



Training Manual

A Guide to HEInnovate and Delivering Workshops

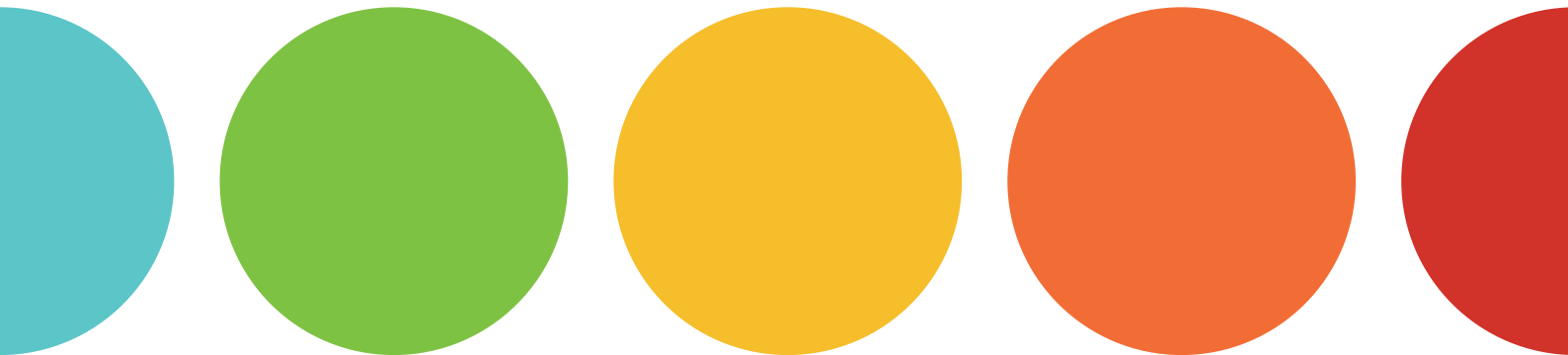


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About the manual

This manual is a guide for HEInnovate workshop facilitators (would-be and experienced workshop facilitators). The manual provides a complete overview of the HEInnovate tool and methodology as well as guides for three different types of HEInnovate workshops: Stage 1 - Introduction to HEInnovate; Stage 2 - Discovery and Planning and Stage 3 - Implementation and Impact. These workshops can be run individually or sequentially to suit the development phase of a higher education institution.

The manual offers conceptual and methodological ideas for going through the process of organising and running an HEInnovate workshop, as well as tools and templates for documenting agreed actions and setting out future roadmaps for change.

The manual is structured as follows:

About HEInnovate	Part A
About HEInnovate workshops	Part B
Tools, templates and guides	Part C
Guides for HEInnovate Workshops:	
Stage 1 - Introduction to HEInnovate	Part D
Stage 2 - Discovery and Planning	Part E
Stage 3 - Implementation and Impact	Part F
General terms and conditions	Part G



Part A:

HEInnovate, a guiding framework for entrepreneurial and innovative higher education institutions

1. Introduction

1.1 What is HEInnovate?

HEInnovate is a self-assessment tool for higher education institutions (HEIs) wishing to explore their entrepreneurial and innovative potential. The self-assessment tool has the simple purpose of helping higher education institutions identify their current situation, respecting the local and national environments, and from that, agreeing on potential areas for action. HEInnovate facilitates the assessment of an HEI in a systematic way, opening up discussion and debate associated with the entrepreneurial / innovative nature of Higher Education Institutions. HEInnovate also provides a way of following progress over time and building a community of best practice.

HEInnovate covers eight broad areas, under which are the statements for self-assessment:

- Leadership and Governance
- Organisational Capacity: Funding, People, Incentives and Rewards
- Entrepreneurial Teaching and Learning
- Preparing and Supporting Entrepreneurs
- Digital Transformation and Capability
- Entrepreneurial Ecosystem and Networks
- The Internationalised Institution
- Impact of the Entrepreneurial HEI

The HEInnovate website also provides case studies and other material which give ideas, guidance and inspiration for the effective management of institutional and cultural change.

The online self-assessment tool is freely available at: www.heinnovate.eu

1.2 What is an entrepreneurial and innovative higher education institution?

Today, more than ever in their history, higher education institutions (Universities, University Colleges, Polytechnics, etc) are being judged on the ways in which they respond to the social and economic needs of society. As well as education and research, there are many other issues to address. These include for example facilitating social mobility, wider access to higher education for disadvantaged groups, graduate employability, further to short- and long-term contributions to national economic growth and local development, and stimulating the birth of new enterprises and innovation in existing firms.

Being, or becoming, an entrepreneurial and innovative higher education institution is a response to this. There is no “unique” approach, but a variety of ways in which higher education institu-

tions can act entrepreneurially. For example, the way that they manage resources and build organisational capacity; involve external stakeholders in their leadership and governance; create and nurture synergies between teaching, research and their societal engagement, and how they promote entrepreneurship and innovation through education and business start-up support as well as knowledge exchange to enhance the innovation capacity of existing firms.

HEInnovate has been designed and developed as a tool to help higher education institutions to assess what needs to change or be improved in order to address the challenges they are facing.

1.3 The origins of HEInnovate

The European Union has a long track record of supporting the modernisation of higher education through its education and research programmes. One of the activities of the European Commission is the University-Business Forum (UBForum).³ Annual and thematic Forums bring together higher education institutions, companies, business associations, intermediaries, and public authorities, providing them with a common space at a European level for dialogue, networking, and the exchange of good practice.

HEInnovate began as an idea discussed at the UBForum in Brussels in 2011. A group of participants at the event formulated a recommendation to take a closer look at the underlying concepts and characteristics of an 'entrepreneurial higher education institution' and to develop a 'guiding framework' that would be made available as a tool for learning and inspiration. As a result HEInnovate was developed by the European Commission's DG Education and Culture, in partnership with the OECD LEED forum and a group of six independent experts.⁴

HEInnovate is intended for use by all types of higher education institutions in all Member States, therefore rather than defining a single way forward, it offers a self-assessment tool and additional guidance and good practice materials. HEInnovate enables higher education institutions to assess themselves against a number of statements related to the entrepreneurial and innovative nature of their higher education environment.

3 http://ec.europa.eu/education/tools/university-business_en.htm

4 <http://www.oecd.org/employment/leed/>

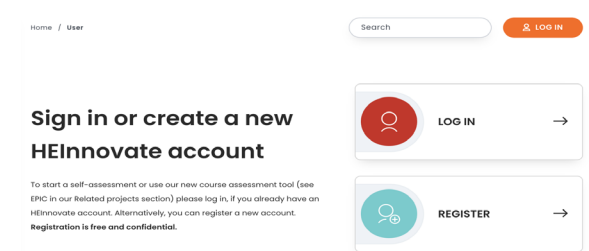
2. How to use the HEInnovate online self-assessment tool

2.1 Who is HEInnovate for?

HEInnovate is publicly available for any higher education institution to use. There is no restriction on who uses it or for what purpose. It is available free of charge but cannot be used for commercial purposes. It has intentionally been left open and flexible so that HEIs make the decision on how best to organise users, analyse results and set out plans for the future.

2.2 How to register with HEInnovate?

The HEInnovate website is found at: <http://heinnovate.eu>. There is a 'Log in' button on the home page of HEInnovate which takes users to the 'Log in' and 'Register' page. Registration is free, confidential and open to the general public.



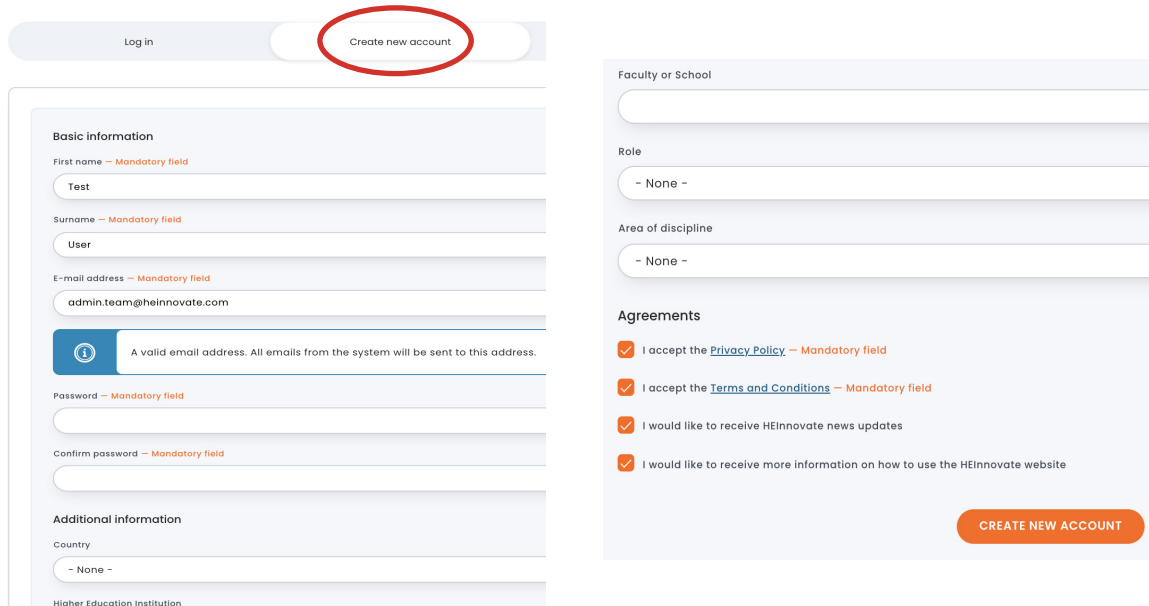
To register a new user account, fill out your details, and pick a secure and memorable password.

Click the 'Create new account' button to finish the registration and access the website. You can also explore the website as a 'Guest' if you click on 'Start your self-assessment' in

the home page. This option gives you limited access to the features of HEInnovate.

Once registered, you will be signed into your account immediately, and the User dashboard will appear in the menu on the left in the home page.

Create new account



The registration form is titled "Create new account" and features a navigation bar with "Log in" and "Create new account" buttons. The "Create new account" button is circled in red. The form is divided into several sections:

- Basic information:** Includes fields for "First name" (Mandatory field), "Surname" (Mandatory field), "E-mail address" (Mandatory field), "Password" (Mandatory field), and "Confirm password" (Mandatory field). A note states: "A valid email address. All emails from the system will be sent to this address."
- Additional information:** Includes a "Country" dropdown menu (set to "- None -") and a "Higher Education Institution" field.
- Agreements:** Includes four checkboxes:
 - I accept the [Privacy Policy](#) – Mandatory field
 - I accept the [Terms and Conditions](#) – Mandatory field
 - I would like to receive HEInnovate news updates
 - I would like to receive more information on how to use the HEInnovate website

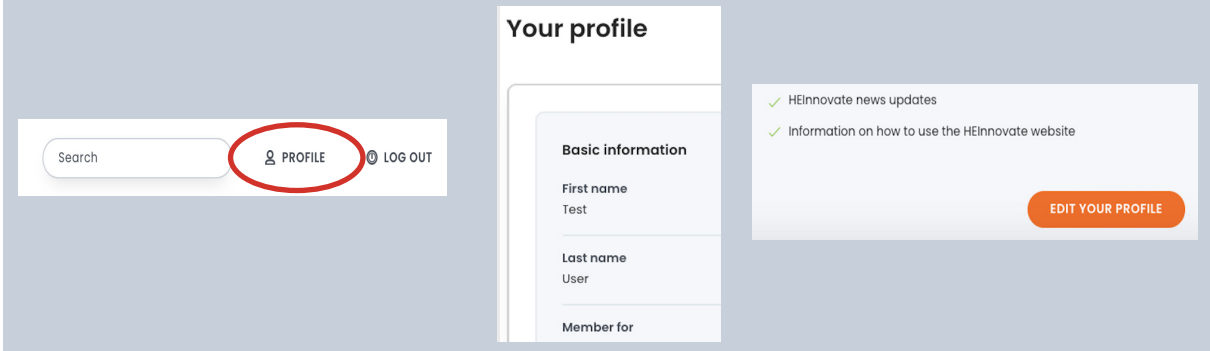
A "CREATE NEW ACCOUNT" button is located at the bottom right of the form.

Any problems with registration or queries?

If you have problems registering or have any other questions on the use of HEInnovate, please check our FAQ on the About page. In addition, a feedback form is available on the website, or you can email your query directly to info@heinnovate.eu.

Want to change your password / edit your profile?

Once you have logged in to the website, you can go to 'Profile' and change your password, edit any other information related to your profile or delete your account.



2.3 What are the groups on HEInnovate?


The group function of HEInnovate is the best way for higher education institutions to use HEInnovate for institutional change. Once registered, any user can set up a group (or many groups), and thereby become a group administrator.

Group administrators can invite as many people as they like, from inside and outside of the HEI to complete a self-assessment. Using the group function of HEInnovate is a very powerful way to open up discussion inside an HEI. The results can be viewed together and analysed to explore the views from different parts of the institution, and between staff, students and even external organisations. The group function is also used in workshops as a means of stimulating discussion and debate.

There is a range of functions available for a group administrator and group members on HEInnovate. The main functions, for example to create groups, manage groups and invite individuals can be accessed from the User dashboard, while the results' display offers downloadable charts and pdf reports.

Dashboard


My self-assessments



START A SELF-ASSESSMENT

Start your self-assessment as an individual or a group member now

[START](#)




MANAGE MY SELF-ASSESSMENTS

Manage existing self-assessments as an individual or a group member

[MANAGE](#)


My groups



CREATE A NEW GROUP

Create a new group to start a group assessment

[CREATE](#)



MANAGE MY GROUPS

View / download group results and see / post on the group message board

[MANAGE](#)

More details about creating and managing groups are available in the Features of the HEInnovate website section of this guide (Part C).

2.4 How to complete a self-assessment?

1. Start a self-assessment

From the User dashboard, click on 'Start new self-assessment'.

2. Complete your details

Please complete some basic information on your institutional affiliation on the next page to continue to the self-assessment. You only have to complete this information once, the system will pre-fill it for you later on.

On this page you also have to select from a drop-down menu whether you want to complete the self-assessment as an individual or as part of a group on HEInnovate. If you wish to complete the self-assessment anonymously, you can indicate it by ticking the box. As a guest user you are anonymous by default.

3. The eight dimensions of HEInnovate

HEInnovate is divided into the eight areas or 'dimensions'.



- **Leadership and Governance:** in order to develop an entrepreneurial culture in an institution, strong leadership and good governance are crucial
- **Organisational Capacity: People, Resources, Incentives and Rewards:** key areas a higher education institution might wish to consider to minimise the organisational constraints to fulfilling its entrepreneurial agenda
- **Entrepreneurial Teaching and Learning:** areas in which entrepreneurial development can take place and tools to deliver education and training opportunities

- **Preparing and Supporting Entrepreneurs:** ways in which HEIs can provide internal and external opportunities and expertise to support staff or students in their career development or enterprising individuals on their pathway to becoming an entrepreneur
- **Digital Transformation and Capability:** the institution's ability to integrate, optimise and transform digital technologies to support innovation and entrepreneurship
- **Entrepreneurial Ecosystem and Networks:** Building and sustaining relationship with key partners and collaborators to create value for the higher education institution and society
- **The Internationalised Institution:** the influence of the international environment on the entrepreneurial aspects of teaching, research, talent development, new opportunities and culture
- **Impact of the Entrepreneurial HEI:** areas a higher education institution might want to measure the impact of its activities to become more entrepreneurial / innovative

Under each of the eight dimensions, there are either five or six statements for users to consider in relation to their institution. As the user progresses through the self-assessment, the dimensions are shown in a progress bar at the top of the self-assessment pages.



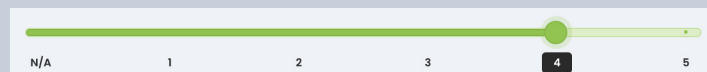
The progress bar colours the current dimension being answered. The entire self-assessment (all eight dimensions) takes around 20 minutes to complete.

What if some of the dimensions are not relevant to my HEI?

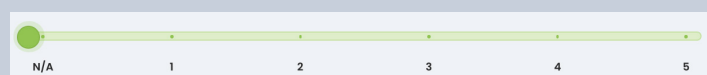
Users do not need to complete every section of the self-assessment, but can pick and choose those areas most relevant to their institution, area of interest or objectives.

How can I complete a self-assessment?

Under each statement, there is a sliding bar which moves from n/a to 5. You can click or drag the bar from the left to the right to indicate the score on a scale of 1-5, with 5 being the highest score.



The bar can be left at n/a if the statement is unanswered or not applicable.



Once the statements in an area are assessed, click 'Save' and go to next section' to continue with another area of the self-assessment.

HEInnovate is filled in from the perspective of the individual user. There are no hard and fast rules as to what constitutes a 1 or a 5. It is up to the individual user to decide on how well they think their HEI is doing in relation to the individual statement. This is why when results are brought together they can only be used for discussion and dialogue and not for the purposes of benchmarking or ranking an institution.

4. Save and submit your self-assessment

Once you have completed the self-assessment, click on the button 'Submit this self-assessment' to store the results.



If you click the button, you cannot go back and change the answers in this particular assessment, but you can return to HEInnovate at any other time to access your previous results, continue or complete another self-assessment.

2.5 How to access the results of the self-assessment completion?

1. Displaying the results

Upon completion of your self-assessment, the results are displayed, showing the average result for each of the eight areas as well as your detailed results (i.e. the scores given for the individual statements). If you are part of a group, HEInnovate also displays your results compared to the group average.

You can download the charts displayed as .pdf or .jpeg files and your detailed results as a Microsoft Excel (.xls) file from the 'Manage my self-assessments' menu on the dashboard.

If you are a group administrator, you will have access to the results of your entire group from the same menu, which allows you to download the self-assessment completions of your group in a single Microsoft Excel (.xls) file for further analysis or as a pdf report for an overview.

2. View additional case studies and materials

Based on the results of your self-assessment, a number of case studies, videos and guidance notes are suggested. These are being written and developed by a range of experts. The full range of cases and guidance notes can be accessed from the 'Resources' section of the website.

Part B: HEInnovate workshops

3. Why HEInnovate Workshops?

The HEInnovate self-assessment tool works best if it is used as part of a process for HEIs who are exploring their entrepreneurial and innovative potential rather than in isolation. Workshops are an important part of the process as they provide an opportunity for those involved to discuss and prioritise actions for the future.

This manual provides guidance for three different types of workshops. The first workshop, Stage 1, introduces new users to the HEInnovate self-assessment tool. The second workshop, Stage 2, is for groups that have already used the HEInnovate tool, to identify and prioritise actions for change. The third workshop, Stage 3, provides an opportunity to revisit action plans, identify impact and refocus the priorities going forward. Workshops one and two can be run independently or all three can be run sequentially.

3.1 What are the HEInnovate workshops?

The HEInnovate workshops are 1-day workshops for one or more higher education institutions. For each workshop, a group of people are brought together to work with HEInnovate. The users will have a chance to use the self-assessment tool and share experiences and ambitions. If time is limited these can be delivered as half-day workshops.

There are three types of workshops set out in this guide, covering HEIs at different stages in their use of HEInnovate:

- **Stage 1: Introduction to HEInnovate workshop**

This workshop is for individuals unfamiliar with or new to the online self-assessment tool. The purpose of the workshop is to inspire and motivate individuals towards seeing the value and relevance of HEInnovate in an HEI and to build their understanding of why the tool exists, what it can do and how to use it. The outcomes from the workshop are that individuals: understand the need for the tool and its potential benefits; are confident in using the tool and how it might be applied in their institution; know where they can get support and advice.

- **Stage 2: Discovery and Planning workshop**

This workshop is for individuals who have already used the online self-assessment tool and have survey data from applying the tool within their own institution (or for a group across a number of institutions). The purpose of the workshop is to help participants: appropriately interpret their data after the self-assessment completion; to understand what the data may or may not tell them about the institution(s) and the current strengths and weaknesses across the HEInnovate eight dimensions; and to provide participants with institutional good practice from across Europe and beyond. The output of the workshop is an action plan, with a list of realistic actions, which allocates roles and responsibilities for implementation and timescales. The outcome is a clear understanding of what needs to be done to make their institution more entrepreneurial and the motivation to act.

- **Stage 3: Implementation and Impact workshop**

This workshop is for individuals responsible for, or involved in, the implementation of change in their institution. The purpose of the workshop is: to report on progress against actions (requires understanding the importance and establishment of monitoring and assessment); to work together to overcome key challenges including the identification of drivers and barriers; discussing the implications of actions and sharing experiences and lessons learnt. Additionally the workshop aims to encourage institutional capacity building through exploring opportunities for the training of facilitators to support the change process. The outcome of the workshop is to stimulate institutional change leading to strategic impact and a motivated peer community seeking to develop collaborative projects.

Stage 1 and 2 workshops, as highlighted, can be delivered independently, according to the experience of the participants. The Stage 3 workshop is most useful as a follow up to workshops 1 and 2. All 3 workshops can also be run as a progressive series. For sequential workshops the intensity of the workshops should not be underestimated in terms of the support required for getting individuals engaged in the process. The level of interaction of the workshop facilitator with the participants will change for each type of workshop. In Stage 1, the role is mainly information provision, in Stage 2, group work becomes an important element and facilitators will need to guide participants towards the creation of action plans, Stage 3 involves working more intensely with small groups of participants.

Guides for the three different types of workshops are provided as part of this manual.

The HEInnovate team collect expressions of interest from HEIs that would like to explore their entrepreneurial and innovative potential. The team also recruits institutions who would be willing to host a workshop where several institutions from the same country or region come together for the 1-day introduction workshop. Expressions of interest can be sent to info@heinnovate.eu

3.2 Common elements for workshop preparation and delivery

The majority of the work involved in preparing, facilitating and capturing key findings is common to all three workshops. This section describes those common activities, roles and resources that can help deliver successful workshops.

There are a number of different roles for people involved in organising and delivering the workshops as outlined in Figure 1 below. One person may hold more than one role (some of which are optional).

Figure 1 Understanding workshop roles

Role	Responsibilities	
	Pre-workshop	On the day
Organiser/ administrator	Brings together the environment, the timetable and manages recruitment of the participants. May be responsible for the budget and for production of printed and web materials with the facilitator. Ensure a reliable Internet connection.	Is a point of contact for practical matters (logistics and organisation)
Facilitator	Designs the workshop agenda and works with the organiser to recruit participants and produce resources or materials	Is responsible for facilitating the achievement of the aims of the workshop and ensuring feedback and agreed actions are recorded
Optional		
Guest speaker	Preparing a speech based on a brief from the facilitator/organiser	Gives a motivational speech at the workshop to inspire participants, provide new thinking and inspire future actions
Rapporteur	n/a	Is the person who summarises and reports back to workshop participants on behalf of breakout groups at plenary session(s)
Record/reporter (scribe)	n/a	Is responsible for capturing key information from plenary and group sessions
Community builder	n/a	Is the person who supports participants in joining the HEInnovate community

3.2.1 Identifying your audience and recruiting participants for the workshop

A key factor in the success of any HEInnovate workshop is the identification and subsequent engagement of the right target audience. Each workshop might have a different audience, depending on its objectives and can include a combination of internal and external stakeholders of higher education institutions.

How do you identify the right audience?

Each workshop is unique and benefits from a different audience. The more diverse the audience, the greater the potential of the workshop. It is recommended however to invite, as a minimum, internal stakeholders of HEIs who are in a position to influence change in an institution.

To recruit the intended audience a mixture of open recruitment and targeted invitations need to be used. To this end the following tools have proven useful in recruiting for workshops, which organisers/administrators might want to consider using:

- Personal networks (the organiser/administrator and facilitator)
- Using existing networks within the region (HE unions, learning networks or specialist technical networks)

- Word of mouth – asking each participant to nominate one or more colleagues on signing up
- E-Flyers that contain clear takeaway messages and benefits of attending
- Using online ticketing systems which allow participants to invite people from their social networks (i.e. Eventbrite)

For each type of workshop there will be specific messages to help recruit the right audience.

3.2.2 Pre-workshop: Communicating with participants

Once participants are signed up it is important to have reliable contact details for them in order to maintain an open and enthusiastic line of dialogue. Whether it is about travel, the workshop agenda, or other activities, this open channel of communication helps the organiser/facilitator to better prepare the participants for their workshop day.

It is helpful to think of this pre-workshop communication as comprising two distinct but related strands

1. Logistical focus: Making sure the workshop runs as smoothly as possible
2. Content focus: Making sure maximum value is achieved from the workshop

Organisers and facilitator(s) should work closely together on the construction of the programme and key logistics. Individual emails/letters might include both logistic and content focused information.

Getting the logistics right

A balance of timely, useful and relevant communication from the workshop organiser/facilitator can ensure that the workshop runs as smoothly as possible. To this end the organiser should ensure that the following take place.

- Create a simple database of contact details (which is kept up to date)
- Emails sent out contain clear information on who to contact for further information
- Instructions on how to find, login and set up a group and invite participants to complete the self-assessment on HEInnovate (as appropriate)
- Formal joining instructions, confirming the date, time, venue, location, amenities and other relevant information regarding the workshop
- Reminders inviting the participants to complete the self-assessment in advance of the workshop (make sure to let them know how long the tool typically takes so they can allow themselves enough time)
- Final reminder before the workshop checking people are still planning to attend

Getting the most value out of the workshop

To get the most value out of any workshop it is important that the organiser and facilitator work together closely to plan the workshop.

These should be discussed before the workshop and form part of the workshop planning, tailoring of materials and decision on workshop techniques.

Once you have a group recruited it is helpful to communicate before the workshop to make sure that (1) the facilitator understands the group that will be attending the workshop and (2) the participants have an idea about the focus of the workshop.

- The best way of doing this is for the facilitator to have one or more conversations on the telephone with participants before the workshop. This is particularly important for the “Stage 2 - Discovery and Planning’ and ‘Stage 3 - Implementation and Impact’ workshops. Should there be an individual who is the project leader/coordinator for the institution or group of institutions we strongly recommend the facilitator speak to them before the workshop. The purpose of the conversation is to identify issues/areas of interest before the workshop allowing the facilitator to prepare. If this is done early enough you might be able to use this to identify a speaker (if this is planned for). It will also get the participant thinking about the workshop.
- For the ‘Stage 1 - Introduction to HEInnovate’ workshop a request that participants email in a single question or issue/area of interest on which they particularly want to focus can be a good way to get participants thinking about the workshop before they arrive.

Questions to help planning the workshop

There are many ways in which HEInnovate can be used for group assessment. Therefore it is important to set the objectives before the workshop. This can be done through the following set of questions

1. What are the overall objectives of the group exercise?
2. What type of participants will be coming and how big is the group?
3. Do you have varying expectations from different group members?
4. From what perspective do you want group participants to fill in the self-assessment? (personal, faculty level, organisational level?)
5. Are there particular areas of the self-assessment which are more important for this group than others? If so, is there extra material which needs to be prepared for the workshop to explore these areas?
6. Are there areas which you do not need certain group participants to fill in (not relevant for example if external individuals are taking part)?
7. How are the results going to be used? How are you going to deal with the confidentiality of the results?
8. The self-assessment is on a scale from 1-5 (with the option of ‘not applicable’). In advance, do you want to provide any further information on how to use the scale?
9. Will you have an external workshop facilitator or will it be run by the group administrator?
10. How much time do you have for collecting pre-workshop input from group participants, delivering the workshop and for post-workshop development?
11. Is there a process of institutional change planned or in progress in any of the participants HEIs?

These should be discussed before the workshop and form part of the workshop planning, tailoring of materials and decision on workshop techniques.

Risk assessment

Whenever you carry out any project it is important to evaluate the risks. There are six key questions: (1) what might happen; (2) how big an impact will it have if it happens; (3) how likely is it; (4) can I reduce the chance it will happen; (5) can I reduce the impact if it does happen; (6) am I willing to go ahead? Depending where and when you run the workshop and who the participants are the risks to consider are illness on the part of the facilitator, travel problems (if in a season with bad weather or in some cases finding the venue). It is also worth considering whether any of the participants might be resistant. Talking to the organiser beforehand can help identify this and give you the opportunity to prepare. For example role-playing how you might respond to difficult questions.

3.2.3 Example of a preparation checklist

This checklist summarises the discussion above.

Preparation checklist	Inc.	Notes
Objectives		
Agree audience		
Agree specific objectives		
Venue		
Book venue – check size of room and availability of breakout rooms for full period of time. Ensure layout is suitable. Cabaret style works best for workshops i.e. tables for 4 to 8 people scattered around the room		
Book Wi-Fi and other IT access. Projection facilities, voting buttons etc if required by the venue		
Book car parking		
Provide maps and locations of nearby public transport, parking and accommodation if necessary		
Book refreshments and plan break times (note any attendees with food allergies)		
If you are not familiar with the venue, find out about accessibility for disabled users, WCs and check for fire exits and find out about planned fire alarms etc		
Resources / equipment		
Facilitator's agenda		
Printed agendas for participants		
Copies of the descriptions of the 8 dimensions		
Presentation		
Feedback sheets		
Plain A3 paper		
Cohort Contact Lists – circulate to confirm information		
Handouts: FAQs		
Handouts: Online community and instructions on how to join		
Stationery box (pens, Blu Tack, post-it notes and name labels)		
Spare flip chart paper		
Pre-prepared flip charts (with key info etc)		
Camera/iPads		

3.2.4 On the day

On the day of the workshop, there are common elements that all HEInnovate workshops should include:

1. Welcome and introduction to the workshop
2. Introduction to the tool and the vocabulary
3. Demonstration of the tool
4. Plenaries and follow on actions

Each of these is covered in more detail below.

1. Welcome and introduction to the workshop

Bear in mind that one of the key aims of the workshop is to build a community of practice and that the workshops are designed to have practical outputs. The first impressions are important. A professional and welcoming introduction session will help achieve this.

The introductory session should include:

- Welcome and check everyone is at the right place
- Logistic arrangements for the day
- Introduction to facilitator and session agenda
- Introductions and individual objectives
- Ground rules

Each of these is described in more detail below. The order is not critical as long as all are covered before the start of the main sessions.

Welcome and check everyone is at the right workshop

In some circumstances there might be many workshops or events in the same place. Should this occur, it is helpful to check that people are at the right workshop. It is also an opportunity to check if anyone is missing, are there people in the group who know them who can give you a reason they are not there (they might even be able to call them for you).

Logistic arrangements for the day

This includes:

- Fire alarms: Are any practice alarms planned, if there is an alarm where do you go and where do you meet outside
- Toilets: Where are they (and do you need passes to use them, to get out for breaks etc)
- Mobile phones: We suggest you ask people to put them on silent and take any emergency calls outside the room
- Timing: Is everyone clear about timing, outline when you plan breaks and ending. Check if anyone has to leave early at this point

Introduction to facilitator and session agenda

This includes introducing yourself as facilitator and briefly setting out the agenda for the day.

The facilitator's role is vital in making the workshop successful. Setting out the facilitator's credentials, aims for the day and their approach should be done as early as possible in the day to reassure the participants that their time will be spent wisely.

Every facilitator has a different style and should prepare in advance to make their workshops fit for the audience and the intended outcome(s). The following guidelines provide a set of universal standards that HEInnovate facilitators are encouraged to aspire to.

<p>Be knowledgeable. However the facilitator doesn't need to be an expert. By reading this guidance and the briefing documents you can maintain consistency of knowledge with other facilitators in other sessions. This is particularly important when sessions are being delivered with participants from several Member States.</p>	<p>Be curious. The facilitator doesn't need to be an expert in the tool or in entrepreneurship education in HEIs, as long as they have read the appropriate preparation material and maintain a curious outlook. One of the common aims of the workshops is to help the participants to support each other in developing the answers to questions that are appropriate and specific to their own institution.</p>	<p>Be prepared. Spend time considering how you need to prepare yourself mentally for the day. Whether you choose to be energetic, calm, intense, or playful, the role of the facilitator can be challenging and shouldn't be underestimated.</p>
<p>Be realistic. The one-day format of the workshop isn't long enough to completely provide solutions to all of the participants' issues. Be clear on the focus and prioritise the activities that will enable participants to continue to pursue their own aims back in their own institutions and to engage in a community that will continue to encourage them to do so.</p>	<p>Be focussed. As a facilitator your role is to enable the participants to achieve the ultimate aims and outputs of their participation. Put tools, reminders or resources in place to help you to do this – whether these are notes interspersed into a PowerPoint presentation or a formal agenda.</p>	<p>Be flexible. Allow for flexibility in the timetable and timelines to allow for participants to concentrate on particular additional elements or outcomes that they wish to pursue while still achieving the overall aims.</p>

Introductions and objectives

To build trust among participants - especially if it is a diverse group – it is important that they introduce themselves to one another and to you as a facilitator.

With a small group it is possible for people to introduce themselves to the whole group from their chairs, ask them to give their name, objective for being at the workshop and, as an ice-breaker, one unusual thing about themselves. This might be a hobby, interest or experience. It is important that the facilitator goes first to provide an example of this and gives the participants a sense of safety. The facilitator should write up the individual objectives put forward by the participants on a flipchart. At the end the facilitator should run through the objectives drawing out any themes they can see.

Another way of doing this is to encourage the participants to move around and introduce themselves to each other including sharing an unusual fact about themselves. Again, the facilitator should do this first to allow everyone to get a sense of what is being asked and some reassurance. If this approach is used, ask participants to write down a personal objective for the day on a post-it and hand it to the facilitator before beginning the round of introductions. The facilitator should then put the objectives on their post-its up on a flipchart and group them in themes.

For larger groups, where individual introductions might be too time consuming, this can be done in smaller groups sitting around tables for example or using post-its which can be put on

flipcharts and the information collected summarised during the plenary. Again, the facilitator should illustrate the unusual fact. Other common ‘icebreakers’ include where was your last holiday, where was your favourite holiday, where would you most like to go?

This will help to capture everyone’s personal objectives in attending the workshop. In practical workshops the earlier participants can start to build a sense of trust and belonging, the easier the workshops will be to facilitate. Understanding the objectives of participation will also help to hold people to account and keep them on track (e.g. “we agreed that we are here for ...”) and enables checking progress within groups. This is also a good moment to find out how the participants might already know each other through pre-existing networks or organisations. The latter is an important point to note down for later follow up.

Ground rules

A workshop hoping to achieve practical outcomes for diverse individuals, possibly from multiple institutions within a country, or even across borders, comes with the possibility of differences in expectations and working culture. Setting out ground rules for the day allows these to be overcome quickly.

Questions relating to the aims of the day, the roles of the participants, expectations of the participants and the organisers all need to be considered by the facilitator prior to the workshop and then discussed and/or agreed with the participants early in the day. In addition, more practical matters, such as being on time (including coming back from breaks), politeness (e.g. interruptions / talking over each other) and agreement on language used should be established.

Most importantly, the confidentiality of the information shared is often a critical ground rule if people are to discuss potentially sensitive issues. For example, you might want to reassure participants that they are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed.

2. Introduction to the tool and the vocabulary

Each workshop will involve different types of introductions and vocabulary in line with the intended outcomes of the different workshops. For participants coming to their first workshop, the introduction should be longer than for a workshop with participants who are already familiar with the tool. More about this will be mentioned under the specific workshop headings in the pull out sections.

3. Demonstration of the tool (and the results, if applicable)

Every workshop revolves around the self-assessment tool and its use. If participants have already taken part in a self-assessment exercise, the facilitator will need to be fully prepared to interpret and explain these assessments. Following on from the demonstration of the tool, the facilitator may want to introduce an expert speaker or a previous workshop participant who has made progress in using HEInnovate to provide more specific insights into areas of HEInnovate or its use in practice.

Note on agendas

Whether to provide an agenda or not is up to the facilitator. There are both advantages and disadvantages to doing so. An agenda can provide structure and encourage participants to stick to a time scale. Conversely, an agenda can lead participants to prioritise which part of the day they wish to participate in and result in partial attendance of some of the workshop sessions only.

It is important to consider how much time to invest in this. For Stage 2 and 3 workshops participants have already used the tool. Time spent on the re-introduction of the tool can be brief. It is very important to consider the context of the participants for every single workshop.

4. Plenaries and follow on actions

Once participants have been introduced to the tool and its features (and in some cases workshops results) and agreed on the workshop objectives, the majority of the time is set aside for addressing the intended outcomes. The outcomes for each of the three types of workshops are described in the detailed workshop guides, but common elements exist.

The HEInnovate workshops work well when participants split into smaller groups to discuss issues that relate specifically to their institutions. Discussion around the findings from the self-assessment exercise (or discussions around statements) can identify common areas of agreement/disagreement and aspirations. A next step is to move from identified issues to potential actions. For Stage 1 workshops, the actions relate to using the HEInnovate tool. For Stage 2 workshops, the actions relate to putting in place the first steps for making improvements at institutions within the participants' own area of responsibility. For Stage 3 workshops, actions will relate to overcoming institutional challenges to change and inspiring or engaging others in their wider community.

The plenary sessions – where all participants are brought back together to share the findings of the group activities and discussions – need to show the variance in focus but also the areas with similarities that all groups share. The role of the facilitator here is to collate these differences and commonalities and summarise them at the end of each plenary session. This is for two reasons: the first is to reinforce the key messages of the workshop; the second is to make sure that the facilitator understands the outcomes being reported back.

3.2.5 Capturing the outputs

Common to all workshops is the need to capture the outputs. As well as encouraging individuals to decide on individual first steps and set deadlines against them. The feedback from the plenary sessions and agreement between groups or individuals to work together needs to be captured.

Tools and tips for engaging the attendees:

- Build trust: Workshops of this type require trust to be built between attendees to facilitate working together over a longer-term process. Icebreakers and personal stories are one way of doing this.
- Build a social network: Prior to the workshop, start the process of setting up a space for shared contact details and discussion. Facebook/social networks are all examples of doing this.
- Build a sense of belonging: Making participants welcome and inviting them to join the network are key steps to building the community of practice that HEInnovate seeks to develop across Europe. Ways to do this can be through sharing common feelings/goals and understanding that even in diverse institutions there are common problems and common opportunities, and that collaboration can be a meaningful benefit from active engagement in a community of practice.
- Be motivational and inspirational: Don't be afraid to share successes but also invite other inspirational people to speak. The more voices on the stage the less likelihood of fatigue

in the participants.

- Encourage activity and movement: A full day workshop can be tiring for the participants. Cater to different preferences of the participants by providing different types of opportunity for movement, participation and discussion. A variety of formal and informal spaces for discussion, lengthy breaks after speakers and inspirational reading material, as well as alcoves or seating with paper/ pens for personal reflection are needed in order to provide opportunities for all participants' preferences.
- Variety: When undertaking feedback and plenary use a combination of personal, small group and large group discussion and feedback. Using multiple types of feedback resource – post-it notes for individuals, flip charts for groups, words, graphics, personal stories, possible futures. The more levels in which the participants' mind is engaged, the greater the likelihood of success.
- Shared dissatisfaction: When used carefully, asking participants to share their dissatisfaction with the current reality in their institution can be a catalyst for discussing positive change. This needs to be controlled carefully in order to maintain a positive environment. Ask whether areas of dissatisfaction are real or perceived and whether change is possible or achievable.
- Aspirational visions: If using dissatisfaction as a catalyst, also use the aspirational vision. Ask participants to imagine the best possible future that will achieve their aspiration for the institution. Start with a very free and inspirational vision and then ask participants to consider what would need to change so that could be achieved.
- First steps: Once dissatisfaction and vision are both discussed – ask participants to consider a single first step that is required to start on the journey to change. If there is time, this could be expanded to two or three steps. These need to be discrete, even simple, tasks that can be measured and achieved within two weeks of the workshop.
- Stay focused: Your role is as a facilitator and not a keynote speaker or lecturer. The participants' voices are most important and the sharing of hopes and fears across the community is critical. As in all workshops, good facilitation ensures that all voices are heard, and that dialogue is not dominated by the few. This may require advance planning in preparing sets of groups to ensure a good mix of participants in workshop activities.

This requires the facilitator to do two things:

1. Make sure actions are identified during the session. This means making sure participants get very specific about what needs to be done, by whom and when.
2. Make sure these actions are recorded which might be delegated to a recorder/reporter (scribe) as described in workshop roles.

There is also a need to agree a strategy for following up after the workshop. This might be the responsibility of the facilitator or the organiser or one of the participants.

Identifying actions requires the facilitator to push for specificity in sessions. The more specific the action the more likely it is that the participant will carry it out. Specificity requires the identification of what will be done, by whom and by when. When doing this the facilitator should make sure participants do not leave the actions open-ended e.g. they can push for “I will talk to John by next Tuesday to persuade them to fill in the HEInnovate tool by the end of the month” rather than “I will talk to John”. When actions are listed on a flipchart the facilitator can go through them and ensure there is a name and date next to each action. This moves the workshop firmly into the realm of activity and away from theoretical or abstract thought.

There are a number of ways to record actions.

- **Action sheets:** One is the use of ‘action sheets’. This manual contains an example of an action sheet which can be filled in by the participants to outline the priority actions following the workshop which are specific to their objectives, responsibilities and overall sphere of influence within the institution. If using action sheets the facilitator should make time for participants to add actions to them after each session. It can be a useful activity after coming back from a break and at the end of the workshop
- **Photographs:** Another method is the use of cameras. Most of us have cameras in our phones and it is worth reminding people that it is quick and easy to photograph flipcharts. The nominated scribe might even photograph the flipcharts for whoever will write up the workshop
- **Pledge:** Consider a final session where workshop attendees agree a pledge or statement of intent. This can be shared on their social network pages, and acts as an integrity check - are their intentions achievable? By making these commitments, the group not only starts to form their community but also sets out common goals and aspirations that will keep them together
- **The workshop report:** It is important to produce a formal report recording not just the discussion but also the actions agreed. This would be produced after the workshop. An author should be identified who will take on this specific action, agree by when it will be done and also agree who will check up on the author. All the above techniques can feed into this report. When circulating the report, it is important to agree a time limit for comments/queries after which the report becomes an agreed record of the workshop and the various commitments made
- **The use of ‘I statements’:** This can be a useful way to bring a workshop to a close, by asking each participant to complete the following I statements. If it is a small group the facilitator can write them up on a flipchart, if a larger group the facilitator can get them to put them down on post-its, put them up and read them out to the group – it is important that these statements are witnessed to show that the participant’s time and contribution is valued

Something I learnt today was....

Something I would do differently in the future is....

Something that surprised me today was...

Producing a forward-looking strategy is too ambitious a task for a workshop. However, HEInnovate has the potential to be used as a base for preparation and generation of a future strategy for any higher education institutions that has participated in the self-assessment.

3.2.6 Post-Workshop

Before the workshop ends make the participants aware that their work is only just beginning and that additional resources are available to support them. The facilitator can then either agree or ask for volunteers to undertake follow-on activities. Others could also provide feedback to attendees through various media, institutional surveys, forming groups, undertaking reviews, staff consultations and workshops and/or preparing impact cases of users.

There is additional case material which is made available through the website on completion of the self-assessment. This material can be used as inspiration or as input for the discussion during a workshop. The case material is organised by the areas of the HEInnovate eight dimensions, although many of them fit more than one category. References and contacts are also provided.

3.2.7 Evaluation, feedback and further support

In all workshops it is important to gain information on what worked and what did not, as well as overall levels of satisfaction with the process and usefulness of the content. At the end of the workshop a one-page evaluation form should be filled out by all the participants. Examples of tailored evaluation forms for the different workshops are included in the individual chapters on the three workshops.

Finally, at the end of the workshop, the material and information collected needs to be reported back in the workshop report. This report also documents the priority areas for attention for the higher education institutions. The workshop elements should have been structured in order for this to be a simple task. The document may also include a roadmap of actions to undertake, especially if the participants agreed on a set of actions. For sequential workshops, this document can be used to set the objectives of the next workshop, as appropriate.

Participants should also be invited to give comments on the tool itself and suggest possible changes or additions they feel might be appropriate in the future.

3.2.8 Joining the HEInnovate Community

After the workshop there is great value in the participants keeping connected. Throughout the workshop the value of sharing experiences and aspirations will have been made clear.

The facilitator can also encourage workshop participants to create a local HEInnovate community. If the group has already agreed to specific actions, this could be a physical or virtual group where they share experiences, keep connected and engaged and submit cases for sharing. This local community can then nominate individuals to participate in the international dialogue to save money and time whilst remaining an effective part of the international community. There are many ways of doing this, for example by taking turns in representing their area at the international forum meetings, by undertaking shadowing or learning visits or providing a point of contact for the HEInnovate team.

The facilitator should also consider whether there are existing HE or entrepreneurship networks already active in this area.

Part C: Tools, templates and guides

4. FAQs

What is HEInnovate?

HEInnovate is a self-assessment tool for higher education institutions, which provides ideas and inspiration for the effective management of institutional and cultural change. It is designed to help interested organisations assess themselves against statements which are organised under the following eight dimensions:

- Leadership and Governance
- Organisational Capacity: Funding, People, Resources, Incentives and Rewards
- Entrepreneurial Teaching and Learning
- Preparing and Supporting Entrepreneurs
- Digital Transformation and Capability
- Entrepreneurial Ecosystem and Networks
- The Internationalised Institution
- Impact of the Entrepreneurial HEI

Where did HEInnovate come from?

HEInnovate began as an idea first discussed at the March 2011 University Business Forum; a bi-annual event that brings together universities and businesses from across Europe to look at mechanisms for cooperation and encourage knowledge sharing. A group of participants at the event formulated a recommendation to take a closer look at the underlying concepts and characteristics of an entrepreneurial higher education institution. The need for guidance and support when developing or improving entrepreneurial HEIs led to the idea of a European Guiding Framework that would be made available as a tool for learning and inspiration.

As a result an online, self-assessment tool was created together with the Organisation for Economic Co-operation and Development. This built on the OECD's work on university entrepreneurship support, and the European Commission's existing policies on encouraging entrepreneurship in higher education. The development of the self-assessment was further supported by a panel of external experts.

What do we mean by a higher education institution or HEI?

To avoid confusion when using HEInnovate, the term HEI (higher education institution) is used to cover all types of higher (third level) education institutions.

For whom is HEInnovate intended?

The main target audiences are those HEI staff concerned with strategic planning and decision-making. The framework can be used, as a formal or an informal exercise, by individuals, or at the faculty or the institutional level. Higher education institutions may also want to bring staff together in working groups to look at the various issues, agree on their position and identify areas for improvement.

What happens to the results?

The results derived from the use of HEInnovate belong to the higher education institution. The results are only available to the registered user or in the case of a group, to the group administrator. The registered profile gives access to all self-assessments completed by the user, which can be used for their own internal comparative purposes. This is not a benchmarking tool; it is a framework to help determine strengths and weaknesses and to provide higher education institutions with access to guidance notes and good practice case studies for inspiration.

How can I use the results of HEInnovate?

The HEInnovate results can be used in a number of ways. If HEInnovate is being used by a group of users, it can highlight different perceptions within the HEI which in turn can lead to discussion and dialogue. The results can be used to set priorities for action, to explore key differences in opinion and find out about areas of good practice in other parts of the institution.

If institutions set themselves roadmaps for change, HEInnovate can be used at different points across a time period in order to assess whether the institution is progressing.

If results are made available in advance of workshops, key guest speakers can be invited to provide external inspiration on areas of weakness identified in the results.

Do I have to share my self-assessment results?

When starting a self-assessment, users can choose to complete the self-assessment anonymously. The results are never in the public domain.

If one registers and completes the self-assessment as an individual, no one else has access to the results.³ If you register as part of a group, the group administrator will also have access to your results. There is also a function which allows you to submit your results anonymously to a group.

Self-assessments can also be completed, either individually, as part of a group, or as guest users without registration.

Can I give feedback on HEInnovate?

The HEInnovate website has a feedback section which can be filled in and the comments will be sent to the HEInnovate Team for review.

5. Explanatory text for each of the eight dimensions

Leadership and Governance. Entrepreneurial leadership and accountable governance are crucial to developing an entrepreneurial and innovative culture within an HEI. Such leadership defines entrepreneurship as a strategic priority and takes entrepreneurial and innovative practices from one-off experiment to an integrated approach that is core to how the HEI undertakes teaching, research and knowledge exchange.

Organisational Capacity: Funding, People, Incentives and Rewards. The organisational capacity of an HEI drives its ability to deliver on its entrepreneurial strategy. If an HEI is committed to carrying out entrepreneurial activities to support its strategic objectives, then key resources such as people, funding and investments, expertise and knowledge, reward and incentive systems need to be in place to sustain and grow its capacity for entrepreneurship and

³ Note: The HEInnovate Team i.e. the site administrators have access to the results, in case technical assistance is needed

innovation.

Entrepreneurial Teaching and Learning. Entrepreneurial teaching and learning involve exploring pedagogies, practices and flexible learning pathways to stimulate entrepreneurial mindsets in an inclusive and sustainable way. While the idea of creating a start-up remains a powerful and versatile pedagogical tool, entrepreneurship education is not just learning about how to transform an idea into a sustainable business. It is also about being exposed to entrepreneurial experiences and acquiring the skills and competences for developing an entrepreneurial mindset and equipping students to be able to contribute to addressing challenging issues such as sustainability and the UN Sustainable Development Goals (SDGs).

Preparing and Supporting Entrepreneurs. HEIs can help students, graduates and staff consider starting a business as a career option. At the outset it is important to help individuals reflect on the commercial, social, environmental, and lifestyle objectives related to their entrepreneurial aspirations and intentions. For those who decide to proceed to start a business, or other type of venture, targeted assistance can then be offered in generating, evaluating and acting upon the idea, building the skills necessary for successful entrepreneurship, and importantly finding relevant team members and getting access to appropriate finance and effective networks. In offering such support, an HEI should ideally act as part of a wider business support ecosystem rather than operating in isolation.

Digital Transformation and Capability. HEIs are already deploying digital technologies, however the uptake and integration varies among and within institutions. HEIs should make the most out of the opportunities presented by digital transformation and consider digital technologies as a key enabler of innovation and entrepreneurship. An HEI's digital capability is defined as the ability to integrate, optimise and transform digital technologies to support innovation and entrepreneurship.

Entrepreneurial Ecosystem and Networks. An entrepreneurial and innovative HEI proactively connects with its ecosystem (intended as an array of interlinked actors pooling skills and resources to pursue a common goal) to deliver social, cultural and economic benefits. The capacity to connect with entrepreneurial ecosystems and networks represents an important catalyst for organisational innovation in the HEI. It also helps the advancement of teaching and research, and transforms the HEI into an important actor in regional development and issues related to territorial cohesion.

The Internationalised Institution. A sustainable entrepreneurial HEI integrates the international into the design and delivery of education, research, and knowledge exchange by introducing new questions, approaches and alternative ways of thinking. Through considering international societal challenges, including the UN SDGs, the entrepreneurial HEI is also better equipped to support its ecosystem.

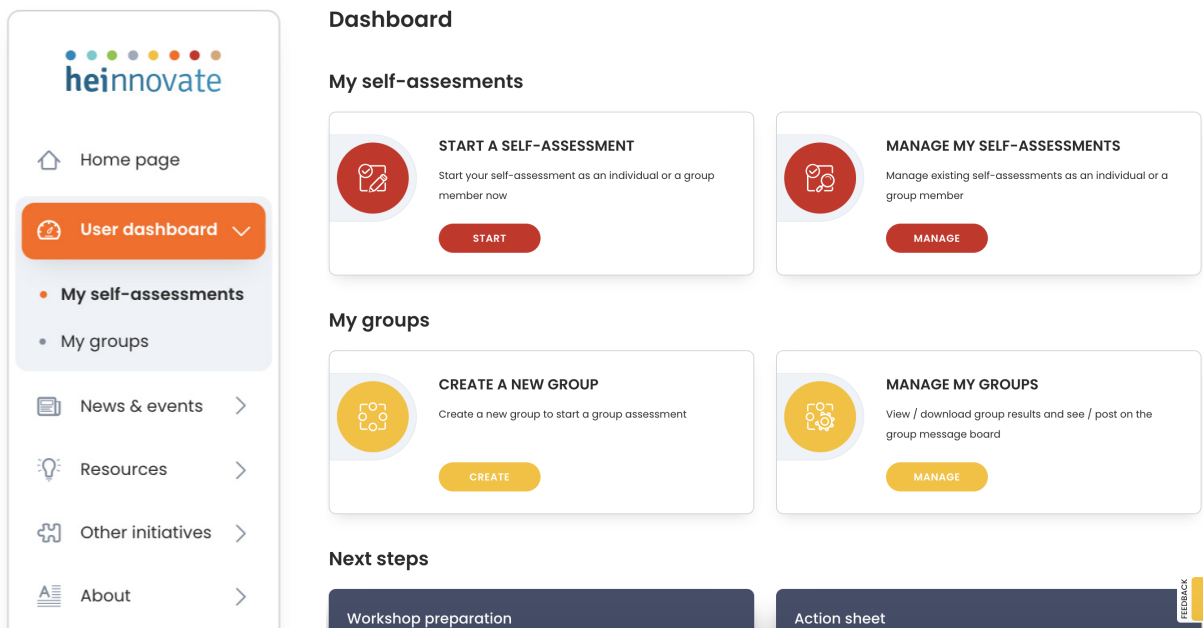
Impact of the Entrepreneurial HEI. Entrepreneurial and innovative higher education institutions need to understand the impact of the changes they bring about. The entrepreneurial HEI combines institutional self-perception, external reflection and an evidence-based approach. An HEI that monitors the impact of all activities connected to the entrepreneurial and innovation agenda generates valuable information and data to be used to improve its own performance. Metrics should span beyond spin-off creation, the volume and quality of intellectual property generation and research income generation. Assessment activities should focus also on graduate entrepreneurship, skills and competence development, teaching and learning outcomes, talent retention, contribution to global, national and local economic development or the impact of the institution's broader entrepreneurial agenda.

6. Features of the HEInnovate website

6.1 The User dashboard

Once you have registered or logged in successfully, you will see your profile page. Here you can change your settings and information about you.

On the left-hand side in the main menu, please select the User dashboard to explore the self-assessment.

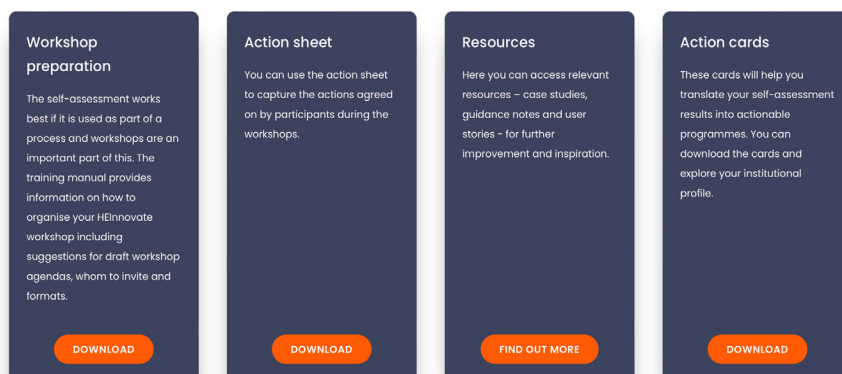


The dashboard is central to all the features of HEInnovate. From the dashboard you can:

- Start a new self-assessment
- Manage your self-assessments – access to all self-assessments you have previously completed or started
- Access all group-related functions, including creating a new group and managing your existing group(s).

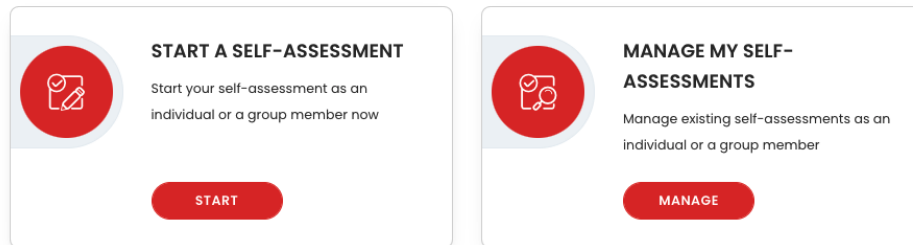
In addition, the User dashboard includes a section called 'Next steps', where you can find useful information and materials to support your use of the tool.

Next steps



6.1.1 Start a self-assessment

My self-assessments

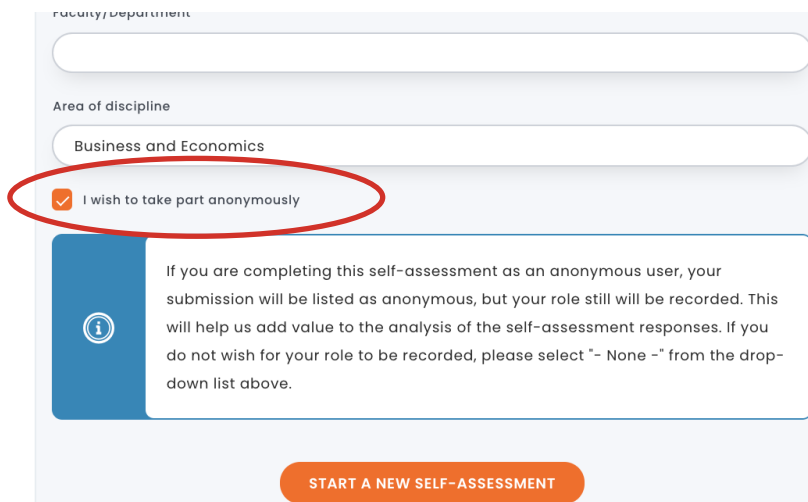


By clicking on 'Start', you will be asked to complete some basic information on your institutional affiliation and select whether you wish to undertake the self-assessment individually or as part of a group. You can only complete the self-assessment as part of a group if you either set up a group yourself or were invited to complete the self-assessment as part of a group.

You will be asked for information, including:

- Whether you wish to submit this self-assessment as an individual or as part of a group of which you are a member
- Your name
- Your country: select from a drop-down list
- The name of your HEI: when you start typing the name of your institution, there are many already available from the drop-down list. However, if you cannot find your institution's name in the drop-down menu, please add its full name and you will be able to see it the next time
- Role: this is your role within your organisation. There are a number of options to choose from, and also the possibility to indicate "other"
- Faculty/Department: while indicating your affiliation to a faculty or department is not compulsory, it can be very useful in a group function when you wish to compare the results at the faculty or department level
- Area of discipline: this is a selection of disciplinary areas to choose from

This is also the page where you can indicate whether you wish to undertake the self-assessment anonymously.











The screenshot shows a portion of a web form. At the top, there is a dropdown menu labeled 'Faculty/Department'. Below it is another dropdown menu labeled 'Area of discipline' with 'Business and Economics' selected. A red oval highlights a checkbox labeled 'I wish to take part anonymously', which is checked. Below the checkbox is a blue information box with a white 'i' icon and the following text: 'If you are completing this self-assessment as an anonymous user, your submission will be listed as anonymous, but your role still will be recorded. This will help us add value to the analysis of the self-assessment responses. If you do not wish for your role to be recorded, please select "- None -" from the drop-down list above.' At the bottom of the form is a red button labeled 'START A NEW SELF-ASSESSMENT'.

The eight dimensions of HEInnovate

Starting a new self-assessment and submitting your details as above will take you to a page where you can select in which area and language you would like to start the self-assessment. Clicking on any of the sections on the diagram will start the self-assessment. More information about each dimension is made available by expanding them in the list on the left-hand side of the page.

You can also download the ‘Concept note’ from this page as a pdf.

Expand the dimensions below to read more

-  LEADERSHIP AND GOVERNANCE ▼
-  ORGANISATIONAL CAPACITY: PEOPLE, RESOURCES, INCENTIVES AND REWARDS ▼
-  ENTREPRENEURIAL TEACHING AND LEARNING ▼
-  PREPARING AND SUPPORTING ENTREPRENEURS ▼
-  DIGITAL TRANSFORMATION AND CAPABILITY ▼
-  ENTREPRENEURIAL ECOSYSTEM AND NETWORKS ▼
-  THE INTERNATIONALISED INSTITUTION ▼
-  IMPACT OF THE ENTREPRENEURIAL HEI ▼

[DOWNLOAD CONCEPT NOTE](#)

Select one of the dimensions below to start a self-assessment



Statements and scoring

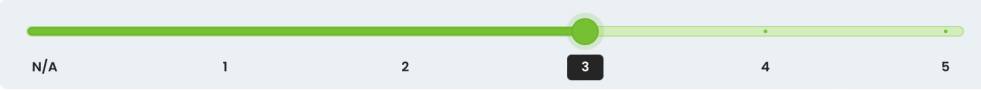
Clicking on any section of the diagram will take you to the given dimension of the self-assessment. For each of the eight dimensions there are a series of statements and a sliding bar to indicate how you feel your institution is doing on a scale of ‘not applicable’ (n/a) to 5. On the scale, 1 represents the lowest and 5 the highest score. For each statement, there is supporting text to help in your assessment. If a statement does not apply to you, a score of ‘n/a’ can be given to indicate ‘not applicable’. An example of the top two statements under the ‘Measuring Impact’ dimension is shown overleaf.

Impact of the Entrepreneurial HEI

Entrepreneurial and innovative higher education institutions need to understand the impact of the changes they bring about. The entrepreneurial HEI combines institutional self-perception, external reflection and an evidence-based approach. An HEI that monitors the impact of all activities connected to the entrepreneurial and innovation agenda generates valuable information and data to be used to improve its own performance. Metrics should span beyond spin-off creation, the volume and quality of intellectual property generation and research income generation. Assessment activities should focus also on graduate entrepreneurship, skills and competence development, teaching and learning outcomes, talent retention, contribution to global, national and local economic development or the impact of the institution's broader entrepreneurial agenda.

1

The impact of the HEI's entrepreneurial activities is regularly assessed across all its activities.



The impact of the entrepreneurial and innovative agenda can be wide ranging. The HEInnovate tool provides an overview of eight different dimensions where HEIs can assess their entrepreneurial and innovative characteristics or commit to new areas for change. If HEIs are committed to specific areas of change, with associated activities it is crucial to measure the impact as well as feed back learning into the future strategy and agenda.

To score highly an HEI could, for example:

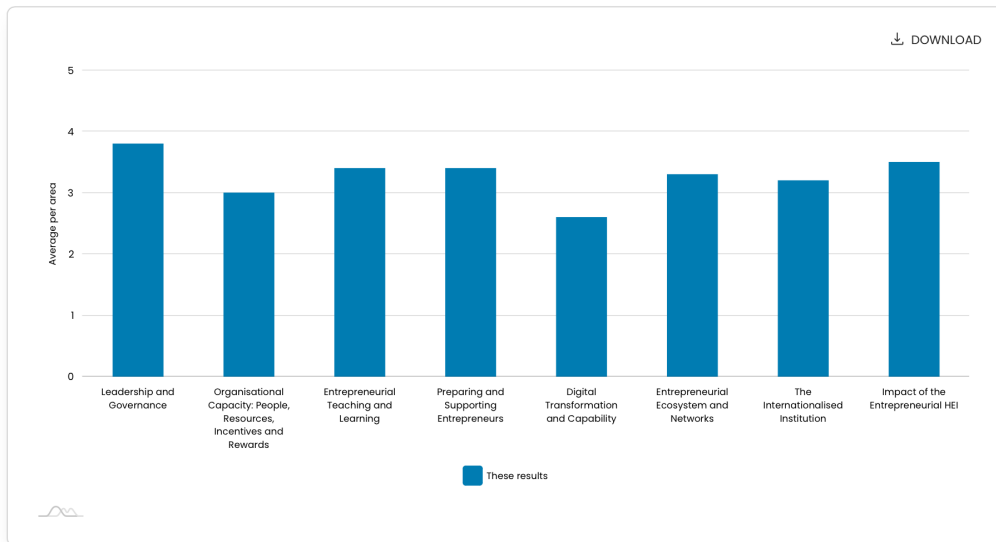
- Set clear intended outcomes / impacts related to the objectives entrepreneurial and innovative agenda.
- Collect regular evidence of the outcomes / impacts of the entrepreneurial agenda.
- Use the evidence of the outcomes / impacts as a tool for reflection and review of the strategy and mission of the institution.

After completing each dimension, click 'Save and go to the next area'. Once you have completed all dimensions of the self-assessment, click on the button 'Submit this self-assessment' on the bottom left. You will be reminded (see below) that it is not possible to change the answers of this self-assessment once it has been submitted.

Once you have submitted the self-assessment, you will be taken to the results page. Here an overview of your self-assessment results is generated, showing your average scores for each dimension.

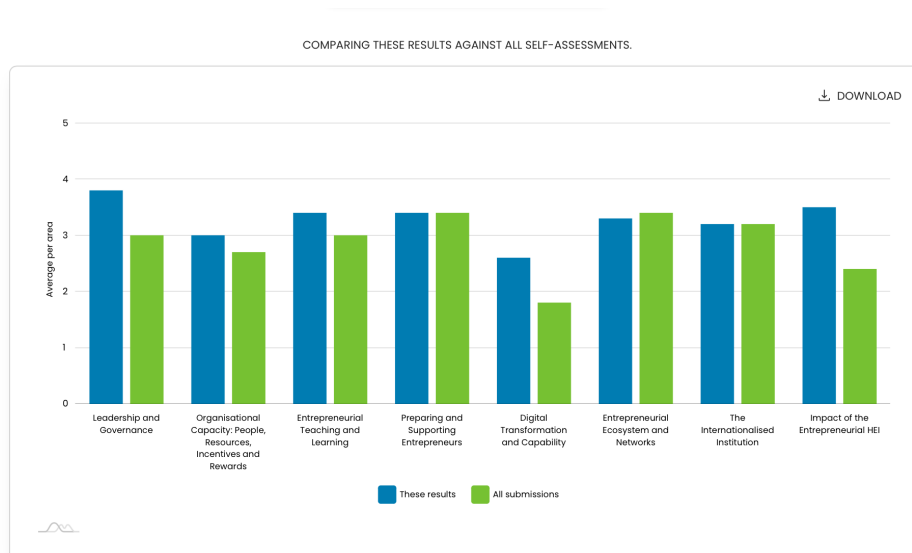
You will not be able to change your answers once you submit this self-assessment. Are you sure you wish to continue?

Cancel
OK



The button on the top right of the chart allows users to download charts as a PNG or JPEG image or an SVG vector image. The buttons on the top right allow you to send the ‘self-assessment results’ report by email or download it as a PDF.

By clicking on the ‘Comparison’ tab, you will also be able to see your self-assessment result averages per statement compared with other group members (if you completed the self-assessment as part of a group) and other respondents from your institution.



Recommended tailored materials

Based on your self-assessment results, you will be presented with recommended resources, including case studies, as well as tailored guidance materials, which you can view online or download as a PDF document.






Recommended resources

[ALL RESOURCES](#)

Based on this self-assessment, the following resources are recommended.

CASE STUDIES

Milan Polytechnic University, Italy: Experience-oriented entrepreneurship education

[READ MORE](#)
[DOWNLOAD](#)



USER STORIES

HEInnovate at the University of Ruse "Angel Kanchev"

[READ MORE](#)


CASE STUDIES

Engaging students and staff in knowledge exchange at Warsaw University of Technology





[READ MORE](#)
[DOWNLOAD](#)

Guidance notes


 LEADERSHIP AND GOVERNANCE
^

- Entrepreneurship and innovation are a major part of the HEI's strategy**
Being entrepreneurial and innovation driven applies both to the organisation as a whole and to its constituting individuals. Organisational culture and values can tie the organisation and the individual together. [Read more](#)
- There is a structure/system for coordinating and integrating entrepreneurial activities across the HEI to facilitate the implementation of the institutional entrepreneurial agenda**
The ultimate aim of an entrepreneurial HEI is to embed innovation and entrepreneurship into the organisational DNA so that they become part of the organisation's culture and its values, policies, structures and practices. [Read more](#)


 ORGANISATIONAL CAPACITY: PEOPLE, RESOURCES, INCENTIVES AND REWARDS
v

Detailed results

Clicking on the 'Detailed results' tab shows your detailed results against each statement.

 LEADERSHIP AND GOVERNANCE
^ SCORE: 3.8


1	Entrepreneurship and innovation are a major part of the HEI's strategy.	3
2	Leadership of the HEI demonstrates entrepreneurial attitude and competences that drive institutional change.	4
3	There is a structure/system for coordinating and integrating entrepreneurial activities across the HEI to facilitate the implementation of the institutional entrepreneurial agenda.	2
4	The HEI encourages and supports faculties, departments, units, teams and individuals to act entrepreneurially.	5
5	The HEI is a driving force for entrepreneurship and innovation in regional, social, community development and addressing societal challenges.	5

 ORGANISATIONAL CAPACITY: PEOPLE, RESOURCES, INCENTIVES AND REWARDS
v SCORE: 3

6.1.2 Manage my self-assessments

The 'Manage my self-assessments' button on the User dashboard provides you with access to all self-assessments that you have started and completed.


My self-assesments



START A SELF-ASSESSMENT

Start your self-assessment as an individual or a group member now

START



MANAGE MY SELF-ASSESSMENTS

Manage existing self-assessments as an individual or a group member

MANAGE

In this menu you can:

- Finish completing a self-assessment you have started, but have not submitted yet
- View the results of your previous completions
- Delete your previous results should you wish
- Assign your completed self-assessments to groups of which you are a member
- Download all your previous completions in a Microsoft Excel (.xls) file

Clicking on 'Filters' allows you to view self-assessments filtered by status of completion, role in the HEI, date range and groups.

My self-assessments
FILTERS
EXPORT TO XLS
START NEW SELF-ASSESSMENT

Status:

From: To:

Role:

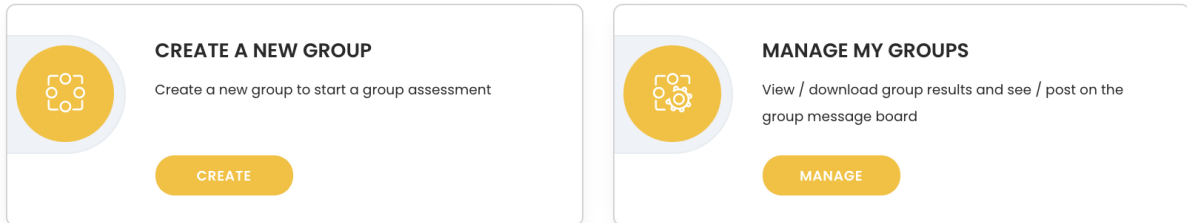
Group:

RESET
APPLY

My self-assessments		FILTERS EXPORT TO XLS START NEW SELF-ASSESSMENT
<div style="border: 2px solid #e67e22; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> SELF-ASSESSMENT NOT STARTED </div>	<p>Created: 08 Oct 2021 - 18:40</p> <p>Role: Master students</p>	<p>Institution: -</p> <p>Group: Test Group 2 (remove from group)</p> <div style="text-align: right; margin-top: 5px;"> START SELF-ASSESSMENT Delete self-assessment </div>
<div style="border: 2px solid #27ae60; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> SELF-ASSESSMENT COMPLETED </div>	<p>Submitted: 08 Oct 2021 - 15:27</p> <p>Role: Master students</p>	<p>Institution: -</p> <p>Group: Test Group 1 (remove from group)</p> <div style="text-align: right; margin-top: 5px;"> VIEW SELF-ASSESSMENT RESULTS Delete self-assessment </div>
<div style="border: 2px solid #27ae60; border-radius: 50%; width: 40px; height: 40px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> SELF-ASSESSMENT COMPLETED </div>	<p>Submitted: 08 Oct 2021 - 11:10</p> <p>Role: -</p>	<p>Institution: -</p> <p>Group: Assign to group</p> <div style="text-align: right; margin-top: 5px;"> VIEW SELF-ASSESSMENT RESULTS Delete self-assessment </div>

6.1.3 Creating a new group and inviting members

My groups



To create a new group you should click on 'Create' on the top right of the user dashboard page or on the yellow button, as shown above.

Please enter a unique group name to create your group on HEInnovate.

Inviting members

EDIT GROUP

INVITE MEMBERS

To invite individuals to join your group, you can click on the 'Invite members' button from within the group's page itself.

First from the drop-down menu select the group to which you wish to invite people. You can only see the group(s) that you created. You are then given two options for inviting others to complete the self-assessment as part of your group.

- Option 1 –You can type in the email addresses of the colleagues you wish to invite to take part in the group assessment, separated by commas, semicolons or spaces. You can also add a personalised message and by clicking on the 'Invite members' button the system will send your invitations out automatically. All of the people you have added will receive an email with a link to the group.

Invite new members

E-mail address – **Mandatory field**

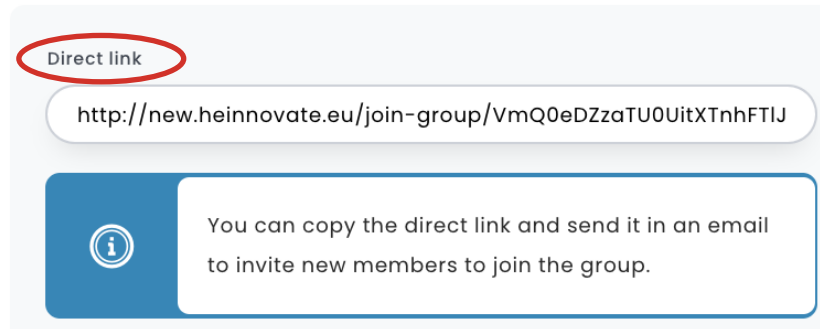
To send the invitation to multiple people at once, enter the e-mail addresses separated by a comma.

Message – **Mandatory field**

CANCEL SEND INVITATION

- Option 2 – Alternatively, you can copy the dedicated group link that appears at the bottom of the window, and you can circulate the link in an email to all the colleagues you wish to invite to join your group.

...or share direct link



Does everyone I invite have to be part of my institution?

No, who you invite is up to you. You may want to undertake an exercise with just faculty members, with people from across the institution or with a broader group of stakeholders including external partners for example to gain insight into their views.

What do those invited need to do?

Once a group is set up, each invited individual should login or register and start a group self-assessment. While the link in the invitation e-mail takes invited group members to the self-assessment completion as part of the group, if they decide to return to the website later, they should select the right group from the drop-down menu when completing the self-assessment.

Each individual has a choice of completing the self-assessment anonymously or as a guest user. If they check the anonymous box or use the guest option, the group administrator will still receive the self-assessment results but will not know who completed them. Completions by guest users are automatically deleted from the system after 90 days.

How are the results displayed for the group administrator?

The group administrator has access to all of the group results. The group results can be downloaded as a **Microsoft Excel (.xls) file**.

6.1.4 Managing your groups

You also have access to the group management-related functions on the User dashboard.

This menu takes you to a list of all the groups you are either managing or where you are a member.

Group members

FILTERS

Name or email

Email, first or last name

RESET APPLY

SELF-ASSESSMENT COMPLETED

Test User

E-mail address:
admin.team@heinnovate.com

SELF-ASSESSMENT COMPLETED

Zsuzsa Javorka

E-mail address:
zsuzsa.javorka@technopolis-group.com

You can manage your individual groups or, if desired, delete the groups you have created. To perform actions related to a specific group e.g. see the list of your group members, view self-assessment completions, send out reminder e-mails or edit your group, click on 'Edit group'.

From this page, you can access the group self-assessment results by clicking 'View group results'.

Test Group 2

EDIT GROUP

INVITE MEMBERS

2

Self-assessments in total

1

Completed by registered member

1

Completed by guest users

Open

Group status

Submissions created by guest users will only be visible in an aggregate form under "Group results" section.

[VIEW GROUP RESULTS](#)

Group members

FILTERS

SELF-ASSESSMENT COMPLETED

Test User

E-mail address:
admin.team@heinnovate.com

Self-assessment submitted:
08 Oct 2021 - 15:27

[VIEW SELF-ASSESSMENT RESULTS](#)

SELF-ASSESSMENT COMPLETED

Zsuzsa Javorka

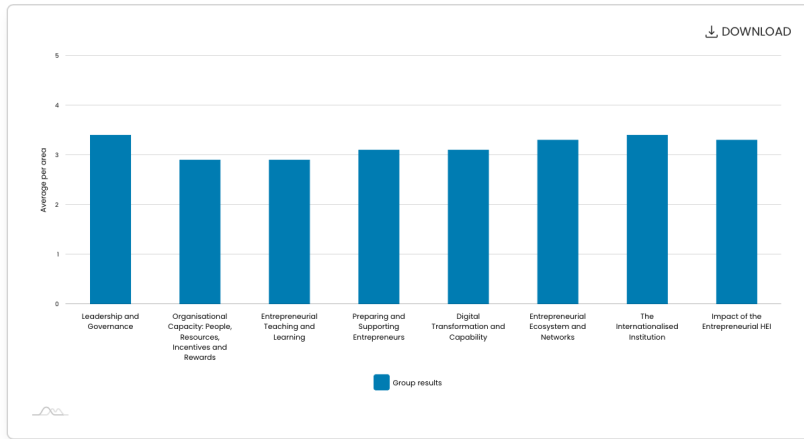
E-mail address:
zsuzsa.javorka@technopolis-group.com

Self-assessment submitted:
08 Oct 2021 - 15:31

[Remove from group](#)

In your group results, you can see an overview of all completions across the eight dimensions. In addition, you can select any of the dimensions to see and download detailed group results (by number of scores or by stakeholder type) as shown on the second and third charts below.

Group self-assessment

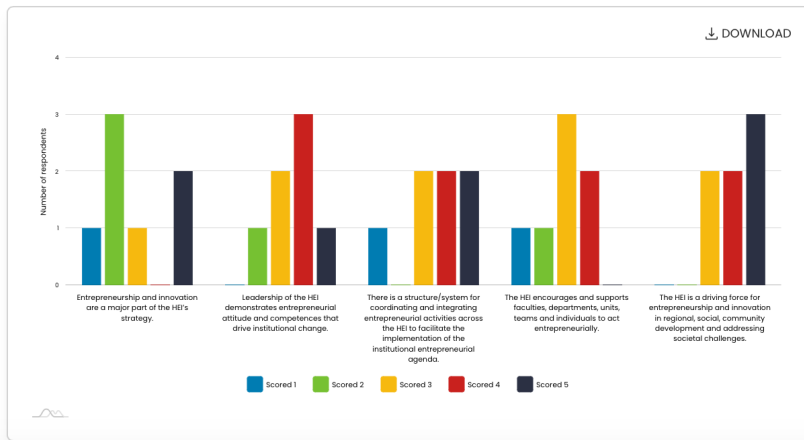


Select a dimension

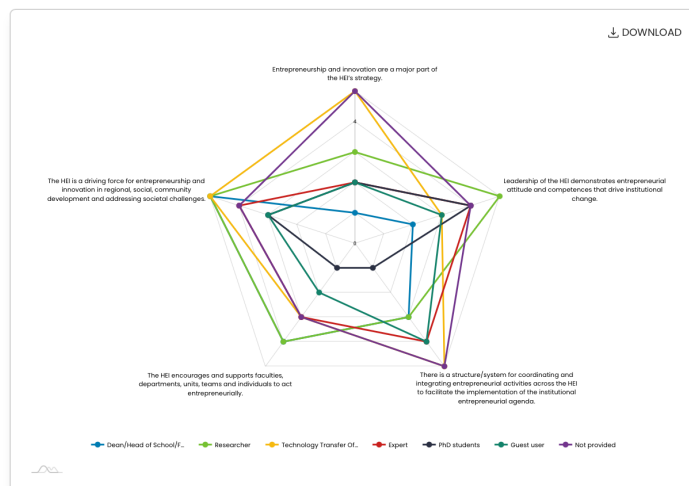
Leadership and Governance

Click on the legend in the graphs to customise the results displayed. You can select any of the items in the legend to display or hide. You can also download the images by clicking on the icon in the top right hand corner.

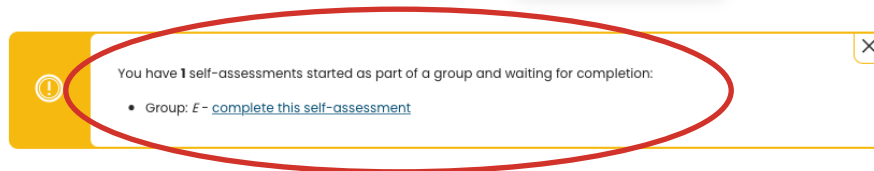
LEADERSHIP AND GOVERNANCE



LEADERSHIP AND GOVERNANCE



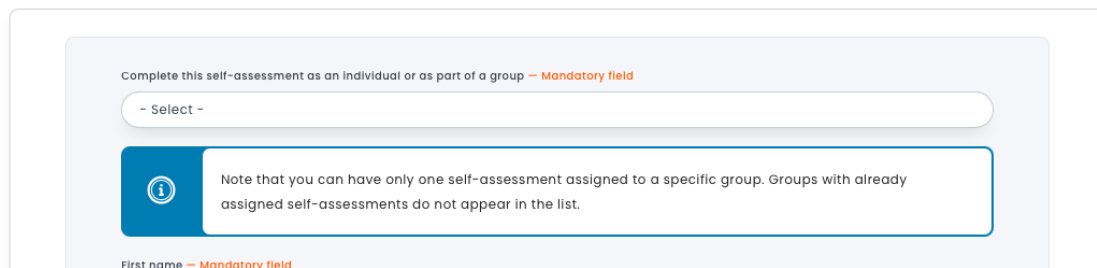
If you have already started a self-assessment as part of a group but you have not submitted it yet, then you will receive a message reminding you that you can finish completing the self-assessment as part of your group. To ensure that your self-assessment is assigned to the right group, please complete the already started assessment by clicking on the link that is highlighted as presented in the box below.



Start your self-assessment

HEinnovate is designed to help interested Higher Education Institutions to assess themselves against statements which are organised under eight areas. Please fill out the details below to start your self-assessment. Keep in mind that you can submit your self-assessment anonymously by checking the box "I wish to take part anonymously".

Self-assessment details

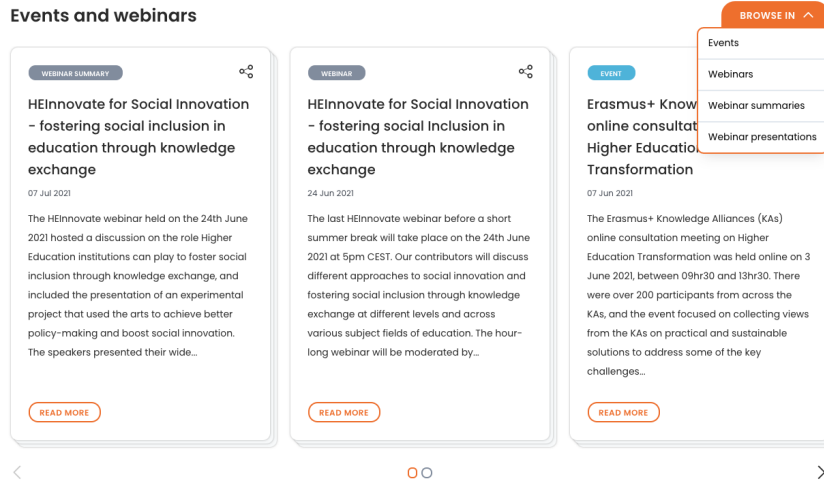


A form titled "Self-assessment details" with a light blue background. It includes a dropdown menu with the text "Complete this self-assessment as an individual or as part of a group - Mandatory field" and the option "- Select -". Below the dropdown is a blue information box with a white 'i' icon and the text: "Note that you can have only one self-assessment assigned to a specific group. Groups with already assigned self-assessments do not appear in the list." At the bottom, there is a label "First name - Mandatory field" next to an input field.

6.2 News and events

News & Events

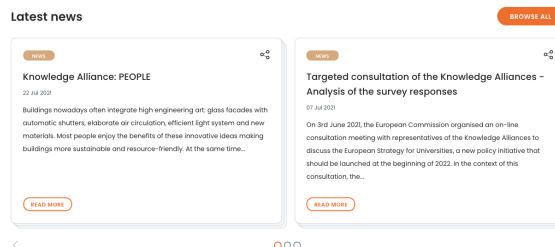
Events and webinars



The screenshot shows three content cards in a carousel. The first card is a 'WEBINAR SUMMARY' titled 'HEInnovate for Social Innovation - fostering social inclusion in education through knowledge exchange' dated 07 Jul 2021. The second card is a 'WEBINAR' with the same title dated 24 Jun 2021. The third card is an 'EVENT' titled 'Erasmus+ Knowledge Alliances (KAs) online consultation meeting on Higher Education Transformation' dated 07 Jun 2021. A 'BROWSE IN' dropdown menu is open over the third card, listing 'Events', 'Webinars', 'Webinar summaries', and 'Webinar presentations'. Each card has a 'READ MORE' button at the bottom.

The next button in the menu will take you to the News & Events section of the site, where you can see the latest updates about HEInnovate, browse upcoming and past events, webinars, and read the webinar summaries or listen to past webinar recordings.

Latest news

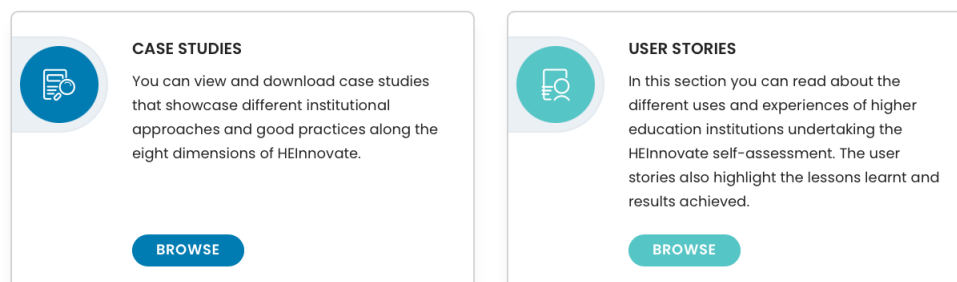


The screenshot shows two news cards in a carousel. The first card is titled 'Knowledge Alliance: PEOPLE' dated 22 Jul 2021. The second card is titled 'Targeted consultation of the Knowledge Alliances - Analysis of the survey responses' dated 07 Jul 2021. A 'BROWSE ALL' button is located in the top right corner. Each card has a 'READ MORE' button at the bottom.





6.3 Resources

The Resources page provides access to relevant resources for further improvement and inspiration, including case studies, user stories, guidance notes, digital resources and other documents (such as country reviews, relevant literature reviews and the concept note behind HEInnovate), along with training materials.

HEInnovate resources




The screenshot shows two resource cards. The first card is for 'CASE STUDIES' and states: 'You can view and download case studies that showcase different institutional approaches and good practices along the eight dimensions of HEInnovate.' The second card is for 'USER STORIES' and states: 'In this section you can read about the different uses and experiences of higher education institutions undertaking the HEInnovate self-assessment. The user stories also highlight the lessons learnt and results achieved.' Both cards have a 'BROWSE' button at the bottom.

 <p>GUIDANCE NOTES</p> <p>These short notes are linked to the individual statements of the HEInnovate self-assessment. You can gain ideas and guidance, how to further your institutions practices and approaches along the different statements.</p> <p>BROWSE</p>	 <p>OTHER DOCUMENTS</p> <p>Read the findings of the HEInnovate country reviews and explore other relevant reports including literature reviews and the concept note behind HEInnovate.</p> <p>BROWSE</p>
 <p>TRAINING MATERIALS</p> <p>The training materials provide information on how to use HEInnovate, how to organise your HEInnovate workshop including suggestions for draft workshop agendas, whom to invite and formats.</p> <p>BROWSE</p>	 <p>DIGITAL RESOURCES</p> <p>Here, you can watch video tutorials on how to make the most of the HEInnovate website. You can also access select HEInnovate webinar recordings.</p> <p>BROWSE</p>

In this page you can also find the ‘Related projects’ section, which gives access to two projects that support entrepreneurship and innovation in higher education: the Entrepreneurial Potential and Innovation Competences (EPIC) and entreTime, a new entrepreneurship education service aimed at upskilling educators within HEIs.

Resources can be filtered by keywords, document type, area of discipline, country and HEInnovate dimension. The available materials can be viewed online or downloaded.

Related projects



EPIC

The Entrepreneurial Potential and Innovation Competences (EPIC) course assessment tool was designed to help educators to measure the effectiveness of their entrepreneurship courses. It can be used to assess the skill and competence development of participants in different entrepreneurship courses, modules, summer schools, bootcamps or training programmes.

[BROWSE](#)

By clicking the ‘Training materials’ box in the resources page, you will find a set of materials with information on how to use HEInnovate and everything you need to organise your very own HEInnovate workshop.

You can view and download all training materials:


- The eight dimensions document, which provides an overview of the eight areas of HEInnovate and lists the statements found in the self-assessment. It is available in all EU languages
- A general presentation, which covers the background of HEInnovate and provides a brief overview of the eight areas of the self-assessment. Use the presentation as you see fit and tailor it to suit your workshop
- The Training Manual i.e. this document
- The workshop guides, which are chapters from this Training Manual, providing advice and ideas on how to run the three different types of HEInnovate workshops, set the agenda and whom to invite
- An action sheet to capture the actions agreed on by participants during the workshops
- Access all group-related functions, including creating a new group and managing your existing group(s).

Training materials

 FILTERS

The HEInnovate self-assessment tool works best if it is used as part of a process for HEIs who are exploring their entrepreneurial and innovative potential rather than in isolation. Workshops are an important part of the process as they provide an opportunity for those involved to discuss their self-assessment completion results and prioritise actions for the future.

The training materials provide information on how to use HEInnovate, how to organise your HEInnovate workshop including suggestions for draft workshop agendas, whom to invite and formats. In addition, you can also find below a presentation about HEInnovate, tailored evaluation forms, an action sheet, and you can download the eight dimensions document with the statements in the EU languages.

TRAINING MATERIALS 

HEInnovate - The eight dimensions

This document provides an overview of the eight areas of HEInnovate and lists the statements found in the self-assessment. To access this document in any of the EU languages, click on the 'view' or 'download' buttons on the right.

Document available in 22 languages.

[VIEW](#) [DOWNLOAD](#)


TRAINING MATERIALS 

HEInnovate - General presentation

6.4 Other initiatives

There are a number of initiatives run by the European Commission that are of interest to the users of HEInnovate. In this section of the website, you can learn more about the HEInnovate for EIT HEI Initiative.

Other initiatives



HEINNOVATE FOR EIT HEI INITIATIVE

The third call of the EIT HEI Initiative closed on 28 February 2023.

[BROWSE](#)

6.5 About HEInnovate

The About HEInnovate section provides information about HEInnovate; there is a short introductory video and you can also download a presentation on the background of HEInnovate, including advice on how to use the tool.

The profiles of HEInnovate experts are presented here. You can read the expert profiles in more detail and there is also an option to contact the expert.

The About section includes a 'Contact and FAQ' page. You can read through the frequently asked questions to find answers to your enquiries and should you wish, you can contact the HEInnovate Team with your question. In this final section, you can also read HEInnovate Privacy policy and Legal notice.

About HEInnovate


HEInnovate is an initiative of the European Commission's DG Education and Culture in partnership with the OECD.

HEInnovate is a free self-assessment tool for all types of higher education institution. It allows you to assess your institution using a number of statements related to its entrepreneurial activities, including leadership, staffing and links with business. Extensive training and support materials, including practical case studies, are available to support workshops and further development within your institution.

[READ MORE](#)
[DOWNLOAD PRESENTATION](#)




Members of the HEInnovate expert team

The expert group is an important driving force behind taking HEInnovate forward. In this section you can read the profiles of our experts and contact them.




Pedro Manuel Saraiva

Full Professor, University of Coimbra









Pedro has significant experience in innovation



Steve Stevens

Manager DOI, Student entrepreneurship program
Ghent University

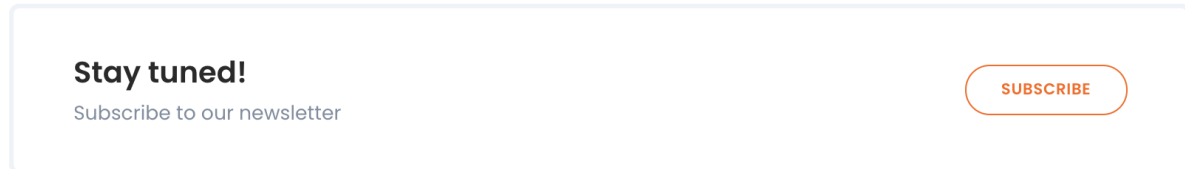


Milena Stoycheva

CEO of JA Bulgaria and The Edge: R&BD and Visiting Professor with the EIT Digital Master School in I&E (Innovation and Entrepreneurship), JA Bulgaria; JA Europe; The Edge - R&BD; Visiting Professor in I&E, EIT Digital Master School - UNITN

6.5.1 Stay tuned

At the bottom of each page of the website, there is a button to subscribe to the HEInnovate newsletter and opt in to remain updated with latest news and events.



Parts D, E and F: The workshop guides

The three workshop guides are provided as individual ‘pull-out’ sections and are self-contained.

All guides should be used in conjunction with the general section on running and facilitating HEInnovate workshops.

- Part D is the guide for the [Stage 1 - Introduction to HEInnovate](#)
- Part E is the guide for the [Stage 2 - Discovery and Planning workshop](#)
- Part F is the guide for the [Stage 3 - Implementation and Impact workshop](#)



7. Part D: Guide for Stage 1 Workshop – Introduction to HEInnovate

7.1 Purpose

The ‘Introduction to HEInnovate’ workshop (Stage 1 workshop) is aimed at people who are new to or unfamiliar with HEInnovate. This can be for people within one HEI, either focused on a particular department or unit or from all parts of the organisation, or from multiple institutions.

7.1.1 Objectives of the workshop

Objectives

- To introduce participants to HEInnovate, its benefits and limitations, including the objectives of the sequential workshops
- To provide people with an opportunity to become familiar with the self-assessment tool and methodology
- To explore the eight dimensions of the self-assessment tool
- To advocate and explain the concept of the entrepreneurial university
- To provide an opportunity for dialogue and debate
- To make the participants aware of the wider network and community of practitioners

Optional (if there are external speakers)

- To expose participants to experienced thought leaders and practitioners

Optional (if this involves several HEIs)

- To introduce initial activities for preparing to complete the tool in their own institution

7.1.2 Expected outcomes of the workshop

The expected outcomes of the workshop are:

- Participants become familiar with HEInnovate and understand how it can help them with developing a more entrepreneurial approach within their area of responsibility
- Participants discuss and debate the areas of the framework and feel able to prioritise areas for action for their areas of responsibility
- Participants are able to identify real actions and what they would do to ensure implementation

7.2 Preparing for the workshop

7.2.1 Whom to invite?

Invitees can be from a single institution, or from multiple institutions. The workshop is aimed at providing an overview of the HEInnovate tool and its potential use. Therefore all different types of stakeholders, both internal and external, involved with HEIs are welcome.

7.2.2 How to set an agenda?

‘Introduction to HEInnovate’ workshops can be one day or half a day, depending on the time

available. If the session lasts a whole day, it should involve an external speaker who can bring insights which are relevant to the audience. The workshop is a mixture of plenary and breakout sessions. The following gives some ideas for the sessions during an 'Introduction to HEInnovate' workshop.

It is recommended that the **agenda for the Stage 1 Workshop** contain the following:

- Introduction and welcome
- Icebreaker
- Agreeing expectations and roles for the day
- Introduction to the tool
- Example of real results and case studies of how the assessment translated into action (possibly a guest speaker)
- Participants discuss and debate the areas of the framework and feel able to prioritise areas for action (breakout groups followed by a plenary session). May be repeated for different dimensions of the tool
- Participants are able to identify real actions, and who would implement them at the HEIs. Discussion at the plenary session encourages sharing as well as agreeing on follow up activities
- Conclusions from the day – short summary by the facilitator followed by agreement on next steps and introduction of follow up activities

7.3 Delivering the workshop

As well as using all the common elements of the workshop identified in Part B, Stage 1 workshop requires the following specific elements:

7.3.1 How to use HEInnovate in a Stage 1 workshop - Introduction to HEInnovate

Every workshop revolves around the use the HEInnovate self-assessment tool and self-assessments from participants coupled with the facilitator's ability to interpret and explain these assessments. It is recommended that the facilitator introduces an expert speaker or a previous workshop participant who has made progress in using HEInnovate to provide additional insight into the areas or implementation. For the Stage 1 workshop: Introduction to HEInnovate, it is possible that there are no self-assessment results available and some participants may be unfamiliar with HEInnovate.

Therefore a live demonstration of the website may be interesting alongside the online video.

Useful resources

For this first introductory workshop it is a good idea to have web-ready devices available for participants who may wish to complete the tool during, or directly after, the workshop. Whether on tablet, laptop or fixed computers, enabling activity and direct engagement with the online tool is an important factor and provides a foundation upon which workshop discussion can be drawn out.

Case studies are also useful. Having summaries of these available as printed out and laminated sheets, or even as posters is useful to motivate participants' thinking.

If participants have not filled out a self-assessment, or seen HEInnovate:

In the case where participants have not seen HEInnovate or filled out the self-assessment, handouts containing the list of statements can be a good way of helping people to get up to speed and work well in the breakout sessions, even without access to Internet. More time may be needed for users to familiarise themselves with the terminology.

Another way of reducing the time needed to familiarise users with the self-assessment tool is to only assign one area for each breakout group to look at. Depending on the audience this may require the breakout session to be repeated to enable participants to explore more than one dimension of the tool.

7.3.2 Role of the facilitator in the 'Stage 1 - Introduction to HEInnovate' workshop

In the 'Stage 1 - Introduction to HEInnovate' workshop, the facilitator has the role of introducing the tool and all its features. Additionally, the facilitator needs to set the objectives of the breakout groups clearly to the participants, prepare potential questions for discussion, circulate and engage with participants and lead the report back to the plenary and prioritisation of actions.

7.3.3 Plenaries and follow on actions

As described in Part B – Common Elements, the HEInnovate workshops work well when participants split into smaller groups to discuss issues that relate specifically to their own roles and institutions. This provides an opportunity to see what issues are in common with other participants and how they perform in comparison to others. Discussion around the findings from the self-assessment exercise and particularly relating to the eight dimensions can bring out common areas of disagreement and aspiration. A second stage of discussion, where participants discuss possible first steps, leads to achieving the objectives of the HEInnovate workshops. For Stage 1 workshops, actions should, as a minimum, relate to using the tool for the first time and engaging staff from within the participant's institution to do the same and sharing and disseminating the findings with others.

For the introductory workshop a presentation on HEInnovate, the concept of the entrepreneurial university and the results of the self-assessment exercise (if available) can be presented in PowerPoint or equivalent.

Suggested sessions for Stage 1 workshop

Please note that timings are indicative only. We recommend you set timings yourself based on your experience and the particular group.

Sessions	Suggested timings		Notes
	for half-day	for a day	
Introduction	09:15	09:15	A welcome and introduction including logistics for the day, introducing facilitator and agenda, introductions and individual objectives and ground rules
Plenary session 1 - Introduction to HEInnovate and overall presentation of the objectives of the workshop	10:00	10:00	A presentation on the use of the HEInnovate, its structure and its aims and objectives
Presentation of the results from an example self-assessment exercise	10:20	10:30	Examples results (e.g. from an individual or test group) will be presented to the participants, highlighting how the data show areas of strength and areas for potential improvement. If using a group example (an example is available on the website), the charts can be used to show differences and other patterns within the aggregate results that have emerged by comparing data sets. This should demonstrate the value of the tool to new and potential users.
Break		11:00	
Questions arising from the process			
	10:40	11:20	Time should be allowed for first observations on the results of the self-assessment as well as questions. Additional information may be asked of the Plenary to judge their first reactions which can then be fed into the work of the breakout groups.
Break	11:00		
Speaker		12:00	
Lunch		12:30	
Break out groups - areas of the self-assessment based on scores/types of individuals	11:20	13:30	For the breakout groups there needs to be a nominated moderator to guide the discussion. For each breakout group only a selection of the self-assessment statements can be tackled in the given time. If there are two sets of breakout groups, participants can rotate and explore a further dimension of the tool.

Sessions	Suggested timings		Notes
	for half-day	for a day	
Plenary session 2 – report back from the breakout groups	12:00	14:30	<p>This provides the opportunity for each group to report back on the main identified strengths and weakness. This can be listed by the facilitator using an interactive board or post it notes for example.</p> <p>The report back can cover: Overall discussion points; issues identified in the understanding of the results – agreements and disagreements; identified strengths of the institution(s); identified weaknesses; identified actions; prioritisation of action</p>
Break		15:00	
Exploring the strengths, weaknesses and priorities for action	12:20	15:15	A facilitated session exploring the identified strengths and weaknesses with questions from the groups. If necessary, a final prioritisation can be undertaken with the whole group
Close - Final questions – the way forward	12:40	16:00	A facilitated discussion on how the participants would like to move forward by applying the tool, including interest in further HEInnovate workshops (sequential approach)
End	13:00	16:30	

Potential areas for discussion during the break out groups

- What was taken into consideration when scoring the statements?
- Are there significant differences in views on the scores between participants?
- With the benefit of this discussion is it possible to come to more consistent views?
- What are the areas of strength which can be considered good practice by the HEI?
- What are the areas in need of improvement that should be addressed by the HEI?
- Focusing on the key areas for improvement, which are the highest priority?
- What are the barriers to making improvements in these areas?
- What enabling factors can facilitate change and address the areas identified?
- What could/should we now do?

7.3.4 Capturing the outputs

As well as encouraging individuals to take individual first steps, the overall feedback from the plenary sessions and agreement between groups or individuals to work together needs to be captured.

For the ‘Stage 1 - Introduction to HEInnovate’ workshop the aim of the facilitator is capture the willingness and likelihood of the participants to use the tool within their organisations and the first steps or aims they hope to achieve as a result of doing so.

Part B on the common elements contains more generic information about capturing the outputs.

7.4 What happens next?

7.4.1 *Next steps*

Depending on the commitments made during the workshop, all participants should be contacted after the workshop and provided with the presentations and the workshop report. Additionally, plans for scheduling the next workshop can be made, if applicable.

The facilitator should ideally ensure that the HEInnovate team can benefit from the knowledge gained during the workshop. Feedback would be much appreciated and can be shared by using the info@heinnovate.eu email address.

See Part B for guidance on what to do once the workshops are completed.

8. Part E: Guide for the Stage 2 Workshop – Discovery and Planning

8.1 Purpose

This is a workshop for people familiar with and already using HEInnovate for self-assessment with aspirations to improve their organisation’s practice as an entrepreneurial HEI. This can be for single or multiple HEIs engaging a diverse range of internal and external stakeholders. This might include staff from the institutions’ central management and/or administration, faculty and students, as well as external business, NGO partners and policymakers.

8.1.1 Objectives of the Stage 2 workshop

Objectives

- To (re-)introduce participants to HEInnovate, its benefits and limitations
- To stimulate thinking about the meaning of the entrepreneurial HEI and how this relates to the workshop participants
- To identify the importance and benefits of developing a more entrepreneurial culture and environment across the participants’ institution
- To explore how HEInnovate data can be used to identify priority areas for improvement across the eight dimensions of the self-assessment tool
- To help participants recognise and strive for achievable but ambitious targets in pursuing a more entrepreneurial HEI
- To encourage dialogue and sharing of experiences to develop ideas for action for implementation at the participants’ institution
- To make the participants aware of the wider network and community of practitioners

Optional (if this involves several HEIs)

- To provide participants with examples of other institutional cultures and approaches

8.1.2 Expected outcomes of the workshop

The expected outcomes of the workshop are:

- Participants understand the concept of the entrepreneurial institution and how this relates to their own institution
- Participants understand the importance of HEInnovate as a catalyst for institutional change
- Participants understand how to interpret data and are aware of its limitations
- Participants discuss what the tool can tell them about their own organisations
- Participants have identified priority areas for development and can articulate ideas for how to improve these areas at their institution, including allocated resources

8.2 Preparing for the workshop

8.2.1 Whom to invite?

Invitees can be from a single institution, or from multiple institutions. This workshop will focus heavily on staff and stakeholders that are already aware of and/or using the HEInnovate tool.

These could be people that have attended a Stage 1 workshop. Whether in teaching and learning, research or administrative roles, this workshop is designed to help those able to influence and/or change aspects of the operations and practices of the HEI.

8.2.2 Communications and preparations beforehand

The common elements for workshop preparation can be found in Part B of the manual. For the 'Stage 2 - Discovery and Planning' workshop it is also recommended to ask participants to submit their HEInnovate self-assessments through the website before the workshop. These results provide a very useful input to the discussions, highlighting the main differences in stakeholders' opinions, and some of the key strengths and weaknesses of the participating institutions.

Participants can also be asked to volunteer questions they would like to address about implementation or share their existing or intended plans to deliver a more entrepreneurial, innovative HEI. This can be used as discussion material at the workshop.

For this workshop in particular it is useful for the facilitator to speak to the 'project lead' to get information about where the group is in terms of progress, motivation and potential resistance.

8.2.3 How to set an agenda?

'Stage 2 - Discovery and Planning' workshops can be one day or half a day, depending on the time available. If the session lasts a whole day, it might be interesting to involve an external speaker who can bring insight relevant to the audience, for example through sharing results and case studies, showing how the assessment can lead to implementation. Like the introductory workshop, this works best as a mixture of plenary and breakout sessions. The following gives some ideas for the sessions during a Stage 2 workshop.

It is recommended that the **agenda for the Stage 2 workshop** contains the following:

- Introduction and welcome
- Icebreaker session
- Agreeing expectations and roles for the day
- Introduction to suitable uses for the tool and limitations
- Example of results from participants and case studies of how the assessment can lead to implementation (possibly a guest speaker)
- Participants discuss and debate the areas of the framework related to operations and implementation (breakout groups followed by plenary). May be repeated for different dimensions of the tool
- Participants consider ambitions and aspirations which are realistic and achievable
- Participants consider real actions, and methods of implementation at their HEI(s). A discussion with plenary to encourage sharing as well as enable follow up
- Conclusions from the day – short summary by the facilitator followed by agreement on next steps and introduction of follow up activities such as the development of a roadmap or action plan

8.3 Delivering the workshop

As well as using all the common elements of the workshop identified in Part B on common foundations, the Stage 2 workshop requires the following specific elements.

8.3.1 How to use HEInnovate in a Stage 2 workshop - Discovery and Planning

The Stage 2 workshop uses completed assessments which provides the opportunity to base the discussions on the real results of the participating organisations (and their stakeholders). Key differences across the eight areas can be explored, within the results of a single institution or across all participating HEIs. While the completions offer the possibility to discuss all eight areas, they also enable participants to focus on sections of most relevance.

Useful resources

Handouts containing the list of statements can be a very useful way of reminding participants of the content and work well in the breakout sessions. In addition, making available best practice examples is also useful to motivate participants' thinking.

8.3.2 Role of the facilitator in the 'Stage 2 - Discovery and Planning' workshop

While an institutional host (administrator/organiser) may prepare the workshop, the facilities and invite participants, the facilitator has a more specific role than just explaining the tool and all its features and leading the report back to the plenary and prioritisation of actions. The facilitator also needs to set the objectives of the breakout groups clearly and prepare potential questions for discussion based on the analysis of the self-assessment completions prior to the workshop.

8.3.3 Plenaries and follow on actions

As described in Part B – common elements, HEInnovate workshops work well when participants split into smaller groups to discuss issues that relate specifically to their institutions as well as those that show similarities with others. Discussion around the findings from the self-assessment exercise and particularly relating to the relevant dimensions can bring out common problem areas and common aspirations. Discussion should be encouraged where participants discuss possible steps and actions. These should as a minimum set ambitions or aspirations for improvement, allocate roles and responsibilities for implementing the actions identified, disseminate the findings within the institution. Follow on actions can use the data to prioritise activities within their own institution(s).

For the 'Stage 2 - Discovery and Planning' workshop an introductory presentation on HEInnovate, the concept of the entrepreneurial university and the results of the self-assessment exercise can be presented in PowerPoint or equivalent. However, the facilitator and organiser should discuss this and make sure it is appropriate. It is important not to go over something the participants already know in a workshop for which people will have made an effort to find time to attend.

In a Stage 2 workshop participants might have preferred areas of the self-assessment they wish to discuss during the workshop based on their roles in the organisation. Again this highlights the advantage of the facilitator communicating with the project lead or similar before the workshop.

Suggested sessions for Stage 2 workshop

Please note that timings are indicative only. We recommend you set timings yourself based on your experience and the particular group.

Sessions	Suggested timings		Notes
	for half-day	for a day	
Introduction	09:15	09:15	A welcome and introduction including logistics for the day, introducing facilitator and agenda, introductions and individual objectives and ground rules
Plenary session 1 – (re-) introduction to HEInnovate, its uses and limitations and overall presentation of the objectives of the workshop	10:00	10:00	A welcome and introduction, a presentation on the use of the HEInnovate, its structure and its aims and objectives. This presentation should give the facilitator the opportunity to set the tool in context and manage the expectations of the workshop participants.
Presentation of the results of the group self-assessment exercise	10:15	10:20	The results of the self-assessment will be presented to the participants, highlighting areas of strengths, weaknesses, disagreements and other patterns which are clear from the aggregate results.
Break		11:00	
Questions arising from the process	10:45	11:15	Time should be allowed for first observations on the results of the self-assessment as well as questions. Additional information may be asked of the Plenary to judge their first reactions which can then be fed into the work of the breakout groups.
Break	11:00		
Break out groups - on individual dimensions of the self-assessment	11:15	11:45	For the breakout groups there needs to be a nominated moderator to guide the discussion. Which breakout group participants might choose to join should be considered beforehand. For each breakout group a selection of the self-assessment statements can be chosen to focus on in the given time. If there are more sets of breakout groups, participants can rotate.
Lunch		12:30	

Sessions	Suggested timings		Notes
	for half-day	for a day	
Plenary session 2 – report back from the breakout groups	11:45	13:30	<p>This provides the opportunity for each group to report back on the ways in which data can be interpreted and used, what the tool is able to tell them about their own institutions and the actions identified for implementing changes.</p> <p>This session can stray into areas of strategy and the facilitator should be careful to encourage participants to discuss the areas over which they have influence or control.</p> <p>The report back can cover: overall discussion; issues identified in the understanding of the results – agreements and disagreements; identified actions; prioritisation of actions.</p>
Break		15:00	
Exploring the strengths, weaknesses and priorities for action	12:15	15:15	A facilitated session exploring the identified strengths and weaknesses with questions from the groups. If necessary, a final prioritisation can be undertaken with the whole group.
Close - final questions – the way forward	12:30	16:00	A facilitated discussion on how the individuals or the HEI(s) would like to go forward in implementing the actions, including interest in further HEInnovate workshops and building or joining communities of practice.
End	13:00	16:30	

Potential areas for discussion during the break out groups

- What do responses to the self-assessment using these statements tell us about an (the) institution(s)?
- If individuals are giving different or inconsistent scores within an institution(s), what are the reasons for this?
- Can the group agree on areas of strength, which can be considered good practice by the HEI(s)?
- Can the group agree on areas of weakness, which need to be addressed by the HEI(s)?
- Focusing on the areas of weakness, which are the highest priority?
- What are the barriers to improving on the areas of weakness?
- What are the enabling factors, which can facilitate change and address the areas of weakness identified?
- What are the areas for change that the participants are able to control or influence?

8.3.4 Capturing the outputs

As well as encouraging individuals to take individual next steps and set deadlines against them, the overall feedback from the plenary sessions and agreement between groups or individuals to work together needs to be captured.

More guidance about capturing outcomes and enhancing follow-up activities can be found in

Part B on common elements for workshop preparation and delivery.

8.4 What happens next?

8.4.1 Next steps

All participants should be contacted after the workshop and provided with the presentations and headline action points. Although this ultimately depends on the commitments made during the workshop, follow up is important to encouraging commitment to action. Additionally, plans for scheduling a follow-up workshop can be made, if applicable.

The facilitator should ideally ensure that the HEInnovate team can benefit from the knowledge gained during the workshop. Feedback would be much appreciated and can be shared by using the info@heinnovate.eu email address.

See Part B on common elements for further guidance on activities that need to be undertaken after the workshop is completed.

9. Part F: Guide for the Stage 3 Workshop – Implementation and Impact

9.1 Purpose

This workshop is designed as a follow-up activity building on the ‘Discovery and Planning’ workshop (as described in Part D of this manual). The workshop is aimed at understanding the progress made as a consequence of the action plan and/or roadmap developed at the ‘Discovery and Planning’ workshop. This workshop provides an opportunity to refine the action plan going forward and explore the success and failures that influenced the implementation of the actions proposed.

This guide for Stage 3 workshop is written for participants from a single institution. If there are multiple HEIs involved, the format will differ slightly and groups for discussion might need to be established around common themes from the action plans.

9.1.1 Objectives of the Stage 3 workshop

Objectives

- To report progress against actions (requires understanding of the importance of monitoring and assessment)
- To work together to overcome key challenges, including the identification of key drivers and barriers
- Discuss the implications of actions, share experiences and lessons learnt
- Encourage institutional capacity building through exploring the opportunities for training of institutional facilitators to support the change process

Optional (if this involves several HEIs or participants from different countries)

- To share experiences and build a peer community

9.1.2 Expected outcomes of the workshop

The expected outcomes of the workshop are:

- Sharing achievements of the action plan, highlighting key successes
- Reassessing and refocusing priorities for actions based on progress made
- Building a motivated peer community seeking to develop collaborative projects

9.2 Preparing for the workshop

9.2.1 Whom to invite?

Those who have been involved in the implementation of the action plan, including for example HEI leaders, members of governing bodies, deans, heads of departments and centres for research, enterprise, teaching and learning, knowledge exchange, SME development, internationalisation, staff development and other professional service areas.

9.2.2 Communications and preparations beforehand

Since this workshop builds on the achievements of the action plan, as agreed on during the ‘Discovery and Planning’ workshop (Stage 2 workshop), it requires input from the participating institution. As well as completing the self-assessment again to identify progress and enable the analysis of the change, participants will be also required to prepare the following:

- A brief presentation on the action plan and stakeholder involvement
- Overview of the actions and activities undertaken as a result of the action plan
- Key successes and main drivers/barriers

The facilitator should also have access to the workshop report from the ‘Discovery and Planning’ workshop and have a conversation with the project lead before the workshop.

9.2.3 How to set an agenda?

‘Implementation and Impact’ workshops can be one day or half a day, depending on the time available. The workshop is a mixture of plenary and group work. The following gives some ideas for the sessions during a strategic impact workshop.

It is recommended that the **agenda for Stage 3 workshop** should contain the following:

- Introduction and welcome
- Defining expectations and outcomes for the workshop
- Introduction (or reminder) of the entrepreneurial institution concept, its importance, and the benefits of using HEInnovate as a catalyst for change
- Presentation of the self-assessment data overtime, and analysis of change
- Presentation of the action plans agreed on during the implementation workshops, including key success factors, driver/barriers identified, incentives and rewards
- Examples of institutional good practices (e.g. case studies and invited guest speakers)
- Discussion, refining/refocusing priorities for change
- Conclusions from the day – including agreement on the next steps

9.3 Delivering the workshop

As well as using all the common elements of the workshop identified in Part B on common elements, The Stage 3 workshop requires the following specific elements:

9.3.1 How to use HEInnovate in a Stage 3 workshop - Implementation and Impact

Stage 3 workshop uses a series of completed assessments which provides the opportunity to base the discussions on the real results of the participating organisations (and their stakeholders) overtime.

Handouts of the previous action plans can be a very useful way of reminding participants of the agreed activities, roles and responsibilities within the institution(s). In addition, making available best practice examples is also useful to motivate participants’ thinking.

In addition for Stage 3 workshop if an external speaker is involved, he/she should be an institutional leader who can clearly demonstrate how they have shaped their institution and the benefits achieved from becoming a more entrepreneurial/innovative organisation. The important point is that the speaker must be relevant for the audience and have credibility.

9.3.2 Role of the facilitator in the ‘Stage 3 - Implementation and Impact’ workshop

In the ‘Implementation and Impact’ workshop the facilitator will focus more on bringing out the concerns, challenges and aspirations of the participants and focus less on the mechanics of HEInnovate. Additionally, the facilitator needs to set the objectives of the group work clearly to the participants, prepare potential questions for discussion, stimulate input from the participants and lead the report back from the group work to the plenary and support the development of the next steps.

For this workshop it is worth considering an internal facilitator. Internal HEI staff have proved themselves the most effective agents of change in the use of HEInnovate in practice. Someone with experience of entrepreneurial behaviour, innovation and change as well as facilitation would be ideal. It might also be possible to have two facilitators for this type of workshop.

9.3.3 Plenaries and group work

For Stage 3 workshop, discussions should focus on achievements, stimulating organisational and cultural change. Additionally, it needs to explore how the institutions progress towards their goals, how they monitor and assess their achievements and how they incentivise and reward progress.

Suggested sessions for Stage 3 workshop

Sessions	Suggested timings		Notes
	for half-day	for a day	
Introduction	09:15	09:15	A welcome and introduction including logistics for the day, introducing facilitator and agenda, introductions and individual objectives and ground rules
Plenary session 1 – Recap on the entrepreneurial institution concept and its importance	10:00	10:00	Welcome, presentation of workshop objectives and a recap on the entrepreneurial institution concept, why it is important in the 21st century and the relevance of HEInnovate as a catalyst for change
Review of the results of the self-assessment exercise	10:10	10:15	The results from the self-assessment exercise – comparison over time - will be presented to the participants, in particular highlighting areas of change
Break		11:00	
Presentation of the action plan and the impact	10:40	11:15	Participants should present their action plans and the respective impact
Break	11:00		
Questions arising from the process	11:15	11:40	Time should be allowed for first observations on the results of the self-assessment in conjunction with the focus and progress of the action plans and identified impact

Sessions	Suggested timings		Notes
	for half-day	for a day	
Plenary group work	11:40	12:00	For the group work there needs to be a nominated moderator to guide the discussion and report back. Time should be given to assess the priorities and proposing refinements and refocusing of actions going forward, and ideas for strategic projects (e.g. collaborative actions, training of institutional facilitators) Two types of group work can be considered: One mixes up participants with different roles across the institution, the other brings together participants with similar roles. Both are important and should be undertaken if time permits
Lunch		12:30	
Plenary group work continuation		13:30	See above
Break		15:00	
Plenary session 2 – report back from the group work	12:20	15:15	This provides the opportunity for each group to report back on the identified steps for improvement and result in a final prioritisation undertaken with the whole group
Close – the way forward	12:30	16:00	A facilitated discussion on how the HEI would like to go forward in implementing the actions including setting milestones for the future
End	13:00	16:30	

Potential areas for discussion during the group work:

- Focusing on key areas for improvement, what were the most successful actions and why?
- What were the key enabling factors / main barriers to implement these actions? What areas were you able to control or influence the most?
- How did all types of stakeholders react to the changes initiated? Were there any incentives and rewards developed to facilitate the implementation of the action plan?
- What type of monitoring/assessment was undertaken? How did it work?
- What are the main areas where further actions are needed?
- What can facilitate change and address these areas?
- What else are you going to do to recognise, support and incentivise change?

9.3.4 Capturing the Outputs

For this strategic impact workshop the key role of the facilitator is to synthesise the actions undertaken and document future actions agreed on by the participants in consensus. This should include milestones established and provisions for measuring the impact of institutional change. Capturing the nature of the challenges identified and proposed actions to be taken is important.

9.4 What happens next?

9.4.1 Next steps

As an immediate step following the workshop, all participants should be contacted and provided with the presentations and refined priorities for action. This workshop represents the final step of a series of facilitated workshops. HEIs are expected to follow up on the implementation on their own, possibly with the guidance of an internal facilitator of their institution.

It is worth noting that there is no reason an HEI could not use this format of workshop at regular intervals, perhaps once a year, to help move forward.

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2. Access to the Service and materials offered via the Website is open. However, it requires authentication.

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