

Collaborative Growth Programme

Toolkit:
Report Guidelines



Scoping study report guidelines

It is important to present your Scoping Study findings in a way that is useful for all the network members, stakeholders and funders. The best reports are those that are drafted in plain English and reflect the evidence gathered, the outcomes and impacts obtained.

So what is the purpose of your Scoping Study ?

Most scoping study projects funded under the Invest NI Collaborative Growth Programme carry out the following activities in order to address their overall objectives:

- Clarification of capabilities and/or skills gaps;
 - identification of market opportunities;
 - development and testing of scenarios/business models in relation to business objectives/opportunities;
 - building of trust and collaboration amongst network members;
 - establishment of appropriate Terms of Reference/Rules of Engagement etc;
 - development of a roadmap for future activity;
 - identification of risks and ways in which they can be shared;
 - exploration of potential funding and/or resourcing;
 - assessment of the size/scale of the opportunity;
 - collection of an evidence base to make a case for future support
 - sharing of knowledge and skills;
 - engaging with other stakeholders to build critical mass and close skills gaps;
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What is the typical format and/or content for a scoping study report?

A Scoping Study report can make use of a range of formats, but as a minimum should demonstrate the following elements:

- The front page;
 - ◊ Report Title;
 - ◊ Network Name;
 - ◊ Network Letter of Offer Reference Number (available from Lead Company);
 - ◊ Date of Publication;
 - ◊ Author;
 - ◊ Reference to support being provided by Invest NI Collaborative Growth Programme;
 - ◊ Relevant logos associated with the Network and/or its member companies
- Contents Table
- Executive Summary
- Introduction/Summary – explain the reasons for carrying out the Scoping Study;
- Background/Context to the sector or market being addressed;
- Specific project purpose/objectives – which reflect your application objectives and are outlined in the Letter of Offer;
- Summary of the methodology or approach taken to the study;
- Details of the network member companies and any other key stakeholders involved;
- Details of how each individual objective was tackled, and how the resulting learning helped inform the overall scoping outcomes;
- An assessment of existing skills, and identification of any new skills required within the network to take advantage of the opportunity; recommendations as to how new skills could be acquired;
- Summary of outcomes and impacts of project for both SME participants and stakeholders, including scale and scope of any commercial opportunities identified – prioritised where possible. Please use the Outcomes and Impacts template provided elsewhere in this Toolkit and attach it to your Final Report;
- Consideration of potential business models to commercialise project;
- Consideration of risks/barriers to success and any proposed mitigation;
- Consideration of potential Terms of Reference/Rules of Engagement and/or Intellectual Property agreements related to the project;
- Reflections on what worked well about the project, and what could be improved;
- Conclusions, including recommendations and proposed way forward eg. preparation of **S**(specific) **M**(measureable) **A**(activity-based) **R**(realistic) **T**(timebound) project plan for Phase 2 Collaborative Growth project;
- Appendices, as appropriate eg:
 - Minutes of meetings;
 - Powerpoint presentations or any material produced to aid discussions;
 - Terms of Reference/Rules of Engagement/Intellectual Property Agreements;
 - Any media coverage achieved;
 - Capability Register;
 - Summary of reference material;
 - Glossary of Terms and Abbreviations

Who is responsible for drafting the scoping study?

The network facilitator will be responsible for drafting the report and ensuring the information presented is an accurate reflection of the evidence collected as a result of network and stakeholder meetings; workshops; research gathering; and one to one interviews.

Who should contribute to the scoping study report?

The network members will be the main contributors to the report in terms of shaping the content, however information should be gathered from appropriate stakeholder engagement; interviews; research publications; sector reports etc.

How long should a Scoping Study report be?

It is impossible to give a definitive answer to this question as every project will be different in terms of its duration, subject matter, scope and scale. You should bear in mind that every report will need to demonstrate value for money given the specific amount of funding awarded.

Very brief 'shopping list' style summaries are unlikely to provide the level of detail required to help network members make informed business decisions, or to form the basis of any application for Phase 2 Collaborative Growth Programme funding; 'on the other hand, wordy' or repetitive reports, relying on overly technical or academic analysis at the expense of commercial detail, may also struggle to tell a compelling story as to where the real business opportunities lie for participating SMEs.

Who should sign off and approve the content of the final report?

The network members who are signatories to the scoping study application are responsible for signing off on the content of the report before it is submitted to Invest NI. The lead company must also sign off on the final draft and must not pay out against the facilitator's final claim until confirmation has been received that Invest NI are content with the quality of the report.

Who sees the final report?

The primary audience for the report is the members of the Collaborative Network. These SMEs have defined the scope of the project and have agreed on the objectives; it is they who stand to benefit from the collaborative activity and therefore they must be satisfied that the report is comprehensive and fit for purpose.

As the project funders, Invest NI also have a stake in ensuring that the report addresses all the objectives in the Letter of Offer and represents value for money in respect of the public purse.

The allocated Collaborative Growth Programme Executive will review the draft final report and will more than often share it with colleagues within Invest NI and the wider public sector, depending on the subject matter. This is to ensure that the findings/outcomes/recommendations contained therein are feasible, relevant and factually accurate and to take into account any feedback that might improve the document.

In some instances depending on the subject matter, Invest NI would wish to avail of the report as a reference point/ best practice document and share with other Government Departments.

Anything else?

- The report should be formatted in **12pt** text with **1.5** spacing;
- All pages must be numbered and quotations referenced in either footnotes or in an appendix;
- Where possible please break the report down into clearly numbered or labelled sections;
- Tables and diagrams should be labelled and cross referenced;
- Photos must be captioned appropriately;
- Please do not use acronyms without spelling out what they mean at their first point of use in the document;
- Don't forget to complete your Outcomes and Impacts template and include with your Report
- Please run a spellcheck before submitting the report
- Finally, ensure that the report tells a story a factual story, of course!