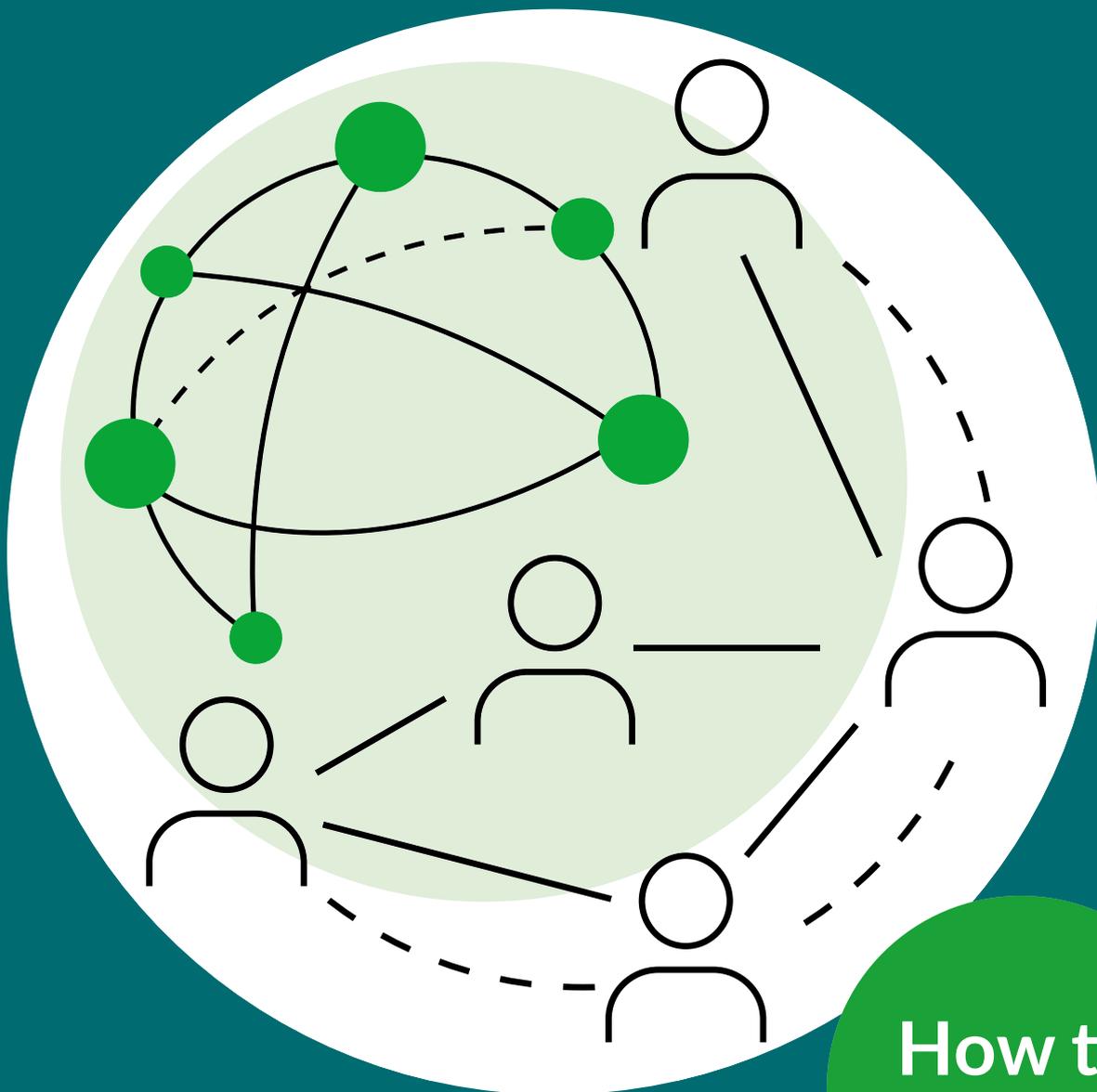


Coming together

Version 1.0



**How to
Guide**

NAVIGATING THE INNOVATION JOURNEY

This 'How to Guide' explores the co-innovation process starting with the creation of an idea, where an idea can be generated in response to an opportunity or challenge that requires action.

The multi-actor project **LIAISON** (Better Rural Innovation: Linking Actors, Instruments and Policies through Networks) has been studying ways of speeding up innovation in agriculture, forestry and related sectors through working in partnership with others. This How to Guide explores the early phases of working in partnership, including **ideas generation, ways of accessing networks** in order to create a partnership for co-innovation, and relevant considerations around **funding**.



IT BEGINS WITH AN IDEA

What can be the trigger for a novel idea that would benefit from co-innovation?

An idea for a co-innovation activity does not appear out of nowhere. For example, an idea may originate from:

- An **individual** person or organisation (an *actor*)
- A **formal partnership** such as a project consortium
- An **informal partnership** such as a cluster or network
- A **call for proposals** on a certain subject by a funding body

In other words, the formation of the idea may precede or follow that of the partnership. For example, LIAISON found the following practical cases of ways that ideas can be triggered as a result of different circumstances:

- Identified by an individual stakeholder in response to their own need or a technical/societal need/challenge or opportunity (e.g. a farming business such as *Magners Farm*)
- Identified by more than one stakeholder through sharing information and knowledge on a topic of common interest (e.g. *Arena Skog*)
- Brokered between stakeholders by an innovation support programme such as the *RISS Programme*

- As the next stage of an existing or completed co-innovation activity including commercialising an 'invention' (e.g. the H2020 project *TRUE*)

Whatever the trigger for the idea, it is how the group agrees to act on the idea which is key.

How can others be engaged around the idea?

Before proceeding with an idea, time is likely to be spent on evolving the idea and discussing potential options to take it forward with others. This initial stage of interrogating an idea often presents internal challenges that can help refine the idea and identify better its outcomes or the necessary next steps. At this stage it is also possible to scope out who else is already interested in this topic, active in this area and whether there is potential for joining in with an existing group.

The start of any co-innovation activity requires motivation and a shared degree of **curiosity**, desire to **co-operate**, and/or wish to **make a change** or **profit in business**. Coming together around shared goals will help everyone agree on the best way to proceed. This requires developing a strategy and considering the necessary infrastructure to make it happen. Depending on the desires of the individual or group, there is an abundance of knowledge and expertise available that can be drawn upon for:

- Developing a partnership from existing networks or via some form of innovation support service
- Bringing in new knowledge and expertise from various sources to help with developing the idea
- Transforming an existing informal partnership into a more formal partnership (e.g. with a legal status) in order to co-operate more efficiently
- Supporting the process of working as a group to bring an idea together and develop or create a plan.

LIAISON PARTICIPATORY METHODS

Disney creative strategy – helps groups identify creative, practical solutions by analysing a problem using different thinking styles (outsiders, dreamers, realisers and critics).

EXPLORING NETWORKS TO FIND THE RIGHT PARTNERS

How best to connect with innovation networks?

There are numerous benefits to be gained from getting connected to and collaborating with an ‘innovation network’.

Various forms of innovation network exist in agriculture, forestry and rural development. They bring together people with common interests and/or common problems to share knowledge and develop solutions together for the challenges and opportunities they experience. These networks vary in scale and formality and consist of numerous types of rural stakeholder - producers and processors, experts and non-experts, NGOs and governmental administrations, researchers and advisors. All with common goals and mutual interest in co-operating, sharing resources and co-creating new knowledge together.

Finding out about and gaining access to such networks can be difficult. Identifying and finding the right networking opportunities can take time. For less connected individuals or smaller organisations it can be difficult to hear about opportunities or to get in contact with people who have the necessary information. This can be very frustrating, especially when you know that opportunities exist (e.g. to apply for funding) but you don’t know how to get connected with them!

LIAISON found examples of actors proactively seeking opportunities through funding calls to access networks. In the *Food Heroes* project, one partner specifically decided to join the project as a way to gain access to other networks for other future collaboration opportunities.

One very effective way to help identify and get connected with existing networks and upcoming opportunities is to participate in Info Days organised by the ‘contact points’ of national, regional or international funding programmes. Many funding organisations also often have a ‘find a partner’ section on their websites to help with the match-making of interested applicants.

What are the benefits of participating in multi-actor projects?

Turning an idea into reality is hard work and –especially in more complex projects – identifying and engaging the right partners to develop an initial concept into a workable plan can make or break a project. It’s important therefore to assess the

benefits of any ‘new’ individual or organisation joining a co-innovation project - both from their perspective and also what they can bring to the group. LIAISON identified the following benefits of participating in a multi-actor project:

- **Access** to broad **networks** (of people and organisations)
- **Introduction** to other projects
- **Engagement** with a diverse range of stakeholders across Europe (and globally)
- **Benefit** from access to **external funding** especially for smaller or less established organisations
- Access to the **support of other partners** with the opportunity for gaining new knowledge, skills and capabilities.

LIAISON PARTICIPATORY METHODS

Speed boat – uses the analogy “We are all on the same boat!” to bring participants together and define the project stakeholders and aims, and identify individual and group strengths, limitations, risks.

What is the best way to identify who to collaborate with?

Identify and connect with the expected users of the project results from the outset. This will help to define who needs to be involved in the co-innovation activity to achieve the best outcomes. Gain insights from these potential users as part of the planning process. This will help both to identify the issues they want to be addressed and to understand their expectations. It will also highlight any potential role they could have within the project.

Some partnerships (as well as the evaluators and funders) might consider it a good idea to actively include new and less experienced partners in a project in order to gain new insights and try new ways of working together. Developing links with advisors in the agriculture, forestry and related sectors can be beneficial in spreading innovative solutions and forging new relationships. At the outset, partnerships should assess how cooperation will benefit the project most, especially where costs may be incurred.

How to contact and collaborate with ‘harder to reach’ groups?

Multi-actor projects benefit from diverse partnerships with a broad range of complementary skills. However, it may not always be easy to engage with the most

appropriate or relevant partners. There are numerous reasons why certain individuals, groups or organisations are harder to reach than others and it is important to explore what barriers to collaboration may be existing. Working with a trusted intermediary can help to overcome these barriers once they have been identified. New collaborators who have never engaged in this type of activity before will require patience and support to help them navigate and understand new and unfamiliar ways of working with others. Trust will often need to be built, especially when bringing partners together with very different motivations.

In the case of the *Tous Paysans* project it was found that the support and guidance of neutral external facilitators was essential for i) developing open, interpersonal relationships within the partnership and ii) for establishing a foundation of trust upon which the rest of the project was built and any difficulties encountered were overcome.

Developing a strategy that commits to being fully inclusive from the outset can help to secure the active participation of members that could otherwise be left behind or missed out and not have the opportunity to contribute valuable input.

The effective targeting of 'harder to reach' groups during dissemination is explored in more detail in the **ACHIEVING IMPACT: How to Guide**.

What is the best way to ensure effective partner engagement?

LIAISON identified three specific layers of engagement to ensure the successful establishment of multi-actor consortium or project groups:



Figure 1: Elements to establishing a co-innovation group

In reality these three levels of interaction overlap during the co-innovation process as they are mutually dependent. LIAISON also identified that different types of funding affect and shape the way partnerships form. For example there may be criteria around eligibility of partners and/or activities, opportunities for commercialisation of the innovation, or obligations to disseminate. It is important to be aware and consider the potential impact such funding requirements could have when forming a partnership.

How this can be effectively managed is explored in more detail in the **CONNECTED PARTNERSHIPS: How to Guide**.

ACCESSING FINANCE AND ENGAGING WITH FUNDERS

What role can funding bodies have within multi-actor co-innovation projects?

LIAISON discovered that multi-actor projects have a range of different experiences in their relationship, and level of engagement with funders (or funding bodies). Some funders, such as national or regional managing authorities, grant giving and paying agencies have a direct contact point for the group being funded and a connection with the project forms over time.

Building a relationship with the funder from the outset and maintaining good communication can help to enhance co-innovation projects. As a recipient of funding there will be requirements and guidance that need to be met. Taking time to understand the internal structures and requirements of a funding body (or agency) can help throughout and might be particularly useful during a conflict or occasion when activities need to change.

Taking time to understand what is needed before applying for funding is important. Applications can be complex and time consuming, so taking the time to interpret what is required and how it fits with the idea is time well invested. Sometimes this will require adaptation of the initial idea or making the decision to split the activity into stages while retaining a focus on the long-term goal.

What is the best funding option for the planned activity?

Often a specific funding call is announced that matches the idea sufficiently, and a coordinator or the core group will mobilise a co-innovation partnership

around a funding application. In fact, many ideas are only operationalised after funding has been awarded. As a result, the innovative ideas will be adapted or further developed in detail. This can make it possible for the necessary infrastructure and resources to be put in place for the co-innovation activity to proceed.



Figure 2: Factors influencing funding sources accessed for co-innovation projects

Alternatively, a member may be specifically included in a partnership because they contribute funding. Funding via a bank or other loan sources may be sought, a public or private funding source may be lobbied for funding, or an offer of funding may be received from a funding programme (not in response to a call for proposals).

LIAISON found a range of such examples including:

- a micro-finance business loan – *Magners Farm*
- private or self-funding – *10-Frame Beehive*
- help from an innovation support service to find a funding source which suited their capacities – *24 hour hops*

There can sometimes be a requirement to secure co-financing for the activity which also needs to be factored in and properly planned for. Choosing the right funder, funding conditions and public, semi-public or public partners can have a significant impact on the success of co-innovation partnerships.

And don't forget that not all multi-actor partnerships secure external funding to progress an idea or project.

What support is available when seeking and identifying funding opportunities?

Multi-actor partnerships may be able to access a range of support to assist with identifying and accessing funding. The level and type of support, advice and guidance, however, differs significantly between funding bodies, funding periods and regions.

The range of support available to access assistance might include:

- Specialist funding **consultants** to help to find the best suitable funding or funding mix
- **Feedback** on the design of the methodology or the workplan
- **Administrative support** pre-project or during the application process
- **Communication** and dissemination support
- **Identifying** and reaching out to **networks** to exchange ideas between projects
- **Moderation** in case of a conflict
- **Expertise** to evaluate impact or the innovation process

It is important to take time to understand what is available in a particular area. The funding conditions and eligibility criteria can also vary from one location or sector to the next so any funding source should be thoroughly investigated.

Getting the right process in place

The partners around an innovative idea need to consider who is best placed to lead the proposal writing when applying for a grant or drafting a business plan. This individual or team may or may not be the same as coordinates the co-innovation activity. It is a matter of finding the best fit for each role. Previous grant application know-how tends to be very useful for more complex grants, and a successful grant application track record can result in trust from funding bodies. Participants will therefore want to look at the consortium members and evaluate the best people to take the lead, and if necessary look for experience from outside the group to support which may incur an additional cost. Previous relations and good communication with the funding body, especially amongst lead partners, will put the partnership in a better position when applying.

Do not assume that a first rejection means the end: the project proposal can be improved and resubmitted, especially if supported by a good external service point, or if good relations are in place with the funder.

TAKING THE LEAD

How to prepare for leadership roles in co-innovation

In leading any multi-actor partnership, it is important to take into consideration the following factors when forming the best partnership for co-innovation:

- Recognise the resource and capacity differences between members, and be aware of how these might affect partners' performance as well as the performance of the consortium as a whole
- Identify how to most effectively combine existing skills and capabilities.
- Explore how to create opportunities for learning and capacity building among partners
- Consider how weaker collaborators might be able to benefit from the skills and experience of others to fully mobilise their own unique capacities
- Share the privileges and opportunities (where appropriate) to take responsibility for tasks, as well as divide the role(s) of co-ordination among partners
- Establish a clear and realistic timeframe for the implementation of the delegation of co-ordination tasks
- Be alert to the potential impact events or happenings external to the project might have on activities – positive or negative – and develop strategies to address them

It can be helpful to develop a framework for collaboration from the start (this is a requirement of some funders). This can be helpful in establishing a shared commitment among all participants to achieve the desired level of cohesion of the group at later stages. Good planning and co-ordination of the project, especially in the early development and funding application stage, is crucial to avoid or reduce the potential for later conflicts. It may also help to identify other opportunities and assets (e.g. opportunities for collaboration, additional funding sources) and anticipate bottlenecks (legal and bureaucratic barriers; stakeholders' lack of resources, capacities, or motivation) to project activities.

To find out more see the **GOOD PLANNING: How to Guide**.

What are the likely challenges to be prepared for?

All multi-actor partnerships should be prepared to encounter challenges along the way. These include:

Funder requirements	<ul style="list-style-type: none"> • Inflexibility of the grant agreement • Unavailable project officers • Demanding reporting duties • Administrative burden
Capacity to deliver	<ul style="list-style-type: none"> • Performance issues • Conflicting workloads • Lack of confidence • Staff changes • Limited resources and capacities
Consortium dynamics	<ul style="list-style-type: none"> • Failure to address differences/disagreements • Different overarching objects • Lack of competences or motivation by some partners • Challenges related to diversity and inclusion

MONITORING AND EVALUATION

When is it best to start measuring impact?

In projects with complex and dynamic co-innovation processes, evaluation can play a central role in assisting decision-making at every stage. Evaluation activities are fundamental and useful beyond simply measuring the success or failure of an initiative. If these activities are carried out on a continuous basis, they can assist the group's decision-making, especially if there is a need to make changes to the plan or activities to ensure the desired impacts.

For the multi-actor partnership to demonstrate their success (either to themselves or to prove their value to funders) it is important to consider evaluation as a necessary aspect of innovation and to embed it into the planned activity. It is worthwhile being clear from the beginning what the partners are aiming to achieve and the desired impact when the innovation project will be implemented. Prior to the start, evaluation strategies can be developed to measure impact throughout the lifetime of the project, so adjustments can be made to meet its goals. Core partners should keep in mind from the start the need for evaluation throughout the project. Establishing a clear monitoring and evaluation framework as a first co-ordination task helps to make sure it is embedded across all activities.

LIAISON PARTICIPATORY METHODS

Timeline– provides a space for the group to revise the progress of the project so far and adjust the plan. It can be a cathartic opportunity and provides a chance to make adjustments based on reality.

For more information on this topic see the **GOOD PLANNING: How to Guide**.

ABOUT THE LIAISON 'HOW TO GUIDES'

LIAISON has developed five 'How to Guides' to support practitioners taking part in co-innovation initiatives. For the purpose of these guides a 'practitioner' is any actor seeking to take part in or provide direct support for partners in co-operation initiatives or projects which innovate through a participatory processes.

LIAISON (Better Rural Innovation: Linking Actors, Instruments and Policies through Networks) is a multi-actor project which has been funded within the EIP Agri, an initiative launched by the European Commission in 2012 with its goal of fostering competitive and sustainable agriculture and forestry that "achieves more and better from less".

The interactive innovation approach brings together a diverse range of public and private innovation actors (farmers, advisors, researchers, businesses, NGOs etc.) with complementary knowledge and experience to appraise, gather, co-create and disseminate practical solutions to the real needs of farmers and foresters. These needs are driven by, and derived from, the real opportunities and day-to-day challenges faced by farmers, foresters and rural businesses. The innovations generated through an interactive approach can deliver solutions that are well adapted to circumstances and which are easier to implement.

LIAISON has compiled a handbook on participatory methods for co-innovation initiatives, plus also a Tool Box of evaluation and impact assessment tools.

The information in this guide is for general informational purposes only. Readers are advised to check any information against regulations or ways of working in their own locale. Any use of this information is at your own risk.



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Coming Together

Good Planning

Healthy Partnerships

Connected Partnerships

Achieving Impact

These guides highlight what we have learned from LIAISON's activities and data collection. The aim is to help all that use them enhance the way they co-innovate in farming, forestry and rural development.

The Coming Together Guide was written by Helen Aldis, Ana Allamand and Simone Osborn with contributions from Liz Bowles, Evelien Cronin, Andrew Fieldsend, Susanne von Münchhausen, and Eleonore Pommier. Thanks are also due to the partners in the LIAISON project that undertook the case studies cited in this guide.

