T.5.3: Methodology & Coordination of the Pilot & Testing Phase

Trainees Handbook

With the support of

University of Patras

Contents

1 INTRODUCTION

The current document provides you with details about the SocialB training program that you will probably be interested to attend. Through it, it is expected to be prepared in such a way to know what to expect from the training and also to be ready to fill the tasks required by you in every step of the process. More specifically, this guide will enlighten you about:

- The LUs that are offered in SOCIALB and their content
- The learning methods that will be used during your experience with SOCIAL B training program
- Specific guidelines for the connection, usage and navigation in the SOCIAL B training platform
- Examples of activities foreseen in each LU

1.1 LUs THAT ARE OFFERED IN SOCIAL B

If you are interested in attending the Social B training, then you should keep in mind, that there are six different modules developed within Social B, each one of which covers critical aspects of the daily operation, funding and management of a Social enterprise. Moreover, each of these modules include four Learning Units that approach holistically the topic presented within the module. In the table given below you can see the available modules and Learning Units that are offered via the Social B platform. You can choose as many as you wish, concerning your time and specific needs.

Module	Learning Unit	Face-to-face / Synchronous E-learning	Asynchronous E-learning	WBL	Self-Directed Learning	Hours in Total
No. 1- Introduction to Social Entrepreneurship	LU 1: History and evolution of SE in Europe	4h	6h	8h	2h	20h
	LU 2: Reshape business value chain into social value chain	4h	6h	8h	2h	20h
	LU 3: Introduction to Social Innovation	4h	6h	8h	2h	20h
	LU 4: Good Governance in the field of Social Enterprise	8h	12h	16h	4h	40h
No. 2 Project Design and Management	LU 5: EU projects - EU opportunities for the development and funding of social enterprises	4h	6h	8h	2h	20h
	LU 6: Procurements processes, funding applications and proposals writing	8h	12h	16h	4h	40h
	LU 7: Project Management	4h	6h	8h	2h	20h
	LU 8: Soft Skills	4h	6h	8h	2h	20h
	LU 9: The role of human resource management	4h	6h	8h	2h	20h

No. 3 **Human Resource**	LU 10: Recruitment and selection of employees and volunteers	4h	6h	8h	2h	20h
	LU 11: Managing employees performance	4h	6h	8h	2h	20h
	LU 12: Leadership, and communication for maximum impact	8h	12h	16h	4h	40h
No. 4 **Social Impact Assessment**	LU 13: Introduction to Social Impact Assessment	4h	6h	8h	2h	20h
	LU 14: Methodology and tools to assess social impact	8h	12h	16h	4h	40h
	LU 15: Data analysis and visualization	4h	6h	8h	2h	20h
	LU 16: The importance of communicating social impact to key stakeholders	4h	6h	8h	2h	20h
No. 5 **Financial and Economic Sustainability of SE**	LU 17: Strategic planning and the life cycle of Social Enterprises	4h	6h	8h	2h	20h
	LU 18: How to build a business plan	8h	12h	16h	4h	40h
	LU 19: Financial planning and cash flow constraints	4h	6h	8h	2h	20h
	LU 20: Credit access and opportunities for social enterprises: Social Finance and Social Impact Finance	4h	6h	8h	2h	20h
No. 6 **Growth Strategies, Marketing and Fundraising for SE**	LU 21: Growth strategies and long term profitability of Social Enterprise projects	4h	6h	8h	2h	20h
	LU 22: Market evaluation and competitiveness assessment	4h	6h	8h	2h	20h
	LU 23: Fundraising and diverse fundings for SE	4h	6h	8h	2h	20h
	LU 24: Marketing, Sales and Networking skills	8h	12h	16h	4h	40h

The exact content of the learning units, the outcomes as well as details on hours of delivery per training method are provided below:

Learning Outcomes				
Learning Unit	**Knowledge**	**Skills**	**Competences**	**Duration**
LU 1: History and evolution of SE in Europe and Governance of SE	**After the completion of this learning unit, you will :** • Understand the main features, the origin and the profiles of Social Enterprise, across Europe • Identify the main elements of the Social Enterprise spectrum	**After the completion of this learning unit, you will be able to:** • Recognize best practises and worst-case scenarios of Social Enterprises to face social need	**After the completion of this learning unit, you will be competent to:** • Become more effective to maximise social impact rather than economic profit	**20 hours from which:** **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 2: Reshape business value chain into social value chain	**After the completion of this learning unit, you will :** • Be familiar with the concepts of value co-creation, value chain and multiple bottom line	**After the completion of this learning unit, you will be able to :** • Apply the concept of social value to the business value chain to promote impact-driven business development	**After the completion of this learning unit, you will be competent to:** • Outline the several components of the social value chain, recognizing differences and similarities between the public and business value chains	**20 hours from which:** **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL

LU 3: Introduction to Social Innovation	After the completion of this learning unit, you will : • Define social innovation frameworks and concepts, principles and practices	After the completion of this learning unit, you will be able to: • Address social needs through innovative sustainable solutions	After the completion of this learning unit, you will be competent to : • Identify the main element of Social Innovation process	**40 hours from which**: **8h** for face-to-face training and/or synchronous E-Learning, **4h** of self-directed learning, **12h** of asynchronous E-Learning, and **16h** for WBL
LU 4- Good Governance in Social Enterprises	After the completion of this learning unit, you will : • Identify the concepts of governance and board dynamics in the context of social enterprises • Explain the principles of good governance in SEs (accountability, transparency, democratic processes, and social responsibility) and identify relevant measures for implementation	After the completion of this learning unit, you will be able to: • Evaluate and apply measures for accountability, transparency, democratic processes, and social responsibility in the SEs • Identify the appropriate governance practices for developing an effective and dynamic board	After the completion of this learning unit, you will be competent to: • Assess changes in SEs related to accountability, transparency, democratic processes, and social responsibility and board management.	**40 hours from which**: **8h** for face-to-face training and/or synchronous E-Learning, **4h** of self-directed learning, **12h** of asynchronous E-Learning, and **16h** for WBL

LU 5- EU projects - EU opportunities for the development and funding of social enterprises	After the completion of this learning unit, you will : ● Be familiar with the European funding framework: EU portal, EU programmes, stakeholders and networks opportunities	After the completion of this learning unit, you will be able to: ● Tailor a project idea for a proposal call and choose the most appropriate funding opportunity	After the completion of this learning unit, you will be competent to: ● Successfully navigate to the EU funding portal	20 hours from which: 4h for face-to-face training and/or synchronous E-Learning, 2h of self-directed learning, 6h of asynchronous E-Learning, and 8h for WBL
LU 6- Procurements processes, funding applications and proposals writing	After the completion of this learning unit, you will : ● Be acquainted with the key principles of proposal writing and the proposal lifecycle	After the completion of this learning unit, you will be able to : ● Apply the process of proposal writing and submitting	After the completion of this learning unit, you will be competent to: ● Recruit the right partners for a project proposal ● Develop a project proposal including work plan, work packages, deliverables, management structure, milestones and procedures	40 hours from which: 8h for face-to-face training and/or synchronous E-Learning, 4h of self-directed learning, 12h of asynchronous E-Learning, and 16h for WBL

	After the completion of this learning unit, you will :	After the completion of this learning unit, you will be able to:	After the completion of this learning unit, you will be competent to :	20 hours from which:
LU 7: Project Management	After the completion of this learning unit, you will : - Define project management and identify the resources needed for each stage of project management including stakeholders, etc. · - Differentiate the key phases in a project life cycle and describe the activities carried out in each phase	After the completion of this learning unit, you will be able to: Apply the principles and processes of project and risk management	After the completion of this learning unit, you will be competent to : Illustrate good practises of project management (e.g.,budgeting, cost estimation, scheduling, scope and risk management tools etc.)	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU8 – Soft Skills	After the completion of this learning unit, you will : - Recognize the importance of soft skills (communication, team working, problem solving, creative thinking) in project management approach - Identify the various forms of communication and principles of effective communication and active listening	After the completion of this learning unit, you will be able to: - Create effective, flexible and resilient teams according to the needs in SE sector - Gather information about a problem, analyse it and manage a creative thinking process to develop solutions in SEs contexts	After the completion of this learning unit, you will be competent to : - Incorporate various forms of communication with different actors and stakeholders of SE sector - Think out of the box when trying to provide solutions to social problems	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL

LU 9- The role of Human Resources Management	After the completion of this learning unit, you will : • Specify the main functions of HRM, their application, the relation with performance of staff (paid –unpaid) in an SE	After the completion of this learning unit, you will be able to : • Choose the appropriate combination of human resources and develop management strategies to boost greater SE performance • Form HR strategies which add value to the social enterprise	After the completion of this learning unit, you will be competent to : • Seek achieving competitive advantage through the strategic deployment of human resources assets and the development of HR strategies	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 10- Recruitment and Selection of Employees and Volunteers	After the completion of this learning unit, you will : • Recognize the strategic importance of recruitment and selection in the context of social enterprises. • Describe the contemporary trends and techniques in recruitment and selection and the distinctive aspects between paid staff and volunteers (including the board) in social enterprises.	After the completion of this learning unit, you will be able to : • Employ appropriate recruitments strategies, and procedures for volunteers (including the board) and employees in social enterprises • Apply a suitable process for the selection of volunteers (including the board) and employees in social enterprises	After the completion of this learning unit, you will be competent to : • Implement a recruitment process for volunteers (including the board) and employees in social enterprises, and measure the outcomes • Plan and put in place an effective recruitment and selection process for volunteers (including the board) and employees in social enterprises	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL

LU 11- Managing Employee Performance	After the completion of this learning unit, you will : • Describe the most known motivation theories and theories used for understanding volunteerism and recognize how they correlate/ affect organizational behavior (work engagement, commitment, job satisfaction) contributing to employees' performance. • Describe what a learning organization is and list the benefits of the establishment of a learning culture within a social Enterprise.	After the completion of this learning unit, you will be able to : • Select various learning and development opportunities for enhancing volunteers' commitment and engagement • Develop strategies on how to promote employees' and volunteers' motivation	After the completion of this learning unit, you will be competent to : • Assess learning and development practices for enhancing employees' personal development and volunteers' retention	20 hours from which: 4h for face-to-face training and/or synchronous E-Learning, 2h of self-directed learning, 6h of asynchronous E-Learning, and 8h for WBL
LU 12- Leadership and Leadership Communication for maximum impact	After the completion of this learning unit, you will : • Define the role of leadership in social enterprises and the qualities and skills that a leader should have in order to bridge different contradictory aspects of an SE and the role of emotional intelligence upon the entrepreneurial behavior, attitudes and leadership • Describe different leadership styles in relation to the SEs challenges and the role that communication has in the whole procedure	After the completion of this learning unit, you will be able to : • Build and sustain trustful relationships with all relevant internal and external stakeholders through responsible leadership • Manage identity issues related to the commercial and social side and solve emerged leadership dilemmas	After the completion of this learning unit, you will be competent to : • Apply successful leadership by managing the difficulties that derive from the inherently contradicting nature of the SEs • Gain insight into their own preferred leadership style, and the advantages and disadvantages attached to that (and other) style(-s)	40 hours from which: 8h for face-to-face training and/or synchronous E-Learning, 4h of self-directed learning, 12h of asynchronous E-Learning, and 16h for WBL

LU 13: Introduction to Social Impact Assessment	After the completion of this learning unit, you will : • List the main definitions of Social Impact and history of Social Impact Assessment • Describe the main social impact assessment (SIA) models • Be familiar with the main steps of the Social Impact Assessment Life Cycle	After the completion of this learning unit, you will be able to : • Set up a social value assessment	After the completion of this learning unit, you will be competent to : • Identify the main elements of the Social Impact Value Chain	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 14: Social impact assessment tools and techniques	After the completion of this learning unit, you will : • Be familiar with the main processes and methodologies of Social Impact Assessment:Theory of Change and Social Return on Investment.	After the completion of this learning unit, you will be able to: • Design and handle all the steps linked to the assessment process with the SROI and TOC model	After the completion of this learning unit, you will be competent to: • Identify the outcome areas and related indicators, using both ToC and SROI as well as mapping the changes generated by a project/services/program.	**40 hours from which**: **8h** for face-to-face training and/or synchronous E-Learning, **4h** of self-directed learning, **12h** of asynchronous E-Learning, and **16h** for WBL

LU 15: Data analysis and visualization	After the completion of this learning unit, you will : • Be familiar with data collection methods, typology of data analysis and data visualization IT tools	After the completion of this learning unit, you will be able to: • Apply data collection methods, and visualise data using IT tools	After the completion of this learning unit, you will be competent to: • compile and prepare a data collection plan and represent data using the appropriate charts and graphs	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 16: The importance of communicating social impact to key stakeholders	After the completion of this learning unit, you will : • Be aware of the key role of social impact for the engagement of stakeholders and data communication • Identify the strategic role of social impact reporting	After the completion of this learning unit, you will be able to: • Apply the principles of good communication of social impact	After the completion of this learning unit, you will be competent to: • Engage public and private stakeholders through the use of social impact reporting • Communicate according to the principles of good communication of social impact in accordance with stakeholders' expectations and social enterprise actions	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL

	After the completion of this learning unit, you will :	After the completion of this learning unit, you will be able to:	After the completion of this learning unit, you will be competent to:	20 hours from which:
LU 17: Strategic planning and the life cycle of Social Enterprises	• Define the steps of the strategic planning process for the development and sustainability of SEs • Recognize the components and the importance of strategic planning for the development of SE	• Develop a business strategy for a social enterprise	• Identify key components of strategic planning process for SE	**4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 18: How to build a business plan	• Recognize the interaction between a Social Business Canvas and a Business Plan • Define the main elements of a Business plan and the logical linkages between them	• Design a Social Business Canvas according to the identified main contents • Prepare a Business Plan based on a business model	• Explore, outline and implement a business idea in detail (using the Social Business Canvas model). ● Use a Business plan to check whether a business idea is also a business opportunity.	**40 hours from which:** **8h** for face-to-face training and/or synchronous E-Learning, **4h** of self-directed learning, **12h** of asynchronous E-Learning, and **16h** for WBL

LU 19: Financial planning and cash flow constraints	After the completion of this learning unit, you will : • Define key concepts of financial planning, economic management, cash flow, budgeting activities	After the completion of this learning unit, you will be able to : • Create a provisional reporting structure to project and monitor economic performance through costs provision, managing cash flow constraints, challenging financial periods and a project's budget definition	After the completion of this learning unit, you will be competent to : • Read and interpret an economic report and foreseeing final year results	20 hours from which: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 20: Access to credit and opportunities for social enterprises: the role of Social Finance and Social Impact Finance	After the completion of this learning unit, you will : • Be familiar with Social Finance, Social Impact Finance and Social Impact Bond schemes • Explore the strengths and weaknesses of an outcome payer scheme to solve social needs	After the completion of this learning unit, you will be able to : • Design an outcome payer scheme	After the completion of this learning unit, you will be competent to : • Identify the key players needed to develop a Social Impact Bond scheme, and the role played by the Social Enterprise within a SIB	20 hours from which: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL

LU 21: Growth strategies and long- term profitability of Social Enterprise projects	**After the completion of this learning unit, you will :** • Define and assess a SE's organizational capabilities and constraints for implementing a successful growth strategy • Be familiar with a range of growth strategies leading to social impact scaling up and long term profitability	**After the completion of this learning unit, you will be able to :** • Identify and explore the factors that affect the growth and long-term profitability of social enterprises and develop strategic solutions • Develop adaptive and efficient strategies to cope with a contraction of public resources	**After the completion of this learning unit, you will be competent to :** • Scale up and pursue long term profitability of a social enterprise, balancing both social impact scaling and commercial growth • Design and apply successful growth strategies for social enterprises	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 22: Market evaluation and assessing competitiveness	**After the completion of this learning unit, you will :** • Describe how to prepare market research and competition analysis • Define market segmentation and recognize the importance of targeting and positioning	**After the completion of this learning unit, you will be able to :** • Set up market research steps and product life cycle Set up consumer research	**After the completion of this learning unit, you will be competent to :** • Undertake costumers and competition analysis	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL

LU 23: **Fundraising and funding models for SEs**	After the completion of this learning unit, you will : • Be familiar with different tools and methods of fundraising • Define the different types of crowdfunding (eg. equity crowdfunding, lending crowdfunding, reward crowdfunding)	After the completion of this learning unit, you will be able to : • Initiate the main steps of fundraising campaign	After the completion of this learning unit, you will be competent to : • Identify the best funding model for a campaign	**20 hours from which**: **4h** for face-to-face training and/or synchronous E-Learning, **2h** of self-directed learning, **6h** of asynchronous E-Learning, and **8h** for WBL
LU 24: **Marketing, Sales and Networking skills**	After the completion of this learning unit, you will : • Be familiar with the role of marketing, sales and networking as key customer engagement tools generally, and specifically within SEs • Be familiar with the key purpose, scope and challenges of a range of different marketing strategies and tools (i.e, direct marketing vs other marketing elements,) and media (ie.,printed, online etc) • Be aware of how marketing and sales efforts are related to customer engagement, and how to use a database to target marketing communications	After the completion of this learning unit, you will be able to : • Develop a basic marketing strategy for a social enterprise • Explore network opportunities that may contribute to successful marketing and sales campaigns and activities	After the completion of this learning unit, you will be competent to : • Create a basic marketing campaign • Design and build a networking strategy	**40 hours from which**: **8h** for face-to-face training and/or synchronous E-Learning, **4h** of self-directed learning, **12h** of asynchronous E-Learning, and **16h** for WBL

2 THE LEARNING METHODS TO BE USED IN THE SOCIAL B TRAINING PROGRAM

The SOCIAL B project promotes your enhancement on topics related to social entrepreneurship through the adoption of training methods that seek the development of your learning to learn competence along with experiential and collaborative learning. For this to be achieved, the training material developed within SOCIAL B, is provided to you through a mix of learning methods (blended learning). The curriculum is designed to be delivered as a blended learning course. In this sense, you will participate in all training methods provided by SOCIAL B project, which are:

- ✓ Face To Face Training and/ or Synchronous e-Learning
- ✓ Asynchronous online learning,
- ✓ Work-based learning, and
- ✓ Self-directed learning.

2.1 FACE TO FACE TRAINING AND/ OR SYNCHRONOUS E-LEARNING

Face To Face training constitutes the most traditional way of learning, as you all have experienced through your school years. You will attend a class along with peers and be trained on a specific topic. The course has a certain structure taking place in a specific venue at certain hours on certain dates. There is a trainer to guide the learning procedure and deciding the training techniques to be used according to the topic and your training needs, the case studies/ assignments to be delivered along with the technological equipment to be used for maximizing the learning effect.

On the synchronous e-Learning method you will also attend a class not on a physical way but virtually. You will have to attend the class on specific dates and hour according to training schedule, at the same time with your peers and the trainer. The only difference is that you be connected to the training from your own place through your PC/ Laptop/Tablet etc. In addition, technological equipment is required as well as internet connection.

2.2 ASYNCHRONOUS ONLINE LEARNING

In this form of training, you will have the opportunity to exploit your autonomy as a learner. In fact, Asynchronous e-learning activities are time-independent, so that you will be able to participate in the online training according to your time availability and scheduling. It can take place at any time. In addition, it is more flexible making your participation in training easy since you have the time to absorb concepts better between courses. For this learning method you are going to use the SOCIAL B Training platform where guidelines on how to enrol, navigate and use it are provided within the platform.

2.3 SELF-DIRECTED LEARNING

You may also find in the literature as Independent / autonomous learning. In fact, Self-dericted learning describes the learning process in which you are able to direct, control and organise learning without the assistance of a trainer or / instructor. Please note, that this requires strong self-motivation and self-orientation on behalf of you.

Within the framework of SOCIAL B there are numerous tools employed so as to retain your interest in the topic offering also the opportunity to find out more on this. For example, you are given the below mentioned opportunities:

- ✓ **Additional Information:** further resources, articles, websites, videos, TEDX talks are provided to you in case you want to learn more on the given topic
- ✓ **Did you know ?-** in this section case studies, tips and peculiarities connected to specific topics are provided
- ✓ **Self-reflection questions:** These questions provoke you to think about your experience in a given issue and reflect on it

2.4 WORK-BASED LEARNING (WBL)

Work-based learning (WBL) is a form of experiential learning and implies two characteristics, namely learning in a work context and learning through practice. It can be further understood as the model of learning **through** work, **for** work and **a**t work (European Training Foundation, 2013). It combines traditional forms of education with work experiences, where theoretical and technical skills can be combined and applied. WBL is usually applied to develop basic work habits, occupational identity and specific occupational competences. Through WBL you will not only acquire specific skills and competences, but also enhance your ability to develop learning to learn skills.

The procedure that you will follow is simple:

- ✓ After you have finished the theoretical parts of a LU, the training provider will send you in a Social Enterprise for a specific amount of time in order to carry out activities in a real working environment within a real context.
- ✓ A specific project has been developed for each LU and you are called to carry out the activities foreseen by following the instructions of every project.
- ✓ For your support within the SE a WBL Trainer/ instructor will be also there to support you and/or guide you for accomplishing your tasks

3 EXAMPLES OF ACTIVITIES DESIGNED IN EACH LU

For the assessment, it is vital that you **know and understand how you will be assessed**. The teacher/trainee knows what the end product should look like, and it is his/her responsibility to **effectively convey that expectation to you as learners.**

Within SOCIAL B there are various types of activities foreseen, in order for you to check whether you have acquired the knowledge provided through the LUs and developed specific skills and competences. These activities concern:

- ✓ True and False Questions
- ✓ Multiple Choice Questions
- ✓ Practical Activities for you as individuals
- ✓ Practical activities for you and your peers
- ✓ Short questions that need a short answer

All these questions along with the results from the WBL activities contribute in the final grading of your performance.

Finally, it should be mentioned that at the end of the piloting of the six (6) Learning Units you will be provided with a Certificate of Completion of SOCIAL B Training program by the Coordinator of Social B consortium, that is the **Technological University of the Shannon: Midlands Midwest**, abbreviated as **TUS.**

ANNEX I – GUIDELINES FOR THE SOCIAL B MOODLE PLATFORM