the following groups:

1. **Trainers - operators from project partners,** who will be equipped with all necessary competences to train managers of intermediary organizations from target industrial sectors (construction, mechanic and furniture) with Co-Create content.
2. **Cluster Managers** from the target industrial sectors and **Managers of Intermediary organizations trained** will be supported with knowledge needed for effective enhancing innovation and networking in their environment. They will be equipped with the knowledge and skills for transferring activities to SMEs and other related organizations. Intermediary organizations can also be further divided into two groups: 1. Traditional Sector: Clusters, Chambers of Commerce, Industry and/or Crafts, Technology parks etc. and 2. Creative Sector: fablabs, incubators, co-working
3. **SMEs and Other important stakeholders** in the field in the regions

The overall objective of both trainings is to transfer knowledge about core Co-Create methods and to enable both target groups to be able to implement PILOT ACTIONS in the

later stages of the project. So to complete the picture it should be mentioned that in later stages Pilot Actions will be organized including other stakeholders, and in these later stage activities mainly

SMEs and other related organizations from target industrial sectors will be reached in a later stage during the transferring activities and will reach out to SMEs and Creative Industries.

In respect to the target groups two types of training should be organized: for Operators International Train-The-Trainers event, for Intermediary organizations a local workshops will be organized in each of the participating regions.

5.2 The Cascade of Training influence according to the structure of Target Groups and their Needs

To reach the biggest possible impact of training is imperative that the training is conceived in such way that it will be disseminated from developers of training contents to operators from project partners, than in the second step to managers of intermediary organizations and later virally to other wider publics (cluster managers and employees of SMEs from target industries and other parts of the society). Training steps are the following:

1.) **Primary (train the trainers**): Developers (JSI PP5, other partners) have developed the training contents and workshops to achieve the above described objectives of training. The Materials are available in the Appendices'. Developers will be trainers and operators from project partners will be trainees at the primary level of training.

2.) **Secondary (train the target beneficiaries (local training activities)**: Managers of intermediary organizations are secondary targets to receive training from the previously trained operators from project partners. Through this procedure managers of intermediary organizations will become trainers within their own environment.

3.) **Tertiary (viral transfer of knowledge - not directly covered in the frame of the project)**: In this and further stages the disseminated knowledge will virally spread to cluster managers from other sectors, managers of SMEs, heads of R&D, heads of marketing etc. included in clusters, other employees in the SMEs and later in society at large, also using an online repository of knowledge, created by the Co-Create project.

Table 5: Process of trainings and transfer of knowledge

LEVEL	TRAINERS	TRAINEES (TARGETS)	WHAT
Primary (train the trainers). *This level will consist of webinar and two days training workshop.*	Responsible project partner (JSI) in cooperation with lead partner and some other partners	Operators from project partners	Transfer of knowledge about the core and support Co-Create project approaches. How to organize the trainings, how to use the instruments capitalized from past projects, how to monitor results. Knowledge related to practical transfer of core concepts in praxis. How to motivate and empower managers of intermediary organizations in the next step of training.

Secondary (train the target beneficiaries) – Local Training Activities *This level will consist of obligatory 4 hours training and optional additional form that will be adapted to local circumstances, a one day training in total.*	Operators from project partners	Managers of intermediate organizations	Transfer of knowledge about the core and support Co-Create project approaches. How to organize the trainings, how to use the instruments capitalized from past projects, how to monitor results. Knowledge related to practical transfer of core concepts in praxis.
Tertiary (viral transfer of knowledge – only partly covered through transferred activities in the frame of the project) *This level and next levels do not have formalised form of training*	Managers of intermediate organizations	Clusters managers, managers of SMEs, heads of R&D, heads of marketing etc. from target industries and creative industries	Co-Create project web page, Co-Create eNews, Co-Create documents repository, Co-Create promotional materials (e.g leaflets)
Fourth (viral transfer of knowledge - not directly covered in the frame of the project)	Clusters managers, managers of SMEs, heads of R&D, heads of marketing etc. included in clusters	Employees in the SMEs and other organisations	Co-Create project web page, Co-Create eNews, Co-Create documents repository, Co-Create promotional materials (e.g leaflets)
Further	Employees in the SMEs and other organisations	Society at large…	Co-Creat promotion via press realises, other PR aproaches

The above grid is not fully understandable to me. What about the tertiary, fourth and further levels?

5.3 Needs of the Target Groups

Needs of the Target Groups connected to the training activities can be seen below:

Operators from project partners will face the main challenge of how to gain all necessary knowledge and to be able to organize local training event for their local managers of intermediate organizations. Special challenge will be how to motivate and empower managers of intermediary organizations in the next step of training.

The primary level training (train the trainers) addresses these challenges through the developed methodology (see below and Appendices).

Managers of intermediary organizations from target industrial sectors and creative industry will face challenge how to motivate and empower managers of SMEs, heads of R&D, heads of marketing etc. to grasp content of the training. In the next step of transferring (WP4) managers of intermediary organizations will face challenge how to do this next step most efficiently.

The secondary level training (train the target beneficiaries) will have to address these challenges.

Managers of intermediary organizations, managers of SMEs, heads of R&D, heads of marketing etc. from target industrial sectors and creative industry will face challenge how to accept and incorporate ideas, knowledge and existing forms of cooperation coming from creative industries and Co-Create projects concepts to their (relatively conservative) environment of target industrial sectors (construction, mechanic and furniture).

The third and next levels of training (viral transfer of knowledge - not directly covered in the frame of the project) will have to address these challenges.

The Pilot Actions, however, will build on this methodology, and use it to organize specific Pilot Actions within this project, in order to apply the developed principles in real environment: with SMEs from traditional sectors and design experts to create the needed spark for the advancements on the market.

The Needs are answered in the structure of the Training Activities and Materials presented.

5.4   Definition of goals of particular training at different levels

Goals of training differ so to some degree based of the level of training:

a.) For primary level training (train the trainers - operators from project partners) basic goals are the following:

Short webinar:
- Preparation of operators for two days training – understanding of procedure and logics of training and explanation of preparatory activities; explanation of the logical framework; presentation of the main methods/concepts, tools and methods and the basic knowledge on Design Thinking and Co-creation to be used in the project framework (optional: identification of relevant cases that will be worked on the training and introduction of the fact that pre-prepared case studies will also be used as a basis of the training)

Two days training workshop:

- Sufficient transfer of knowledge about the Co-Create project content that will enable independent transfer of knowledge to the next level. Operators from project partners should after completed training obtain sufficient understanding of training outline that is described in the Chapter 1, training content briefly described in the Chapter 3 (including content prepared in the frame of deliverable 3.1.1. for transfer of knowledge to the next levels).
- Gaining of knowledge and skills necessary for practical implementation of secondary level training. This will include knowledge and skills such as: how to organize the trainings, how to use the instruments capitalized from past projects, how to monitor results, role playing and practical transfer of Co-Create project in praxis.
- Gaining of knowledge and skills how to motivate and empower managers of intermediary organizations in the next step of training.
- Feedback from the attendees in a form of questionnaire and "wrap-up session" at the end of the training.

There won't be any follow-up actions after the train the trainers course?

b.) For secondary level training Local training activities (train managers of intermediate organizations) basic goals are the following:
- Training activities are the first step of engagement of the target groups (managers of local intermediary organizations) in the project training activities;
- Sufficient transfer of knowledge on core Co-Create methods - design thinking and co-creation - and cross-innovation, cross-fertilization and gamification to participants that will enable independent transfer of knowledge to the next levels.
- How to use the instruments capitalized from the previous projects (WP3.1)

Managers of intermediate organizations should after completed training obtain sufficient understanding of training outline that is described in the Chapter 1, training content briefly described in the Chapter 3 including content prepared in the frame of deliverable 3.1.1. for transfer of knowledge to the next levels.

5.5   Engage the participants

To reach lasting effect of the Co-Create project, the participants to the Trainings (regardless of stage of involvement) need to become engaged in the process.

HOW: use of attractive, combined and complex support approaches (like for example design thinking, co-creation, gamification) that participants will be empowered, will see benefits for themselves and will want to continue with their participation.

WHY: participants will be motivated to start using support approaches (cross-fertilization and cross innovation) described above as their own useful tools which they benefit from.

WHAT SHOULD BE DONE: target groups; managers of intermediary organizations (incubators, fab labs, co-working organizations…) and consequently by means of transferring also key SME personnel should be trained (with use of mentioned attractive approaches used during the training process) so that they gain knowledge and skills related to design thinking, co-creation, cross-fertilization and cross innovation for effective implementation of the pilot activities.

It is rather obvious that **engagement** of different groups of people can be achieved in different ways. However, there is a common aspect to this issue, where the Operator of any training should be constantly aware of the recurrently expressed needs of the participants. Some tools to interact with participants on this level include:

- The initial training needs survey,
- Increasing their attitude and interest to the topics with selected examples and best practices
- The core question of the Webinar is focused on "What do they expect from the Training",
- The possibility to get further involved by producing their own "real case" examples,
- The evaluation and suggestion formats at the end of the process,
- The option to be involved as Operators in further steps …

These are all motivating and should be presented in a clear way to the participants to enable their cooperation and should be capitalized upon through the constant follow-up from the Operator.

EDUCATE: Educate target groups about core approaches (design thinking, co-creation) using support approaches (cross-fertilisation, cross innovation, gamification).

MAKE THEM GRASP THE CONCEPT: Make them grasp the concept of the core approaches. Design and implement training through which they would be able to feel the concept and grasp it.

QUALITY CONTROL: Monitor quality control of implementation.

FOLLOW THE GOAL: Make the process of learning curve for participants sustainable; for example use gamification elements, try to deeply incorporate core approaches in the implementation of activities of participants. Use incentives to motivate participants for continuous use of core and support concepts to reach a lasting effect.

6 Implementation of Trainings

6.1 Training preparation activities

The training preparation procedures should start approximately five weeks before each training. First step to successfully preparation and timing of the training is room reservation and sending of invitations to potential training participants, this has to be done in the first week of preparation. It is important to carefully collect confirmation from participants about their training attendance confirmation. It is recommended that the agenda of the training is prepared four weeks before the training. Regular reminders and follow up e-mail should be send to the training participant once per week and 3 days before the training.

Initial training needs assessment

Proper assessment is important part of successful training. Individual training level assessment will be done by the project partner(s) responsible for particular trainings. Assessment of the training will be done before or at the beginning and at the end of training. Some basic level of competences and needs of participants needs to be determined in order to be able to fine tune the content of the training to the actual level and needs of the participants of trainings. This information will help the trainer to easily evaluate the overall knowledge of the training group at the beginning of the training and it will help the trainer to explain and focus more on the topics that are new to the training group during the training. Also comparison between assessment of entry level competences and final assessment will provide the possibility of evaluation of quality of performed training.

Assessment of competences and training needs of participants will be composed of questionnaire with set of listed training contents with marked entry level of knowledge and questions regarding their needs (questionnaire is in the Appendix 2).

Process of implementation of assessment of competences and needs of participants will be done in the following way:

a.) For TRAIN THE TRAINERS the information about level of competences and needs will be gathered through A SURVEY shared before the 2 days workshop.
- According to the results of questionnaire the activities of the two days workshop could be changed in order to fit the real state of the art of knowledge of the participants and then drive the training topics.
- Based on the results of questionnaire should be acquired information about needs and possible suggestions for implementation of local training activities

b.) For LOCAL TRAINING ACTIVITIES (train managers of intermediate organizations) the information about level of competences and needs will be gathered in the following way.

- Operators from consortium partners should contact potential participants of training, motivate them for training, briefly explained the concept of training and raise question about needs and possible suggestions for primary level of training.
- Based on the contacts with potential participants of training operators should gather some basic idea about the level of knowledge of core approaches and other key training topics.
- At the beginning of the training should among the participants be distributed questionnaire about assessment of competences – option 2 for mangers of intermediate organisations (Appendix 2). Results of this questionnaire will be compared with the same questionnaire based evaluation that will be done at the end of the training (same questionnaire will be put to participants at beginning and end of training). Comparison of results will indicate the level of knowledge and skill obtained.

Webinar for project partners

PP5 will prepare short (approx. 2 hours) webinar for project partners operators where information about the procedure and logics of training will be distributed with explanation of preparatory activities including identification of (non-obligatory, as case studies could be used for this purpose as well) relevant cases (the Current Innovation Assessment in Appendix) that will be worked over at the training. Also some suggestions and feedback information about the implementation of training workshop will be gathered for project partner's operators.

Materials

Materials of the Training include ppts to present topics for each relevant content to be introduced at the Training. These materials are part of this document as a separate document (.ppts/.zip in the Appendices). The Tentative Agenda is also available in the Appendices.

The list of documents is available below and include presentations, case studies presentations, case study description, canvas for case study practical part – canvas will be prepared on real-case studies if proposed by project partners, technique presentations. These documents can be referenced from the Table below.

Table 6: Materials available for the Webinar before the training

Agenda chapters	Delivery format
explanation of the logical framework	ppt presentation in VOX webinar tool, also available in WP3.2. Training methodology_webinar.ppt
presentation of the main methods/concepts, the basic knowledge on Design Thinking, Co-creation	ppt presentation in VOX webinar tool, also available in WP3.2. Training methodology_webinar.ppt
optional: identification of relevant cases that	ppt presentation in VOX webinar tool, also

will be worked on the training and introduction of the fact that preprepared case trials will also be used as a basis of the training	available in WP3.2. Training methodology_webinar.ppt
CSI Assessment file	Microsoft Word (.docx) document to be sent to project partners (Co-Create_WP3.2_Training methodology_CIS Assessment.docx)

Communication Tools

Inform target groups on available core and support approaches with adequate communication means like newsletters, personal phone calls or visits, mailings. Since there is no mass involvement proposed, other tools like postcards etc. are not previewed in this phase.

6.2 During the training

Organization of Co-Create training will follow the next operating steps: identification of training participants, preparing a mailing list, preparing a training agenda, project logo, reservation of the training room and projector, preparing all the necessary training material, training methodology for the target groups and other practical activities.

All below written content and timing is indicative and can change in relation to actual circumstances of the training implementation.

Materials

Materials of the Training include ppts to present topics for each relevant content to be introduced at the Training. These materials are part of this document as a separate document (.ppts/.zip in the Appendices). The Tentative Agenda is also available in the Appendices.

The list of documents is available below and include: presentations, case studies presentations, case study descriptions, canvas for case study practical part – canvas will be prepared on real-case studies if proposed by project partners, technique presentations. These documents can be referenced from the Table below.

Table 7: Materials available for the Training (Train the Trainers).

Agenda chapters	Delivery format
Overall logical framework of the training methodology	Power Point Presentations (ppt), file name: WP3.2. Training methodology_logical framework.ppt
Introducing the concepts of Design Thinking	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Design thinking.zip
Introducing the concepts of Co-Creation	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Co-Creation.zip
Introducing the concepts of Cross fertilization	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Cross-fertilization.zip
Introducing the concepts of Gamification	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Gamification.zip
Introducing the concepts Cross-innovation	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Cross-innovation.zip
Guidelines for Practical implementation of local trainings for intermediary organizations	Power Point Presentations (ppt), file name: Co-Create_WP3.2. Training methodology_Implementation.ppt
Presentation of the Toolbox, stemming out of previous projects (IPRSMEs, FIDIAS, FIREMED, etc.)	WP3.1 outcomes – ppt presentation, prepared by Leatitia Amiot (TVT), WP3.1
Practical training, workshop or work with an expert on case-study or real-life example	ppt presentation of case-studies, also in word document and printed materials to be handed to participants at the training
Feedback collection	Feedback questionnaire – printed material to be handed to the participants at the training

6.3   After the training

Final Assessment

Final assessment will be performed at the end of the two days training workshop for project partner's operators and also at the end of the training for managers of intermediate organisations. In other levels of training is this kind of evaluation also encouraged, but it can be adapted to the actual circumstances and possibility of implementation.

Training participants should be asked to fill out the assessment form at the end of training.

The main purpose of final assessment will be:

 - to gain information about the final level of knowledge of participants in order to be able to evaluate training content quality of transfer of training content when comparing entry and final assessment.

- to receive feedback information from participants about the new knowledge they learn from the training and how will they use the new knowledge on their day to day basis.

- To receive feedback information regarding performed quality of the training process.

Questionnaire of final assessment is composed of:

-   Set of listed training contents with marked final level of knowledge and how will they use the new knowledge on their day to day basis.

-   Evaluation questionnaire of quality of performed training (in Appendix 3)

It would be appropriate if the trainers ask the training participants focused evaluation question such as: "do you think you can apply now what we just discussed? Did you miss any insights or trainings?"

In case there is an opportunity and need to test the effectiveness of a training one very good way might be to organize an exercise where previously taught skills are exercised. The results need to be addressed with caution though, because it is nearly impossible to correctly evaluate a skill not taking into account the previous experience and many other factors.

After the end of training is responsible partner obliged to compose a brief (approx. one or two pages) evaluation of training with numerical results and conclusions based on the acquired questionnaires. Evaluation should be passed to:

-   In case of two days training workshop for project partner's operators; to project leader.

In case of training for managers of intermediate organisations; to responsible partner (PP5).

Overall monitoring

Overall project level training implementation evaluation will be done by the project lead partner that will monitor and evaluate work of the responsible project partner for training implementation. This will be done by regular direct communication.

Operational project level evaluation will be done by the responsible project partner for training implementation that will gather and monitor completion of results of the training as specified in the project proposal. This will be done by regular communication with all project partners. In case of non-compliance will be in coordination with project lead partner implemented mitigation actions.

6.4   Action plan of training implementation

Action plan includes activities for primary level (train the trainers) and secondary level (train managers of intermediate organizations).

All below written content and timing is indicative and can change in relation to actual circumstances of the training implementation.

Table 8: Action plan of training implementation

Action	Week start	Week end	Result
DATE of Training is set to be earliest W6=Wx or after	W0	W0	A planned date for the Training is set to the Wx=W6 or later (also depending on the outcome of the discussion with the Attendants later on)
Collection of information on suitable attendants of the Training	W1	W1	A list of possible interested people to attend the Training
Send out (via email or in personal phone calls) the preliminary information on possibility of Training to be arranged in the specified project topics, with a request for confirmation of preliminary interest	W2	W2	A list of preliminary interests confirmed, A set date of the Training
An invitation to the confirmed preliminary interested attendants to participate in the Training with a deadline for application (depending on the number of participants, use doodle to define the suitable date)	W3	W4	A list of applications for the attendance to the Training
An invitation to the applicants with save the date for the Webinar to discuss the	W4	W4	A confirmed date for the Webinar

execution of the Training (doodle) (participation in the Workshop is crucial for the success of the Training)			
Send the Info Pack to the applicants. The Info Pack differs for the primary and secondary level.	W4	W4	(Suitable) InfoPack received by the Applicants to the Training.
A Webinar	W5	W6	Executed Webinar
Short Minutes of the Webinar	W6	W6	Short Minutes of the Webonar produced with a list of priorities from the participants and/or a list of most important observations from the Trainer and a deadline (if so agreed, depends on the level of awareness of the Trainees) for delivery of Filled out preliminary input documents from the Attendants to be provided until Wx-1w.
A don't forget message to the Trainees sent	Wx-1w, e.g. w7	Wx-1w, e.g. w7	A reminder is sent to the Attendants. (On the date, venue details, things needed for the Training, final Agenda.) If so agreed, a reminder for the preliminary input documents is sent. (Otherwise this is left our and only case studies are to be used at the event itself to discuss principles in practice.)
Training execution	Wx, e.g. w8	Wx, e.g. w8	Training is executed, including theoretical background, practical examples/exercises, Feedback collection
Minutes of the Training prepared, agreed on with the Attendants and submitted to the WP3.2 leader (JSI)	Wx+1, e.g. w9	Wx+1, e.g. w9	Agreed upon Minutes of the Training submitted.
Report of the Training prepared, agreed upon with the Attendants and submitted to Co-Create project coordinator	Wx+3, e.g. W11	Wx+3, e.g. W11	Agreed upon Report on Training submitted.

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Appendix 1 – Documents for the training workshops organization: Theoretical guidelines regarding training techniques (A Handout to the Trainers)

For successful implementation of training some of the below presented theoretical guidelines regarding training techniques should be used:

Various approaches to training are available, e.g. world-wide accepted findings of David A. Kolb can be used for basic understanding of foundations for successful training implementation. Kolb pioneered idea of experiential training, which is training by reflection on doing[i]. Experiential training's focus is on the individual training process. Kolb introduced four training styles. McCarthy who further developed these concepts into the 4MAT model that trainer can easily implement and that will provide good training results[ii]. McCarthy proposes four types of learners, that are the following.

1. WHY,
2. WHAT,
3. HOW and
4. WHAT IF people.

McCarthy four types of learners are also shown in the 4MAT System diagram figure 1 that indicates what percentages of people falls into specific learner category, according to McCarthy. These percentages show that fair percentage of participants will reach all four categories, which means that trainers must cater their trainings for all four types of learners.
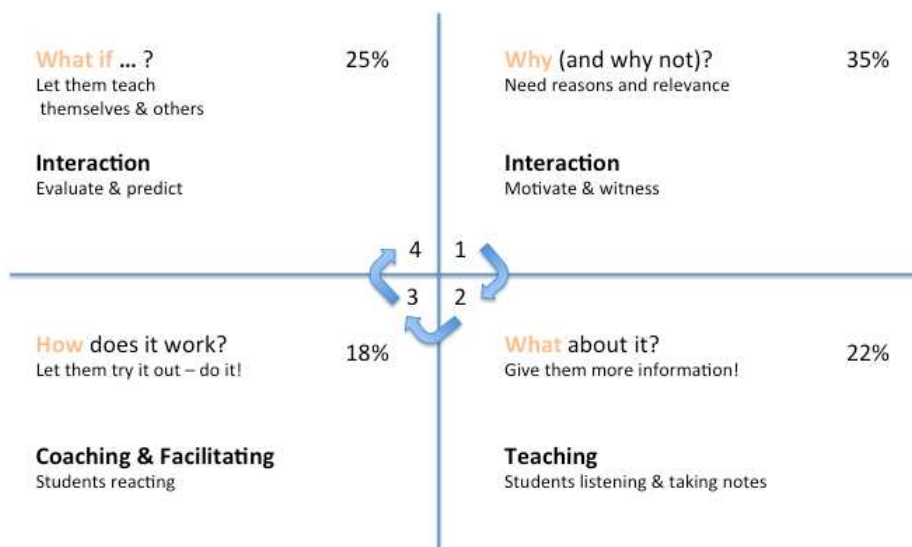
Illustration 1: The 4MAT System (McCarthy)

The ineffectiveness of the traditional lecture style, but also of just "reading a book", is also apparent in the training pyramid[iii] , presented below. The pyramid shows that a training which combines "hearing" and "seeing" already achieves much better results, but that the

most effective training methods include "seeing and writing" as in workshops, and "doing" as in going through the steps one by one. Looking at the training pyramid, you can see that seeing is fairly effective, but doing and teaching are the best vehicles for training and remembering. This method has proven to be very effective for example in medical educations.

People remember :

- 10% of what they **read** — Read
- 20% of what they **hear** — Hear a lecture
- 30% of what they **see** — Look at slides, diagrams, mock-ups
- 50% of what they **hear and see** — Watch live demos, videos, or go and see for yourself
- 70% of what they **say or write** — Complete worksheets, journals, give presentations
- 90% of what they **do or teach** — Practice (with coaching), do the real thing or TEACH it
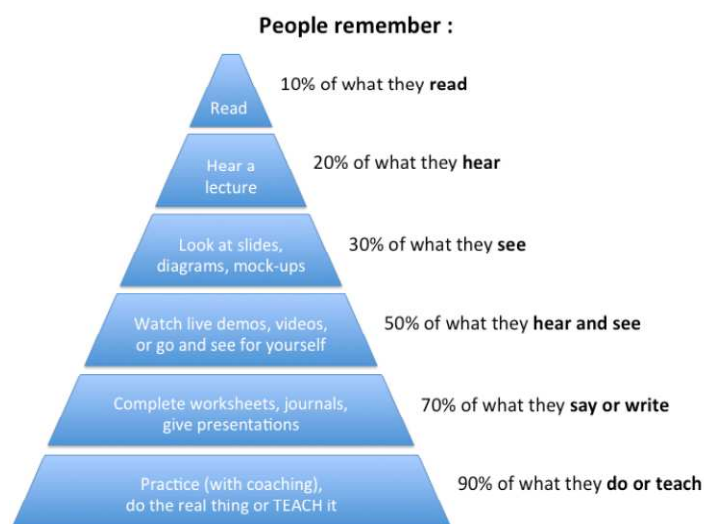
Illustration 2: The Training Pyramid

a. Motivation for training and training

The basic motivation of any trainer should be to want to share experience and knowledge with their trainees. This applies both to a professional trainer, as well as to ad hoc trainers[iv]. Body language, tone of voice and language (the words you speak) are vital to the success of training. Surprisingly enough for many, research indicates that the success of communication depends for 55% on body language, 38% on tone of voice and only 7% on the actual words spoken.

Body language includes how you stand, walk, sit, and wave your hands. An upright stance, chin up (not talking to the floor but to your audience), back straight but relaxed conveys confidence in yourself. It also opens up lungs for the kind of good breathing that is needed to carry voice and to keep doing that for maybe even hours[v].

➢ **MOTIVATION PRINCIPLES FOR TRAINERS:**
1. People learn best by doing. Providing as much realistic practice as possible.
2. Trainees learn best when the trainers immediately reinforce correct responses, perhaps with a quick well done.

3. Trainees learn best at their own pace.
4. The schedule is important. The training curve goes down late in the day, so that full day training is not as effective as half the day or three fourths of the day.

➢ **MOTIVATION PRINCIPLES FOR COURSES PARTICIPANT** (managers of intermediary organizations, SMEs representatives, policy makers)
1. Making skills transfer easy: transferring new skills and behaviour on courses participant by providing adequate practice between the training situation and the work situation.
2. At the start of training trainers should provide an overview of the material to be presented. Knowing the overall picture facilitates training;
3. Trainers should use variety familiar examples that are close to managers of intermediary organizations, SMEs representatives, policy makers;
4. Lecture information should be well organized and presented logically in meaningful units with many visual aids as possible.
5. Trainers should use terms that are already familiar to managers of intermediary organizations, SMEs representatives, policy makers. [vi]

b. Planning

Basic level preparation for a training that is fairly basic in content and the exercises are not complex or deeply technical but when preparations for trainings that are more complex in the content and exercises then the trainers need a more technical set-up. The advanced level of preparation typically will take five to ten days of preparation. This means that when trainers prepare for a basic two-day training, they need to reserve at least four days to prepare.

Right at the beginning trainers should consider, prepare and write honest answers to specific:

➢ **TRAINING GOAL:** what are the training goals? What do participants need to know and/or be able to do after the training? How good should they be at knowing/doing that? Measuring the knowledge after the training.

➢ **TARGET AUDIENCE (managers of intermediary organizations, SMEs representatives, policy makers):** what is the background, education or knowledge level of course participants? What language is the training in, and what are the mother tongues of your trainees? Are there cultural and/or gender differences that you need to take into account?

➢ **GROUP SIZE & TRAINING ASSISTANCE**: how many participants will attend the training? Groups with up to ten trainees can be handled well by one trainer on their own, including logistics. For groups with more than ten people, trainers should aim at getting some form of administrative support. For groups beyond twenty participants, trainers

will need to consider getting training assistance. This can be in the form of one or more assistants who take care of exercise or workshop elements. Work with a co-trainer, performing the training together as a pair requires good preparation together, getting to know one another, and especially finding ways to react to one another and take cues from each other naturally.

➤ **SUCCESS/FAIL FACTORS:** Making a shortlist of factors that can make or break the success of training courses should be a priority for trainers. These factors can be anything from a failing air-conditioning, to a broken projector, not enough space for all participants, public transport, etc. For each of the factors, trainers should think about the likelihood of that occurring, and remedy for when it would happen[vii].

c. Training material

Training material should be elaborated enough for all courses participants so that participants will be able to use the material knowledge when there is no trainer around them to offer help.

Training material needs to bring lasting education to courses participants (managers of intermediary organizations, SMEs representatives, policy makers), so the trainer has to make sure the training material address the following issues:

➤ **EFFECTIVE STRUCTURE OF TRAINING MATERIAL**: Choosing a structure that enables courses participants (managers of intermediary organizations, SMEs representatives, policy makers) to meet the training goals. Adapting the 4MAT system would be very helpful for trainers when preparing the training material. The 4MAT system addresses the needs of all four different types of learners, and does so in the most effective order.

➤ **UNDERSTANDABLE TRAINING MATERIAL.** Language of the material should be straightforward and without complex content or information. Without long sentences, many commas, and double negatives such as "do not forget to not …" as these really confuse people. Materials should be as much as possible free of errors in spelling, language and of course also content – too many errors will make training materials look really unprofessional.

➤ **EASY REFERENCE**: making sure that courses participants (managers of intermediary organizations, SMEs representatives, policy makers) can easily find what they are looking for in the training material. A good table of contents is a must. A set of references will help courses participants a lot if there is a commented bibliography added.

➤ **READABILITY**: projected slides and printed hand-outs have to be readable. This means: big enough fonts and no distractions, text and background contrast in both colors light/darkness. For a text slide this means that four or five bullet points is much to be preferred over 7 or more – less is more where it comes to slides. Avoiding distractions – no backgrounds that make the texts hard(er) to read and keeping logos to a minimum.

d. Group dynamics

Every new group of courses participants (managers of intermediary organizations, SMEs representatives, policy makers) will be different from the previous one. Humans differ and their reaction to trainings differs. Also any group that is newly formed has its own dynamics. This is part of the challenge for trainer that has to be a motivation and reason to enjoy doing trainings. Giving constructive and useful feedback to courses participants will be an important part of the training. If the feedback is too long and detailed, the courses participants will only remember two to three things.

e. Check lists

CHECKLIST WILL HELP THE TRAINERS PREPARE FOR A SUCCESSFUL TRAINING. The suggested timeline given below is an example to help the trainers think ahead. The trainers have to make sure that everything in the checklist will be covered[viii].

Appendix 2 – Practical steps for organization of Train the trainers or Local trainings for Intermediary organizations and Documents for the training workshops organization

a. Setting the tentative date of the Training in advance

At the beginning of all actions a suitable tentative date for the organization of the Training need to be set. The final date needs to be agreed upon with the Attendants later on. It needs to be acknowledged that the Training will take place in Week 6 from the start of preparation of the Training (or later, depending on the agreement with the Attendants in the next phases).

b. Collection of information on suitable attendants for the Training

It needs to be kept in mind that the Local trainings are intendent for local intermediary organizations, which are (for the purpose of the Co-Create project) divided into two groups:
- Traditional sectors, e.g. Chamber of Commerce and Industry/Crafts, clusters, Technology parks,
- Creative industry, e.g. Incubators, Fab labs, co-working organizations, Design thinking initiatives etc.

One should be aware about possible local intermediary organizations and belonging contacts before launching the organization of the local training. Please keep in mind that at least 5 participants are required due to Co-Create project application. Also, in practice, at least 5 participants are necessary to execute a lively training, based on discussion and practical involvement of participants.

During the first steps of the preparation of the Training a list of local contacts deemed suitable to participate in the Training are to be collected.

Based on local contacts, as described above, one can follow the bellow described steps to motivate and engage local intermediary organizations' contacts.

c. Invite participants (from intermediary organizations)

As an initial contact a face to face or telephone contact with interested stakeholders for the Co-Create project training is suggested, followed by an invitation via informal email and attachment of the workshop agenda. In some cases also e-mail invitations can be used to raise profile of the event or to involve a larger amount of potential attendants.

OPTIONAL:

Prior to defining the exact date of the Training one can use doodle to set the dates of the local training. This is very much recommended when one is planning the meeting with more participants coming from different organizations, which is actually the situation when planning the Co-Create local trainings for intermediary organizations. Think about how many possible dates to propose – too many possible dates may be counterproductive.

In any case, the purpose of the exercise is to send out the preliminary information on possibility of Training to be arranged in the specified project Topics, with a request for confirmation of the preliminary request.

Invitations E-Mail-texts
TEMPLATES OF THE COMMUNICATION TO CONFIRM INTEREST

Dear <Name of Intermediary Organization>,

With this email I am now sending you information on the previewed date of the Training as discussed /via telephone/via email previously.

Please confirm your availability and interest to participate in the Training, so we can start adjusting the contents to cover as much as possible the issues within your focus (e.g. <put in data you have previously collected on the Stakeholder>).

With friendly regards,
<NAME OF RESPONSIBLE PERSON>

d.   **Introductory Webinar**

The Webinar is a precursor to the Training. It is organized by the Trainer at a time convenient for the Trainees. At least one hour should be allocated to the Webinar.

Prior to the Webinar the Trainer should address the Trainees with a welcome mail, introducing him/herself. This initial email should look like the template below.

From here on one can choose among two option how to proceed towards local training – with or with-out webinar prior the local training taking place.

- The option without webinar is suitable when in contact with participants it becomes clear that this step is considered redundant from their side. In this case all information need to be sent to them via email.
- For the majority of potential attendees, however, a webinar will be an interesting option to further gain insight into the potential benefit of the Training and their possibility for active participation within the Training.

This preparatory work will make the Training a more vivid and discussion based event, which will increase the benefits of the Attendants.

Invitations E-Mail-texts
TEMPLATES OF THE COMMUNICATION (PRIOR TO THE WEBINAR)

With-out webinar

Dear <Name of Intermediary>
As discussed I hereby send you the agenda for the <OFFICIAL WORKSHOP NAME >. During the workshop we will inform you also about the results of the Co-Create project, future cooperation possibilities and <ADD ADDITIONAL TEASER ARGUMENTS>.

The workshop takes place at <PLACE OF WORKSHOP>, <ROOM>, on <DAY OF MEETING> from <START TIME> to <END TIME>.

Please do not hesitate to call me in case of any question (<PHONE NR OF PRESPONSIBLE PERSON>). A short prior notice about your participation via email or phone would help us during preparation.
With friendly regards,
<NAME OF RESPONSIBLE PERSON>
Attach: Proposed Agenda of the Training, plan to find training workshop room, plan for parking (if required)

With webinar prior to the local training

Webinar Agenda for the Operators – preparation to the Train-the-trainers workshop:

10.00– 10.30 Understanding of procedure and logics of training and explanation of preparatory activities;
10.30– 11.00 Explanation of the logical framework;
11.00 – 11.45 Presentation of the main methods/concepts and methods and the basic knowledge on Design Thinking, Co-creation
11.45-12.00 Optional: identification of relevant cases that will be worked on the training and introduction of the fact that preprepared case trials will also be used as a basis of the training;

Webinar Agenda for the Local intermediary organization – preparation to the Local workshop:
10.00 – 10.15 Explanation of the logical framework;
10.15 – 11.00 Presentation of the main methods/concepts and methods and the basic knowledge on Design Thinking, Co-creation
11.00-12.30 Optional: identification of relevant cases that will be worked on the training and introduction of the fact that prepared case trials will also be used as a basis of the training

Dear Trainees,

As you are well aware from the discussions we have had so far, we propose to have a Training on <> in the month of <> at the premises of <>. The training is a result of the project of the European Commission, Co-Create.
Let me introduce myself. My name is <> and I will be your host and trainer at the previewed training event.

In this email I would like to ask you to hold a preparatory Webinar at a date you find suitable. To allocate such a date please fill in the doodle <make link> form. The purpose of this Webinar is to prepare the data and to fine-tune the topics and the Agenda of the Training. You will find attached two files, the CSI Assessment file and the exemplary Agenda. Both will be discussed into the details during our preparatory Webinar, so please take a look at them.

I would very much appreciate if you could answer my request and fill in the doodle until <>.
Best regards and hear from you soon.
Your sincerely,
Co-Create Trainer

NAME <>
Attach: Proposed Agenda, CSI Assessment file

The list of the ppts to be used at this stage is the following (same as Table above):

Table 9: Materials available for the Webinar before the training

Agenda chapters	Delivery format
explanation of the logical framework	ppt presentation in VOX webinar tool, also available in Co-Create_WP3.2. Training methodology_webinar for PP.ppt
presentation of the main methods/concepts, the basic knowledge on Design Thinking, Co-creation	ppt presentation in VOX webinar tool, also available in Co-Create_WP3.2. Training methodology_webinar for PP.ppt
optional: identification of relevant cases that will be worked on the training and introduction of the fact that preprepared case trials will also be used as a basis of the training	ppt presentation in VOX webinar tool, also available in Co-Create_WP3.2. Training methodology_webinar for PP.ppt
CSI Assessment file	Microsoft Word (.docx) document to be sent to project partners (Co-Create_WP3.2_Training methodology_CIS Assessment.docx)

e. Proposed Agenda for the local Training

Prior to the training a "Training needs survey" should be send to the participants (template of the survey is in a Annex 5.

It is important for the Proposed Agenda to be introduced early in the discussions that the Tentative Attendants receive concrete information about the layout of the Training and become involved in the preparation early on.

The agenda is to be introduced to the Attendants within the steps as described above.
There are two separate agendas proposed below:
- the first one is suitable for the Train the trainers event in Milano, with the planned participation of operators (=coordinators)
- the second one is the proposed agenda for the local trainings, to be used by the consortium partners (and later on in other Trainings).

The two agendas differ, as the purpose of the first is to involve the consortium partners, explain the details of the content of the topics material for the later Trainings, to obtain comments and to enable them to train further participants at the secondary level.

Proposed agenda for the MILANO TRAIN THE TRAINERS TRAINING

Date: 12 – 13 July 2017,

DAY 1

Place: Politecnico, Milano, Italy   Trainer: <>

09:00-09:15, Registration of Participants (JSI)

09:15-10:00 Welcome (JSI)

        Introducing participants of the day. What are their expectations? What is their requested take home message?

10:00-10:30, Overall logical framework of the training methodology (JSI)

10:30-11:00 Guidelines for organization of the local trainings (JSI)

11:00-11:30 Working Coffee Break

11:30-12:15 Capitalization of the past projects toolkit (TVT)

12:15-13:00 Introducing the concepts of Design Thinking Theoretical part (external expert: Service8), part1

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13:00-13:45, Quick Lunch

13:45-16:00 Introducing the concepts of Design Thinking Practical part (external expert: Service8), part2

15.00-15:15 Working coffee Break

16:00-16:30 Wrapping up (external expert: Service8)

DAY 2

09:15-09:30, Registration of Participants (JSI)

09:30-11:00, Introducing the concepts of Co-Creation Theoretical part (external expert: Service8), part1

11:00-11:30 Working Coffee Break

11:30-13:00 Introducing the concepts of Co-Creation Practical part (external expert: Service8), part2

13:00-13:45, Quick Lunch

13:45-14:15 Introducing the concepts of Cross fertilization (external expert: Primum)

14:15-15:00 Introducing the concepts of Cross-innovation (external expert: Primum)

15:00-15:30 Working coffee break

15:30-16:00 Introducing the concepts Gamification (external expert: Primum)

16:00-16:30 Wrapping up, Feedback collection (JSI)

The list of the ppts to be used at this stage is the following (same as Table above).

Table 10: Materials available for the Training (Train the Trainers)

Agenda chapters	Delivery format
Overall logical framework of the training methodology	Power Point Presentations (ppt), file name: WP3.2. Training methodology_logical framework.ppt
Introducing the concepts of Design Thinking	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Design thinking.zip
Introducing the concepts of Co-Creation	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Co-Creation.zip
Introducing the concepts of Cross	Power Point Presentations (ppt), file name: Co-

fertilization	Create_WP3.2_Training methodology_Cross-fertilization.zip
Introducing the concepts of Gamification	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Gamification.zip
Introducing the concepts Cross-innovation	Power Point Presentations (ppt), file name: Co-Create_WP3.2_Training methodology_Cross-innovation.zip
Guidelines for Practical implementation of local trainings for intermediary organizations	Power Point Presentations (ppt), file name: Co-Create_WP3.2. Training methodology_Implementation.ppt
Presentation of the Toolbox, stemming out of previous projects (IPRSMEs, FIDIAS, FIREMED, etc.)	WP3.1 outcomes – ppt presentation, prepared by Leatitia Amiot (TVT), WP3.1
Practical training, workshop or work with an expert on case-study or real-life example	ppt presentation of case-studies, also in word document and printed materials to be handed to participants at the training
Feedback collection	Feedback questionnaire – printed material to be handed to the participants at the training

Proposed agenda for the <u>LOCAL TRAINING</u> - EXAMPLE

Date: <>.<>.2017,

Place: <>   Trainer: <>

09:00-09:30, Ice breaking

Welcome, introduction of the concept of the day

Introducing participants of the day. What are their expectations? What is their requested take home message?

09:30-12:30, Building blocks of innovation concepts

09:30-10:15 Overall logical framework of the training methodology

10:15-11:00 Introducing the concepts of Design Thinking and Co-Creation

11:00-11:30 Working Coffee Break

11:45-12:15 Introducing the concepts of Cross fertilization,

12:15-12:30 Introducing the concepts of Gamification,

12:30-12:45 Introducing the concepts Cross-innovation

12:30-13:15, Quick Lunch

13:15-15:15, Towards an effective Exploitation Strategy

Practical training, workshop or work with an expert on a case-study or a real-life example

15:15-16:00, Towards an effective new Current Innovation Situation

15:15-15:45 Presentation of the Toolbox, stemming out of previous projects (IPRSMEs, FIDIAS, FIREMED, etc.)

15:45-16:00 Discussion on potential use of the Toolbox

16:00-16:30, Wrapping up

    Wrapping up & Closing Remarks. Collecting orkshop feedback forms.

f. Wrap-up of the Webinar

At this point it needs to be understood that the Trainer has a twofold goal at the Webinar:
- Explanatory role: The Trainer will explain the purpose of the training and its outcomes for the state of innovation results at the Training.
- Data collection role: The Trainer will explain the two files (CIS Assessment file, see Appendix) and Exemplary Agenda file. The purpose of the files is to induce discussion about the organization of the Training and to collect enough information and to conduct a successful training.

Should the Trainer not be successful in the Data collection role, he should resort to using the preprepared case studies at the Training. In practice the inability of tentative Attendants to the Training (e.g. participants to the Webinar) to provide practical examples connected to the field of the Training planned, means that these Attendants are at an early stage of recognition of the possible tools offered by the Training. In this sense the Trainer should opt for the usage of preprepared Case studies instead of executing the Training in part on the basis of concrete examples provided by the Training Attendants.

It is important that the Trainer is confident in what the purpose of the Webinar should be. The questions asked at the Webinar by the trainer are:
- Why the training? (responded by the Trainer according to the Methodology above)
- What is most important for you in the Training? (to adopt the Agenda)
- What problems do you encounter during your innovation work in the cluster?
- Could you please fill in the CIS Assessment form for me as a preparatory action for the Training?

The outcome of the Webinar should be a thank you note by the Trainer, along the following lines:

Webinar Follow-up/Thank you E-Mail-text

TEMPLATE

Dear Trainees,

Thank you for the Preparatory Webinar held on <>. Please find attached short Minutes for your convenience. We are on our way to a successful Training!

As discussed at the Webinar, please … - / OPTIONAL consider filling out the CIS Assessment forms and return them to me until <> /in order to keep in mind the importance of involving a realistic case from your own environment for the discussions we will have at the Training.

I will adopt the Agenda to the conditions explained in the Webinar and return it to you for final review.

Your sincerely,

Co-Create Trainer

NAME <>

Attach: Minutes of the Webinar, Proposed Agenda, OPTIONAL: CSI Assessment file (All files available in the Appendices)

g. The Training – Execution

As the last step prior to the Training a do-not forget message is sent to the Attendants. Content of the message includes again information on the date, venue details, things needed for the Training, final Agenda). If so agreed, a reminder for the preliminary input documents is sent (the Current Innovation Assessment in Appendix). (Otherwise this is left out and only case studies are to be used at the event itself to discuss principles in practice.)

For the successful execution of the Training the following need to be taken into account:

- The Overview of contents of the Co-Create training courses,

- The Plan for Training implementation,

- The Training Process,

- The Agenda.

All these information are given into the detail in the document above. The Contents of the Co-Create training courses are described into the detail in APPENDICES, through sample ppts for the specific Contents to be covered.

h. **TRAINING WORKSHOP EVALUATION FORM**

To test the effectiveness of a training workshop one good way might be to give the evaluation for to the training participants. An example of the Co-Create project training workshop evaluation form is given below.

The Evaluation form should be filled out immediately at the end of the Training and submitted to the Trainer (confidentiality should be assured while turning in the filled out Evaluation Forms in a way that the Trainer defines the place on the Table for the filled out Forms to be left for him).

The Evaluation form should be shared with the Co-Create project operators in order to track effectiveness and quality of the Trainings, that were carried out.

TRAINING EVALUATION FORM - EXAMPLE
for participants in Co-Create project training workshop

Date: _____

Title and location of training: _____

Trainer: _____

Please indicate your impressions of the items listed below.

1. Has the The Co-Create Training met your expectations? (1, not at all; 5, completely)

1	2	3	4	5

2. How do you evaluate the agenda of The Co-Create Training (content covered)? (1, poor; 5, excellent)

1	2	3	4	5

3. How do you evaluate The Co-Create Training structure (i.e. duration, breaks, discussion)? (1, ineffective; 5, effective)

1	2	3	4	5

4. How do you evaluate your overall participation in The Co-Create Training? (1, useless; 5, very useful)

1	2	3	4	5

5. Which part of The Co-Create Training (thematic) did you find most useful? Why?

_____

_____

6. Which part of The Co-Create Training did you find less useful? Why?

_____

_____

7. Is there any additional topic you would have liked to be discussed during The Co-Create Training and were not included in the agenda?

_____

_____

8. Following The Co-Create Training are there some areas where you feel you would need additional support? If yes, on which topic?

_____

_____

Other suggestions.

_____

_____

Thanks for sharing with us these information, they will help us improve our service!

i. **TRAINING NEEDS SURVEY**

a. Training needs survey for the Operators

Who will be attending the Train-The-Trainers event in Milan on 12 and 13 July 2017?

- Colleague from the project partner organization
- someone not from project partner organization – external expert

What is your level of understanding of the following Co-Create methods (1 – poor, 5 – excellent):
- Cross-innovation ___
- Cross-fertilization ___
- Design Thinking ___
- Co-Creation ___
- Gamification ___

Desired level of understanding of the Co-Create methods after the training (1 – poor, 5 – excellent):
- Cross-innovation ___
- Cross-fertilization ___
- Design Thinking ___
- Co-Creation ___
- Gamification ___

Is there any other relevant content that you would like to have information?

Do you already have established contacts with the local intermediary organizations like:

- Chamber of Commerce and/or Craft
- Technology Park
- Clusters
- Incubators
- FabLab
- Co-working
- Other Industrial representatives
- other

Are you already involved in (or are you aware of) some SME related cases where matching between creative and classical industry would be desired:

- Yes
- No

- If yes: please shortly explain your case

Would it be possible for your organization to arrange a practical session (applying Co-Create methods based on real-life cases) with your local intermediary organizations:

- Yes
- No
- If no: why

What kind of support would you need to organize the local trainings for intermediary organizations:

- Training material (presentation of Co-Create methods) in ppt version
- Invitation letter to participants
- Agenda
- Toolkit
- Theoretical guidelines regarding training techniques
- Assessment questionnaire
- Check list for event organization
- Attendance list
- Other

Do you have any other needs related to training (content, operational support, etc.)?

b. Training needs survey for the Local intermediary organizations

Who will be attending the Local workshop on ?? and ?? ?? 2017?

- Name
- Organization
- E-maile
- phone

What is your level of understanding of the following Co-Create methods (1 – poor, 5 – excellent):

- Cross-innovation ___
- Cross-fertilization ___
- Design Thinking ___
- Co-Creation ___
- Gamification ___

Desired level of understanding of the Co-Create methods after the training (1 – poor, 5 – excellent):

- Cross-innovation ___
- Cross-fertilization ___
- Design Thinking ___
- Co-Creation ___
- Gamification ___

Is there any other relevant content that you would like to have information?

Are you already involved in (or are you aware of) some SME related cases where matching between creative and classical industry would be desired:

- Yes
- No
- If yes: please shortly explain your case

Would it be possible for your organization to arrange a practical session (applying Co-Create methods based on real-life cases) with your SMEs:

- Yes
- No
- If no: why

What kind of support would you need to organize the local trainings for intermediary organizations:

- Training material (presentation of Co-Create methods) in ppt version
- Invitation letter to participants
- Agenda
- Toolkit
- Theoretical guidelines regarding training techniques
- Assessment questionnaire
- Check list for event organization
- Attendance list
- Other

Do you have any other needs related to training (content, operational support, etc.)?

j. **Current Innovation Situation Assessment (CIS Assessment)**

Current Innovation Situation Assessment

(CIS Assessment)

Table 12: CIS Assessment

Institution	*Fill in*
Responsible person	*Fill in*
Describe the problem you encounter or the status of the project / service / product to be developed	
Proposed Result of the IA (innovation action)	*What should be the result of your collaboration with the Designer/....?*

Characterisation Description	*Innovation result defined. What products/services are going to create value for the society/company. What is the solution offered delivered as a service or in another form.* *What is the problem that the service/product addresses and what is the solution.*
Target groups	*Customers, users.*
Unique Value Proposition	*Why the product/service is better than the competition´s*
Planning	*What roadmap is previewed or operation plan to be followed to fulfill the goal. Propose milestones.* *Information on possible funding sources for that.*

Appendix 3: Checklist for Workshop Organizers

This checklist is a comprehensive and non-binding document, but it could assist organizers during workshop or event preparation and organization for the Co-Create project Training. Each organizer should evaluate the checklist and adapt it. According their format and requirements some mentioned actions may be obsolete, and other important actions may be missing.

1.1 Training Workshop Planning and Goals

Workshop name	
Date Location Responsible organizer (Person / Institution) Short description Purpose / Goals Duration Available budget Planned number of participants	

1.2 Workshop Preparation

Activity	Person responsible	Due Date
Establish organization team		
Planning meeting schedule		
Establish responsibilities		
Determine budget		
Venue reservation		
Confirm external speakers (if planned)		
Accommodation for travelling participants		
List of invitations		
Check availability of Co-Create project commination material (Folders, Roll-ups etc.)		
Draft Workshop Agenda		
Prepare signage for Workshop		
Book catering (if planned) – provide nr of participants		
Check parking for participants		
Check availability of required equipment (beamer, podium, micros etc.)		
Mail invitations		
Agree on registration process		
Arrange responsibilities for photo documentation		
Print handouts, program, name badges etc.		

1.3 Training Workshop Day

Activity	Person responsible
Check and get familiar with equipment before the workshop (light, beamer, microphone,..) Set up registration (participant list) Place dissemination material (folders, roll-ups etc.) Check room deco Check availability of water and catering Ensure furniture is on its place Organize photo documentation of event Write meeting minutes	

1.4 After the Workshop

Activity	Person responsible	Due Date
Mail short summary to participants Distribute contact info of participants to all participants (check for allowance beforehand) Report meeting minutes and photos to Co-Create project partners and coordinator		

1.5 Workshop Minutes Template

< WORKSHOP TITLE>

ORGANIZING INSTITUTION	
VENUE	REGION
DATE	TIME

Participants:

- ▪ Name1, Institution
- ▪ Name 2, Institution

Agenda:

<Copy Agenda here>

Meeting topics:

Action points:

1. First Action Point: Person: Description, Date
2. Second action point: Person: Description, Date

Photo protocol

<Add some pictures from the WORKSHOP

1.6 Deliverable REPORT: Local Training reports

Report Deliverable form will be available in separate file due to its formal nature.

Appendix 4: Guidelines for train the operators course

Introduction

The purpose of The train the operators is to deliver general knowledge on core Co-Create methods: Design thinking, co-creation, cross-fertilization, cross-innovation, gamification to host organization staff members (co-workers, colleagues)

There will be probably organized additional Train the trainers event in October 2017 in Milan, more focused on Creative Camps methodology and a concrete application of the core Co-Create methods that were introduced by the first Train the Trainers.

.

Section 1: Planned series of steps

Action	Week start	Week end	Result
DATE of Training is set to be earliest W3=Wx or after	W0	W0	A planned date for the Training is set to the Wx=W3 or later (also depending on the outcome of the discussion with the Attendants later on)
Collection of information on suitable attendants of the Training Send out (via email or in personal phone calls) the preliminary information on possibility of Training to be arranged in the specified project topics, with a request for confirmation of preliminary interest	W1	W1	A list of possible interested people to attend the Training A list of preliminary interests confirmed, A set date of the Training
An invitation to the confirmed preliminary interested attendants to participate in the Training with a deadline for application	W2	W2	A list of applications for the attendance to the Training
Send the Info Pack to the applicants. The Info Pack differs for the primary and secondary level.	W2	W2	(Suitable) InfoPack received by the Applicants to the Training.
A don't forget message to the Trainees sent	W3	W3	A reminder is sent to the Attendants. (On the date, venue details, things needed for the Training, final Agenda.) If so agreed, a reminder for the preliminary input documents is sent. (Otherwise this is left out and only case studies are to be used at the event itself to discuss principles in practice.)
Training execution	W3	W3	Training is executed, including theoretical background, practical examples/exercises, Feedback collection
Minutes of the Training prepared, agreed on with the Attendants and submitted to the WP3.2 leader (JSI)	Wx+1, e.g. W4	Wx+1, e.g. W4	Agreed upon Minutes of the Training submitted.
Report of the Training prepared, agreed upon with the Attendants and submitted to Co-Create project coordinator	e.g. W5	e.g. W5	Agreed upon Report on Training submitted.

Section 2: Participants, invitation

Invite participants

As an initial contact a face to face or telephone contact with interested stakeholders/operators for the Co-Create project training is suggested, followed by an invitation via informal email and attachment of the workshop agenda. In some cases also e-mail invitations can be used to raise profile of the event or to involve a larger amount of potential attendants.

OPTIONAL:

Prior to defining the exact date of the Training one can use doodle to set the dates of the local training. This is very much recommended when one is planning the meeting with more participants coming from different organizations, which is actually the situation when planning the Co-Create local trainings for intermediary organizations. Think about how many possible dates to propose – too many possible dates may be counterproductive.

In any case, the purpose of the exercise is to send out the preliminary information on possibility of Training to be arranged in the specified project Topics, with a request for confirmation of the preliminary request.

<div align="center">

Invitations E-Mail-texts
TEMPLATES OF THE COMMUNICATION TO CONFIRM INTEREST

</div>

Dear <Name of the Stakeholder/Operator>,

With this email I am now sending you information on the previewed date of the Training as discussed /via telephone/via email previously.

Please confirm your availability and interest to participate in the Training, so we can start adjusting the contents to cover as much as possible the issues within your focus (e.g. <put in data you have previously collected on the Stakeholder>).

With friendly regards,
<NAME OF RESPONSIBLE PERSON>

Section 3: Training needs survey for the operators/stakeholders

Who will be attending the workshop on ?? and ?? ?? 2017?

- Name
- Organization
- E-maile
- phone

What is your level of understanding of the following Co-Create methods (1 – poor, 5 – excellent):

- Cross-innovation ___
- Cross-fertilization ___
- Design Thinking ___
- Co-Creation ___
- Gamification ___

Desired level of understanding of the Co-Create methods after the training (1 – poor, 5 – excellent):

- Cross-innovation ___
- Cross-fertilization ___
- Design Thinking ___
- Co-Creation ___
- Gamification ___

Is there any other relevant content that you would like to have information?

_____

Are you already involved in (or are you aware of) some SME related cases where matching between creative and classical industry would be desired:

- Yes
- No
- If yes: please shortly explain your case

What kind of support would you need to organize the local trainings for intermediary organizations:

- Training material (presentation of Co-Create methods) in ppt version
- Invitation letter to participants
- Agenda
- Toolkit
- Theoretical guidelines regarding training techniques
- Assessment questionnaire
- Check list for event organization
- Attendance list
- Other

Do you have any other needs related to training (content, operational support, etc.)?

Section 4: Proposed Agenda for the local Training

Prior to the training a "Training needs survey" should be send to the participants
It is important for the Proposed Agenda to be introduced early in the discussions that the Attendants receive concrete information about the layout of the Training and become involved in the preparation early on.

The agenda is to be introduced to the Attendants within the steps as described above.

The purpose of the agenda is to involve the consortium partners, explain the details of the content of the topics material for the later Trainings, to obtain comments and to enable them to train further participants at the secondary level.

Proposed agenda for the TRAINING FOR OPERATORS - EXAMPLE
Date: <>.<>.2017,
Place: <>   Trainer: <>
09:00-09:30, Ice breaking
Welcome, introduction of the concept of the day
Introducing participants of the day. What are their expectations? What is their requested take home message?
09:30-10:15 Overall logical framework of the training methodology
10:15-11:00 Introducing the concepts of Design Thinking and Co-Creation
11:00-11:30 Working Coffee Break
11:45-12:15 Introducing the concepts of Cross fertilization,
12:15-12:30 Introducing the concepts of Gamification,
12:30-12:45 Introducing the concepts Cross-innovation
12:30-13:15, Quick Lunch
13:15-15:15, Towards an effective Exploitation Strategy
Practical training, workshop or work with an expert on a case-study or a real-life example
15:15-16:00, Towards an effective new Current Innovation Situation
15:15-15:45 Presentation of the Toolbox, stemming out of previous projects (IPRSMEs, FIDIAS, FIREMED, etc.)
15:45-16:00 Discussion on potential use of the Toolbox
16:00-16:30, Wrapping up
Wrapping up & Closing Remarks. Collecting workshop feedback forms.

Section 5: Training workshop evaluation form

To test the effectiveness of a training workshop one good way might be to give the evaluation for to the training participants. An example of the Co-Create project training workshop evaluation form is given below.

The Evaluation form should be filled out immediately at the end of the Training and submitted to the Trainer (confidentiality should be assured while turning in the filled out Evaluation Forms in a way that the Trainer defines the place on the Table for the filled out Forms to be left for him).

The Evaluation form should be shared with the Co-Create project operators in order to track effectiveness and quality of the Trainings, that were carried out.

<div align="center">

TRAINING EVALUATION FORM - EXAMPLE

for participants in Co-Create project training workshop

</div>

Date: _____

Title and location of training: _____

Trainer: _____

Please indicate your impressions of the items listed below.

9. Has the The Co-Create Training met your expectations? (1, not at all; 5, completely)

1	2	3	4	5

10. How do you evaluate the agenda of The Co-Create Training (content covered)? (1, poor; 5, excellent)

1	2	3	4	5

11. How do you evaluate The Co-Create Training structure (i.e. duration, breaks, discussion)? (1, ineffective; 5, effective)

1	2	3	4	5

12. How do you evaluate your overall participation in The Co-Create Training? (1, useless; 5, very useful)

1	2	3	4	5

13. Which part of The Co-Create Training (thematic) did you find most useful? Why?

_____

_____

14. Which part of The Co-Create Training did you find less useful? Why?

_____

_____

15. Is there any additional topic you would have liked to be discussed during The Co-Create Training and were not included in the agenda?

_____

_____

16. Following The Co-Create Training are there some areas where you feel you would need additional support? If yes, on which topic?

_____

_____

Other suggestions.

_____

Thanks for sharing with us these information, they will help us improve our service!

Section 6: Current Innovation Situation Assessment (CIS Assessment)- you may use this form, if you have some real case studies provided in 3.3.2. set of training course materials

Current Innovation Situation Assessment

(CIS Assessment)

Table 12: CIS Assessment

Institution	*Fill in*
Responsible person	*Fill in*
Describe the problem you encounter or the status of the project / service / product to be developed	
Proposed Result of the IA (innovation action)	*What should be the result of your collaboration with the Designer/....?*

Characterisation Description	*Innovation result defined. What products/services are going to create value for the society/company. What is the solution offered delivered as a service or in another form.* *What is the problem that the service/product addresses and what is the solution.*
Target groups	*Customers, users.*
Unique Value Proposition	*Why the product/service is better than the competition´s*
Planning	*What roadmap is previewed or operation plan to be followed to fulfill the goal. Propose milestones.* *Information on possible funding sources for that.*

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Section 7: Checklist for Workshop Organizers

This checklist is a comprehensive and non-binding document, but it could assist organizers during workshop or event preparation and organization for the Co-Create project Training. Each organizer should evaluate the checklist and adapt it. According their format and requirements some mentioned actions may be obsolete, and other important actions may be missing.

Training Workshop Planning and Goals

Workshop name	
Date Location Responsible organizer (Person / Institution) Short description Purpose / Goals Duration Available budget Planned number of participants	

Workshop Preparation

Activity	Person responsible	Due Date
Establish organization team Planning meeting schedule Establish responsibilities Determine budget Venue reservation Confirm external speakers (if planned) Accommodation for travelling participants List of invitations Check availability of Co-Create project commination		

Activity
material (Folders, Roll-ups etc.) Draft Workshop Agenda Prepare signage for Workshop Book catering (if planned) – provide nr of participants Check parking for participants Check availability of required equipment (beamer, podium, micros etc.) Mail invitations Agree on registration process Arrange responsibilities for photo documentation Print handouts, program, name badges etc.

Training Workshop Day

Activity	Person responsible
Check and get familiar with equipment before the workshop (light, beamer, microphone,..) Set up registration (participant list) Place dissemination material (folders, roll-ups etc.) Check room deco Check availability of water and catering Ensure furniture is on its place Organize photo documentation of event Write meeting minutes	

After the Workshop

Activity	Person responsible	Due Date
Mail short summary to participants Distribute contact info of participants to all participants (check for allowance beforehand) Report meeting minutes and photos to Co-Create project partners and coordinator		

Section 8: Workshop Minutes Template

< WORKSHOP TITLE>

ORGANIZING INSTITUTION	
VENUE	REGION
DATE	TIME

Participants:

- Name1, Institution
- Name 2, Institution

Agenda:

<Copy Agenda here>

Meeting topics:

Action points:

3. First Action Point: Person: Description, Date
4. Second action point: Person: Description, Date

Photo protocol

<Add some pictures from the WORKSHOP

List of Figures

List of Tables

References

[i]   offers a good introduction. On David Kolb's commercial website there is a useful set of references in

[ii]   An easily accessible presentation of 4MAT is found on McCarthy's commercial website under . The original book is "About Training Inc.; 1st Ed. edition (May 1996)" by Bernice McCarthy. Other useful references found at

[iii]   The training pyramid is widely attributed to the US National Training Laboratories (NTL) – this seems to be an urban legend however. The idea for the pyramid probably comes from Edgar Dale in his book Audio-Visual Methods in Teaching, Dryden Press (1954) – but it's unclear where the percentages come from, though the NTL seems to claim they are based on their research – only they can't find that research. See   which also contains the image

that we presented. As the plausibility of the diagram is mostly undisputed, we decided to present it here as it does contain valuable ideas.

iv   Good Practice Guide on Training Methodologies, How to become an effective and inspirational trainer, November 2014, European Union Agency for Network and Information Security, See:

v   for these percentages, which of course vary per research – but the trend remains the same. Credits go to the pioneering work of Ray Birdwhistell, see e.g.   .

vi   Training training and Motivation, CiteMan Network - Corporate Community Knowledgebase

vii   Good Practice Guide on Training Methodologies, How to become an effective and inspirational trainer, November 2014, European Union Agency for Network and Information Security, See:

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