RE-ACT Training:

Enhancing multi-stakeholders' capacity to engage in regional smart specialisation strategies

GUIDELINE FOR SELECTING TRAINERS

Introduction: objectives and scope

The present guideline is prepared in accordance with the description of Work Package 3 (WP3) of the project with the acronym RE-ACT. The objective of the document is to outline and support the selection of trainers for the delivery of the training oriented towards regional stakeholders from the triple/quadruple helix, other than Higher Educational Institutions (HEIs), i.e. representatives of businesses, local public administration, RIS3 responsible organizations and civil society/consumers/workers.

Its immediate scope is to support HEI project partners in selecting the external trainers that will deliver the training during the implementation of the project, in case such roles were not foreseen for the members of the project team. However, the document also aims to support any organization that will replicate the training in the future in other regions or countries or for similar stakeholders from the same regions and countries covered by the project, but not trained during the project lifetime.

The content of this document should be treated as a general guideline. Depending on particular circumstances and country specific requirements, its content can be slightly changed, considering that the selection process for trainers should be an equal, transparent and fair process, compliant with applicable legislation (for example public procurement rules) and at the same time aiming to assure that the quality of training and that standards are kept and learning objectives achieved.

* Note: Due to the fact that the training contains a specific part dealing with the presentation of the region-specific RIS3, the representatives of the policy responsible organization that participate at the training or another representative of this organization can be invited to prepare and sustain that part of the training.

Number of trainer(s)

Due to the content of the training material it is unlikely that one trainer would be able to cover all parts of the training. Thus, in order to deliver all modules prepared, at least two or three trainers will be needed and should be able to closely work /cooperate with each other. The trainers will need to cover the following broad topics:

1. HEInnovate

2. Smart specialisation, regional development, regional innovation, triple/quadruple helix cooperation

3. HEInnovate for RIS3

4. Collaboration between different types of stakeholders and communication (soft) skills

For the training sessions organized within the RE-ACT project, in all cases, there will be a need for one team member on behalf of a project partner that presents relevant information regarding the project.

In case one person can be identified possessing all necessary knowledge and being able to deliver all training modules, covering all topics, the organization responsible for the training should arrange for providing a certain number of facilitators/moderators that can support the trainer during practical exercises and in case trainees are split in smaller working groups.

Role of trainer(s)

The trainers will need to be involved in the organization of the training, together with the members of the responsible project team/organization and will need to fully deliver the training modules, including both theoretical and practical parts. The training will be organized and delivered for a heterogeneous group of participants with different knowledge, perceptions and competencies, representing all levels from local public administration, RIS3 responsible organization(s), businesses and business representatives (e.g. chambers of commerce, trade unions/associations, business associations, cluster associations, etc.), as well as the civil society (citizens, NGOs, workers associations, student associations, consumer associations, etc.)

Besides the delivery of the training, trainer(s) will need to be able to:

- – support the responsible project-team/organization in the appropriate communication of training objectives and the recruitment of trainees,

- – conduct surveys or consult potential participants about training needs and, if necessary, to be able to complete, revise the basic material with country or region specific information or with topics of interest for participants, closely related to the ones already covered by the training material,

- – communicate about training materials linking theoretical and practical parts with self-study materials and additional resources,

- – provide further additional materials, resources in case it is requested by participants at the training,

- – track, compile data collected during the training and contribute to the development of a database/folder with all training materials, as well as to the elaboration of reports, analyses that might be due after the training, including involvement in the interpretation of information from evaluation forms,

- – contribute to sending out follow-up information after the delivery of the training, as well as be open to answer any questions coming from participants linked to the interpretation of self-study or additional materials,

- – support the project-team/organization in collecting evidence from the training, e.g. participants lists, photos, print-screens, recording, etc.,

- – cooperate, synchronize and work together with other trainer(s) or in case of one trainer with facilitators and moderators,

- – if necessary, to translate/adapt training materials (Power Point presentations) from English to the language the training will be held.

Qualification and requirements

1. The trainer(s) should have at least a bachelors' degree in economics, economic geography, geography, political science or a related field.

2. The trainer(s) should have at least 3 years of practical experience in HEInnovate and/or smart specialisation, regional development, regional innovation, triple/quadruple helix cooperation or should demonstrate sound knowledge in these areas - with research results, studies/books/articles published - having a relevant academic background.

3. The trainer(s) should have at least 2 years of experience in teaching at university level or in training/adult education, and, in this latter case, if relevant from the point of view of country specific rules, should possess a trainer certificate issued by the competent national authority.

4. The trainer(s) should have experience with the moderation/facilitation of discussions between various types of stakeholders,.

5. The trainer(s) should have proficient computer skills and, in case the training is delivered online, have experience with online teaching platforms.

6. The trainer(s) should have sound English knowledge (at least level C1 according to the European reference framework)[1] ,

7. The trainer(s) should be native speaker(s) or have sound knowledge of the language in which the training will be delivered in[2].

8. The trainer(s) should have the following skills and abilities:

   – good interpersonal skills and ability to communicate with people from various backgrounds and all levels of administration/management,

   – good project management skills,

   – organizational and administrative skills,

   – ability to multitask, prioritize and manage time in an efficient manner,

   – fair team building skills, as well as ability to encourage, mentor and lead,

   – excellent verbal and written communication abilities.

In addition:

9. The trainer should be open to acquire knowledge about the role of universities in smart specialisation and particularly to become familiar with the self-assessment tool "HEInnovate for RIS3".

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[1] In case, due to internal rules language knowledge needs to be demonstrated, one of the following can be requested:
   - Language diploma, OR,
   - Any other diploma that demonstrates that the candidate trainer has participated in an education programme requesting high level language knowledge, OR
   - Link to publicly available documents, elaborated by the candidate in English (e.g. reports, articles, studies, etc.),

[2] In case the candidate trainer is not a native speaker of the language, the trainer candidate should sound knowledge of the language (level C2 according to the European reference framework). In case demonstrating language knowledge is necessary, any of the documents mentioned under footnote 1 can be used.

Enhancing multi-stakeholders' capacity to engage in regional smart specialisation strategies

GUIDELINE FOR SELECTING TRAINEES

Introduction: objectives and scope

The present guideline is prepared in accordance with the description of Work Package 3 (WP3) of the project with the acronym RE-ACT. The objective of the document is to outline and support the selection of trainees for the delivery of the training to be held in WP3, addressing triple/quadruple helix stakeholders, other than Higher Educational Institutions (HEIs), i.e. representatives of businesses, local public administration, RIS3 responsible organizations and civil society/consumers/workers.

Its immediate scope is to support HEI project partners in gathering trainees with a profile suitable with the description of project target groups. The training is held on a regional level, in the same region the HEI project partner is situated in, based on the training materials prepared within the same WP. In cases in which there is no regional RIS3 in a partner country, HEI partners can target the national level, however, making sure that new stakeholders can be addressed in the rollout of the training in WP4.

The content of this document should be treated as a general guideline. Depending on particular circumstances and country or region specific requirements, or institutional arrangements its content can be adapted, all the while assuring the enhanced participation of as many trainees as possible from diverse groups of representative and relevant stakeholders. This is of particular relevance, due to project aims, as well as the content and target groups of further activities. Participation of regional key actors in this training shall be the basis of their effective and efficient involvement in future actions fostering cooperation and interaction and the reinforcement of the role of HEIs at regional level.

Similarly to the other documents produced, this guideline also aims to support any organization that will replicate the training in the future in other regions or countries or for similar stakeholders from the same regions and countries covered by the project, but not trained during the project lifetime.

Number and affiliation of the trainees

In accordance with the project description, the training to be held by each of the RE-ACT partner HEIs must address a minimum number of 15 participants from the triple helix. In line with the decision of the project consortium, adding participants from the fourth helix is strongly encouraged.

The stakeholder groups primarily targeted are:
- regional and local public authorities,
- RIS3 responsible organisation(s) (R&I policy responsible organizations that have the task to design and implement RIS3s at regional and/or national level; generally, in one NUTS II level regional, irrespective of the countries' administrative arrangements - centralised or decentralised - there is one such policy responsible organisation, usually also involved in the management of Cohesion Policy Funds as Managing Authority or Intermediate Body),
- representatives of the business environment (businesses, business organisations, associations, trade associations, clusters, chambers of commerce, etc.),

and, additionally from the fourth helix:

- representatives of workers, consumers and citizens at large (NGOs, consumers' or workers' associations, student organisations, individuals, etc.).

Except for (the) RIS3 responsible organisation(s), ideally all other stakeholder groups should be equally represented by 3-5 representatives in average, but the figures may change, depending on the regional needs and context, making sure however that at least one participant comes from each group and that there are at least 15 participants covering the triple helix.

So as to reach participants from as many target groups as possible, the recommended division of the participants is:
- 1 or 2 persons from (the) RIS3 responsible organization(s) at the regional or national level depending on the specificity of the partner countries. In case there is an institution on the regional level, responsible for regional development that voluntarily developed RIS3[1], regional level is applicable or the partner can invite someone from both regional and national levels;
- 5 to 7 persons from local public authorities at county or local (urban/municipality) level. If possible, invitees should include those urban authorities that addressed Policy Objective 1 under an integrated urban strategy elaborated under Policy Objective 5[2] ERDF from the same region the partner is situated in and/or have project ideas linked to Policy Objective 1[3].
- 5 to 7 persons from companies or associations/organizations representing companies (i.e. Chambers of Commerce, cluster organizations, trade associations, business associations, etc.) from the same region where the partner is situated. The companies and clusters should be active in areas of economic activities covered by regional smart specialisation priority domains.

In addition to that:
- 2-3 persons or more can be invited from the 4th helix (i.e. consumers', workers' associations, representatives of community, society at large, student associations, etc.) from the same region where the partner is situated.

Targeting, mobilising and selecting trainees

The main pool of participants should come from the regional representatives involved in the second ignition event organized under WP1. In case after the ignition event, the minimum number and required diversity of stakeholders cannot be reached, the pool of invitees shall be widened in an equal and transparent manner, including further potential regional stakeholders that might be interested in participating at the training. It is recommended that starting from the list of invitees for the validation workshops, HEIs already target new relevant partners for the ignition event. The ignition event - to be organised according to the guidelines prepared by SERN under WP1 - should be the main source of stakeholder mobilisation and raising of interest of relevant actors. In case after the ignition event interest for the training remains below expectations, partner HEIs should use all available direct and indirect, official and unofficial communication forms to gather the necessary number and variety of

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[1] Voluntary development of RIS3 means that the R&I policy is developed without a link to the use of the European Regional Development Fund, i.e. for 2014-2020 has not been an ex-ante conditionality for the use of funds for R&I investments under Thematic Objective 1 and for 2021-2027 is not an enabling condition for the use of funds under Policy Objective 1 "**Smarter Europe,** through innovation, digitisation, economic transformation and support to small and medium-sized businesses".

[2] Policy Objective 5 - a **Europe closer to citizens**, by supporting locally-led development strategies and sustainable urban development across the EU - is an optional Policy Objective. If selected by a Member State, ERDF funds can be used to support the implementation of integrated, territorial, bottom-up strategies that can address all or some of Policy Objectives 1 to 4. Peculiar attention To Policy Objective 1 is given in this context, since that objective is the one financing R&I, i.e. smart specialisation projects.

[3] Promoting project ideas in this context means that the authority has implemented or has an objective to implement projects that support research and innovation or the innovation system.

participants in line with the commitments undertaken through the Application Form. For example invitations can be extended to the leadership of relevant regional organisations, accepting participants to be nominated subsequent to internal decisions, possible trainees could be reached through e-mail and phone and/or the training could be promoted on social media through the project and/or partner profile and/or on relevant web-pages. During all activities partners should follow the information and communication related rules of the project and of the Erasmus+ Programme and make use of the materials prepared for the ignition event and the training, e.g. training leaflet, course structure, content of ignition event presentations or the training, etc.

The **main criteria for selection** are:

- familiarity with the RE-ACT project (the participants in the validation workshops and ignition events belonging to the stakeholder groups to be targeted chiefly),

- current position in the organization (leading positions, responsible for the cooperation with HEIs or with the RIS3 responsible organisation, RIS3 related project management, participation at entrepreneurial discovery focus groups, membership in RIS3 governance bodies on regional level, involvement in strategic planning at the level of local public administration, etc.),

- experience in projects involving multi-stakeholder cooperation (capacity building, regional development, knowledge exchange, etc.)

- interest in innovation-driven regional development and in participation in future project activities.