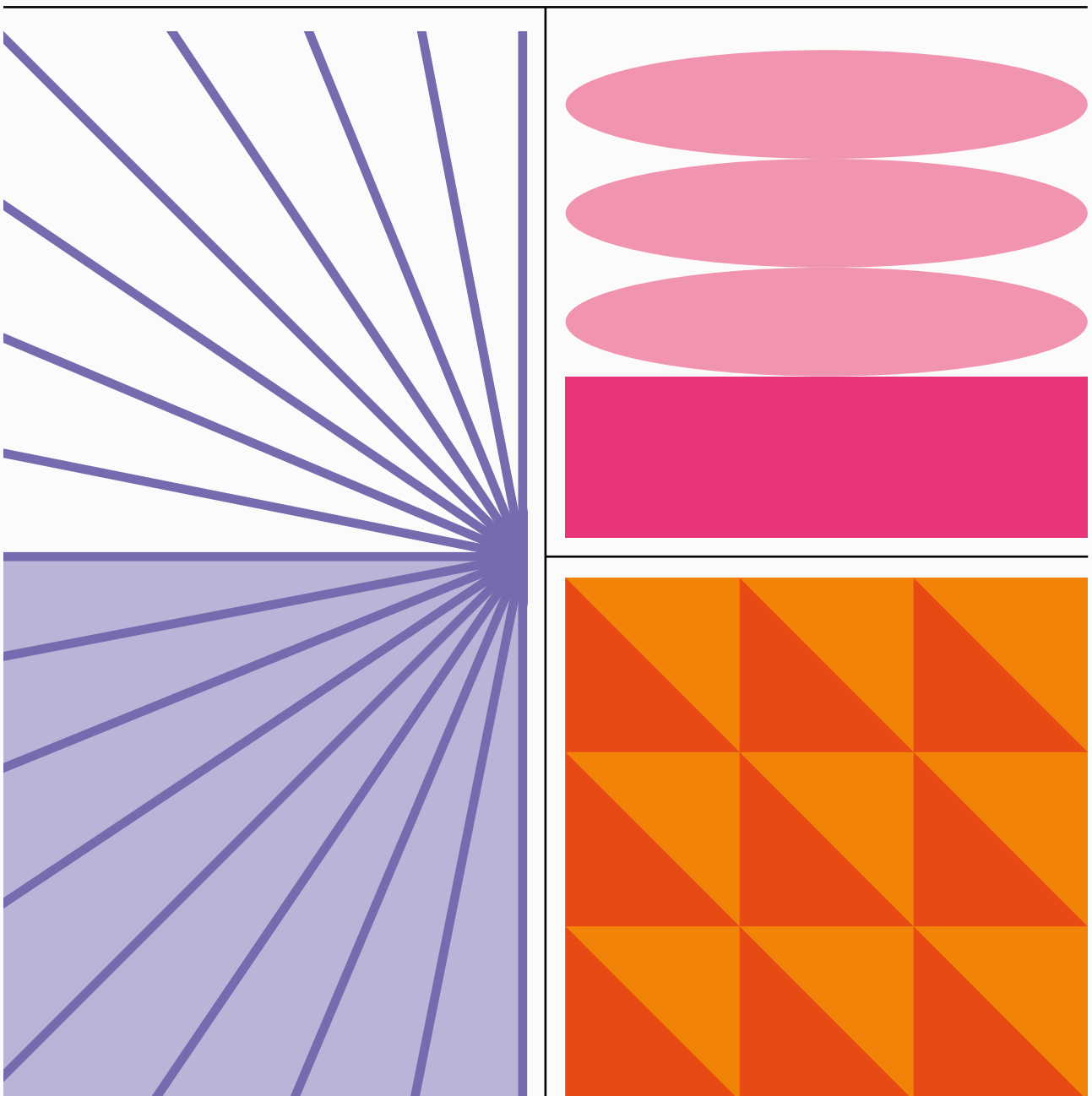


HOW TO SET UP AN OSHUB: THE SOCIAL BUSINESS MODEL CANVAS

02

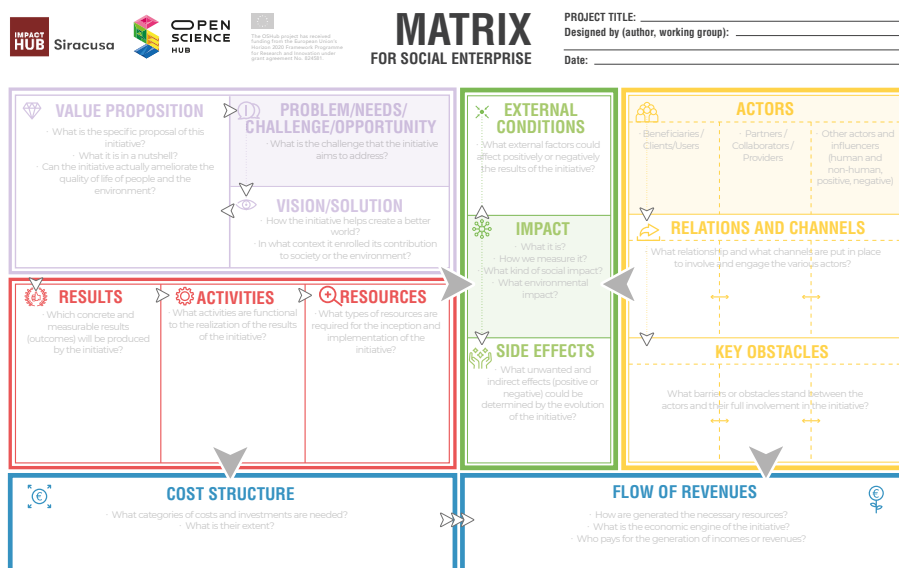


The OSHub Social Business Model Canvas (SBMC) is a matrix that supports users building a sustainability plan, while evaluating the economic feasibility and envisioning the impact of the OSHubs. It guides OSHub to follow a logical process to identify and define their value proposition, results, actors and stakeholders involved, human and economic resources as well as sustainability, impact, and any obstacle or external conditions that OSHubs may encounter.

The OSHub SBMC is a living tool that can be modified and adapted anytime to the reality of the user’s circumstances, making it very flexible and powerful in that regard.

Visually, it presents different boxes all logically connected with arrows, in order to verify the consistency, efficacy and efficiency, as well as the feasibility of the plan. A special feature is that each box is differentiated by a colour to facilitate the logical reasoning of users. Even though the arrows indicate a path for filling in the matrix, their orientation can change, based on the level of knowledge of the user, as well as, the type of reasoning applied. Each section of each box is filled with questions that can help the user to understand the path to follow and the kind of information to collect for that specific section.

The canvas works with an input-output process through which the user organises information and, in the end, obtains a sustainable, feasible and efficient plan. The timeline of this plan is heavily related to the needs of the user and the nature of the initiative/project to be put in practice.



Source: elaboration based on references on the logical framework www.logframe.eu and on the business model canvas www.businessmodelgeneration.com including additional versions proposed by Danielle Olson and others.

Profit No profit Hybrid Other _____

interreg
 INTERREG
 EUROPEAN UNION
 Powered by ERDF and EAFRD

2.1 Yellow Box: Actors, Key Obstacles, Relations and Channels

An important part is the identification of target/beneficiaries, and in general stakeholders, necessary to support the project idea or the initiative. This block is divided into three sections which help the user to identify who is involved or should be involved, how they plan to ensure this involvement and what kind of obstacles can interfere with the engagement process.

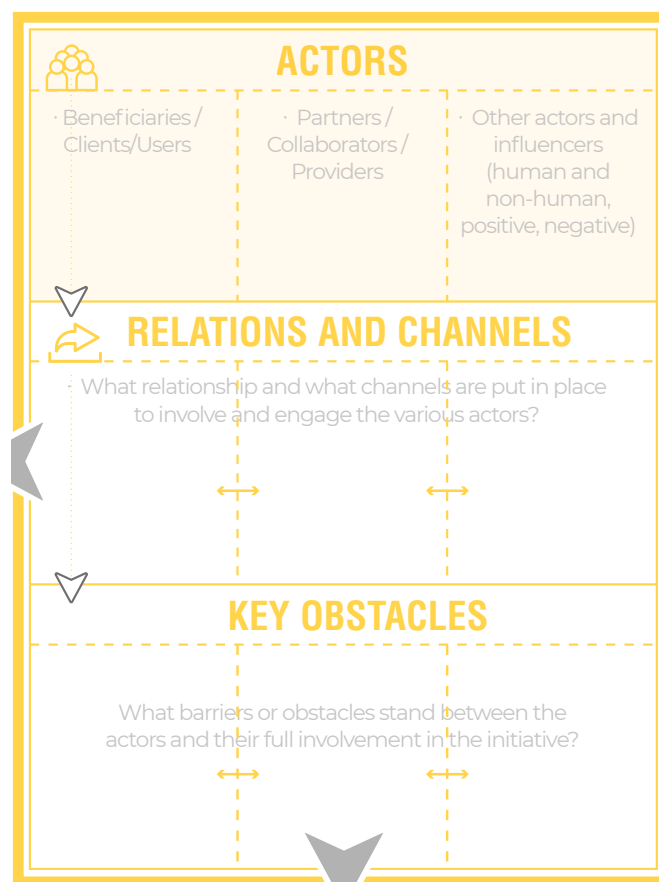


Figure 2.1: Yellow Box of the OS Hub Social Business Model Canvas.

2.1.1 Actors

The first part asks the user to differentiate the direct beneficiaries of the project idea from those who are in one way or another useful to the implementation of the activities and the achievement of the goals (ie. providers, collaborators, partners and other influencers).

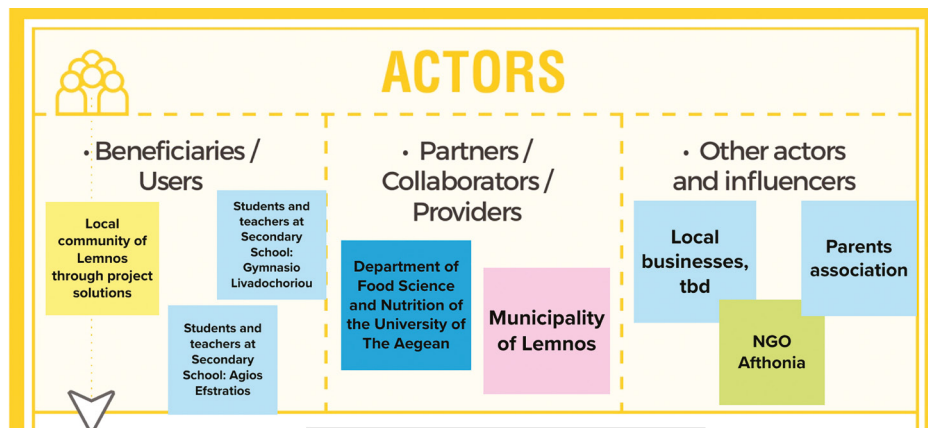


Figure 2.2: Yellow Box – example for the “Actors” section, from OSHub-GR.

2.1.2 Key Obstacles

The second part of the section asks the user to write down what possible limitations they may encounter in the process of actor involvement. This section forecasts one crucial element of the social business canvas which is the evaluation of risks and problems. Reflecting about potential issues will help the user to produce problem-solving strategies in advance.

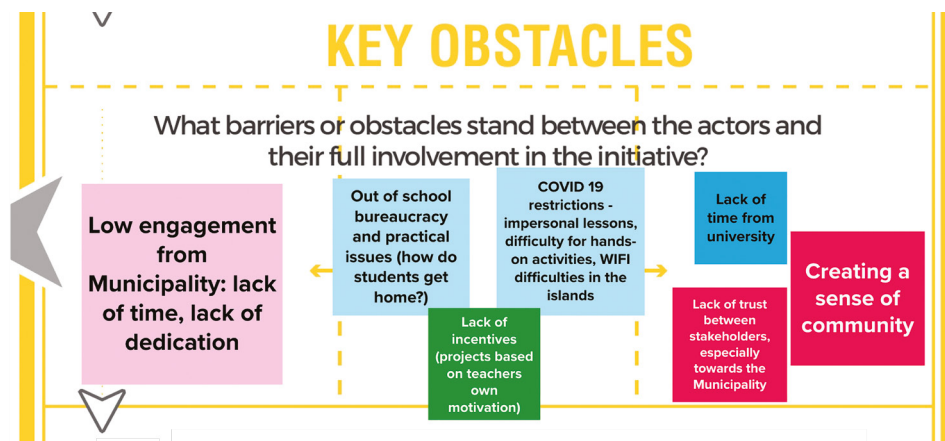


Figure 2.3: Yellow Box – example for the “Key Obstacles” section, from OSHub-GR.

2.1.3 Relations and Channels

The last section is dedicated to the explanation of the process of involvement of the actors. This section is the pillar of the social business canvas because it focuses on the “workforce” necessary to carry out the project idea or initiative.



Figure 2.5: Example of the Yellow Box of the OSHub Social Business Model Canvas, from OSHub-GR.

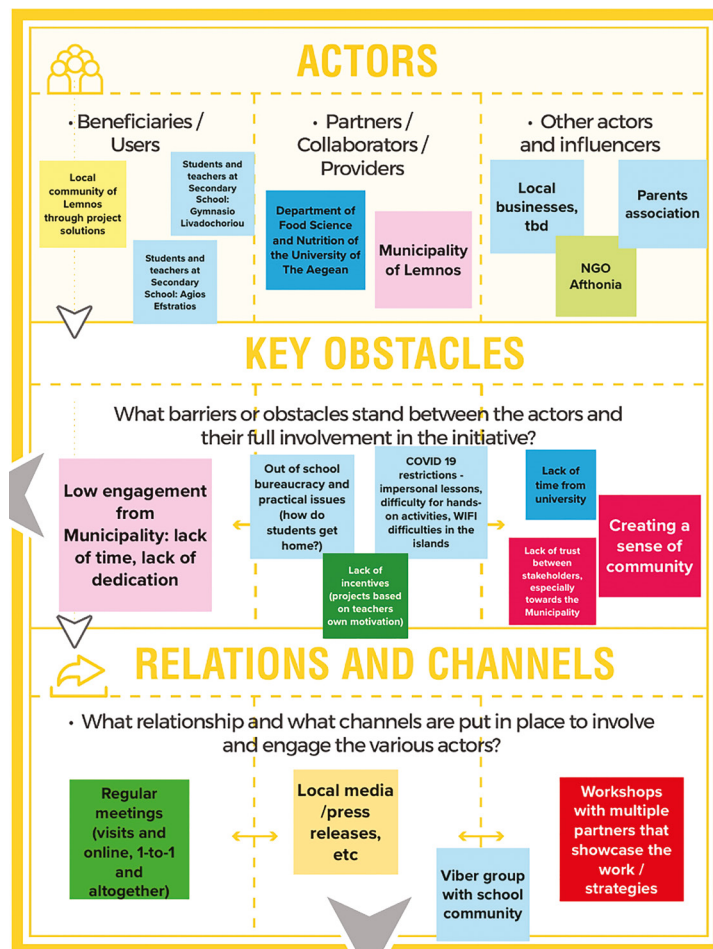


Figure 2.4: Yellow Box – example for the “Relations and Channels” section, from OSHub-GR.

2.2 Red Box: Results, Activities, Resources

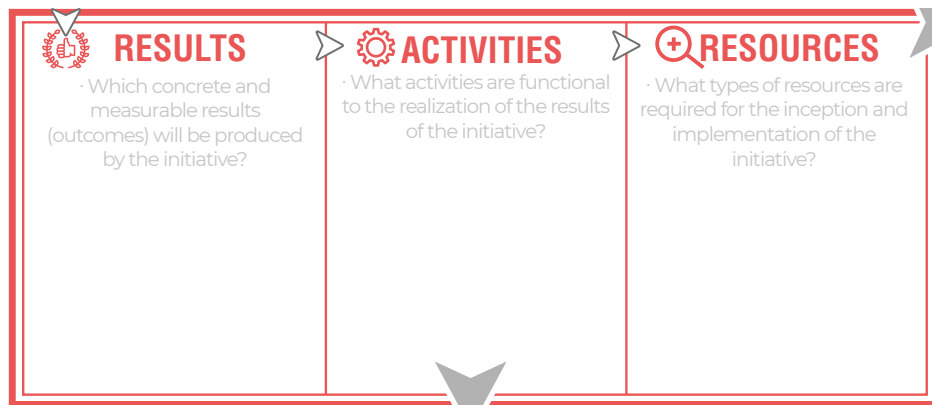


Figure 2.6: Red Box of the OSHub Social Business Model Canvas.

It is important to work on describing the kind of results, challenges, activities and resources OSHubs have identified or developed to realise the results. The results represent the specific objectives in which the value proposition, that is to say, the main mission of the OSHub, is broken up.

The reason why these three elements are part of the same box is threefold. First, it is important that these elements have a strict logical and coherent connection between each other. Specifically, results and activities need to be logically interrelated to obtain a feasible and efficient plan. Considering the different scales of the SBMC, if the value proposition represents the main goal/objective to realise, the results are the more "practical" and specific goals to achieve. In fact, depending on the inductive or deductive approach of the user, the canvas could be started from this box instead of the violet one or vice versa.

2.2.1 Results

Results have to be measurable, and this characteristic is important to obtain the feasibility and, later, to determine the costs.

In the section dedicated to results there is a question which is very similar to the one discussed in the value proposition, regarding social and environmental challenges. Following the scale scheme, the results may share the main challenge or address "sub-challenges" that are related to the main one.

RESULTS

- Which concrete and measurable results (outcomes) will be produced by the initiative?
- Which specific social or environmental challenges will be addressed?

1. Complete pilot school projects with a robust evaluation shared with schools and stakeholders
2. Establish strategic and long-lasting partnerships with the stakeholders
3. Establish stable collaboration with the DIP (Department de l'Instruction Publique)
4. Install a space dedicated to schools and youngsters in our Fab Lab with the PP furniture

1. Water quality
2. Glacier
3. Importance of fundamental research
4. Mobility

Figure 2.7: Red Box – example for the “Results” section, from OSHub-CH.

2.2.2 Activities

The activities refer to the practical action that will be developed and implemented in order to achieve the results. As for the results, activities also have to be measurable, so that one can obtain feasibility and to determine the costs.

ACTIVITIES

• What activities are required to produce the results for the initiative?

1. Organise 2 co-creation sessions per school in Dec and Jan	2. Build water stations with the students and stakeholders	3. Analyse data and share it	4. Evaluation of the project
1. Organise 2 or 3 meetings with all stakeholders	2. Involve them timely as agreed	3. Keep them informed	
1. Official meeting in Jan-Feb after the COVID crisis	2. Make Open Science Hub an official DIP activity		
1. Develop furniture models with Glitter (PP Geneva)	2. Fabricate furniture	3. Maintain the space suitable for schools	

Figure 2.8: Red Box – example for the “Activities” section, from OSHub-CH.

2.2.3 Resources

The resources are the elements that allow you to concretize the activities, and can range from human resources to materials, equipment, facilities, etc. It is key to define the resources as clearly and specific as possible in order to facilitate the identification of costs.

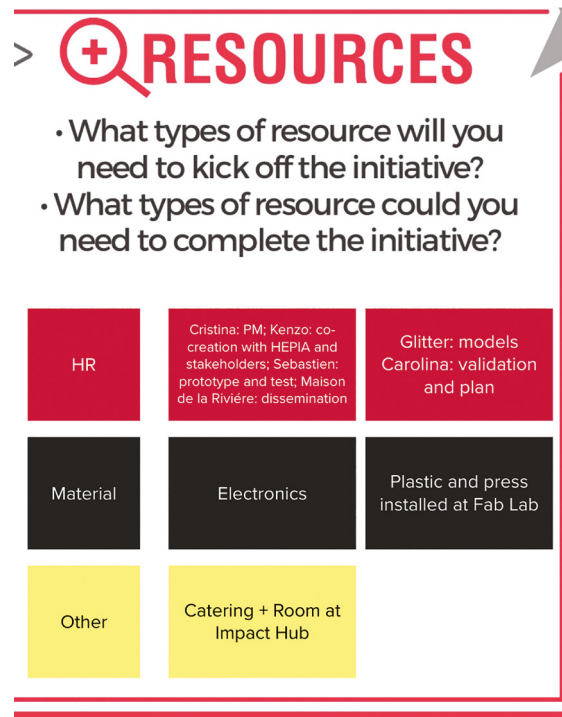


Figure 2.9: Red Box – example for the “Resources” section, from OSHub-CH.

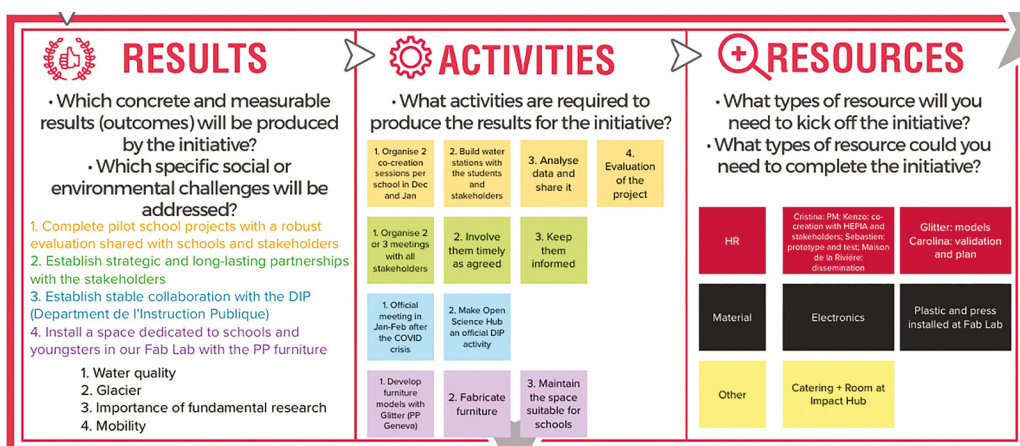


Figure 2.10: Example of the Red Box of the OSHub Social Business Model Canvas, from OSHub-CH.

2.3 Violet Box: Value Proposition, Problems/Needs/Opportunity

The value proposition is the beating heart of the Social Business Canvas because it represents the main objective behind any social business, or business in general, that allows the project idea to live and breathe. Identifying the value proposition is also important because it is the beginning of the logical process to regulate the Social Business Canvas. In the end every box needs to be coherent and logically related to the value proposition, because every block is the piece of the puzzle that composes the big picture, which is in fact the value proposition.

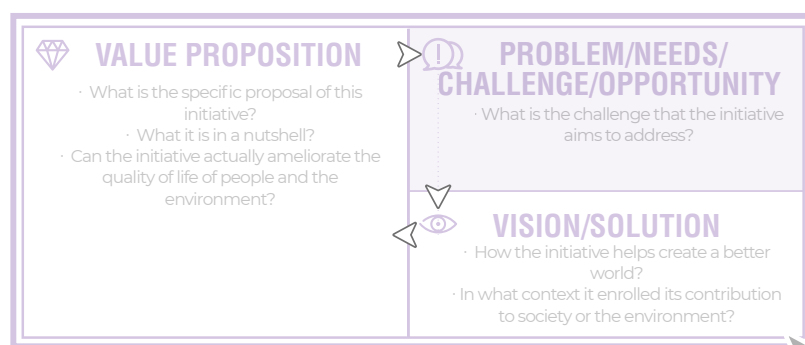


Figure 2.11: Violet Box of the OSHub Social Business Model Canvas.

2.3.1 Value Proposition

The section on the block dedicated to the value proposition presents some questions that help the user, not only to identify the specific proposal of the initiative, but also to identify the social and environmental purposes of the initiative, therefore highlighting the innovative and socially driven aim of the social business canvas compared to the traditional version.

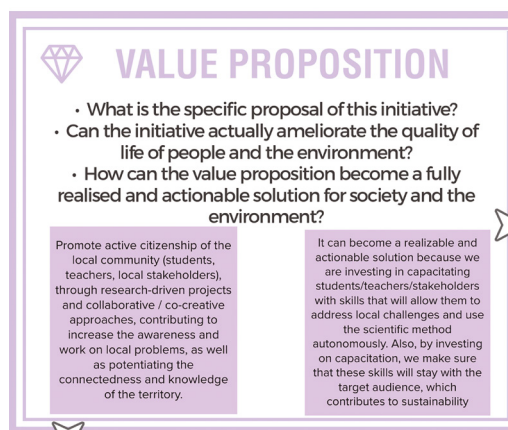


Figure 2.12: Violet Box – example of the “Value Proposition” section, from OSHub-PT.

2.3.2 Problems/Needs/Opportunity

Because the Social Business Canvas is an engine specifically designed to support business ideas and initiatives that have a social purpose, the tool itself proposes to integrate the section about the main challenge with the Sustainable Development Goals set up by the United Nation to be achieved by 2030. Similarly, in this case the aim is to facilitate the thinking process of the user in the identification of the challenges.



Figure 2.13: Violet Box – example of the “Problems/Needs/Opportunity” section, from OSHub-PT.

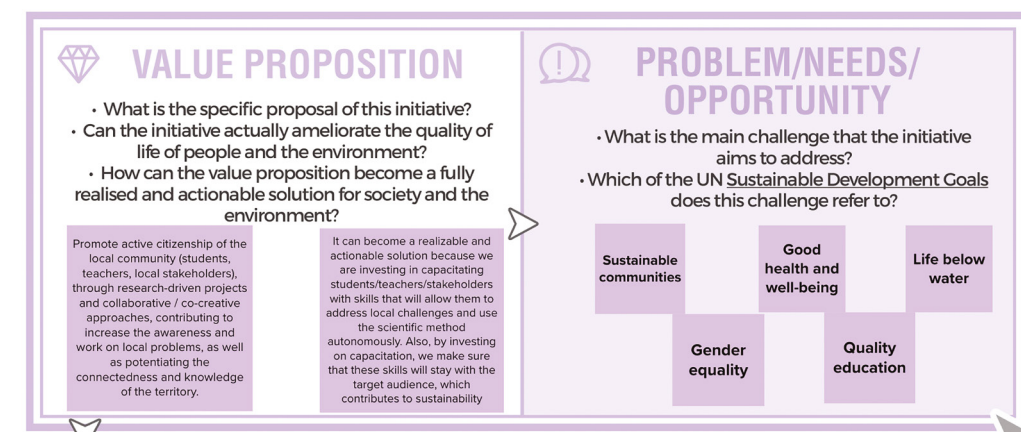


Figure 2.14: Example of the Violet Box of the OSHub Social Business Model Canvas, from OSHub-PT.

2.4 Green Box: External Conditions, Impact, Side Effects

The section about Impact is one of the most significant elements of the OSHub SBMC. It comes from the traditional logical framework used in project cycle management and asks the partners to reflect on the kind of impact they aim to produce.

As for the logical framework, in this section impact is not only divided in local, social and environmental but, most importantly, is related to the identification of measurable indicators to assess the level of impact produced. Furthermore, partners are led to think about what side effects and external conditions can influence and “impact” OS Hubs, either positively or negatively.



Figure 2.15: Green Box of the OSHub Social Business Model Canvas.

2.4.1 External conditions

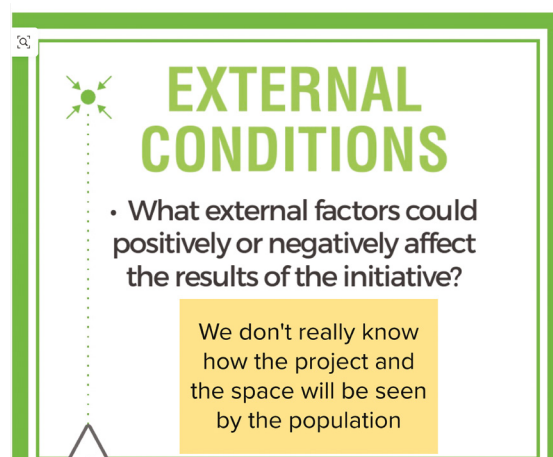


Figure 2.16: Green Box – example for the “External Conditions” section, from OSHub-FR.

2.4.2 Impact

In this section the user is asked to reflect on what impact they want to produce and size of this impact. In fact, one of the first questions is to explain how this impact is going to be measured. This block is strictly connected to other ones that we described above. The measurability of the impact depends on the measurability of the results and activities and on the identification of the identity and quantity of the actors involved. It is also related to the value proposition and, specifically in what way it will impact the local and, in percentage, the global community.

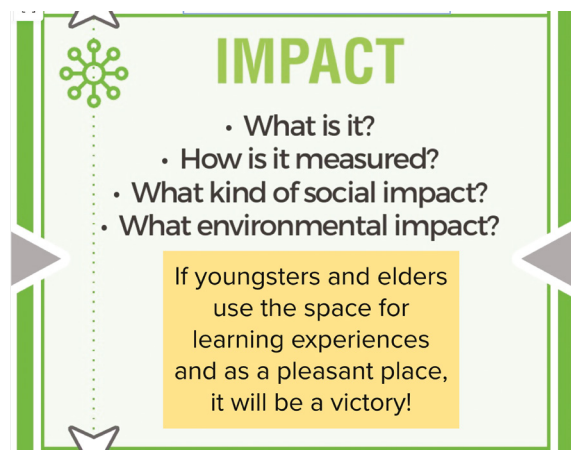


Figure 2.17: Green Box – example for the “Impact” section, from OSHub-FR.

2.4.3 Side effects

The section of side effects really addresses the positive or negative effects that the project or initiative may produce involuntarily.

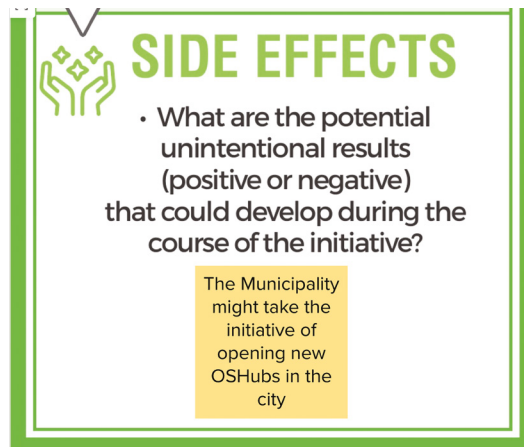


Figure 2.18: Green Box – example for the “Side Effects” section, from OSHub-FR.

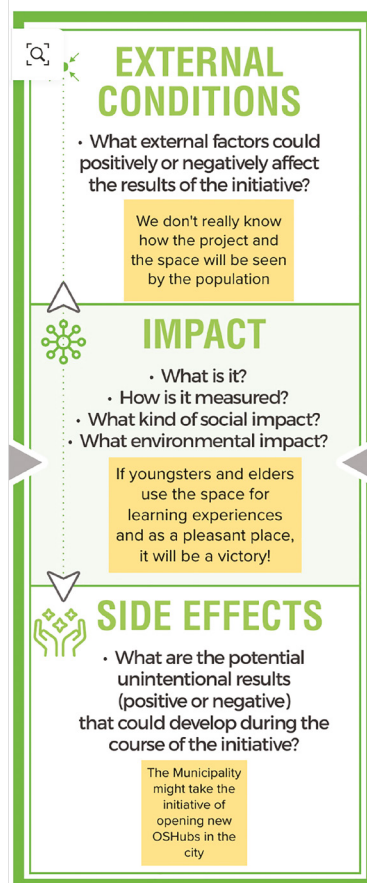


Figure 2.19: Example of the Green Box of the OSHub Social Business Model Canvas, from OSHub-FR.

2.5 Blue Box: Cost Structure and Flow of Revenues

The last block is dedicated to numbers. Once all the other boxes are filled in, the last step is to draft a financial plan that is able to sustain the implementation of the project or initiative, on one side, and to envision a sustainability plan, on the other.

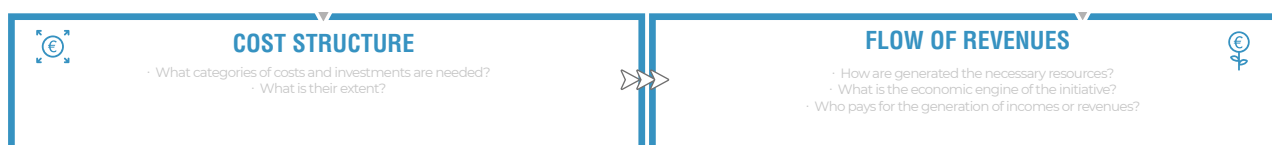


Figure 2.20: Blue Box of the OSHub Social Business Model Canvas.

This section of the OSHub SBMC has been also translated into a template that is depicted in the table below, in which partners are invited to reflect on the source of revenues and how the costs are split.

A) Turnover	2021	2022	2023
Sales of goods and services	- €	- €	- €
Grants	- €	- €	- €
Other income	- €	- €	- €
Total A	- €	- €	- €
B) Production costs			
Purchases of raw materials, consumables, consumables and goods	- €	- €	- €
Services:			
<i>Utilities and facilities</i>	- €	- €	- €
<i>Transports</i>	- €	- €	- €
<i>Rents</i>	- €	- €	- €
<i>Consultancies</i>	- €	- €	- €
<i>Marketing</i>	- €	- €	- €
<i>Training</i>	- €	- €	- €
<i>HR</i>	- €	- €	- €
<i>Travels and events</i>	- €	- €	- €
Tangible assets depreciation	- €	- €	- €
Intangible assets depreciation	- €	- €	- €
Overhead costs	- €	- €	- €
Total B	- €	- €	- €
Operating activity (A-B)	- €	- €	- €
C) Financial management			
Cost of interest	- €	- €	- €
Other financial costs	- €	- €	- €
Totale C	- €	- €	- €
Earnings before taxes	- €	- €	- €
Direct taxes	- €	- €	- €
Net profit	- €	- €	- €

Figure 2.21: Template used to build the costs and the flow of revenues.

2.5.1 Cost Structure

The first section is related to the cost structure which is strictly connected to the red box and, in particular, to the resources and activities. This section asks the user to provide costs for all the elements that are needed to carry out the activities. It also asks the user about the extent of the costs and investments, adding to the reasoning process the variable of time. This will help the user to organise the funding and the project revenues and expenses.

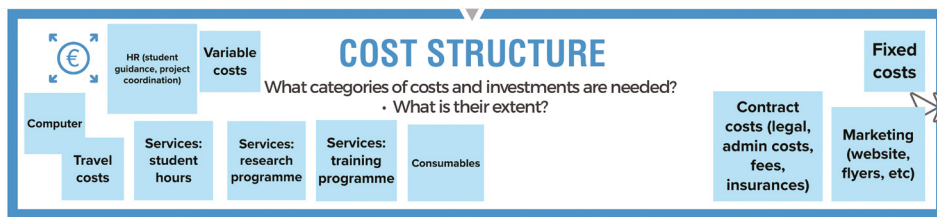


Figure 2.22: Blue Box – example for the “Cost Structure” section, from OSHub-NL.

2.5.2 Flow of Revenues

To build a plan that is able to be self-sustaining is of strategic importance. As such, this second section relates to the flow of revenues, which is especially important when thinking about sustainability. Most particularly, it asks the user to reflect about the cycle of funds, and from where and from whom the money comes from.

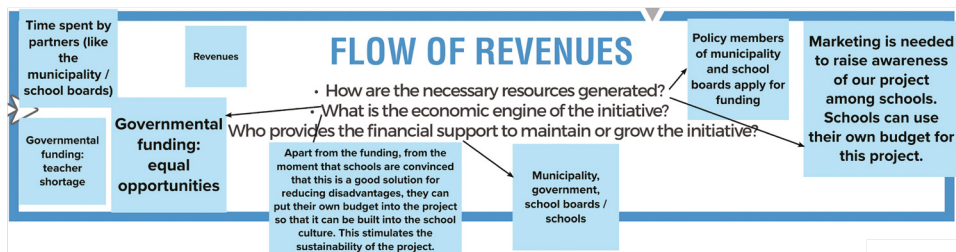


Figure 2.23: Blue Box – example for the “Flow of Revenues” section, from OSHub-NL.

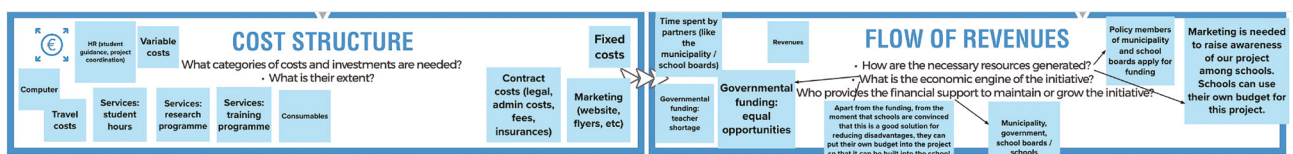


Figure 2.24: Example of the Blue Box of the OSHub Social Business Model Canvas, from OSHub-NL.

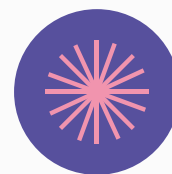
2.6 Co-creation tools to assist the OSHub Social Business Model Canvas journey

The OSHub SBMC actualises an idea into a high impact, working, feasible concept, allowing the user to combine all aspects required for its success and identify the channels and resources required to facilitate it. SBMC is built on co-creation and innovation within the local context, and OSHub has gathered a number of tools to assist users with this process, to ensure the best use of the canvas is gained.

These tools can be used individually or in tandem with one another. They should be revisited throughout both the planning and implementation process along with involved stakeholders as various aspects may change as the user moves through the project development journey. It is important to note that each tool can be helpful for multiple sections of the SBMC.

TOOL

PRIORITISING IDEAS AND ASSUMPTIONS MAPS



SMBC SECTION Violet

OBJECTIVE Decide on an initial project concept or topic to pitch to schools (or other relevant stakeholders) as a challenge-based starting point.

REASONS TO USE

- Brainstorm meaningful topics and challenges being faced by the schools you wish to engage and/or by their community.
- Brainstorm possible projects that overcome this topic/ challenge, and consider their feasibility vs impact.
- Explore assumptions of the hub and external stakeholders regarding their understanding of the school's relationship with each challenge topic.
- Identify areas where greater research is required to remove bias.
- Decide on three different projects to pitch to the school.

INTRODUCTION TO THE TOOL This tool is a set of three maps that assist the hub in identifying possible challenge topics they may like to design their project around in collaboration with local schools, while understanding their own assumptions of the topic.

- The first map asks for answers to the question: "What issue have we seen that is important to our audiences?"
- The second map asks participants to map topics against perceived importance and feasibility.
- The third map encourages participants to think about what assumptions have to be made for the top rated ideas from the previous map before preparing a pitch to schools.
- At the end of using this tool, three project topics will be selected to pitch to schools.

HOW TO USE This tool should be used in a session lasting no more than 45 minutes, and can be run internally only or together with a limited number of external stakeholders.

Move through each map in sequential order (starting with the first and ending with the third). In the 45 minutes only 5 minutes should be given to adding sticky notes to each map. The rest of the time should be used for open discussion. Prompts are included on the axes of this map to encourage a focus on Open Schooling.

The third map may open up questions about the topic where more research is required to confirm or deny assumptions. This may happen in initial discussion with the school(s).

Note: To avoid bias in the second map, participants should copy and complete their own grid individually before deciding to place the ideas on the shared map.

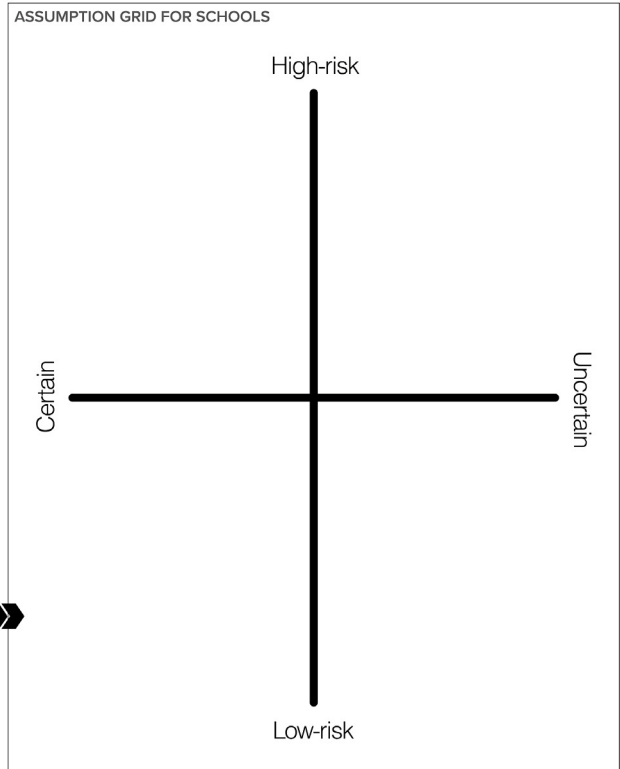
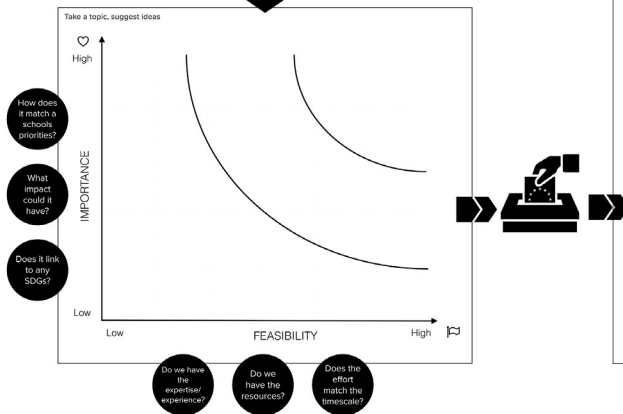
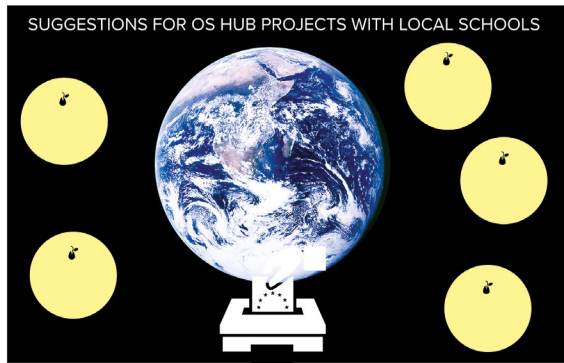


1

1



Now we will use a relevant challenge topic for us to decide what to attempt to engage schools with. Before looking at every stakeholder, first we must seek the buy-in from schools. After renaming the stickies with 3-5 topics your facilitator will run a vote to choose a top topic. After this decision is made move to the next section in the outline to brainstorm ideas around the topic.



2



Use this to map to channel some ideas leading to a vote on the top 3 ideas to bring to a school. Think about the importance of the project to a school, to us, to other local stakeholders. Think about how feasible the idea is - is it doable given all the factors? Use the questions to help place your ideas, but keep your thoughts free to come up with suggestions surrounding the topic. After 15 minutes the facilitator will start a vote and you can choose your top 3 ideas. The overall top 3 will lead to the next task.

3

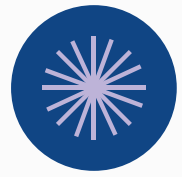


What do you think you know about school interest about the topic? What relevant assumptions are you confident about when it comes to teachers and students (**CERTAIN**)? What relevant assumptions are you not confident about (**UNCERTAIN**)? What evidence do you have or need to back the assumptions up? Imagine moving forward with an assumption - is it easy to act on (**LOW RISK**) or complicated to act on (**HIGH RISK**)?



TOOL

STAKEHOLDER MAP TEMPLATE



SMBC SECTION Yellow, Blue, Red

OBJECTIVE Collate a longlist of diverse local stakeholders and identify subsets of key stakeholders for agreed project concepts/topics. Choose key stakeholders to approach for the local OSHub Management Board.

REASONS TO USE

- Identify all possible stakeholders of the project and ensure all contact information is available as required.
- Assign categories to each stakeholders so that they may be easily filtered through
- Identify those who may be beneficial to the OSHub management board
- Use to assist with understanding available resources and possible flows of revenue

INTRODUCTION TO THE TOOL The Stakeholder Map provides a space where all possible stakeholders (both internal and external) of the project can be listed and categorised appropriately, allowing for simple selection when choosing levels of participation of each actor.

- The template offers proposed categories that will likely be helpful for an OSHub to use when discussing stakeholders.
 - The template is easily accessible and adaptable to suit the needs of the hub and include as much information as deemed necessary for each stakeholder.
-

HOW TO USE The core team should discuss all possible stakeholders, whatever level of participation they may have, and complete the template with the required information for each stakeholder. The template can be edited to include more or less information, or to request assignment of a specific set of possible responses (eg. Sector: Choose from Industry, Academia, Civil Society, Informal Education-related entity etc).

This objective does not necessarily need to be completed as a real time exercise and instead existing internal and external key stakeholders can add to the list. Therefore it is useful to consistently revisit the list.

The spreadsheet can be filtered by type, speciality, distance or any other number of properties that might be deemed useful.

Note: It is important to recognise any bias to a particular stakeholder type and actively address this in seeking out diversity.

TOOL

STAKEHOLDER ANALYSIS



SMBC SECTION Yellow, Blue, Red

OBJECTIVE Prioritise key stakeholders identified using the STAKEHOLDER MAP TEMPLATE and decide which to engage for the project or topic.

REASONS TO USE

- To identify the influence each stakeholder may have over the project
- To understand the level of communication and engagement required for each stakeholder due to their influence and interest/availability
- To ensure time and resources are allocated correctly to ensure engagement levels are met
- To envision and decrease possible engagement barriers that may arise during the project

INTRODUCTION TO THE TOOL Stakeholder analysis allows the user to clearly identify the level of engagement that is required for each key stakeholder based on the influence they have on the project, as well as perceived interest of the topic and availability to participate.

- The main template consists of a grid with the x axis labelled *interest/availability* and the y axis is labelled *influence*.
- Each stakeholder is placed on the grid depending on their interest/availability level vs influence level. This tool splits communication priority left and right with those on the left seen as a lesser priority and those on the right as higher priority.
- The grid is separated into four boxes which are labelled various degrees of engagement: *Justify to Them; Monitor Them; Actively Engaged; Help Them Engage*
- Depending on the box in which the stakeholder is placed on the grid determines the extent of which they should be engaged in the project, and therefore the method and resources required to ensure successful engagement.
- In the template, the user will find an explanation of each engagement level.

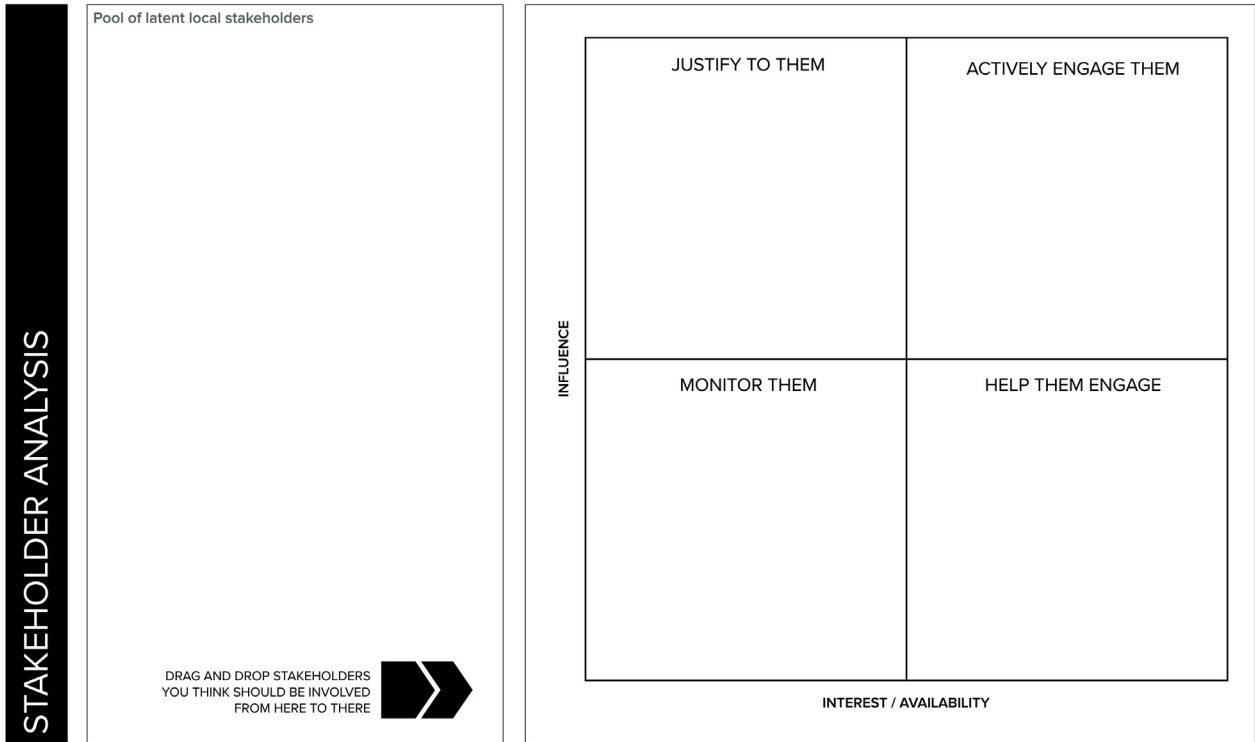
As this tool is used for analysis of key stakeholders, it is important to remember that communication with all will be important, however this communication will likely differ per stakeholder depending on the outcome of this tool.

HOW TO USE Identify key stakeholders from the 'STAKEHOLDER MAP' list and place them into the large box on the right of the tool. The core team should discuss their thoughts, perceptions and knowledge on the influence vs interest/availability of each stakeholder, and place them on the grid accordingly.

It may come to light that there is more knowledge on one stakeholder than another, prompting further research. Update the tool once necessary research has been carried out.

If new stakeholders are added throughout the process or previous engagement levels assigned change, revisit and update the tool.

3



1

This can be created at the very beginning before approaching anyone (including schools) to list all your known local stakeholders OR knowing the ideas you have you can choose to put only relevant stakeholders here.

The stakeholders can be dragged and dropped onto the next map (Influence vs. Interest) to help decide who you need to engage as well as schools to make the OS Hub project work.

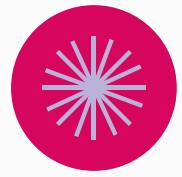
2

If the schools you interviewed are onboard for the project idea(s) you can move forward with mapping other stakeholders. This is using your knowledge and other stakeholders knowledge of each other to map influence and interest in order to think about levels of communication and engagement. The grid is divided into:

- JUSTIFY TO THEM:** Those who you believe will have influence over the project in some way. You will need to justify to them the importance of the project to schools and other stakeholders in the community.
- MONITOR THEM:** Those who you believe will not be engaged with the project but may be worth looking at what they are doing in case they start moving in interest or importance during the project.
- ACTIVELY ENGAGED:** Those who you believe have great influence and would be very interested in the project. These are a priority to engage.
- HELP THEM ENGAGE:** Those who you believe would be very interested in the project but wouldn't normally engage or be able to engage. This section can (if desired) be used to highlight underrepresented stakeholders who could have greater influence, but only with your help. In that last case they are a priority to engage too.

TOOL

PARTICIPATION MAP



SMBC SECTION Yellow

OBJECTIVE Decide on the level of participation of your key stakeholders (actors).

REASONS TO USE

- Identify stakeholder participation level
- Highlight communication channels required
- Identify whose input is required for certain milestones

INTRODUCTION TO THE TOOL The Participation Map provides a clear overview of the level of participation of your stakeholders. This map can be used as a starting point for who should be recruited for the project on the co-creation journey and their role.

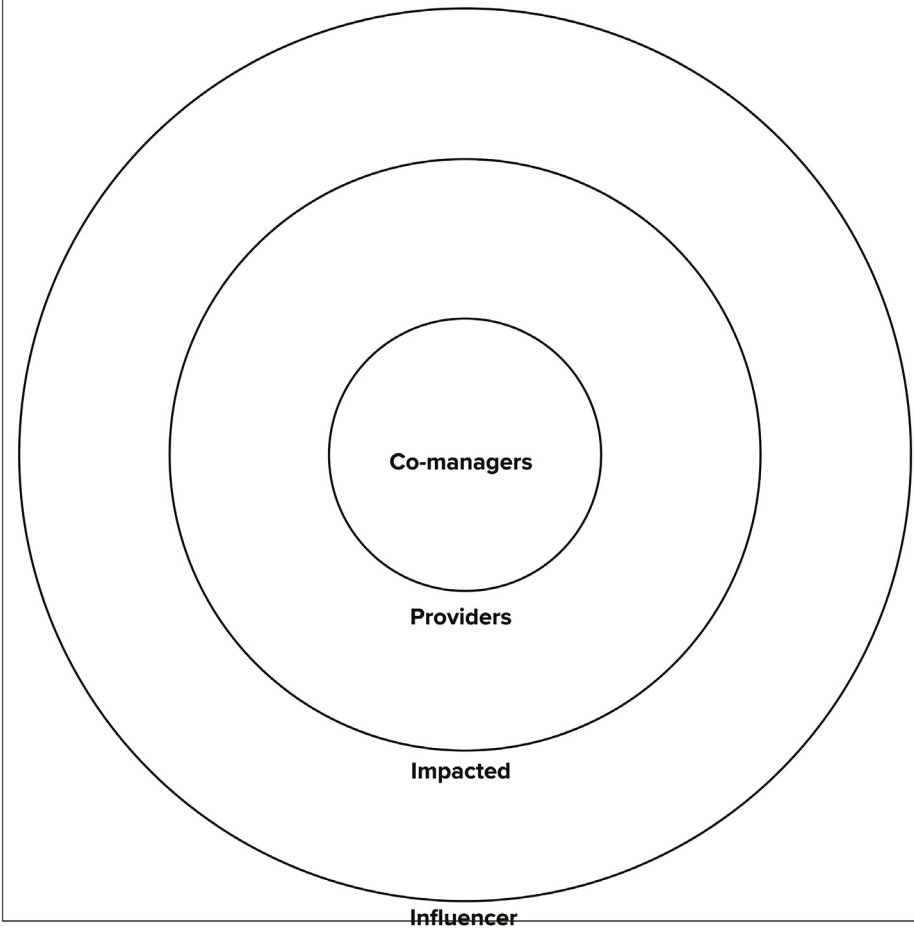
- The template consists of four (this may be adapted) concentric circles, each larger than and encasing the last. Each circle is given an 'actor role', and moving outwards from the centre, a stakeholder's participation level decreases.
- The actors located in the centre are those most involved in the project (Eg, Actors identified as users/beneficiaries) who will have a stake in all decisions made.
- As you move out from the centre, the necessity of actors being involved in decision making decreases, as does their stake in decisions.
- Discuss this map with your stakeholders, as they may feel they wish to participate more or less in certain areas.

HOW TO USE Place each stakeholder within the map depending on their participation level. Use the category descriptions below to help you make your choice. Discuss this choice with your team.

The template should be revisited after the yellow box is filled. Possible obstacles or complicated engagement channels may alter the level of participation by a stakeholder, thus changing their role.

5

Participation Map



Co-managers are those involved in co-managing the solution (internal personnel/ pro-active stakeholders/ beneficiaries)

Providers are those that are strategic stakeholders and technical expertise who could help co-produce or co-design the project.

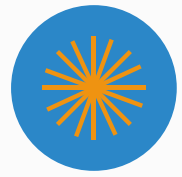
Impacted are those who could offer advice and/ or are impacted by the project outcomes

Influencers are those that might obviously influence the success of a project such as policy makers but also think about service providers that are thought of less often, but key. For instance what basic services are being relied on? Think of transportation, caterers, cleaners, technical support and more.



TOOL

EMPATHY MAP



SMBC SECTION Yellow

OBJECTIVE Understand the needs and motivations of each prioritised stakeholder before pitching involvement in an initial concept or topic to them.

REASONS TO USE

- Consider the wants and needs of collaborating partners.
- Identify areas of most importance that can be focused on when pitching the idea.
- Identify possible obstacles the partners may face, and means by which the project can minimise those obstacles.
- Develop a pitch that is effective, impactful and engages the target partners.

INTRODUCTION TO THE TOOL Empathy Maps ask hubs to take the time to empathise with partners by considering how partners interact with a topic or environment. This will help with understanding constraints and opportunities for deep collaborations, while providing a strong starting point for new partner relationships.

- The template consists of six sections, which prompt users to consider how the partner may think and feel, what they may see and hear, what they may say and do, and what they may gain or lose during their involvement in the proposed project.

HOW TO USE Introducing and completing this exercise should take no more than 20 mins and should be used by those who are going to be engaging with partners in initial discussion and follow up meetings.

Each area of the template should be discussed, and then results from this discussion placed on the map using sticky notes. The map can be used for one or multiple stakeholders, however sticky notes should then clearly state which stakeholder they refer to.

A facilitator may want to give time for the map twice, broken up with an empathy exercise or simple scenario to consider to maximise output.

2

EMPATHY MAP
Identifying stakeholder behaviour

Project name:

Stakeholder:

Designed for:

Designed by:

Day: Month: Year:

Version:

what does (s)he

THINK & FEEL?

What really counts
Major preoccupations
Worries & aspirations

what does (s)he

HEAR?

What friends say
What the boss says
What influencers say

what does (s)he

SEE?

Environment
Friends
What the market offers

what does (s)he

SAY & DO?

Attitude in public
Appearance
Behaviour towards others

PAINS

fears
frustrations
obstacles

GAINS

"wants"/needs
measures of success
obstacles

Designed by
EVENT DESIGN *collective*
2018 EVENT DESIGN COLLECTIVE GMBH

EVENT DESIGN USING THE EVENT CANVAS™ METHODOLOGY
www.eventcanvas.org

version 20180621
Source: adapted from XPLANE

For OS Hub a key goal is to explore open schooling principles with local school stakeholders. While all stakeholder type analysis is important, the start of the journey relies on the investment and interest of students in your school(s).

1

Everyone can work on this one map together. On your stickies make sure to indicate if you are talking about a teacher or student.



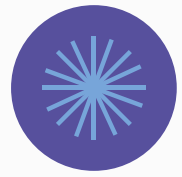
Now you should have a good way of engaging schools empathetically to probe the assumptions you have made in order to discover if one or more of your ideas are feasible.

After these conversations you will need to revisit the assumption grid and readjust it before moving on to identifying key players that may be needed to co-create a project.



TOOL

PITCH MAP



SMBC SECTION Yellow

OBJECTIVE Develop a pitch for a specific stakeholder based on their needs, interests and possible role in the project.

REASONS TO USE

- To highlight the needs and wants of a stakeholder that are relevant to the project.
- To decide on the role the stakeholder will play – why are they being engaged and what can they offer?
- Develop a pitch that is effective, impactful and engages the target partners.

INTRODUCTION TO THE TOOL *Note: This tool builds on the EMPATHY MAP, which should be completed first before using this tool.*

Using knowledge gained from the empathy map, the pitch grid allows the user to clearly list the interests and needs of the stakeholder to the useful qualities and resources they possess which makes them a beneficial stakeholder. From this, an elevator pitch of the project for a stakeholder can be developed.

- The template consists of a grid with four quadrants labelled; Qualities; Interests; Offers ; Needs.
 - When filled out, it will be used to ensure the elevator pitch developed is correctly catered toward the stakeholder you wish to engage.
 - The pitch is the first impression stakeholders will have of your project, and therefore it is very important it is impactful on each stakeholder and that they are inspired to work on the project. Otherwise the project may miss out on valuable skills, knowledge and resources.
-

HOW TO USE Using the same frame of mind as used in the empathy map, build the list of qualities, interests, offers and needs within the tool. Remember possible bias, and ensure correct research is carried out if knowledge is lacking on a particular stakeholder.

Spend 15 minutes to build the list and consider a 'pitch script'.

The tool can be repeated for as many stakeholders as is deemed necessary.

EMPATHY MAP

Identifying stakeholder behaviour

Project name: _____ Stakeholder: _____ Day: _____ Month: _____ Year: _____
 Designed for: _____ Designed for: _____ Status: _____

what does (s)he

THINK & FEEL?

What really counts
Major preoccupations
Worries & aspirations

what does (s)he

HEAR?

What friends say
What the boss says
What influencers say

what does (s)he

SEE?

Environment
Friends
What the market offers

what does (s)he

SAY & DO?

Attitude in public
Appearance
Behaviour towards others

PAINS

fears
frustrations
obstacles

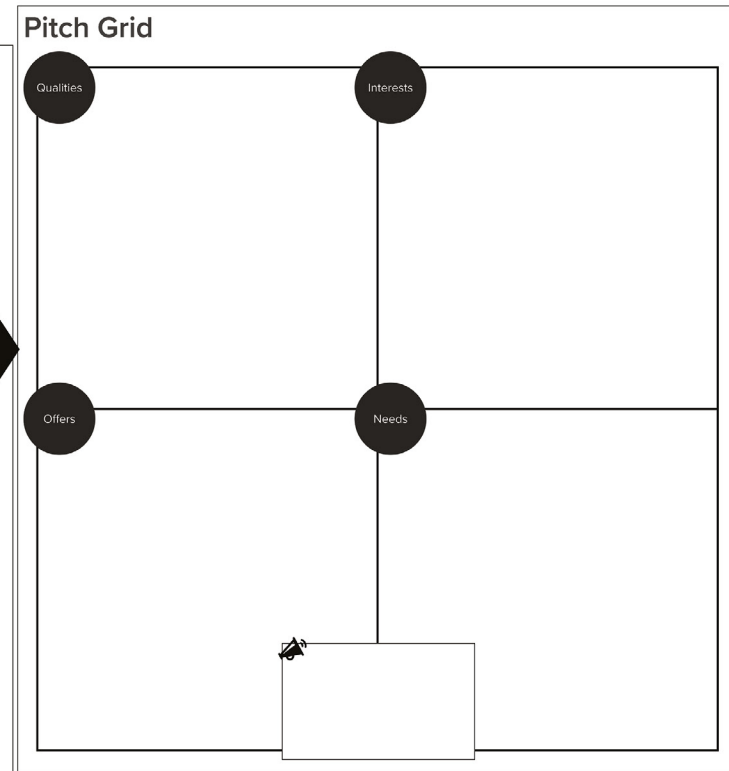
GAINS

"wants"/needs
measures of success
obstacles

Designed by **EVENT DESIGN** *alliance*
 2019 EVENT DESIGN COLLECTIVE GMBH

EVENT DESIGN USING THE EVENT CANVAS™ METHODOLOGY
www.eventcanvas.org

version 20180621
Source adapted from XPLANE



Before engaging stakeholder types it is important to think of their motivations through empathy mapping like we did for students and teachers. Empathising here will help you pitch the concept of the OS Hub project idea to them so they know how much involvement you are seeking from them and are considerate of their situations. In the next step we will use this consideration of stakeholder types through empathy mapping to help create an 'elevator pitch' to help engage a desired stakeholder.

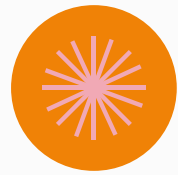


Now that you have empathy mapped your stakeholder, think and note down their qualities/properties, what they could potentially offer, what their needs are and what interests they have. From these decide together a short opening elevator pitch. Perhaps test this pitch on another group of colleagues for feedback and discussion. Making the first, best steps with a stakeholder will help them invest in your idea(s). This can be repeated for multiple stakeholder types. Your facilitator can expand the canvas size and duplicate the empathy and pitch maps as needed.



TOOL

LOCAL CONTEXT CANVAS: DEFINING THE CHALLENGE



SMBC SECTION Red, Green

OBJECTIVE Define and analyse the challenge being tackled within the context of the project.

REASONS TO USE

- Consider the needs of the local community/context that the project is based in.
- Identify the challenge connected to these needs, and the reasons for this challenge.
- Analyse the possible factors that feed into this challenge, and the requirements for overcoming these.
- Ensuring research has been carried out to remove assumptions regarding social needs in the local context.
- Consider the challenge within the wider community, providing the opportunity for important stakeholders and resources to be acquired for involvement.

INTRODUCTION TO THE TOOL This local context canvas prompts the users to use co-creation and collaboration to consider the local context of the challenge they are hoping to tackle with their project, thus ensuring the involvement of local stakeholders who have in-depth knowledge of the context within the project development process.

- The template consists of four boxes, each viewing the challenge from a different perspective.
- It covers the social needs hoping to be addressed, an in-depth review of the challenge, the external factors leading to this challenge, and the evidence that such a solution is actually required.

HOW TO USE Spend 30 minutes discussing the tool with your team and local stakeholders, and add content where appropriate. Use the prompts to assist where needed. Consider possible research that may need to be carried out to further an understanding of a particular area, and ensure expert opinion is included.

Revisit this tool after the appropriate research is done or if new actors are introduced to the project. Use this tool to assist with understanding resource requirements and stakeholder participation.

Note: This tool was developed as part of the SISCODE (Grant Agreement n.788217) toolbox, and has been repurposed by OSHub. Check out the full toolbox [here](#).

LOCAL CONTEXT: DEFINING THE CHALLENGE



NEEDS

What is the key social need that you are addressing?

 Explain the reasons why the need is important and for who it is relevant.



CHALLENGE

What is the local challenge?

 Describe the local challenge (problem) that the Lab will address, elaborate a question you would like to answer by working on this challenge.



FACTORS


What social & cultural factors shape / generate this challenge?

 Sociocultural factors are customs, lifestyles and values that characterize a community. Think about esthetics, education, language, law and politics, religion, social organizations, technology and material culture, values and attitudes.



EVIDENCES

What evidences do you have that this is a significant challenge?

 Describe what you know and your experience about the topic. Identify the possible effects of working on this challenge.

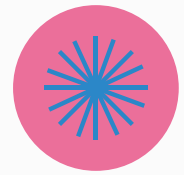


Comments:



TOOL

LOCAL CONTEXT CANVAS: DEFINING HUB CAPABILITIES



SMBC SECTION Red, Yellow, Blue

OBJECTIVE To understand the resources, knowledge and capabilities available to the project.

**REASONS
TO USE**

- To clearly identify what resources are readily available to the hub, and what will be required to source.
 - To identify the skills, knowledge and experience available to the hub, and which stakeholders must participate in order to make use of these.
 - To outline the co-creation approach currently adopted by the hub (if any), and how that may need to change depending on stakeholders being engaged and desired objectives of the project.
 - To fully understand the strengths and weaknesses of the hub so that the project is designed to be feasible, high impact and relevant.
-

**INTRODUCTION
TO THE TOOL**

This local context canvas prompts the users to identify resources at their disposal and consider where stakeholders may be engaged to assist with any skills and knowledge deficit.

- The template consists of three boxes, each asking the user to define the position of the hub within the three categories of Technology and Resources, Knowledge and Competencies and Co-creation Approach.
 - A detailed understanding of a hubs position within these categories is vital for the feasibility of the project, as if required tools and skills cannot be located, the project will likely be unsuccessful.
 - It also ensures that the hub takes full advantage of the capabilities of the local community and the benefits its local context has.
-

HOW TO USE

Spend 30 minutes discussing the tool first with your core team, and then local stakeholders, adding content where appropriate. Use the prompts to assist where needed. Consider possible stakeholders or industry that may need to be contacted.

Continue to revisit the tool if a new partner is added to the hub/project, updating resources and capabilities acquired along the way.

Note: This tool was developed as part of the SISCODE (Grant Agreement n.788217) toolbox, and has been repurposed by OSHub. Check out the full toolbox [here](#).

LOCAL CONTEXT: DEFINING THE LAB CAPABILITIES



TECHNOLOGY & RESOURCES

What are the technologies and resources available?

Describe the different technologies and resources available in the Lab for addressing the challenge.



KNOWLEDGE & COMPETENCIES

What are the knowledge and competencies available?

Describe the knowledge, experience and competencies available in the Lab for addressing the challenge.



APPROACH

What is the co-creation approach adopted in the Co-creation Lab?

Describe and illustrate the approach that the Lab has on co-creating initiatives with different stakeholders.



Comments:



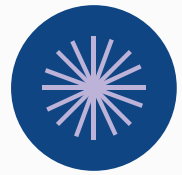
This project has received funding from the European Union Horizon 2020 research and innovation programme under grant agreement n.798217



Icons by Gregor Cresnar from the Noun Project

TOOL

LOCAL CONTEXT CANVAS: THE POLICY ENVIRONMENT



SMBC SECTION Violet, Green, Yellow

OBJECTIVE To define the policy environment surrounding the topic/
challenge of the project, with a focus on local policy.

**REASONS
TO USE**

- To identify what existing policies connected to the project topic are present within the local context.
 - To understand the role these policies play within society and how this may impact the project.
 - To consider how the project may be used to influence and improve both local and global policies on the issues being addressed, and whether this is an aim of the project.
 - To consider what stakeholders may need to be involved in the project to assist with the role of policy within the project.
-

**INTRODUCTION
TO THE TOOL**

This local context canvas prompts the users to identify local policy related to their topic of interest, and how this policy will play a role within the project.

- The template consists of three boxes, each asking the user to form an understanding of existing, influencing and future policies within the context of the project.
- If policy is not considered, it can lead to unexpected obstacles in the future of product development, while also removing the opportunity of the project to have an important impact on the local community.

HOW TO USE

Spend 30 minutes discussing the tool with your core team and local stakeholders, adding content where appropriate. Use the prompts to assist where required. Consider research that may be required to ensure a complete overview of policy is captured. Continue to revisit the tool if new research comes to light, or new actors are added to the project, possibly bringing in new policy from other areas of society.

Note: This tool was developed as part of the SISCODE (Grant Agreement n.788217) toolbox, and has been repurposed by OSHub. Check out the full toolbox [here](#).

LOCAL CONTEXT: DEFINING THE POLICY ENVIRONMENT



EXISTING POLICIES

What are the existing policies related to the challenge?

 List the policies that already address tematics related to the challenge. Describe how existing policies could limit/block or support/encourage the development of the challenge.



INFLUENCING POLICIES

What are the threats on addressing existing policies?

 Describe the ease and difficulties about influencing policies in the local context.



FUTURE POLICIES

Pitch your idea about how the challenge could influence future policies

 Describe how addressing this challenge could inspire policy making and discussion.



Comments:



This project has received funding from the European Union Horizon 2020 research and innovation programme under grant agreement n.798217



Icons by Gregor Cresnar from the Noun Project