transformative
social innovation
theory

Transformative

Social Innovation

1st Training Tool with Modules and Online Canvas

Deliverable n. 6.3

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Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Date:	19th of 12 in 2014
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Introduction to Deliverable 6.3 & process

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Introduction to Deliverable 6.3 & process

Part I outlines our emergent thinking on the development of Training Tools. Part II consists of a general overview of the training tool that is developed in Deliverable 6.3, that is further elaborated in Part III (a participants' guide) and Part IV (a facilitators' guide). Part V contains an online canvas. Following Deliverables should consist of Part II – V. We refer to Part I wherever needed in the upcoming years and suggest to use Part I to elaborate our Communication & Dissemination strategy.

For the development of the Deliverables in WP6, the working papers, policy brief and a proto-type tool produced in WP2 will be used as input. According to our project proposal, Annex I - Description of Work, Part A (in following: DOW), 'The proto-type tools are scientific recommendations that are used as input in WP6 to develop and translate these into training tools targeted at the four groups specified in WP6' (2013: 9).

In our DOW, we have indicated that we would 'discuss and validate the Tool Box, training material and the web-based resource hub' in the Engagement Workshop 2 (MS-16). This means that, until month 48 (2017), we will test and pilot the products that are produced in Deliverables 6.3 – 6.7. In the meantime, we will need to continuously identify and revisit the needs for our training tools.

According to the DOW (2013: 26) the following Training Tools are to be produced:

Deliverable	Delivery date, month
D 6.3, Training Tool 'Game-changers & Forward looking analysis'	12
D 6.4, Training Tool "Governance"	14
D 6.5, Training Tool "Social Learning"	32
D 6.6, Training Tool "Funding"	43
D 6.7, Training Tool "Monitoring"	43

Each <u>Deliverable</u> should consist out of 4 parts.
- The first part introduces the training tool. It should consist of:
  - Introduction,
  - Description of target-groups
  - Description of the offline module, including:
    - Objectives and topics,

- Methodology,
- Outline of the module,
  o Description of the online canvas for the module, including:
    - Objectives and topics,
    - Methodology.
- The second part is the particpants' handbook for the module. It should consist of:
  o An introduction to the module, including:
    - A description of objectives and content,
    - Target-groups,
    - Methodology,
  o The outline of the module, including:
    - Basic sessions or building blocks
  o The programme of the module
- The third part is the facilitators' guide to the module. This is the participants' handbook complemented with suggestions to facilitators.
- The optional fourth part is the online canvas for the module, consisting of:
  o The online canvas,
  o Instructions on use,
  o Recommended readings.

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References

Annex I - Description of Work, Part A (in following: DOW), TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169
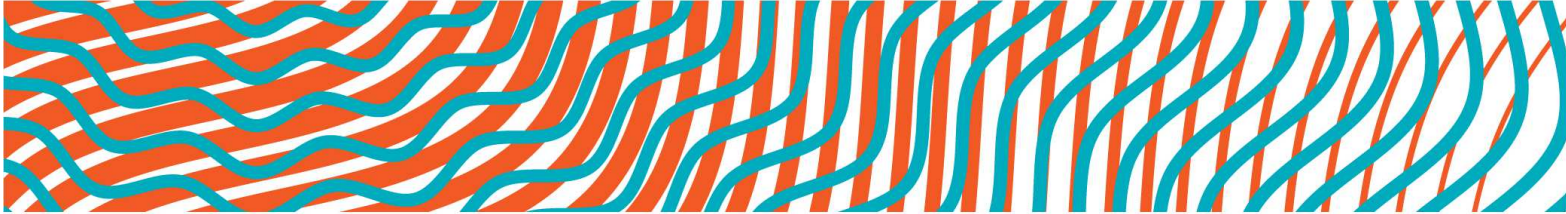
Part I

Towards Developing a 'Toolbox' and 'Training Programmes' in TRANSIT

Deliverable n. 6.3, Part I

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Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Zuijderwijk, L. (eds.), Becerra, L., Juarez, P., Olivotto, V., Wittmayer, J. (2014), *Part I: Towards Developing a 'Toolbox' and 'Training Programmes' in TRANSIT.* TRANSIT Deliverable 6.3, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169

Date:	19th of 12 in 2014
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1.1 Introduction to part I

This is the introduction to Part 1 of Deliverable 6.3. In this Part, we outline our emergent thinking on the development of Training Tools throughout the 1st year of TRANSIT. It is a position paper that elaborates our stance on 'training tools', gives an overview of existing tools as well as develops our vision for tool development in TRANSIT. In doing so, we are building on Deliverable 2.1 and outline areas of interest that should be addressed in the development of the coming tools (Deliverable 6.3 up to 6.7.). The position we take here is not set in stone, rather it will develop throughout the project and further adapted and refined as we see necessary.

The following section 1.3 describes our ambiguous stance to 'training tools'. Section 1.4 reviews the training tools that are available online, and section 1.5 contains our proposal for the training tools in TRANSIT, based on our critical assessment in section 1.3 and our added value as comes forward from section 1.4.

1.2 Critically assessing "training tools" in TRANSIT

This section discusses our critical thinking about 'training tools', 'toolboxes' and 'training programmes', concepts with which the consortium has an ambitious relationship. It is TRANSIT's mission to 'Develop a theory of transformative social innovation with a focus on empowerment and change in society that is relevant for both scientists and practitioners' (TRANSIT website, 8th December 2014). TRANSIT has set itself the goal of addressing this practical relevancy not just after the project is finished, but during the project as well.

It was envisioned in the DOW, that this practical relevancy could amongst others be addressed through the creation of 'toolboxes' and 'training programmes'. [1] The toolbox should enable practitioners and policymakers to apply theoretical insights with respect to our cross-cutting themes (governance, social learning, funding and monitoring) and the role of game-changers (DOW 2013: 24). The toolbox should in various ways be "useful for practitioners and policymakers" (DOW 2013: 24).

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[1] In TRANSIT, we have used a variation of concepts, such as 'tools', 'toolbox', training', 'training programmes, ' training packages'. We will here use 'training tool' or 'tool' to refer to all of the above.

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Our doubts with this concept are that the concept of training tool is associated with a one-directional knowledge-transfer and with the offering solutions to problems, using our toolbox. mirrored by the preference of some for speaking of "play book", "thinking tool", "reflective tool" or "facilitation method" instead of training tool (Avelino & Wittmayer 2014: 4).

Therefore, we are re-thinking and critically assessing the meaning and practical relevancy of such training tools. This leads to TRANSIT exploring, *how can we be relevant to practitioners and other target groups offering such training tools?* We propose to explore the various ways of being relevant by using the concepts of 'mode 1', 'mode 2' and 'mode 3'-science.

Research-institutions dedicated to social innovation in Europe, Latin America and the United States, make research generated insights available for – mainly – social innovation practitioners (see section 1.4). In other words, the training tools as generated in TRANSIT would be produced in a well-known tradition of making research practically relevant. A review of training tools that are available online, demonstrated that almost all of these based on research insights are 'how to'-tools, targeted at practitioners in social innovation. A characteristic of such training tools is that they contain checklists of activities, rules to follow or a to-do's list in order to obtain a certain goal. These tools guide the participant through a number of steps and allow him/her to reflect on the practical application of these tools. There are at least three reasons for developing a critical perspective onto such 'how to-'tools.

In the first place, researchers in TRANSIT are exploring the argument that such training tools could "reproduce the system" by guiding the practitioner through a number of steps that are based on generated knowledge about this exact system. This would leave little space for critically reflecting on this system (paraphrasing a member of the International Advisory Board of TRANSIT). This is necessary from our point of view because transformation is a fundamental change of system and structures, requiring a questioning of these exact structures – as well as the training tools that are usually produced within these structures. We are therefore in favor of a reflective process that requires a certain mechanism of intervention of the subjects to facilitate a reflective evaluation, thus using a so called a 'reflective tool'. This leads to the question *how can we conceptualize and practice a TRANSIT training tool which increases reflexivity*?

In the second place, we assume that knowledge transfer takes place between practitioners, policy-makers and other actors without interference of a 'third party' or 'intermediary' such as a knowledge institute or think tank. As a consequence knowledge transfer is not the monopoly of these parties anymore. Therefore, we question to what extent training tools should be designed to

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transfer knowledge from 'knowledge holders' such as researchers (as 'trainers') to 'knowledge recipients' such as practitioners and policy-makers.

Thirdly and related to that, is that studying social innovation makes it even more important to reflect upon the meaning and practice of training tools. In the domain of social innovation, the notion of "co-production of knowledge" is central (see Voorberg et al. 2013 for a review). Social innovation in itself is considered as a process of co-production (cf. Voorberg et al. 2013). It can be stated that the social innovation process relies on the development of social bonds created by people who circulate in many networks and who are willing to share their knowledge, influence and social links with the goal of finding original solutions (Nussbaumer & Moulaert 2007). These social bonds happen in a 'space' where collaboration and joint knowledge production can be exercised. What could the role of research and science be in this 'space'? How could research and science be integrated in this collaboration and joint knowledge production (Hackmann 2014)? This leads to the question *how can we conceptualize and practice the interaction between TRANSIT researchers and actors in social innovation, such as practitioners and policy-makers?*

Both questions will be explored throughout the full process of developing training tools up to 2017. Turning to the ideas of 'mode 1'-, 'mode 2'- and even 'mode 3'-science could help us to position the training tools we are producing into a broader idea of science-society interfaces. 'Mode 1' is a 'knowledge-first' approach in which the scientist is perceived as knowledge-provider, acknowledging a boundary zone between science and society. As the European Commission notes, "[r]esearch is an activity apart from other resources: it is an activity of special kind that is the core of knowledge building" (2013:34).

'Mode 2'-science is more 'process-oriented' (Rydin 2007; Schmale et al. 2013; Wittmayer & Schäpke 2014), in which other stakeholders than researchers are perceived as problem-owners and hence the definition of the problem itself becomes collaborative opening up a space of joint knowledge co-production where science and society overlap (Nowotny et al. 2001; Miller 2013 in Wittmayer & Schäpke 2014). Researchers are (only) one of the knowledge providers in these spaces (Miller 2013 in Wittmayer & Schäpke 2014), which could be created and maintained by researchers in "process oriented" research (Wittmayer & Schäpke 2014). It could offer spaces of 'facilitated participatory learning'.

A mode researchers are only starting to explore, is 'mode 3', in which the fluid roles and relations of researchers and the 'Others' are explored (see also Avelino & Wittmayer 2014: 16 – 17). A 'mode 3'- science comprises a re-orientation towards societal relevancy and problems, along with

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a change in the formal and informal science institutions (incl. organizations, routines, paradigms, self image) (Schneidewind & Singer-Brodowski 2013).

1.3 Reviewing available online training tools: towards the added value of tools in TRANSIT

The first part of this section offers some insights into the reasons for using training tools that are available online. The second and third part offer a review of available online training tools with the objective to position our work on tools in relation to existing resources.

1.3.1 Training tools online: characteristics, (dis)advantages and requirements

This section looks into why online tools are used, in general. Baars (2006) in Kallenberg, Van der Grijspaarde and Ter Braak (2009: 278) argue that an online learning environment for students in higher education (we'd rather speak of 'participants') has several advantages compared to 'traditional' learning (that we predominantly associate with 'mode 1' science).

Amongst others, participants should be able to learn at moments and places of their choice, as it is accessible across time and space: it should be a form of *ubiquitous learning* for the individual. Secondly, the recommended readings and online tool should – after reviewing its use – easily be updated, it should save costs as learning means are free of charge, and it should be easier to reach an international target group. However, in terms of international target groups, the access in financially, spatial and social terms should be taken in account.

There are also certain requirements to such an online learning environment. In terms of resources, the material should be practically relevant for the target group, should be limited, both in size and number, should be varied (based on the medium) and a hierarchy in resources is advisable, based on importance with regards to the objectives. Further on, clear instructions and/or extended descriptions of the exercise are needed, as well as clear instruction possibilities for feedback and communication (Veen 2000 in Kallenberg, Van der Grijspaarde and Ter Braak 2009: 278).

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Both the requirements and the advantages are related to the absence of facilitator-participant and participant-participant-interaction: if there is any communication, it is usually a-synchronized. The consequences thereof are discussed in the following section.

As an overview in Annex 1 demonstrates, most of the online training tools that we reviewed are 'how to'-tools. Our main observations are summarized in the next section.

1.3.2   A review of tools: Europe, Latin-America and the United States

We have characterized the training tools available on five dimensions: the goal of the training tool, the target group, the thematic areas (including but not only: game-changers, governance, social learning, funding and monitoring), whether we see this as a 'how-to' tool or a 'reflective' tool.

In November 2014 the tools available were sampled through an exhaustive search of web pages related to issues of social innovation, as well in English as Spanish (see the Annex for the full search terms). With regard to the "web-based tools" four websites in Europa, three in the United States, two in Canada and one in Latin America were found. In Europe, these are the Development Impact and You, Social Innovator, Salto Youth and Competentiecentrum Transities; in the United States are Community Toolbox, Project on Social Innovation, and Project Innovation; in Canada are Innoweave and SIG Knowledge Hub; and in Latina America it is Política de Innovación Social. Please see Annex 1 for the exact criteria and full overview of the tools available and accessible via a web platform. This means that offline trainings are not taken in review. There is however a strong range of these offers[2], by universities in Europe, Latin America and the United States. And, in the other sense, there are fewer web-based training tools. Based on this overview, we summarize our main observations.

In the first place, both offers (courses and online tools) are strongly linked to research activities. That is, the research centers as mentioned in the overview are dedicated to social innovation (with research generated content) providing training courses and toolkits.

In the second place, the role of academics (researchers) is mainly restricted to the actual generation of knowledge, being part of the research teams of the centres. They are not part of the target-groups of the online training tools.

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[2] Several courses were identified: 18 in Europe, 11 in Latin America and 5 in Canada and United States. See Annex 1 for an overview of the universities.

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In the third place, the predominant target population consists of practitioners and this explains the bias of 'how-to'. Very few courses are targeted at policy-makers (only one in the Latin-American[3] context and two in Europe[4]) and none is oriented to outside researchers.

In the fourth place, almost all the surveyed tools are have a profile of 'how-to'. Clear instructions are required as there is a delayed or absent option to communicate. The consequence is that the tool has the character of a 'checklist of activities', a summing up (whether or not canvassed) 'rules to follow' or a 'to do'-list – as to replace a human interaction. Another consequence is that there is no mechanism to test the learning process. In this sense, the 'student' could be a passive actor, the teacher doesn't have to exist. Learning is fully dependent on the motivation of the student. The trainer has no formal mechanism to improve the tool as the learning-by-doing dynamics are restricted: there are no possibilities for institutional learning.

In the fifth place, we did not detect any classroom course or web-based training tool engaged in transformative social innovation.[5] There are schools and courses dedicated to the phenomena of 'transitions' but we have found no courses that link social innovation to transformation. We could reason that it is not possible to create a checking list or rules of action in relation with transformation dynamics of societal structures. It is very difficult to codify these relations in a 'how-to' recommendations agenda of social transformation. As we already argued in section 1.2, the best option might be to perform reflective learning trainings in order to enable the participant to broaden his/her decision making process through critical thinking. These seem to require a trainer or facilitator to ensure a reflective process requiring a certain mechanism of intervention of the subjects to facilitate a reflective evaluation. We will call such an intervention a 'reflective tool'.

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[3] *Red Nacional de Innovación Social* (http://innovacionsocial.org.mx/index.php/formacion) and *Política de Innovación Social* (http://www.politicadeinnovacionsocial.co/home). Visited november 2014.

[4] *Sinnergiak* (http://www.sinnergiak.org/) and *Más Innovación Social* (http://www.masinnovacionsocial.es/index.html). Visited november 2014.

[5] However, one of the partners in TRANSIT (DRIFT) is recently started to run a course on social innovation, in which the relation to transformation is a central topic, see http://transitionacademy.nl/course/masterclass-sociale-innovatie/ (November 2014).

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1.4 Implications and proposed structure of TRANSIT training tools

1.4.1 Implications for training tools in TRANSIT

In this section we discuss the implications and opportunities of our observations in previous sections for the tool development in TRANSIT.

Let us first summarize these in a number of propositions:

1. We propose to conceptualize 'training' as a planned process in which a learning experience takes place, with regard to certain objectives (based on Pennink 2010). Avelino & Wittmayer (2014: 3), conceptualized 'tool' as 'a heuristic that is used to facilitate a learning process'. These learning processes range from "classical' university education to […] more intervention-oriented learning […]", thus ranging from a knowledge-transfer to a facilitated participatory learning process (idem: 3). Based on this, our working definition of a training is a process that facilitates a learning experience and is facilitated by a heuristic. A trainer is the facilitator of this process. This process varies along with the researchers' roles and erlations to 'Others', as discerned in the above, using the various 'modes'.

2. Specific about our tools are their situatedness in the context of transformative social innovation, that is: social innovation and its relations to societal transformation. This requires that they should be of reflective character.

3. We propose to see researchers as part of our target-group in general, together with practitioners and policymakers. This opens up a range of possibilities, in particular in relation to 'mode 2' and 'mode 3' science.

4. The training tool takes shape both online and offline. Our training tools would thus be produced in a well-known tradition of making research practically relevant.

5. With regard to the offline shape of the training tool: these are modules. Each module is structured around the core-themes we discerned for the training tools, namely: Transformative Social Innovation and game-changers, and the cross-cutting themes governance, social learning, resourcing and monitoring. Each module consists out of various sessions. A facilitator could employ the full module – thus all consecutive sessions – or select one or more sessions to employ.

6. Each offline modules could be <u>complemented with an online canvas</u>[6]. This canvas could be used in the offline module (as part of a session), and independently. If used independently, this becomes a 'how to'-tool with the (dis)advantages as described above. It could be an option to research how a 'how to'-tool relates to a 'reflexive tool'.

7. We propose to <u>monitor and evaluate the production and implementation of training tools</u> throughout the research process. This will help us to adapt and refine these throughout and at the same can help us to investigate our own positioning in terms of 'mode 1' and 'mode 2'-science, between 'knowledge-transfer' and 'facilitated participatory learning' and even towards a 'mode 3'-science. This <u>enables institutional learning</u> with regards to the offline modules, by developing in time a feedback-mechanism. We suggest to see the training tools as products that need refinement and (contextual) adjustment to the needs of the target-groups. Through a 'learning-by-doing'-approach, we test and further develop the training tools, both in the Engagement Workshops and throughout the process. With regard to the online canvas, one proposition is to add the possibility for <u>participant to share their canvas with us and other practitioners by reviewing and publishing their completed canvas on our website.</u> This may help evaluation and institutional learning. We will use Google Analytics to trace to what extent the online canvas is downloaded.

We will explore the practical implications of these propositions throughout the full process of making training tools in TRANSIT. The table below is a first step: using keywords, it shows the practical overlap and differentiation between training tools in various 'modes' (adapted from Pennink 2010).

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[6] A canvas is a download (usually PDF) that can be completed by an user for obtaining a certain objective. By using a pre-ordered set of steps, the user is guided towards an end-objective. Usually, such canvasses come in the form of 'how-to'tools.

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Table 1: Keywords on how researchers' relations to 'Others' inform training tools for transformative social innovation.

Researchers' role	Trainer, lecturer, teacher that performs knowledge-transfer.	Facilitator of a processes through which knowledge is co-produced.	Not as a fixed role but an activity that moves among participants. Constructed in relations among the participants
Associated 'Mode' of science	1	2	3
Description the process facilitating a learning experience.	Interaction between trainer and trainee. At least partly knowledge transferral. Teacher controlled, learner has little or no choice. Providing information, evaluating.	Facilitated interactive space of learning. Collaboration. Mutual respect, openness. Problem centred, experience based. Learn from and re-examine experiences. Active participation, group interaction	Peer-to-peer setting of space/time of learning happens in open process. Analysis of power-knowledge relations. Strong involvement of 'participant' in planning and design of training.
Perceived attitude of participants in training	Dependant	Collaborative	Independent
Facilitators' perception of participants	Practitioners and policy-makers: 'students' Participant should follow instructions, receive information, little responsibility for own learning process. Gaining facts.	Practitioners and policy-makers: 'participants' Offer ideas, linked to experience, active participation, responsible for process. Centred around own experiences.	Everybody has a certain knowledge on a topic, everybody can be a participant. Offer ideas, linked to experience, active participation, responsible for process. Centred around own experiences.

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	Need of structure, direction, encouragement.	Sharing and building on knowledge and experiences. Interaction, practice, observation, challenge, participation, esteem, experimentation.	Sharing and building on knowledge and experiences. Participant may feel facilitator has little to offer. Internal awareness, experimentation, non-judgemental support.
Perceived control by facilitator	High control	Moderate control	Loose control
Associated tool	How-to	How-to & reflective	Reflective
Examples of associated methods	Lecturing, reading, demonstration, assignments, checking, testing, transmission of content, reinforcement, grading, materials, guided discussion, field visits, demonstration.	Structured exercises, games, group discussions, case studies, role plays, brainstorm, simulation, debate, Backcasting,	Open Space Technology, Unconferencing.

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Each training tool that is produced in Deliverable 6.3 – 6.7 should ideally cover the three perspectives, implying at least one session for each mode, next to the online canvas. Based on the above, in the following section we outline the proposed structure that could be used in each training tool.

1.4.2   Proposed structure TRANSIT training tools and Deliverables

The objective of each Deliverable (6.3 – 6.7) is to present the facilitators (that could be researchers in TRANSIT) a training tool that is ready to be employed, but that leaves room for the facilitators to adapt the module and its sessions to the specific social contexts and target-groups.

The <u>training tool</u> exists out of a three components:

- A participants' handbook that could be handed out to the participants, after the facilitator adapted it,
- A facilitators' handbook that is an elaboration of the participants' handbook. This contains suggestions for the facilitator, references and Powerpoint presentations that could be adapted,
- An optional online canvas, that could be used as part of an offline session, and independently.

The facilitator could use the five training tools as a package, or could be used as stand-alone products. The training objectives, topics and target-group are to be decided upon per package.

The <u>preliminary titles</u> of the training tools read as follows.

1. Five shades of change? Relations between social innovation and societal transformation
2. A process of (dis)empowerment: Governance
3. A process of (dis)empowerment: Social learning
4. A process of (dis)empowerment: Resourcing
5. A process of (dis)empowerment: Monitoring

These preliminary titles are based on the central hypothesis in TRANSIT (see conceptual heuristic in Avelino et al. 2014: 8) and could be adapted to emerging insights in TRANSIT.
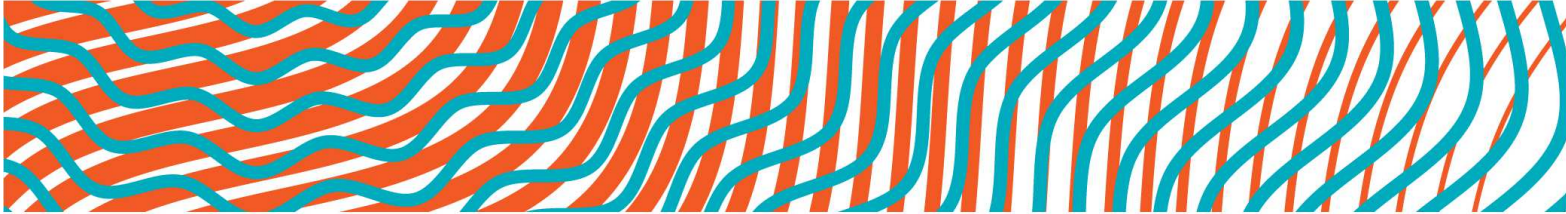
Part II

General Introduction to 1st Training Tool:

'Five Shades of Change? Relations between Social

Innovation and Societal Transformation'

Deliverable n. 6.3, Part II

transformative social innovation theory

Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Zuijderwijk, L. (eds.), Wittmayer, J. (2014), *Part II: General introduction to 1st Training Tool: 'Five Shades of Change? Relations between Social Innovation and Societal Transformation'.* TRANSIT Deliverable 6.3, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169

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1.1 Introduction

This is the introduction to Part II of Deliverable 6.3 titled: 'Five shades of change? Relations between social innovation and societal transformation'. Part II introduces the module and the online canvas that make up the training tool. It is followed by Part III and IV, the participants' and facilitators' handbook, and Part V, the online canvas. Part I discussed the emergent critical thinking about training tools in TRANSIT and how this could inform the production of Deliverable 6.3 – 6.7.

The objective of Part II, is to present the facilitators (that could be researchers of TRANSIT) a training tool that is ready to be employed, but that leaves room for the facilitators to adapt the module and its sessions to the specific social contexts and target-groups.

In the Description of Work (hereafter: DOW, 2013, p. 24 of 33), the objectives for this Deliverable are described as: 'Game-changers & Forward Looking Analysis; Increase understanding and develop competences on how policy and practice can draw on the potential of game changers and forward looking analysis to support the development and increase the impact of social innovation. The focus will include social innovation; cycles of innovation; game changers; forward looking analysis'. These are further developed into objectives that reflect our emerging thinking on this topic.

We refer to section 1.3 for full insight into the 'scientific recommendations' that were used as a theoretical and substantive basis for the training tool in this Deliverable. In Part IV, the facilitators' guide, we demonstrate how we made extensive use of these 'scientific recommendations' in the training tool.

The subsequent section discusses how we conceive of the target-groups for this training tool. Then the objectives and topics, methodology and the outline of the module are introduced. The online canvas is described in the last section.

1.2 Target groups training tool

As outlined in the DOW, the initial target groups for the training tool were 'practitioners, policymakers and academics in the field of social innovation' (DOW, p. 24 of 33). These target-groups form the broad and basic starting-point for this training tool.

We define practitioners as actors that are taking concrete action-oriented actions and decisions towards their persistence and their survival in a certain discipline. We see policy-makers as actors who are employed in a government structure and have decision-making power. A third

group we are interested in, are academics –analysts of practices and policies. As these are quite broad categories, it would be impossible to meet their needs with one single training tool. Therefore, we propose to refine the target groups as follows:

Within the loosely defined domain of social innovation, it is possible to identify a set of common knowledge demands when we look at the intersections of these three groups of actors. There are policy makers who also are practitioners (and vice versa), academics who are part of networks of social innovation, academics providing advice on public policy, and key practitioners who are consulted as experts by the policy makers. From this perspective, the training tool can support a target group of actors we call *'practitioners or professionals in the field of social innovation'.* We thus expect prior interest in the field of social innovation and the nature, dynamics and trajectories of relations between processes of social innovation and social transformation.

1.3 Scientific recommendations & insights from Transition Facilitation Methods

This section discusses in the first place the 'scientific recommendations' onto which this training tool is based, which are drawn from a Working paper by Avelino et al. (2014) titled '[Game Changers and Transformative Social Innovation. The Case of the Economic Crisis and the New Economy'](). In the second place, insights are drawn from the Discussion paper by Avelino & Wittmayer (2014), which discussed three facilitation tools in/for/about Transformative Social Innovation.

For the purpose of demonstrating how the scientific insights from the working paper have been used to develop the training tool, we focus on three main insights.

In the first place, the working paper introduces the implicit assumption behind a lot of social innovation discourses that social innovation will lead to societal transformation. Challenging this relation, lead to TRANSIT's guiding question 'how and to what extent does social innovation contribute to societal transformation that responds to societal challenges, and how are people empowered to contribute to such process' (Avelino et al. 2014: 8)? TRANSIT sees 'transformative social innovation' as a process, through which social innovation contributes to societal transformation. In doing so, we need to distinguish 'social innovation' from 'societal transformation' and how social innovation interacts with 'other forms of change and innovation, and how they can be distinguished (idem: 5). These insights are the basis for session 0.2, 1.1 and optionally in 1.3 of the module (see table 2 and 3).

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In the second place, a conceptual heuristic is proposed distinguishing between 'five shades of change', see figure 1.

Figure 1: Conceptual Heuristic to Explore the Dynamics of Transformative Social Innovation (Avelino et al. 2014: 8)

The Dynamics of Transformative Social Innovation
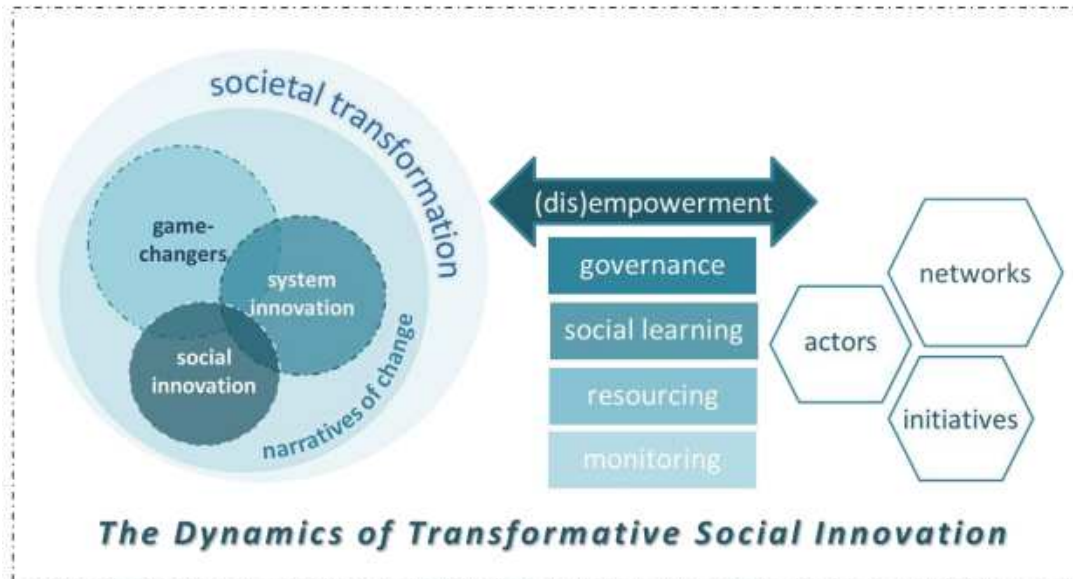
Figure 1 depicts and implies that 'societal transformation is shaped and produced by particular patterns of interaction between the five shades of change, namely game-changers (or macro-developments), system innovation, narratives of change, social innovation and societal transformation. Individual actors, initiatives and networks, are empowered (or disempowered) to contribute to this process through different forms of governance, social learning, resourcing, and monitoring (Haxeltine et al. 2013)' (Avelino et al. 2014: 8).

The working definitions of the five shades of change are outlined in the table below. They are further elaborated in the working paper.

Table 1: Five Shades of Change and Innovation: Working Definitions (Avelino et al. 2014: 9)

5 shades of Change and Innovation	Working definitions
Social innovation	New social practices, including new (combinations of) ideas, models, rules, social relations and/or products.
System innovation	Change at the level of societal sub-systems, including institutions, social structures and physical infrastructures

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Game-changers	Macro-developments that are perceived to change the (rules, fields and players in the) 'game' of societal interaction
Narratives of change	Discourses on change and innovation, i.e. sets of ideas, concepts, metaphors, and/or story-lines about change and innovation
Societal transformation	Fundamental and persistent change across society, exceeding sub-systems and including simultaneous changes in multiple dimensions.

The paper continues to elaborate the 'shades of change' using examples that are related to the 'economic crises'. It presents the central hypothesis, namely that 'societal transformation is the result of specific 'co-evolutionary' interactions between social innovations, system innovations, narrative of change, and game-changers, as distinct but intertwined and partly overlapping dimensions of innovation and change' (idem: 20). Based on the paper, it could be hypothesized that

> "social innovators' can increase the transformative potential of their social innovations, by
> smartly playing into the societal 'game-changers' of their times, while simultaneously
> connecting to political (calls for) 'system innovation', as well as linking up with multi-
> layered 'narratives of change' in both mainstream and grassroots movements" (idem: 21).

Combining these recommendations with the insights from the working paper, lead to session 1.2, and 1.4, optionally in 1.3, and the online canvas.

In the third place, next to being interested in the 'shades of change', TRANSIT requires to deepen the understanding of how dis/empowerment is perceived to happen via processes of governance[1], social learning, resourcing and monitoring. These are topics that are taken up in the subsequent training tools. , As such, they are not directly addressed in this training tool.

The discussion paper (Avelino & Wittmayer 2014) explored tools for facilitating transformative social innovation, taking lessons from transition facilitation methods. . It discussed the Multi-Level Perspective and started to develop some first thoughts about a 'five shades of change'-heuristic as a training tool. This is the basis for session 1.2 (see table 3). Also discussed are

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[1] See for example 'The Institutionalization of Social Innovation: between Transformation and Capture' by Pel & Bauler (2014)

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Transition Scenario's and their inspiration for TSI-scenario's. This is the basis for session 1.4 (see table 3).

The following sections further describe the module and online canvas of the training tool.

1.4 Module 1: Five shades of change? The relation between social innovation and societal transformation

This section describes the objectives, topics, methodology and outline of the module, that is preliminary titled: 'Five shades of change? The relation between social innovation and societal transformation'.

1.4.1 Objectives and topics

After having participated in the module, the participant is able to:

- *Recognize* and *increase awareness* that the relations between social innovation and societal transformation are potentially more complex than often stated,
- *Discuss* relations between various 'shades of change',
- *Develop* their own TSI-story,
- *Use your TSI-story for building evidence* of the role that your social innovation plays in societal transformation.

The key-words include:

- Social innovation;
- Narratives of change;
- System innovation;
- Game-changers and/or macro-events;
- Societal transformation;
- Societal challenge;
- Assumptions & expectations;
- Bureau of European Policy Advisors;

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- Agenda-creation.

1.4.2   Methodology

Following the discussion in part I, we are using various methods that can be related to different 'modes of science'. The methodology in the module consists of various basic elements, which can be adapted to the context in which the methodology is applied. The methodology is made up of the following elements:

- Presentations that introduce concepts, trends and cases,
- Guided group- and smaller group-discussions,
- Individual presentations,
- Open Space Technology/ Unconferencing,
- Group and smaller groupwork for back-casting.

The methodology is further elaborated in the facilitators' guide (part IV of this Deliverable 6.3, the facilitators' guide).

1.4.3   Outline of the modules

Instructions

The tables below refer to two modules. The first is a general introductory module of which session can be employed or that can be used in full for introducing other sessions and /or full modules of the training tool. The second table refers to the module developed on 'Five shades of change?' As our work progresses, the other modules (on governance, social learning, resuring and monitoring) will be added. Each module consists of various sessions (as building blocks) that can be used in the sequence deemed most appropriate in a specific context. This allows the facilitator to adapt the sessions and / modules.

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Outline of modules: Objectives and methods per session

Table 2: Module 0: General Introduction to Module(s)

Module 0: General Introduction to Session and/or Module(s)[2]				
Title of module /session	**Objectives.** *Participants should be able to:*	**Keywords on contents/activities**	**Nature of the activities**	**Notes (completed by facilitator)**
Session 0.1: opening	Introduce themselves; Interact with other participants.	Welcome, interests of the participants	Informal exchange among the facilitator and participants and among participants.	
Session 0.2: Introduction to the module – objectives and methods	Discuss the objectives, content and schedule of the module(s); State their objectives for the session / module; Become acquainted with the concept of social innovation Discuss how they understand 'social innovation'.	Introduction to objectives of module(s); Introduction to the concepts of social innovation; societal change and transformation.	PPT- presentation by facilitator; guided discussion; Q &A.	

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[2] The facilitator can use the sessions in this table in this order for introducing other sessions and /or full modules of the training tool. The facilitator can also select sessions of his/her interest according to target-group and social context.

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Session 0.3: Develop your TSI-story: *present your case*	Do an elevator pitch of their case; Discuss what a TSI-story is.	Explain how participant's case relates to social innovation and – if applicable – to societal change and transformation, in their view; TSI-story	Individual presentations by the participants.	

Table 3: Module 1: Five shades of change? The relation between social innovation and societal transformation

Module 1: Five shades of change? The relation between social innovation and societal transformation				
Title of module /session	**Objectives.** *Participants should be able to:*	**Keywords on contents/activities**	**Nature of the activities**	**Notes**
Session 1.1: Social innovations as solutions for societal challenges? The example of BEPA (2010)	Familiarize themselves with the increasing attention for social innovation, for example in BEPA (2010); Formulate a substantiated opinion on the relation of social innovation and societal challenges; Discuss if and how SI is perceived as solution for societal challenges in their local context.	Introduction by facilitator to social innovation; societal challenge; assumptions; societal change; expectations. Group-discussion on these concepts by participants.	PPT-Presentation by facilitator; Group-discussion	

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	Optional: Discuss their 'social innovation'-mission, if any; Optional: Discuss 'societal challenges' they play into, if any.			
Session 1.2: Complex relations: from social innovation to transformation?	Distinguish and discuss concepts: social innovation; societal transformation; narratives of change; system innovation; game-changers and/or macro-events. Discuss the relations between these concepts; Apply the concepts onto their own experiences with social innovation.	Introduction by facilitator to 'five shades of change', namely social innovation; societal transformation; narratives of change; system innovation; game-changers and/or macro-events.	PPT-presentation by facilitator; Group-discussion	
Session 1.3: Unravelling the relation between Social Innovation & Societal	Create the agenda during the event; Raise issues of interest, that are essential in relation to the session;	The larger purpose of this session is to discuss the relations between social innovation and societal transformation. Other related issues of interest may be discussed as well.	Open Space Technology / *Un*conferencing	Session takes half a day up to a day.

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Transformation	Engage in a process in which roles and activities are not fixed.			
Session 1.4: Develop your TSI-story: *2050*	Apply key-concepts session 1.2; Formulate their TSI-story; Formulate their milestones in terms of the 5 shades of change within this story; Discuss various TSI-stories; Explore the concept of 'co-evolution'; *Optional*: create a medium through which the story is easily communicated; *Optional:* come to a better individual understanding of how the elements in the TSI-story are related to each other.	Participants apply and use the concepts of social innovation; societal transformation; narratives of change; system innovation; game-changers and/or macro-events.	Group and smaller work guided by facilitator; Optional: Individual recording of your TSI-story	The online canvas could be used.

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1.5 Online canvas: Your Transformative Social Innovation-story

1.5.1 Training objectives and topics

After having completed the online canvas the participant is able to:

- *Develop their own TSI-story,*
- *Use it for building evidence* of the role the participant's social innovation plays in societal transformation,
- *Optional: Increase awareness* of the potentially complex relations between social innovation and societal transformation.

The key-words on the canvas include:

- Social innovation;
- Narratives of change;
- System innovation;
- Game-changers and/or macro-events;
- Societal transformation.

1.5.2 Methodology

Following the discussion in part I, we are using various methods as part of exploring the development of training tools in TRANSIT. The online component of this first module is an online canvas. A canvas is a download (usually PDF) that can be completed by an user. By using a pre-ordered set of steps, the user is guided towards an end-objective. This is accompanied by recommended resources, such as readings and video's. This online canvas is meant to complement the offline module: it can be used as part of the offline module, or independently. However, if used independently, this 'how to'-tool has the (dis)advantages as described in part I of this Deliverable. In Part V of this deliverable the online canvas is further elaborated.

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Part III

Five Shades of Change? Relations between Social Innovation and Societal Transformation. Participants' Handbook

Deliverable n. 6.3, Part III

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Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Zuijderwijk, L. (eds.), Wittmayer, J. (2014), *Part III: Five shades of change? Relations between Social Innovation and Societal Transformation. Participants' Handbook.* TRANSIT Deliverable 6.3, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169

Date:	19th of 12 in 2014
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1 Introduction

If you are holding this handbook, it means that you are (interested in becoming) a participating in one of (sessions in) this module, that is part of the training tool 'Five shades of change? The relation between social innovation & societal transformation'. This training tool is part of Deliverable 6.3. It is produced in the TRANSIT research project.

This handbook provides you with information about the various sessions you could participate in. Depending on the facilitator, the module or sessions could be adapted from this.

This module is built is in such a way, that the sessions enable you to gain a certain amount of prior knowledge that is useful for the next session in the module. The sessions could however also be used by the facilitator as stand-alone elements.

1.1 Objectives and content

After participating in the module, you will be able to:

- *Recognize* and *increase awareness* that the relations between social innovation and societal transformation are potentially more complex than often stated,
- *Discuss* relations between various 'shades of change',
- *Develop* your own TSI-story,
- *Use your TSI-story for building evidence* of the role that your social innovation plays in societal transformation.

The key-words include:

- Social innovation;
- Narratives of change;
- System innovation;
- Game-changers and/or macro-events;
- Societal transformation;

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- Societal challenge;
- Assumptions & expectations;
- Bureau of European policy Advisors;
- Agenda-creation.

1.2 Target groups

As outlined in the DOW, the initial target groups for the training tool were 'practitioners, policymakers and academics in the field of social innovation' (2013: 24). These target-groups form the broad and basic starting-point for this training tool.

We define practitioners as actors that are taking concrete action-oriented actions and decisions towards their persistence and their survival in a certain discipline. We see policy-makers as actors who are employed in a government structure and have decision-making power. A third group we are interested in, are academics –analysts of practices and policies. As these are quite broad categories, it would be impossible to meet their needs with one single training tool. Therefore, we propose to refine the target groups as follows:

Within the loosely defined domain of social innovation, it is possible to identify a set of common knowledge demands when we look at the intersections of these three groups of actors. There are policy makers who also are practitioners (and vice versa), academics who are part of networks of social innovation, academics providing advice on public policy, and key practitioners who are consulted as experts by the policy makers. From this perspective, th training tool can support a target group of actors we call *'practitioners or professionals in the field of social innovation'.* We thus expect prior interest in the field of social innovation and the nature, dynamics and trajectories of relations between processes of social innovation and social transformation.

1.3 Methodology

The methodology contains of:

- Presentations that introduce concepts, trends and cases,

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- Guided group- and smaller group-discussions,

- Individual presentations,

- Open Space Technology/ Unconferencing,

- Group and smaller groupwork for backcasting.

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2 Programme and content of sessions

2.1 Module 0: General Introduction to Module(s)

The purpose of this module is to introduce the following sessions and/or the full module. The sessions are meant for facilitating the exchange between participants, to discuss the objectives, schedule, and content of the module(s). You will become acquainted with the concepts of 'social innovation' and 'societal transformation' and discuss what 'social innovation' is. In the last session, you can kick-start the development of your Transformative Social Innovation (TSI)-story, using a case that you are involved or interested in. Here, the idea of the TSI-story will be introduced to you.

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The table below contain the optional structure and content of the sessions of this module.

Module 0: General Introduction to Session and/or Module(s)[1]				
Title of module /session	**Objectives.** *You should be able to:*	**Keywords on contents/activities**	**Nature of the activities**	**Notes (completed by facilitator)**
Session 0.1: opening	Introduce yourself; Interact with other participants.	Welcome, interests of the participants	Informal exchange among the facilitator and participants and among participants.	
Session 0.2: Introduction to the module – objectives and methods	Discuss the objectives, content and schedule of the module(s); State your objectives for the session / module; Become acquainted with the concept of social innovation Discuss how you understand 'social innovation'.	Introduction to objectives of module(s); Introduction to the concepts of social innovation; societal change and transformation.	PPT- presentation by facilitator; guided discussion; Q & A.	**Recommended resources** - Murray, Robin; Caulier-Grice, Julie and Mulgan, Geoff (2010) The open book of social innovation (Social innovator series : ways to design, develop and grow social innovation), London, The Young Foundation/National Endowment for Science, Technology and the Arts (NESTA). Via: http://www.transitsocialinnovation.eu/resource-hub/the-open-book-of-social-innovations

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[1] The facilitator can use the sessions in this table in this order for introducing other sessions and /or full modules of the training tool. The facilitator can also select sessions of his/her interest according to target-group and social context.

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- Jenson, Jane and Harrisson, Denis (2013) Social innovation research in the European Union : approaches, findings and future directions : policy review, Brussels, European Commission. Via: http://www.transitsocialinnovation.eu/resource-hub/social-innovation-research-in-the-european-union--approaches-findings-and-future-directions--policy-review

- Howaldt, J. and Kopp, R. (2012). Shaping Social Innovation by Social Research , chapter in: Franz, Han-Werner; Hochgerner, Josef and Howaldt Jürgen (eds.) (2012)Challenge social innovation : potentials for business, social entrepreneurship, welfare and civil society, Heidelbert ; New York: Springer. Via: http://www.transitsocialinnovation.eu/resource-hub/challenge-social-innovation--potentials-for-business-social-entrepreneurship-welfare-and-civil-society

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Session 0.3: Develop your TSI-story: *present your case*	Do an elevator pitch of your case; Discuss what a TSI-story is.	Explain how your case relates to social innovation and – if applicable – to societal change and transformation, in their view; TSI-story	Individual presentations by the participants.	

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2.2 Module 1: Five shades of change? The relation between social innovation and societal transformation

This module focuses on the relations between social innovation and societal transformation. The first session questions the dominant conception of social innovation as being a solution for societal challenges. Participating in this session helps you to *recognize* that the relations between social innovation and societal transformation could be more complex than often stated. Using examples from amongst others a policy-document such as BEPA (2010) enables you to form a well-founded opinion on assumptions that are dominant and latently present about social innovation.

The second session focuses on increasing your awareness of the relations between social innovation and societal transformation. Here, an alternative view onto this relation is provided. Five 'shades of change' are introduced, which – as we propose - inform the relationship between social innovation and societal transformation. The central 'shades' are social innovation; societal transformation; narratives of change; system innovation; game-changers or macro-developments. You will be describing, and distinguishing these 'shades' and discuss the potential relations between them. Applying the concepts to your 'own' social innovation may help to further familiarize yourself with these new concepts and ideas. You may use these ideas in further developing your TSI-story.

Session 1.3 is optional. If you take part, you will create the agenda during the event, according to your and your peers' own issues of interest that could be related to the linkage between social innovation and societal transformation but must not be.

The further development of your own TSI-story is central to the fourth session. You will be facilitated in using a backcasting method, enabling you to develop your TSI-story. You could use your story for building evidence as you proceed in your (T)SI on the role that social innovation plays in societal transformation.

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The table below contain the optional structure and content of the sessions of this module.

Module 1: Five shades of change? The relation between social innovation and societal transformation				
Title of module /session	**Objectives.** *You should be able to:*	**Keywords on contents/activities**	**Nature of the activities**	**Notes**
Session 1.1: Social innovations as solutions for societal challenges? The example of BEPA (2010)	Familiarize yourself with the increasing attention for social innovation, for example in BEPA (2010); Formulate a substantiated opinion on the relation of social innovation and societal challenges; Discuss if and how SI is perceived as solution for societal challenges in their local context. Optional: Discuss your 'social innovation'-mission, if any; Optional: Discuss 'societal challenges' you play into, if any.	Introduction by facilitator to social innovation; societal challenge; assumptions; societal change; expectations. Group-discussion on these concepts among participants.	PPT-Presentation by facilitator; Group-discussion	**List of readings** - European Union, European Commission, Bureau of European Policy Advisers (BEPA) (2010) Empowering people, driving change, social innovation in the European Union, Luxembourg : EUR-OP. Via: http://www.transitsocialinnovation.eu/resource-hub/empowering-people-driving-change-social-innovation-in-the-european-union - Hubert, Agnès and Noya, Antonella (2012) Challenge social innovation : forward I and II, In: Franz, Hans-Werner, Hochgermer, Josef and Howldt, Jürgen (eds.) Challenge social innovation: potentials for business, social entrepreneurship, welfare and civil society, Heidelberg, Springer, pp. v-xiv. Via: http://www.transitsocialinnovation.eu/r

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				esource-hub/challenge-social-innovation--foreward-i-and-ii - *Optional:* Louwes, K. (2011), De Rotterdamse Innovatie Agenda, via: http://www.rotterdam.nl/Stadsontwikkeling/Document/Economie%20en%20Arbeidsmarkt/Rotterdamse%20Innovatie%20Agenda%20DEF.pdf
Session 1.2: Complex relations: from social innovation to transformation?	Distinguish and discuss concepts: social innovation; societal transformation; narratives of change; system innovation; game-changers and/or macro-events. Discuss the relations between these concepts; Apply the concepts onto your own experiences with social innovation.	Introduction by facilitator to 'five shades of change', namely social innovation; societal transformation; narratives of change; system innovation; game-changers and/or macro-events.	PPT-presentation by facilitator; Group-discussion	**List of resources** - Working paper. Avelino, F. Wittmayer, J., Haxeltine, A., Kemp, R., O'Riordan, T., Weaver, P., Loorbach, D. and Rotmans, J. (2014) Game-changers and Transformative Social Innovation. The Case of the Economic Crisis and the New Economy, TRANSIT working paper, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169 - Keynote speech by Frances Westley (Presented at the Social Frontiers Conference : the next edge of social innovation research, London, 14th November 2013]) [video online]. Via: http://www.transitsocialinnovation.eu/r

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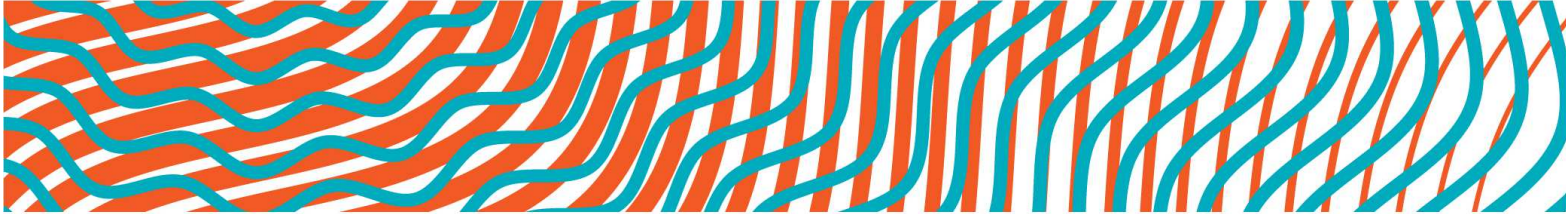|				esource-hub/key-note-speech-frances-westley-on-the-history-of-social-innovation - Optional: Policybrief [tba]
Session 1.3: Unravelling the relation between Social Innovation & Societal Transformation	Create the agenda during the event; Raise issues of interest, that are essential in relation to the session; Engage in a process in which roles and activities are not fixed.	The larger purpose of this session is to discuss the relations between social innovation and societal transformation. Other related issues of interest may be discussed as well.	Open Space Technology / *Un*conferencing. This session has no agenda. The agenda is created during the session through engagement of the participants that raise topics and methodologies during the session.	Session takes half a day up to a day.
Session 1.4: Develop your TSI-story: *2050*	Apply key-concepts session 1.2; Formulate your TSI-story; Formulate your milestones in terms of the 5 shades of change within this story;	Participants apply and use the concepts of social innovation; societal transformation; narratives of change; system innovation; game-changers and/or macro-events.	Group and smaller work guided by facilitator; Optional: Individual recording of your TSI-story	Main question of the overall group session: Which societal transformation do we (hope to) see unfolded in 2050? How did social innovations that existed/emerged in 2014 contribute to this societal transformation?

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			Nature of the exercise: Collective back-casting exercise	In smaller groups, focus on your individual initiatives and address the following question: Which <u>societal transformation</u> do you (hope to) see unfolded in 2050? How did your current initiative (expressed in terms of a <u>social innovation)</u> contribute to this societal transformation?
	Discuss various TSI-stories; Explore the concept of 'co-evolution'; *Optional*: create a medium through which the story is easily communicated; *Optional:* come to a better individual understanding of how the elements in the TSI-story are related to each other.			Standing in 2050 and thinking back to 2014, which milestones occurred leading up to the societal transformation? How did the social innovation relate to these milestones? • Mention one important <u>system innovation</u> – which system does the social innovation target, what was the system innovation, when did it occur/emerge? (e.g. financial system reform in 2030 – banks forbidden to make more than 10% profit) • Mention one important <u>macro-trend/event</u> – what was it, when did it occur/emerge? (e.g. economic crisis started in 2008, kept going until 2020, people were fed up)

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				- Mention one important <u>narrative of change</u> – what was it, when did it occur/emerge? (e.g. new economy incl. ethical banking, narrative that kept growing throughout) (Other milestones?) The online canvas could be used.

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Part IV

Five Shades of Change? Relations between

Social Innovation and Societal

Transformation.

The facilitators' handbook is not available for

download.

Deliverable n. 6.3, Part IV

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theory

Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Zuijderwijk, L. (eds.), Wittmayer, J. (2014), *Part III: Five shades of change? Relations between Social Innovation and Societal Transformation. Facilitators' Handbook.* TRANSIT Deliverable 6.3, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169

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Part V

Proposal for Online Canvas: 'Your TSI-story'

Deliverable n. 6.3, Part V

transformative social innovation theory

Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Markou, I. & Zuijderwijk, L. (eds.) (2014), *Part V: Proposal for Online Canvas: 'Your TSI-story'* TRANSIT Deliverable 6.3, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169

Date:	19th of 12 in 2014
Authors:	Isidora Markou, Linda Zuijderwijk
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Contact person:	Linda Zuijderwijk IHS E-mail: zuijderwijk@ihs.

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PDF for download on website

My TSI story

Which societal transformation do you envision unfolding in 2050? How did social innovations that existed or emerged in 2014 contribute to this societal transformation?

Start your TSI story here!

e.g. financial system reform in 2030: banks are forbidden to make more than 10% profit.

SYSTEM INNOVATION
Which system does the social innovation target? What was the system innovation? When did it occur or emerge?

e.g. economic crisis started in 2008 & kept going until 2020.

MACRO-TREND
What was it? When did it occur or emerge?

What was it? When did it occur or emerge? What "story" were you inspired by?

NARRATIVE OF CHANGE

e.g. new economy included ethical banking, which lead to....

Which societal transformation do you envision unfolding in 2050?

How did your current initiative (expressed in terms of a social innovation) contribute to this societal information?

2014	2020	2030	2040	2050

1. Have you seen our recommended resources? [add link]
2. Start by imagining your 2050-world at the right of the canvas
3. Ask yourself, how your initiative contributed to this world
4. Use the ideas of 'system innovation', 'macro-trend' and 'narrative of change' to build your storyline
5. Use the following symbols to describe the relations that you discover between concepts:

Annex 1

Overview of tools in Europe, Latin – America, United States and Canada.

Deliverable n. 6.3, Annex I

transformative
social **i**nnovation
theory

Focus of deliverable:

This is Deliverable 6.3. It outlines our emergent thinking on the development of training tools and contains the first training tool (a module and an online canvas).

Reference:

Becerra, L., & Juarez, P. (2014), *Part V: Proposal for Online Canvas: 'Your TSI-story'* TRANSIT Deliverable 6.3, TRANSIT: EU SSH.2013.3.2-1 Grant agreement no: 613169

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Table 1: Overview of tools in Europe, Latin – America, United States and Canada.

European Union					
Title and source	**Objective of tool**	**Target group**	**Thematic areas, amongst others:**	**Methods used**	**'How to' or 'Reflective'?**

a. **Development Impact and You**
 	
http://diytoolkit.org/tools/
	This toolkit aims to advise practitioners on a set of "skills".	Practitioners	This toolkit consists of 8 thematic areas. For each area a number of tools are proposed. Amongst others
			1. look ahead
			   a. INNOVATION FLOWCHART
			   b. EVIDENCE PLANNING
			2. develop a clear plan
			   a. SWOT ANALYSIS
			   b. BUSINESS MODEL CANVAS
			   c. BUILDING PARTNERSHIPS MAP
			   d. LEARNING LOOP
				A series of practical exercises are proposed. These have questions or forms that must be filled with information and the result is "learning".	"how-to"

b. **Social Innovator** http://socialinnovator.info/process-social-innovation	This toolkit aims to provide a guide for action to develop a social innovation. In this sense it aims to provide a step by step practical guide social innovation process.	Practitioners	Steps: 1. Promps and Inspirations 2. Proposal and Ideas 3. Prototyping and Pilots 4. Sustaining 5. Scaling and Diffusion 6. Change Sistemic	The teaching consists of training videos and documents. The teaching draws on a set of case studies that serve to illustrate the methodologies proposed for the training cycle.	"how-to"
c. **SALTO YOUTH**	This toolkit aims to provide methodologies. In practical	Practitioners	Main topics: 1.Gender	The tool makes available a set	"how-to"

			2.Citizenship 3.Anti-racism 4.Evaluation 5.Social Inclusion 6.Disability 7.Intercultural Learning 8.Peer education 9.Euromed 10.South-East Europe 11.Eastern Europe and Caucasus 12.Youth Initiatives 13. Youth Democracy 14. Voluntary 15. Religion 16. Environment 17. Project manager 18. Youth Participation	of different teaching: From manuals, exercises, texts, videos, and more.	
https://www.salto-youth.net/tools/toolbox/	terms, the website has a search engine for workflows for the action of practitioners (https://www.salto-youth.net/tools/toolbox/search/)				
d. *Competentiecentrum Transities* Wide definition: http://www.transitiepraktijk.nl/en/experiment/over-transities Methods: http://www.transitiepraktijk.nl/en/experiment/method	While this toolkit is not about social innovation specifically (but on transition) is a good example of toolkit that covers a wide spectrum of areas of training.	Depends on the specific tool being used.	Acceleration sessions **(for practitioners)** Actor, network or stakeholder analyses **(for practitioners and policy makers)** Backcasting **(for practitioners)** Causal analysis **(for practitioners)** Causal loop diagrams **(for practitioners)** Cognition model **(for practitioners)** Collective system analysis **(for practitioners)** Counter-Intuitive Innovation Approach **(for practitioners)** Creativity sessions, essays, interviews for vision creation **(for practitioners)**	A brief explanation of the definition and use of each of these methodologies is provided and then a series of readings (papers) that serve to make learning initially recommended.	Mostly is a "how-to", but also use reflective methodology as a part of the learning process

			DEED **(for practitioners and policy makers)**		
			Dynamic learning agenda **(for practitioners)**		
			ESTEEM **(for practitioners)**		
			Eye-opener workshop **(for practitioners)**		
			Forward and backward mapping **(for practitioners)**		
			Indicator sets **(for practitioners)**		
			Interpretive frame approach **(for practitioners)**		
			Learning history, Timeline method **(for practitioners)**		
			Matchmaking event **(for practitioners)**		
			MiXT **(for practitioners and policy makers)**		
			Most significant change method **(for practitioners and policy makers)**		
			Narrative analysis **(for practitioners and policy makers)**		
			Process accelerator ProVer **(for practitioners)**		
			PROTEE **(for practitioners)**		
			Reflexive Interactive Design (RIO) **(for practitioners and policy makers)**		
			Reflexive process description **(for practitioners)**		
			Reflexive process monitoring (RPM) **(for practitioners and policy makers)**		

			Reflexive programme monitoring **(for practitioners and policy makers)** Scenario development **(for practitioners and policy makers)** SCENE (SoCial, ENvironmental and Economic model) **(for practitioners and policy makers)** Societal Anchoring Analysis **(for practitioners and policy makers)** Socio-technical problem analysis **(for practitioners and policy makers)** Socratic intervision method **(for practitioners)** Stakeholder management **(for practitioners and policy makers)** Strategic Niche Management **(for practitioners)** Technological Innovation Systems approach (TIS) **(for practitioners and policy makers)** Theory of Change **(for practitioners and policy makers)** Transition management **(for practitioners and policy makers)** Transitioning method **(for practitioners and policy makers)** U-process **(for practitioners and policy makers)**		
Canada					
a. **Innoweave**	This toolkit is organized around 9 modules. Each of	Practitioners	Units: 1. Impact and Strategic Clarity	Didactics is organized	"how-to"

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http://innoweave.ca/	these modules has 5 instances. The aim is to provide step-by-step methodology, or checking list to guide the action of practitioners.		2. Social Enterprise 3. Cloud Computing 4. Developmental Evaluation 5. Collective Impact 6. Social Finance 7. Constructive Engagement 8. Scaling Impact 9. Outcomes Finance Learning instances: 1. Info 2. Self-assessment 3. Workshops 4. Coaches 5. Grants	around these five learning instances. The first point involves collecting data, the second to perform a self-assessment of the organization, the third attend a series of workshops (classroom course), the fourth is assigned a coach (directed learning, continuous and personalized) and fifth initiatives to be funded are presented.	
b. **SIG Knowledge Hub** http://sigknowledgehub.com/ Tool related to Social Innovation: http://sigknowledgehub.com/20	This toolkit is organized in 3 stages of training: Intro, deep and dive. This training tool aims to train students on general subjects of social innovation	Practitioners and researchers	Overview of social innovation	The teaching consists of training videos and documents based on the work of Frances	General formation

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12/01/01/introduction-to-social-innovation/				Westley (and the Waterloo Institute). The training is organized in successive stages of deepening on the topic of social innovation.	
United States					
a. **Community Toolbox** http://ctb.ku.edu/en/table-of-contents	This toolkit aims to advise practitioners on a set of "skills".	Practitioners	This toolkit consists of 16 different tools. Amongst others 1. CREATING AND MAINTAINING PARTNERSHIPS 2. ASSESSING COMMUNITY NEEDS AND RESOURCES 3. ANALYZING PROBLEMS AND GOALS 4. DEVELOPING A FRAMEWORK OR MODEL OF CHANGE	Each of these tools is decomposed into a set of questions (that guide activities as a workshop) and supplemented with bibliographical material ordered chapters.	"how-to"
b. ***Project on Social Innovation*** http://www.socialinnovation.ash.harvard.edu/innovators-toolkit.html	The main goal is to "help innovators understand, navigate and transform the broader landscape in which they work".	Practitioners	The toolkit is organized in terms of "12 civic actions": 1. IDENTIFY the problem you will address 2. RETHINK your community's current approach 3. SCAN the landscape for opportunities 4. CRAFT your intervention	Didactic consist in a plain text with data and information and some tips for action	"How-to"

			5. NAVIGATE between collaboration and disruption 6. BALANCE top-down and participatory approaches 7. EXPECT more individual responsibility 8. OPEN space for new ideas 9. ADVOCATE for success 10. LEVERAGE social media 11. FOCUS your dollars on results 12. TAKE the first risk		

c. Project Innovation
http://www.socialinnovationtoolkit.com/methods-skills.html
	This toolkit aims to develop different skills for practitioners. In this sense, this toolkit is not subject but is organized around solving cognitive needs of practitioners.	Practitioners	Cognitive areas for capacity building Units:
			SIDEWAYS LEARNING (lateral learning, horizontal learning, and peer-to-peer learning)
			   1. Question
			   2. Interview
			   3. Survey
			   4. Data analysis
			   5. Self-reflection
			
			PARTICIPATORY METHODS:
			   1. Dialogue
			   2. Create
			   3. Presentation
			   4. Stewardship
			
			COMPETITION:
			   1. Brainstorm
			   2. Facilitation
			   3. Cross sector analysis
			   4. Network
			   5. Space
				The teaching manuals include text. They contain practical exercises, resulting in a didactic training organized step by step stages of theoretical and practical training	Mostly is a "how-to", but also use reflective methodology as a part of the learning process

Latin America					

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a. ***Política de Innovación Social*** **(Colombia)** http://www.politicadeinnovacionsocial.co/home (In the case of Latin America has found a unique web platform containing training tools. It is no coincidence that this toolkit belongs to Colombia. This country shows the greatest web activity on topics related to social innovation in the region.)	Incorporating Social Innovation the field of state public policy. It is for this reason that this primarily aimed at policy makers.	Policy Makers	<u>Collective action by actors in society</u> Promote collaboration among communities, private sector, social sector and public sector to solve problems under schemes of social innovation. Check out the video for more information and brings this action. <u>Social Innovation as a tool of governance</u> Implement approaches and methodologies of social innovation in governance processes. Check out the video for more information and brings this action. <u>Environments and regional policies</u> Build and favorable environments for social innovation regional policies. Check out the video for more information and brings this action. <u>cultural dynamics</u> Contribute to the consolidation of values, behaviors and related social innovation in society practices. Check out the video for more information and brings this action. <u>financial Services</u> Develop mechanisms for public and private financing according to the different stages of social innovation. Check out the video for more information and brings this action.	The teaching consists of training videos and documents	**?:** Mostly tool is a "how-to" tool. However, given its orientation in public policy has a strong imprint of reflective tool

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			Services non-financial support Strengthen support services (consulting, training, networking, etc.) to social innovation. Check out the video for more information and brings this action. Knowledge Management Fostering knowledge management around social innovation. Check out the video for more information and brings this action. Social Innovation in Public Policy Implement approaches to social innovation in the formulation, implementation and evaluation of public policies. Check out the video for more information and brings this action.		

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Webpages on social innovation:
Google-based searching. Criteria used (in spanish):
1. **"Innovación Social" + training**
2. **"innovación social" + cursos**
3. **"innovación social" + formación**
4. **Innovación social**

Google-based searching. Criteria used (in english):
1. **"Social Innovation" + training**
2. **"social innovation" + training tool**
3. **"social innovation" + toolkit**

European Union
a.   Social Innovation Europe

https://webgate.ec.europa.eu/socialinnovationeurope/
b.   Sinnergiak

http://www.sinnergiak.org/
c.   Young Social Innovation

http://www.youngsocialinnovators.ie/index.php/training_and_development/4_Cs
d.   Red de Innovación Social

http://redinnovacionsocial.com/
e.   Instituto de Innovación Social de la ESEADE

http://www.esade.edu/research-webs/esp/socialinnovation
f.   Social Innovation Exchange

http://www.socialinnovationexchange.org/ideas-and-inspiration/methods-and-tools/features/diy-toolkit-development-impact-you

g.   Deusto Innovacion Social

http://blogs.deusto.es/innovacionsocial/que-es-deusto-innovacion-social/
   h.   Innobasque

http://www.innobasque.com/home.aspx?tabid=177
   i.   Innodriven (En españa, Argentina y Uruguay)

http://innodriven.com/areas-de-trabajo/innovacion-social/
   j.   Más Innovación Social

http://www.masinnovacionsocial.es/index.html
   k.   Abest

http://www.abest.es/
   l.   Sinnple

http://www.sinnple.es/
   m.   Master en Innovación Social e Industrias Culturales y Creativas

http://www.berrimaster.eu/es/programa
   n.   Redes Instituyentes

http://redesinstituyentes.wordpress.com/pedagogias-colectivas-y-practicas-instituyentes-2013/
   o.   Benefactor

http://www.benefactor.es/
   p.   Hub de Innovación Social

http://www.socialihub.org/index.html
   q.   Malaga Innovación Social

http://www.malagainnovacionsocial.com/

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    r.   Euskadi Innova

http://www.euskadinnova.net/es/innovacion-social/index.aspx

Latin America
    a.   CEPAL

http://www.cepal.org/dds/innovacionsocial/
    b.   Socialab

http://socialab.com/
    c.   Centro de Innovación Social (UDESA)

http://www.udesa.edu.ar/Unidades-Academicas/Centros/Centro-de-Innovacion-Social
    d.   Programa Nacional de Tecnología e Innovación Social de Argentina

http://www.mincyt.gob.ar/programa/programa-nacional-de-tecnologia-e-innovacion-social-9070
    e.   Instituto de Innovación Social

http://iisocial.cl/
    f.   Centro de Innovación Social de ANSPE

http://www.anspe.gov.co/es/programa/que-es-el-centro-innovacion-social/proyectos-de-innovacion-social
    g.   Instituto Argentino de Innovación Social

http://www.iadis.com.ar/
    h.   Corporación Universitaria Minuto de Dios

http://www.uniminuto.edu/pcislideres
    i.   Red de Innovación Social

http://innovacionsocial.org.mx/
    j.   Sustentia Innvovación Social

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http://www.sustentia.com/
- k. Hilando

http://hilando.gov.co/

United States of America
- a. Boston Center for Social Innovation

http://www.bc.edu/schools/gssw/csi/lab.html
- b. Social Innovation Lab

http://www.socialinnovationlab.net/
- c. Center for Social Innovation

http://www.center4si.com/index.cfm
- d. Center for Social Innovation Standford

http://csi.gsb.stanford.edu/
- e. Center for Social Development

http://csd.wustl.edu/events/ConferencesAndSymposia/Pages/Social-Innovation-and-Engagement-Social-Challenges,-Policy-Practice,-and-Professional-Training-of-Social-Workers.aspx

References to Deliverable 6 3 (add on to Deliverable 6.3)

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