

Interim Independent External Evaluation Report

for

Social Business Educational EcoSystem for Sustainability and Growth: SocialB

funded under

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for Sustainability and Growth: (SocialB)
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Executive Summary

SED's interim evaluation finding is that this is a very worthy project – at a time of economic recovery from the COVID pandemic as educators, trainers and social enterprises need to work together to provide the necessary skills and knowledge to ensure social enterprises as business organisations retain their sustainability and continue to grow and develop.

The SocialB project contributes directly to the aims of the Erasmus+ Knowledge Alliance measure in terms of its potential to deliver innovative training tools and knowledge development related to social enterprise. The finalised outputs of the project will stimulate understanding of the social economy / entrepreneurship and help to develop the skills, and knowledge needed to manage sustainable social enterprises. Evidence provided by the project team indicates that the SocialB project's initial aims have been achieved by bringing together HEI educators, students, business trainers and social entrepreneurs in a collaborative model to design and build the project outputs.

The outputs from the planned workpackages up to M18 have been reviewed for their progress and appropriateness and the following actions are recommended to project team, namely:-

Workpackage 1 – Project Management- that LIT, as lead partner for the project, continue to provide the resources needed to give such exemplar project leadership and co-ordination to the project team especially in view of the continuing COVID19 pandemic and the consequential reliance on virtual forms of communication.

Workpackage 3 - Training Content Design & Development – (i) that a further editing process of the Learning Unit Descriptors is undertaken to ensure greater consistency across each of the modules generated before the task is finalised for publication as an output, and (ii) that the project team take action to ensure that the delayed completion of Task (ii) does not not impact on further project progress.

Workpackage 4 – E-Learning Platform that LIT work with other partners to take appropriate action to ensure the learning repository is populated with the agreed LUs as soon as possible so as not to impact on further project progress

The report concludes with the following general recommendations for the project team to consider, namely (i) to make full use of the potential of the project's established PAGs as well as other sector support agencies to aid the development, dissemination and exploitation of the projects outputs; and (ii) to disseminate the findings so far achieved as widely as possible via social media, professional bodies, as well as through conventional academic papers

This report has been written at a crucial point for the project, as the partners begin to delvelop the innovative module content. Partners are aware of the relevant timeframes and appreciate the effort that will be required to draft the learning materials before the pilot phase in early 2022. The pilot phase will also provide partners with the opportunity to engage more widely with the social enterprise sector.

This interim evaluation has concluded that the project, despite the pandemic, is generally on programme, and as of month 18, has delivered its planned milestones and is in a position to enable it to be completed on time and to the desired standard as planned by December 2022.

Executive Summary

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1.0 Introduction and Background

1.1 Introduction

This report details the findings and conclusions of the interim (month 18) independent external evaluation of a project funded by the Erasmus + KA2 Knowledge Alliance programme:

Project title: Social Business Educational EcoSystem for Sustainability and Growth

Acronym: SocialB

The project is contracted to run from January 2020 until December 2022. This report has been prepared by independent evaluators - Social Enterprise Development (SED), which is a consultancy working primarily in the fields of entrepreneurship, small business development and training. We are competent evaluation specialists as we have extensive and directly applicable experience in leading and completing Erasmus+ projects.

The SocialB project is a collaboration between eight partners from the social enterprise, training and Higher Education sectors in four countries – Ireland, Greece, Italy and Slovenia (4 x HEIs, 2 x SEs, 1 VET, 1 Social Enterprise (SE) Business Support Agency)

This report is structured so as to provide background information about the project, its partners and its operation, before an analysis of the project's progress against its identified milestones related to project, finance, quality and risk management, as well as work package outputs that are appropriate for this mid-term (month 18) evaluation.

1.2 Project Description

The SocialB project team aims to design, develop and pilot an accessible suite of learning resources to support individual and organisational learning, and network development in the field of social enterprise. Over its 36 month duration, the project aims to develop material that will enhance sustainability and employability within the social economy sector, by (i) empowering existing and future SE practitioners with critical competencies and skills, (ii) promoting and imparting entrepreneurial and transversal skills to HEI/VET students, and (iii) enhancing the practical and operational knowledge base and learning of HEI/VET institutions' staff. Learning resources will be presented in a framework of blended learning materials in 16 – 24 Learning Units (LUs) across 6 modules. The learning material is to be designed to address identified skills gaps and training needs in key areas critical for the development, sustainability and expansion of the social enterprise sector.

The specific outputs and outcomes of the project were identified as being:-

Output 1	SocialB (Roadmap) Gap Analysis - The identified needs and challenges will be analysed in each partner country and at EU level. Outcome: Literature Review and training needs reports and analysis identifying gaps/needs and a clear knowledge of future needs.
Output 2	Development of Training and Learning Material - 24 LUs. Each LU will be developed as Open Educational Resources (OERs) in a format to facilitate all HEIs and VETs using innovative training techniques and assessment methodologies. Outcome: LUs, will provide training material into the current educational programmes
Output 3	E-Learning Portal - A cost effective secure open E-Learning portal will be established with access to the LUs Outcome: Availability of curricula and content on E-Learning platform for use in blended learning deliveries and for future use by other HEIs and VETs.
Output 4	Pilots for Trainings and E-Learning Portal - Piloting of content Outcome: Upskilled HEI/VET educators and SE practitioners and robust evaluation of LU material in practice
Output 5	Exploitation and Sustainability - Extensive Communication and Dissemination activities Outcome: Improved application of SocialB content within education and training programmes by HEIs/VETs and evolution of new programme development opportunities

1.3 Nature of Evaluation

This interim report examines and reports on the planned and actual project processes found to be in place at the project mid-point (month 18) and some of the scheduled planned finalized products by reference to recorded progress against the original EU approved project documentation and GANNT chart. As a result, this report reviews the project team's progress in meeting the planned outputs and outcomes (1,2,3) indicated above for work packages (WPs) 1,2,3 and 4 as well as appropriate material developed for WP6 and WP7.

This mid project evaluation is mainly a desk-based review of evidence available through project meeting minutes / recordings, project records and generated output documents. In addition, the evaluation team also conducted a limited number of in-depth qualitative interviews with project team members leading the WP production so as to supplement internal quantitative data related to project wellbeing in general and team work, member cooperation, efficiency and quality assurance procedures (WP6) in particular.

1.4 Project Partners

The SocialB partnership was formed as a cross-sectoral multi-actor partnership drawing together SE organisations and practitioners, trainers and educators in the VET and Higher Education sector. While some partners had individual responsibilities as work package (WP) leads, all partners were expected to participate actively in all work package delivery.

(P1) Limerick Institute of Technology (LIT), Ireland – Lead Partner Work Packages 1 and 4

P1 is the lead organisation for the SocialB project. As a member of the European Association of Universities, P1 is recognised for its active learning approach, its applied research portfolio and its enterprise development. P1 has an excellent record of project delivery and it plays a key role in the economic development of the West of Ireland. As project lead, LIT carries responsibility for WP 1 - Project Management, and 4 -Training Portal Development.

(P2) Ballyhoura Development Co.Ltd., Ireland – Lead Partner Workpackage 6

P2 is a community led local development company limited by guarantee, with charitable status, governed by a multi-sectoral Board of Directors, comprising representatives of the community and voluntary sector, social partners, public and elected representatives. With 30 years' experience, P2 focuses on providing support to communities, individuals and SMEs across the west of Ireland, with the aim of developing empowered and inclusive communities, and driving positive, sustainable, and equitable social and economic change. P2 actively contributes to all workpackages and takes responsibility to lead WP 6 - Quality Assurance and Impact Analysis.

(P3) Olympic Training & Consulting Ltd, Greece – Lead Partner Workpackage 5

P3 provide vocational training, lifelong learning, consulting and similar services. P3 operates nationwide and promotes vocational and entrepreneurial development, as well as combating social exclusion. Towards this target, the development and / or dissemination of innovative educational methods, along with applied research in the field of adult education and the active promotion of new technologies in professional services are systematically employed. As with all partners, P3 are involved in all work packages, and lead WP 5 – Pilot, Testing and Evaluation of Learning Units.

(P4) University of Patras, Greece - Lead Partner Workpackage 2

P4 actively supports the development of entrepreneurship, innovation, and competitiveness of new businesses. It has established an Office of Innovation and Entrepreneurship (IEU) which aims to raise the awareness of young scientists in entrepreneurial culture and encourage innovative ideas and entrepreneurial initiatives. P2 will lead the delivery of WP2 – Skill Gap & Training Needs Analysis in coordinating and delivering a comprehensive overview of the current current skills gaps in the field of SE, based on a comprehensive literature review and analysis of primary data from SEs and stakeholders in each of the partner countries, culminating in the creation of a comprehensive skills gap map and the development of outcomes to address identified needs.

(P5) Programma Integra, Italy

P5 is an integrated social cooperative founded in 2005 and its mission is to promote innovative projects for social inclusion and integration of migrants/refugees. Its activities are focussed on

encouraging sustainable and durable integration pathways, and contributing to community welfare and development. P5 is involved in and contributes to all work packages. P5 brings its SE experience, skills and knowledge to bear on all aspects of the project and is responsible for delivery of tasks related to the primary survey work with SEs and key stakeholders in WP2 to identify skills gaps and needs. P5 will support the pilot, testing and evaluation of the e-Learning platform in WP5, and will partner with P6 to recruit the training panel and contribute to all QA communication and dissemination activities.

(P6) University Tor Vergata, Italy – Lead Partner Workpackage 3

P6 plays a leading role in research and education, as well as in technological, economic, organisational and social development. P6 brings significant experience of training in the field of social entrepreneurship education to the consortium, and is highly qualified to lead and coordinate the process of designing and delivering learning unit training materials and methodologies, in collaboration with the consortium partners. P6 will be the Work Package lead for WP3 – Learning Material Design and Development as well as playing a key support role in WP7 – Communication, Dissemination & Sustainability. P6 will also support and administer the agreed methodology for review of HEI/VET course provision within WP2.

(P7) University of Ljubljana, Slovenia

P7 is an autonomous educational, scientific research and artistic institution of higher education. P7 works in co-operation with various economic institutions, with the government and local authorities as well as other civil institutions. In this way it encourages the harnessing and application of its research and educational achievements and contributes to social development. P7 is involved in all work packages and supports the delivery of all tasks. P7 will lead the tasks associated with the definition and preparation of the Quality Assurance and Evaluation Framework in relation to operational protocols and academic / educational standards. P7 will also contribute to the development of learning unit content, and the liaison with and convening of Project Advisory Board meetings in Slovenia.

(P8) Development Agency Kazjanska – Lead Partner Workpackage 7

P8 is a regional development agency which acts as a support institution for a number of municipalities, companies and institutions in the area. It was established in 2000 to connect institutions and stakeholders in the area. P8 operates an enterprise support unit for companies to start, grow and develop their businesses. It offers office space, mentoring, investment plan preparation, internationalization support and other services for companies. P8 is involved in all work packages and is the lead for work package 7 - the Dissemination, Exploitation, and Sustainability action and strategy, which will underpin the potential reach and sustainability of the project outputs and outcomes. P8 will play a key role in coordination of the primary research with SEs and key stakeholders in WP2, to ascertain the key skills gaps and needs in the SE field. In WP4, P8 will evaluate the e-portfolio and social networking frameworks planned for integration in the SocialB learning repository

1.5 Evaluators Review of the Partnership and Project Progress

Project Partnership

The composition of the consortium – 4 HEIs, 2 SEs 1 VET organisation and 1 SE business development agency – brings direct and varied academic and practitioner skills, expertise, knowledge and relevance to the project. The SocialB partners have a common interest in supporting the sustainable development and growth of the social enterprise sector. In addition to their experience and expertise in the field of education, training and social enterprise support, many have already worked together in previous European projects on similar themes, e.g. Limerick Institute of Technology - LIT, Programma Integra and Olympic Training in SESBA; LIT and University of Patras in INTsenSE; LIT, University of Ljubljana and Development Agency Kozjansko in TELI2, or have been involved in other consortia where practitioners and academia collaborate on SE research and activities, e.g. Ballyhoura Development in a project entitled Rurlnno and RurAction. The Consortium members' participation in a range of complimentary national and EU projects, many focussed on aspects of social enterprise development, also provides a sound platform of networks from which to draw on for specific elements of the project. Such networks should also facilitate widespread communication and dissemination of the project's planned outputs and outcomes.

Interviews with workpackage leads highlighted the depth of knowledge and experience within the partnership, however, interviewees also discussed the different philosophical perspectives and interpretations of social enterprise within the group. It is also worth noting that the partnership countries are at very different stages within the evolution of social enterprise infrastructure and practice, again adding to the debate and discussion within the group; these differences need to be considered whilst shaping the project outputs.

Evaluating the above, it can be concluded that the collective skills, experience and knowledge of the consortium partners serves to provide a strong basis for the effectiveness of the partnership, and in turn for their active participation in all aspects of workpackage delivery so as to facilitate the successful outcome and outputs of the SocialB project.

Project Progress

SocialB was planned to be delivered through seven Work Packages (WPs):

1. WP1 Project Management
2. WP2 Skills Gap & Training Needs Analysis
3. WP3 Learning Material Design and Development, including training methodologies & approaches
4. WP4 eLearning Portal Development
5. WP5 Pilot, Testing & Evaluation of Training
6. WP6 Quality Assurance and Impact Analysis
7. WP7 Communication, Dissemination & Sustainability (Exploitation)

The approved project GANNT chart indicates that the timing of the critical milestones for the delivery of the above work packages were:

Task Nr	Dates	Milestone Description
1	Month 1	Project Kick off Meeting (WP1)
2	Month 5	Project Website Established (WP1)
3	Month 9	Skills Gap Training Needs Analysis & Mapping (WP2)
4	Month 12	Learning Unit Descriptors (WP3)
5	Month 14	E Learning Platform Established (WP4)
6	Month 18	Mid-Term External Evaluation Report
7	Month 19	Learning Unit Materials (WP3)
8	Month 22	Learning Units available on eLearning Platform (WP5)
9	Month 32	Pilot Training Complete (WP5)
10	Month 35	SocialB Practice Toolkits Complete (WP5)
11	Month 35	Final Conferences (WP&)
12	Month 36	Final External Evaluation Report

An inspection of the project records, websites and minutes of virtual transnational meetings indicates that the following milestones have now been achieved

Task Nr	Date Due	Evidence
1	Month 1	Minutes of the project kick off meeting held on 23rd and 24th of January 2020. Photographs of meeting attendees located in project records
2	Month 5	Project website established
3	Month 9	Skills Gap Training Needs Analysis & Mapping – Reports – M8, & M10
4	Month 12	Learning Unit Descriptors – see project report- M16
5	Month 14	E Learning Platform Established
6	Month 18	Mid-Term External Evaluation Report – produced June2021

Partners in all of the project countries have finished with field research. In research related to existing education and training programs related to Social Entrepreneurship they have made over 50 interviews with directors of education and training programs in the four partner countries and collected data of over 100 education programs from all over Europe.

Given the above evidence it can be generally concluded that the project is generally on programme and as of month 18 it has delivered its planned milestones (Tasks 1-5).

2.0 Review & Assessment of Work Packages (WPs)

The project approved by the EU to start in January 2020 envisaged that it would be managed through a mixture of face to face transnational project management meetings and other meetings conducted virtually through skype. This approach to project communications and management had to be abandoned due to the emergence of the COVID19 pandemic at the start of the project and as a result all project management activities except for its planned "kick-off" meeting were conducted virtually via zoom / microsoft teams.

2.1 WP1 - Project Management

P1 led WP1 supported by all partners who were represented on the project executive management team. WP1 deals with the management of the project with the aim of ensuring quality outputs and outcomes are delivered within the time and budget allocated so as to maximise the impact of the SocialB project. The main tasks involved in WP1 included managing the project meetings; overseeing the legal, contractual, financial, communications and administrative management of the project consortium: and the project's quality and risk management strategy. Each of the identified tasks in the WP are now considered;

Project Administration and Communications

This task involved the coordination and monitoring of work progress and budget allocation, producing and monitoring the project management plan, communications plan, preparation of progress reports and final report to the European Commission. P1 were also to prepare a Consortium Agreement for the project partners. Such plans were developed prior to the emergence of the COVID19 pandemic and as such needed to be amended to ensure their subsequent effectiveness.

Evidence from the project files indicates that P1 and all the partner organisations adjusted to the post pandemic circumstances as the project started as planned and the implementation of the project management plan has ensured that the project has delivered its scheduled outputs. The plan set out the roles and responsibilities of all partners and the protocols for communication between partners. Early in the project, P1 established a project dropbox so that all partners could have access to all project resources, including financial and administrative guides documents and templates. This resource has been used as a smart methodology to share all evidence of project activity and to ensure that the latest documents were always available to partners and it is to be commended as an effective tool to facilitate the necessary virtual communication processes through to this mid-term (M18) review.

Project Meetings

The overall transnational project meeting (TNPM) schedule for SocialB is:

Transnational Meeting 1, (M1), Ireland

Transnational Meeting 2, (M8), Greece

Transnational Meeting 3, (M16), Italy

Transnational Meeting 4, (M23), Slovenia

Transnational Meeting 5, (M35) Ireland - with final conference

To date, (M18) TNPMs 1-3 have occurred as planned and commenced with a face to face kick-off meeting in Ireland (M1) which allowed project partners to gain a common understanding of the project work plan and discuss the key issues related to the first phases of the project. This meeting also formalised the EMT, and the need for Project Advisory Boards. Subsequent TNPMs monitored progress, reported on issues and addressed challenges so as to ensure the project remained on track. However, the emergence of the COVID19 pandemic resulted in meetings 2 and 3 being virtual in nature rather than conventional face to face meetings and P1, the task leaders, and the project team are to be congratulated on how well they have adapted to the forced change of approach to transnational project meetings.

In addition, monthly virtual partner meetings (VPMs) have been organised on the first Wednesday of each month to address specific issues related to the achievement of tasks associated with the production of workpackage outputs. The project team complete feedback questionnaires twice a year and the data and comments generated from such activities are considered in a later review of partner interviews for this report.

All partners, that were interviewed as part of the interim evaluation process, considered that P1 was providing a strong lead for the project, with a supportive administrative function.

Financial Management

P1, as the lead partner, manages the project finances and makes all financial reports to the EU. It was found that the SocialB financial budget and spend performance at the project mid-term (month 18) was on track and progressing as anticipated. It was found that the project had established and maintained a compliant and effective system to meet the exacting financial requirements of the EU. Partner contracts were issued at project outset and total budget, breakdown of costs within each category and payment schedules for each partner were made clear in the project documentation. The partners use a claim form and timesheet template and completed claims are checked by the lead partner to ensure that the information is correct, and the costs are eligible. Partners are required to provide updates in relation to their financial position, resource spend and allocation. All indications are that project spend is in line with expectations and will enable planning for future allocations/demands and that the financial reporting mechanisms for the project are well understood and relatively straight-forward.

Quality Assurance & Risk Management

WP6 has been specifically devised to oversee quality assurance, monitoring and impact analysis of the project and it is led and coordinated by P2. Essential quality control protocols and standards have been put in place to ensure common data collection and analysis methods for WP2; the development of the learning framework and LUs (WP3 and 4); and then the development of the e-learning platform and associated tools. In addition project advisory boards have been set up in each partner country which feed into the qualitative assessment

of the project progress, activities and deliverables. A Quality Assurance (QA) Plan has been developed as a task by P7 within WP6, which is a reference document that sets out the quantitative and qualitative quality control mechanisms and protocols for consortium communications, collaborative actions, results, analysis, document authoring, progress verification process, ethical monitoring and documentation, presentation standards, as well as standards governing development of learning materials. The QA Plan also incorporates the Risk Assessment and Management matrix, and has been subjected to review at each of the project's transnational meetings.

Internal quality assessments were undertaken with partners in October 2020 and March 2021. An overall analysis report, produced after the internal evaluation in October 2020 provided evidence that all of the partners were satisfied with the overall cooperation of the project, with partners providing scores of 4/5 or 5/5. A number of issues were raised at this point and these included the methods of internal communication within the group and providing and adhering to realistic timescales for project outputs. The analysis report for the March 2021 internal evaluation again showed strong scores 4/5 and 5/5 for the cooperation of the project partners.

Both internal evaluations highlighted the potential for the project partners to work with social enterprises, support agencies and HEI's. It is acknowledged that this cooperation will have been more difficult during the pandemic. However, as the project moves to its piloting and evaluation stage and there is a need to increase the dissemination of the project outputs, it is likely that this will then be addressed.

Each of the four partner countries have established Project Advisory Groups (PAGs). The membership of the PAGs varies and it is noted that Greece and Slovenia have diversified their PAG membership to include Government representatives. To date the Irish PAG has met once, the Greek and Italian PAGs have had two meetings and the PAG in Slovenia has met on three occasions. Minutes/notes of the meetings and in some cases photographic evidence are available. The internal quality evaluations in October 2020 and March 2021 gauged partner perceptions relating to the role of the PAGs. The scores recorded in the March audit were higher than those in October, this could be related to the change within group membership or the advancement of the project/having outputs to review. During the interviews with the external evaluators P2 and P7 concluded that to date they had no concerns about the quality of the materials produced and that the qualitative and quantitative indicators that had been established within the QA plan had been met.

Given the comprehensive nature of the measures related to QA assurance and risk management evidenced above the external evaluators have confidence that the processes and finalised outputs of the SocialB project will match the standards expected by the EU funding body.

Progress Review

It is clear that project management by P1 to date has been competent, effective and professional. It is evident that the role and responsibilities of partners were made clear at start of the project; time scales for work were agreed and in general have been adhered to by partners; evidence shows that partners have been involved in decision making through

discussion and agreement. This view has been formed through evaluator observations of relevant documentation, internal monitoring procedures and the qualitative feedback obtained by SED from interviews with some of the workpackage lead partners. The project team in general and its lead partner in particular are to be commended for this finding given the changed project management and communication circumstances brought on by the ongoing COVID19 pandemic.

It is recommended that P1, as lead partner for the project, continue to provide the resources needed to give such exemplar project leadership and co-ordination to the project team especially in view of the continuing COVID19 pandemic and the consequential reliance on virtual forms of communication.

2.2 WP2 - Skills Gaps and Training Needs Analysis

The four key tasks that made up WP2 were:

1. Literature Review
2. Analysis of current SE training & education provision at HEI/VET level
3. Skills Gaps & Training Needs Analysis within the SE sector
4. Skills Gaps & Training Needs Mapping

It was planned that each of task would generate a report which would then be compiled into a final comprehensive report. P4 was the WPL supported by HEI partners on academic analysis, and by SE partners on survey work. The WP was scheduled to be completed by M9 . It was anticipated that SEs would play a crucial role in this WP through surveys responses, interviews and engagement with their networks in their respective countries.

Task 1 Literature Review

P4 led this research task supported by the other partner Universities (P6, P8) to develop a critical overview and analysis of the current practice pertaining to SE education and training provision. Material focused on sustainability and organisational growth was sourced from academic journals, previous projects, other EU and international research in the field of SE.

The output entitled Literature Review Report dated April 2020 (M4) contains much detailed commentary and analysis related to social entrepreneurship and its definition, models and typologies as well as desk based research focused on a high-level review of education and training provision and its components in SE primarily focused on partner countries but also to some extent in other EU states. The output is academic in its nature and is based on approx 60 references to other work, the majority of which (70%) was published within the last 10 years. The Report makes clear the continuing debate over the definition of social entrepreneurship and establishes the the Defourney and Nysens (2016) classification of SE types and models as being the basis for the subsequent work on the WP tasks. In addition the Report identifies the learning theories and training approaches currently in-use in SE education and provides recommendations for action that establishes a rationale for further tasks in terms of the directing the format of the survey work in subsequent WP2 tasks and shaping the content of WP3.

Progress Review

SED finds that this output delivered what was originally planned at project application stage and it was produced on time and to an appropriate depth. The contents of the report, in particular the material related to SE definitions, typologies, business models, organisational sustainability and growth should be further disseminated through academic journal papers as a contribution to the wider debate on the topics within the SE academic community.

Task 2 Current SE Education & Training Provision Analysis

P4 led this task supported by P6 to develop a standard series of questionnaires and survey forms to compile information and data on current training and education provision. and P7 to complete a desk top analysis to (a) compile a comprehensive database of relevant courses and course components in the EU; and (b) develop a database of HEIs and VETs active in the field of SE in all partner countries. On-line questionnaires to HEIs and VETs (minimum 15 per country) and in-person interviews carried out by all partners were sent to P7 for compilation and thematic analysis.

The findings related to the research were presented in a final report in Aug 2020 (M8) and followed two rounds of data collection, firstly an on-line survey of SE course and programme providers and secondly, a series of virtual / telephone interviews with a total of 56 interviewees drawn equally from each of the SocialB partner countries apart from Slovenia (11) due to its lower number of available SE courses and programmes. An initial desk based study revealed the identity of the course, its type, level, and location in each of the SocialB project partner countries (4 Nr) and also across a further 20 EU states. Responses were received from a total of 98 course and programme providers from countries across the EU. No responses were received from Czech Republic, Slovakia, Hungary and Romania. The Report presents a complete database of these courses, with information about the country, city, teaching language, term specifications, fees, training content, learning outcomes, teaching methods, admission requirements, type and level of education/training, and delivery methodologies. It was found that the vast majority (70%) of all surveyed courses/programs were of a duration from one to six months, whilst programmes (either BSC or MSC) were of a duration of one year or more. The semi-structured interviews with academics associated with SE course and programme delivery allowed the research to identify skills and knowledge gaps and the need for more work related to topics such as funding opportunities, social impact analysis and HR management on their existing courses and programmes.

Progress Review

SED finds that In the prevailing circumstances of the pandemic, in which home working was the norm and given other barriers, such as language and the difficulty of identifying appropriate courses for their eligibility the project team achieved a good overall response to their on-line survey. That response generated sufficient data to allow it to produce results that could be used to develop courses and programmes across their own home countries. However, such results need to be treated with caution in terms of their generalisability across the EU as the respondents to the survey were heavily drawn from SocialB project partners

countries. Nonetheless it is evident that the finalised SE Skills & Training Needs Analysis Report provides a sound base from which material related to WP3 output can be based. In addition the database of course provision that is located on the project web site provides an opportunity for other course providers not included in the study to add data from their own courses and programmes so that as an output it is of use to EU citizens seeking information on SE courses and programme availability and characteristics in general.

Task 3 SE Skills & Training Needs Analysis

P2 developed the survey methodology and questionnaires and led the task supported by P3, P5 and P8 to explore the existing qualifications and competencies of SEs, as well as on known deficits and anticipated skills requirements through online surveys and face-to-face meetings. At project submission stage, pre-COVID19, it was anticipated that such face to face meetings would be with at least 25 SEs (Board Members and Managers) per partner country: 5 social partners that support social economy and entrepreneurship in each partner country; and 5 SE advisors/advisor organisations in each country to assess their perceptions of skills deficits and needs (140 total).

In the circumstances of the COVID19 pandemic it was resolved to finalise this report in Oct 2020 (M10) on the basis of delayed responses to the online survey. The survey was sent as planned to the differing cohorts of SE stakeholders as identified above and achieved a total of 134 responses. The slight deficit in responses was largely due to the lower response rate achieved in Slovenia due to SE being in its relative infancy in that location. The analysis of the data obtained in the report identified clear management, growth and sustainability challenges for SEs. In terms of growth the research indicated that it was affected by SEs facing challenges related to obtaining funds for investment, staff expertise and staffing resources. In terms of sustainability the survey results indicated that SEs have an over reliance on state funded grants, and capability in terms of strategic business vision. In addition the work identified needed training approaches and methods as well as perceived barriers to participation.

Progress Review

SED find that the work underpinning this report provides a clear direction for the primary needs for SE organisational learning and as a result sets out a potential curricula for courses and programmes in SE education at VET and HEI levels that address issues such as; the development of expertise related to sustainability and growth; financial planning and management; communications, sales and marketing; staff development; fund raising; business strategic planning and soft skills. The quantitative nature of the data underpinning the report, although not as planned, was as good as it could have been given the circumstances of the pandemic and the emergent state of SE organisations in one of the partner countries (Slovenia) and should form the basis of further project work in WP3.

The interviews with the workpackage leads outlined that partners were very satisfied with the high standard of the reports produced as the outputs for WP2. There was acknowledgement

of the time and effort that partners had put into the research, analysis and evaluation processes. An academic paper, based on the findings of the reports has been written and has been accepted for publication.

Task 4 SE Skills Gaps & Training Needs Mapping

P4 led this task that took the quantitative and qualitative findings from Tasks 1, 2 and 3 (see above) to develop an overarching Skills Gaps and Training Needs Analysis Report that identified needs from within the SE sector, available courses and gaps in HEI/VET provision. In addition, an interactive map has been developed by P4 which indicates the so far unpublished details of the 98 identified courses related to SE that have been revealed in the report. Following comment and review by the partners a final report was produced on schedule that consisted of all task reports and it has been made available on the project website. This output forms the basis of further project work in WP3 and provides material that could be used by the project team to disseminate findings via academic conferences, journal papers and other professional fora.

2.3 WP3 - Training Content Design and Development

WP3 is led by P6 and develops the learning content and training delivery methodology and tools to address the identified skills gaps identified in WP2. At project submission the following tasks and timescales were identified as being required to deliver the WP objectives, namely:

- (i) Learning Units Descriptors (by M12)
- (ii) Learning Unit Material (by M19)
- (iii) Training and Assessment Methodology (by M20)
- (iv) Report on Innovative Training Techniques for Social Entrepreneurs (by M22)
- (v) Report on Accreditation & LU Provision (by M36)

P6 is responsible for the overall WP output and each member of the project team were allocated the development of some of the detailed LUs and their associated detailed course contents.

(i) Learning Units Descriptors

At project submission stage it was anticipated that The Skills Gaps & Training Needs Analysis Report (WP2), would provide the basis for the development of the training learning units/modules and were expected to cover topics within the thematic areas of:

Social Impact Assessment;	Project Management;
Economic and Financial Sustainability;	Communication and Marketing for SE;
Fundraising for SE.	

It was planned that between 16-24 Learning Units (LUs) would be developed, with each module consisting of a group of four LUs. A specific descriptor would be developed for each LU covering learning outcomes including level of accreditation, indicative syllabus and core resources. The LUs were to be designed for delivery as individual components or as a

combination of Units and include a general description of unit / topic; the desired learning outcomes covered by the unit; a description of the final assessment required for each unit; detailed learning content; and duration of each unit / topic / module.

As of M18 the project team led by P6 and supported by P7 have produced a Learning Unit Descriptors Report that sets out the following modules and LUs with a brief summary statement of related course content. Also indicated on a standardised template is the expected learning hours for each module/learning unit and their ECTS/EQFL values. The modules listed are:

1. Introduction to Social Entrepreneurship
2. Project Design & Management
3. Human Resources
4. Social Impact Analysis
5. Financial & Economic Sustainability of Social Enterprise
6. Growth Strategies, Marketing & Fundraising for Social Enterprises

Progress Review

The six modules indicated above generated a total of 24 LUs as originally envisaged at project submission stage and the associated brief statement of related course content reflects the findings of WP2 in terms of its uncovered skills and knowledge gaps as well as the broad course themes identified at project submission stage. However, the involvement of all partners in developing this material generated some inconsistencies across the modules in terms of (i) the numbers of learning outcomes identified for each module and LU; (ii) the style / wording of the indicative course content, and (iii) the number of teaching hours for the differing amounts of material within the modules listed. Such inconsistencies could impact on the validity of the developed material as both a stand alone module and as part of a coherent programme of learning.

As a result it is recommended that a further editing process of the Learning Unit Descriptors is undertaken to ensure greater consistency across each of the modules listed above before the task is finalised for publication as an output from WP3.

(ii) Learning Unit/Modules Content Development

P6 leads the development of the training content and learning material and mode of delivery for the modules developed in task (i) above. P4 and P7 were identified as being in support of P6 to ensure this task was completed as planned by M19. The development of the content that forms the output of this Task was assigned to all partners by P6 with 4-6 Learning Units being developed per partner. The prompt completion of this task depended upon the timely production of output from Task (i) and is needed for the efficient completion of Task (iii) - by M20, Task (iv)- by M22 and Task (v) – by M36 that make up the remainder of WP3.

Progress Review

At project proposal stage it was planned that the training and learning materials would be strongly informed and influenced by the output from task (i) above and that its delivery would use a range of teaching methodologies such as, face to face lectures, gamification, online e-learning, problem-based, self directed and work-based learning. On inspection of the output material so far developed for Task (ii) it is clear that this task is not as yet being completed as originally planned. A template for content development for each of the modules identified in Task (i) was produced in M16 and it contains incomplete and unedited information related to learning outcomes, learning hours and potential delivery patterns for the LUs identified above. It is recommended that this material is cross-checked with the finalised material developed in Task (i) above to ensure consistency of content and approach.

The generated module template does set out the pattern of delivery for each LU however, there is as yet no indication of related assessment types and tools. It is recommended that the project team urgently review the generation of this material as there is a need to ensure both diversity of delivery patterns across the LUs as well as a consistency of material volume and associated assessment patterns to ensure that appropriate standards are achieved evenly across all of the LUs listed for delivery. Given the project teams' decision to involve all partners in the generation of the training and learning material there will be a need to edit the finalised output so as to ensure a consistency of approach has been achieved.

Within the partnership there has been significant discussion about the module descriptors and content and this has affected the progress of developing the content. Partners felt that these discussions had been pragmatic and that this was the right point in the project to have these debates, rather than after content had started to be produced.

Partners emphasised that the educational materials produced need to be suitable for use in HEI courses and activities as well as for practitioners; it was recognised that this was not an easy task. There had also been debate within the partnership about module accreditation, a number of partners wanted to emphasise that a core purpose of the project was to produce innovate learning materials, rather than accredited modules.

Partners also highlighted that M18 was a significant point for the project, the module descriptors have been agreed and now all partners need to work on the module content throughout the summer, to be ready for the pilot and evaluation phase (WP5). It must be noted that it was originally planned that the module descriptors would be completed by M13 rather than M18. Partners are realistic about the workload ahead and recognised that everyone needs to undertake the tasks assigned to them within the revised deadlines, to be ready for the pilot testing and evaluation phase in early 2022.

Consequently, as of M18 Task (iii), (iv) and (v) of WP3 have not as yet been effectively started. Given the criticality of Task (ii) to the timely completion of WP3 and subsequent project outputs it is recommended that the project team take action to ensure that the delayed completion of Task (ii) does not impact on further project progress.

2.4 WP4 E-Learning Platform

P1 leads this WP assisted by all partners. The WP aims were to consider the options available and make a recommendation for the implementation of a cost effective, efficient and viable E-Learning platform for the SocialB education and training programmes. The WP would also develop a framework document setting out the core functionality of the portal, its implementation phases, technical requirements and design features. These aims were to be achieved through the timely development of outputs (M10-M24) associated with the following tasks;

- Task 1 A review document on E-Learning Platform Solutions – (M11)
- Task 2 An E-Learning Platform Framework document – (M12)
- Task 3 The development of the SocialB E-Learning Repository – (M14)
- Task 4 L.U.s Content upload onto E-Learning Platform – (M22)
- Task 5 A Pilot Technical Evaluation Report – (M24)

This evaluation will consider output material related to Task 1 – 3 (see above) and review the on-going output associated with Task 4.

Progress Review

Task 1 & 2

The Review of E-Learning Platforms Report was published in M14 This review aimed to present a comprehensive evaluation of the options available for the implementation of a cost effective, efficient, and viable ELearning platform for the SocialB project. The actual document produced provided both a detailed analysis of nine e-learning platforms currently available and an examination of the functionality of the recommended Moodle e-learning platform. The platforms considered were Blackboard, Canvas, Teachable, OpenOlat, Thinkfic, Coursera, Udemy, Alison and Moodle. The available e-learning platforms were evaluated against factors such as registration and access processes, usability, cost, strengths and weaknesses. Following the analysis reference was made to refrereed academic research related to the quantitative and qualitative evaluation of the leading platforms (Moodle and Blackboard) so as to establish Moodle as the recommended platform for partners to use. The report document then goes on to examine the functionality requirements of the recommended platform across the following features, namely communications, integration, structure, interface, teaching and learning, technology and accessibility, student learning, assessment and support

SED finds that this was a rigorous and robust assessment of available e-learning platforms and given the detailed consideration of issues related to the functionality requirements for the recommended platform (Moodle) it anticipates no issues with partners using it to implement other project related tasks.

Task 3 & 4

Task 3 and 4 are interlinked and both led on from the above work and sought to develop a framework document setting out the core functionality required from the e-learning platform to accommodate the SocialB learning repository, its implementation phases, technical requirements, and design features. As of M18 a SocialB page has been set up on Moodle and

is ready to fill with content. The later than planned delivery of work associated with the LU descriptors (WP3) has impacted on this task but SED understands that the LUs are now in the process of being uploaded on the Moodle platform.

SED finds that although the completion of these tasks has not yet been achieved due to late completion of other WP tasks it is confident that work in these areas is on-going and will be completed without further impacting on the delivery of the overall project outputs and outcomes.

2.5 WP 7 – Communication, Dissemination and Sustainability

There is a detailed communication plan for the project, which includes very detailed expectations of each partner. There is also an associated spreadsheet tracking progress against the indicators.

In terms of a midpoint evaluation there are a number of comments relating to project dissemination and sustainability:-

- The project website is well designed
- At this point of the project there is an opportunity to update/add materials to the project
- The original newsletter schedule has been amended and the second newsletter has just been produced in M18
- A journal paper, relating to WP2 has been accepted for publication in July 2021
- Moving forward the partnership should consider how the project outputs can be adapted for conference and journal papers; exploiting the European social enterprise and social innovation networks
- Make use of the PAG members networks to disseminate the materials/outputs produced as part of the project.

3.0 Conclusions and Recommendations

3.1 Conclusions

SED concludes that the evidence provided from its desk based review of project documents and its interviews with some of the partners leading WP production is that this is a strong partnership with a good balance of academic and SE practitioners. Both academic and practitioner partners are fully engaged and contributing to the development of quality outputs for the project. SED recommends that the project team recognise that the development of innovative approaches to the teaching and learning related to its final outputs is as significant an outcome from the project as the accreditation of its outputs. In terms of progress against planned outputs from the project's workpackages SED has found that the project is generally on schedule although progress in some aspects of WP3 and 4 are slightly delayed. Some delays to planned outputs are normal in projects of this nature and our assessment is that the project team are taking the necessary steps to correct the schedule deficit and as a result it is anticipated that the project will be completed on time in December 2022.

It is clear from talking to partner organisations that P1, as an experienced lead partner is providing clear direction and communications in the difficult project circumstances of the COVID pandemic. Nonetheless it is suggested that if travel restrictions are removed that the partners do conduct a face to face transnational meeting so as to benefit from the opportunity to fully explore options to appropriate depths.

3.2 Recommendations

In terms of other recommendations SED suggests that

- (i) the project team recognise that SE is at different stages of evolution in partner countries and as a result seek to make full use of the potential of the project's established PAGs as well as other sector support agencies to aid the appropriate development, dissemination and exploitation of the projects outputs; and
- (ii) the project team seek to disseminate the findings so far achieved (M18) as widely as possible via social media, professional bodies, as well as through conventional academic papers.