

THE OIS IMPACT REFLECTION DESIGN

WHAT IS IT AND HOW CAN IT BE USED?

The OIS (short for *Open Innovation in Science*) Impact Reflection Design is a **set of different instruments of both quantitative and qualitative methods** that you can use at different time points along a research project applying open, collaborative and participative methods. The instruments and their items are structured along the “change elements” of the “OIS Impact model”, which can be downloaded on our website: see <https://ois.lbg.ac.at/ois-resources/tools/>. Together, the instruments **provide a comprehensive picture** in how far these OIS methods led to changes in awareness and competencies, behavior and life circumstances of all stakeholders and, ultimately, societal uptake and impact.

The **interactive OIS Impact Model** includes **more suggestions for reflecting on each change element**. You can incorporate or replace existing questions or items in the OIS Impact Reflection Design instruments with these additional suggestions, or use them for additional or new instruments.

The OIS Impact Reflection Design is not complete, but is rather a foundation to be adapted to one’s individual needs. The instruments were selected in such a way that they can be easily implemented in different settings and can be flexibly combined with one another. Although, we follow a hypothetical research design, it is by no means necessary to implement all tools. Rather, we want to **encourage you to put together individual tools from our suggestions according to your own needs and requirements**.

The OIS Impact Reflection Design, as well as additional suggestions for reflecting on impact elements in the interactive OIS Impact Model are **based on co-creative input from researchers and Experts of Practice of an OIS research project**. However, they are far from comprehensive and should be continuously developed. For that, we rely on your **feedback**: if you used (some of) the instruments in your practice, [please reach out to us](#) and share your experience with us, so we can adapt and improve the set for all.

To follow all descriptions and guidelines in the instruments, please refer to the **overview of definitions** used throughout the toolkit below (see *Definitions used throughout the Instruments*).

OVERVIEW OF INSTRUMENTS

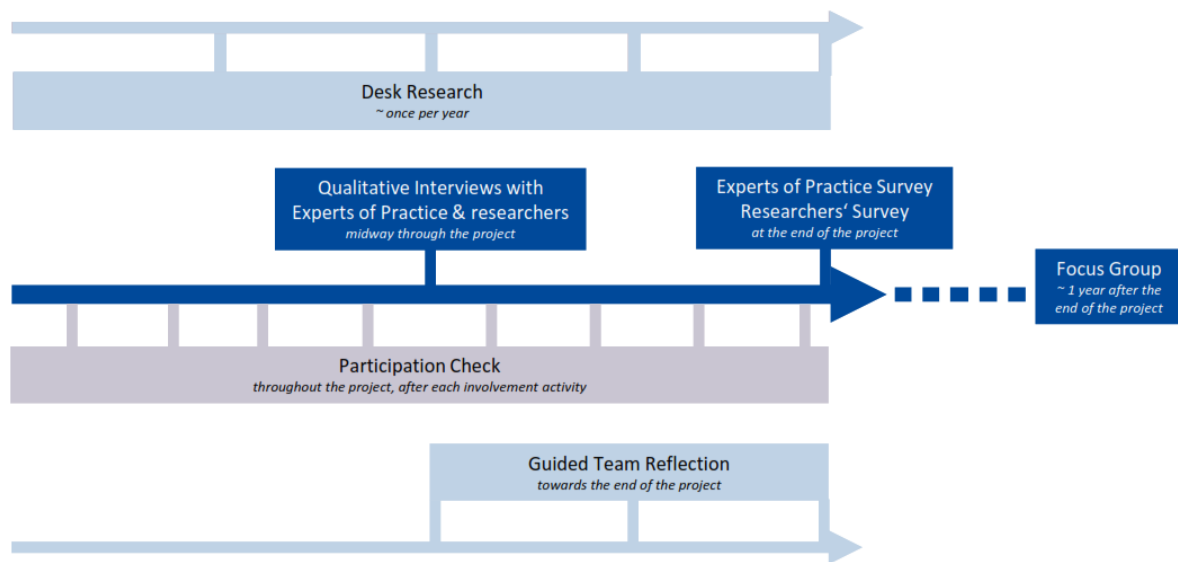


Figure 1: Timeline: Use of instruments along the research project

The following instruments are part of the OIS Impact Reflection Instruments toolkit:

1. **Participation check:** Are all involved Experts of Practice satisfied with the participation process? Are the quality criteria of involvement fulfilled? The toolkit includes a template for a short, written questionnaire at the end of meetings, workshops or other activities and events along the participation process: the Participation check. By evaluating participation through this questionnaire, the project team can identify lack of satisfaction or other grievances in the participation process at an early stage.
2. **Desk Research:** A guideline with suggestions for data to be collected in desk research is included in the toolkit. Desk Research includes every analysis that can be made "sitting at a desk", including analysis of social media, other websites, existing documents, participants lists, etc. The collection of data can be carried out continuously and/or collected at specific time points, while the analysis should take place in regular time intervals (e.g. once per year). Desk research methods have the benefit of being flexible and rather low-cost, but should ideally be combined with other methods to increase their informational value.
3. **Qualitative Interviews with Experts of Practice:** In the toolkit, you can find a template for qualitative interviews with Experts of Practice meant to be carried out in the first half of the project. Qualitative interviews will give valuable insights in the experience of the involvement process. Besides using the interviews for impact analysis, the results can be used for adapting/improving the project. You can also use the results of the qualitative interviews to identify additional impact areas (to be measured in the survey at the end of the project). Qualitative interviews need to be carried out by a neutral person (no member of the research team or research organization).
4. **Qualitative Interviews with Researchers:** A template for the interview guideline can be found in the toolkit. Same as the qualitative interviews with Experts of Practice, these interviews are meant to be carried out in the first half of the project. Results can be used in the same way.

5. **Guided Team Reflection:** The toolkit includes a guideline for discussion items for a Guided Team Reflection, which is an internal reflection meeting of the researchers' team responsible for designing the research process. The meeting should be carried out in a later stage or at the end of the project and should be around 3 hours long. Ideally, the reflection meeting is facilitated by a neutral person. The results of the reflection meeting are meant to be documented. You can also use the results to identify implications for further research projects (e.g. improve future involvement processes).
6. **Experts of Practice Survey:** In the toolkit, you can find a template for a questionnaire to be filled out by Experts of Practice at the end of the project (preferably online). The survey focuses on quantitative results. However, we suggest the use of additional "comment options" (open fields) to allow deeper insights. The survey should take around 10 minutes. Whenever possible, the Experts of Practice Survey and the Researchers Survey (see below) use similar questions and items. This way, perspectives of scientific and non-scientific participants can be compared.
7. **Researchers' Survey:** A template for the questionnaire can be found in the toolkit. Same as the qualitative interviews with Experts of Practice, the survey is meant to be carried out at the end of the project. Results can be used in the same way.
8. **Focus Group:** The toolkit includes a guideline and question template for a focus group of Experts of Practice that is carried out around a year after the project has ended. The aim of the focus group is to identify long-term effects of the participation in the research project. The duration of the reflection meeting should be around 1,5 hours and should be carried out by a neutral person (no member of the research team) to reduce bias.

You can find all templates and guidelines for each instrument in the toolkit. You will also find a detailed overview of change elements of the OIS Impact Model addressed in the items of each instrument enclosed.

DEFINITIONS USED THROUGHOUT THE INSTRUMENTS

The OIS Impact Reflection Design differentiates between the following groups:

Participant	Everybody involved in the participation process: members of the public, practitioners, researchers and policy makers.
Public	Any individual that is concerned by or with the subject of the research project, but does not have a professional motivation. They may not benefit directly from the results of the project. Examples would be a patient suffering from the condition that is researched; a voluntary citizen scientist with experience in the field of the project; a representative of an association that aims to help family members of patients with the researched condition.
Practitioner	All people that are professionally working in the field of the project. They have practical experience and knowledge to contribute to the project. Practitioners are meant to benefit directly from the results of the research project.
Researchers	All scientific staff working on the project.
Policy Makers	Individuals representing organizations or institutions that are responsible for the framework conditions of the practitioners and/or the research project itself. Examples would be representatives of governmental bodies or representatives of funding institutions.
Experts of Practice	An umbrella term for practitioners, members of the public and other experts of experience that are involved in the research project. Experts of Practice may also include policy makers, but primarily in their role in having practical experience with the focus of the research project. This may include policy makers who are responsible for funding the project or a programme. In this case, we advise to check for conflicts of interests to adapt participation accordingly. Examples for policy makers with a clear Experts of Practice profile: representative of the ministry responsible for the research subject; parliaments' representative who is responsible for an agenda relevant to the research subject.

The instruments and their items are structured along the change elements of the OIS Impact model. The corresponding change element of each item in the templates and guidelines is listed in the right column ("*Goal dimension*"). A number indicates the change level in line with the OIS Impact Model:

# Level	Level	#	Change element
Level 7	Societal Impact	7.2	<i>Uptake</i>
		7.1	<i>Relevance</i>
Level 6	Change in life circumstances	6.6	<i>Practical use</i>
		6.5	<i>Meaning</i>
		6.4	<i>Network</i>
		6.3	<i>Research quality</i>
		6.2	<i>Reputation</i>
Level 5	Change in behavior	6.1	<i>Visibility</i>
		5.6	<i>Initiatives</i>
		5.5	<i>Shared ownership</i>
		5.4	<i>Shared goals</i>
		5.3	<i>Shared vision</i>
		5.2	<i>Co-design</i>
Level 4	Change in awareness and/or competencies	5.1	<i>Framework conditions</i>
		4.8	<i>Self-efficacy</i>
		4.7	<i>Appreciation</i>
		4.6	<i>Competencies</i>
		4.5	<i>Motivation</i>
		4.4	<i>Information</i>
		4.3	<i>Perspective</i>
		4.2	<i>Knowledge about competencies</i>
Level 3	Output: Involvement	4.1	<i>Knowledge about needs</i>
		3	<i>Continuous involvement and General Acceptance</i>
Level 2	Activities: OIS measures fulfill quality criteria	2.6	<i>Eye-level</i>
		2.5	<i>Efficiency</i>
		2.4	<i>Orientation</i>
		2.3	<i>Emotional benefits</i>
		2.2	<i>Practical benefits</i>
Level 1	Input: Design of OIS measures	2.1	<i>Identification</i>
		1	<i>OIS measures are designed</i>

All definitions and target groups can be found in the OIS Impact Model downloadable on our website.

TOOLKIT ATTACHMENTS

1. Participation check (Template)
2. Desk Research (Guideline)
3. Interview Experts of Practice (Template)
4. Interview Researchers (Template)
5. Guided Team Reflection (Guideline)
6. Experts of Practice Survey (Template)
7. Researchers' Survey (Template)
8. Focus Group (Guideline and Template)
9. Overview of OIS Impact Model change elements addressed in each instrument

SUPPORT AND FEEDBACK

If you are interested in applying (some of) the OIS Impact Reflection Instruments in your context, please reach out to us. We are happy to support you to adapt the methods and instruments to your specific context and needs.

The OIS Impact Reflection Instruments and additional suggestions in the interactive OIS Impact Model can be used by everyone interested in the impact of participatory methods applied. To continuously update, improve and develop the instruments, we would be happy to hear about your implementation experience.

CONTACT

Mathieu Mahve-Beydokhti
Program Manager Impact
mathieu.mahve-beydokhti@lbg.ac.at

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