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

Trainers Handbook

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1 INTRODUCTION

The current document provides the general guidelines to be followed by SocialB Trainers that will be employed for the delivery of training activities (Face-to-Face, synchronous E- Learning) within the framework of Social B program. The guidelines focus primarily on providing details about:

- The main target groups of the SocialB project
- The structure of the training
- The main pillars upon which the theoretical background of the recommended SocialB Training methodology is based
- The monitoring and assessment methodology and tools to be used during Face-to-Face and/or synchronous E-Learning

It is anticipated to provide Trainers with a clear and coherent procedure on how to deliver Face-to-Face and/ or synchronous E- Learning training and training activities in an efficient and effective way.

1.1 TARGET GROUPS

The target groups of SocialB training via Face-to-Face and/or synchronous E-Learning are HEI students from the field of Social Entrepreneurship or related ones and Social Entrepreneurs and practitioners like managers in SEs, members of the Board, employees in SEs etc.

1.2 STRUCTURE OF THE SOCIALB TRAINING

The modular form of the curriculum allows the flexible implementation of the courses on the basis of the participants' needs. The order of the modules delivered depends on their content. It is suggested for the modules to be delivered progressively.

Training needs of the target group can be met through a diversity of routes, depending on the participants' needs. For example, only one module or learning unit can be selected by the learners according to the competences, skills and knowledge they want to acquire. The curriculum is designed to be delivered as a blended learning course of online learning, face to face training, work-based learning and self-directed learning.

The recommended structure and duration of each module is presented in table 1

Table 1: Structure & Duration of SocialB training

Modules	Leaning Units	ECTS	EQF level	Hours	Duration of each type of training			
					Face to face / synchronous e-learning	E- Learning asynchronous	WBL	Self Directed Learning
1	History and evolution of social enterprises in Europe	1	6	20	4	6	8	2
Introduction	Reshape business value chain into	1	6	20	4	6	8	2

to Social	social value chain							
Entrepreneurship	Introduction to Social Innovation	1	6	20	4	6	8	2
	Good Governance of Social Enterprises	2	6	40	8	12	16	4
2	EU projects - EU opportunities for the development and funding of social enterprises	1	5	20	4	6	8	2
Project Design and Management	Procurements processes, funding applications and proposals writing	2	5	40	8	12	16	4
	Project Management	1	5	20	4	6	8	2
	Soft Skills	1	5	20	4	6	8	2
3	The role of human resources	1	6	20	4	6	8	2
Human Resources Management	Recruitment and selection of employees and volunteers	1	6	20	4	6	8	2
	Managing employee performance	1	6	20	6	4	8	2
	Leadership, and communication for maximizing impact	2	6	40	8	12	16	4
4	Introduction to Social Impact Assessment	1	6	20	4	6	8	2
Social Impact Assessment	Methodology and tools to assess social impact	2	6	40	8	12	16	4
	Data analysis and visualization	1	6	20	4	6	8	2
	Communicating Social Impact to key stakeholders	1	6	20	4	6	8	2
5	Strategic planning and the life cycle of Social Enterprises	1	5	20	4	6	8	2
Financial and Economic Sustainability of social enterprises	How to develop a business plan	2	5	40	8	12	16	4
	Financial planning and cash flow constraints	1	5	20	4	6	8	2
	Access to credit and opportunities for social enterprises: Social Finance and Social Impact Finance	1	5	20	4	6	8	2
6	Growth strategies and long term profitability of Social Enterprise projects	1	5	20	4	6	8	2
Growth Strategies, Marketing and Fundraising for social enterprises	Market evaluation and competitiveness assessment	1	5	20	4	6	8	2
	Fundraising and funding models for social enterprises	1	5	20	4	6	8	2
	Marketing, Sales and Networking skills	2	5	40	8	12	16	4
Total Duration				600h				

Moreover, the Learning outcomes, the training methods, and the duration of each LU are presented in the table given below.



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Learning Outcomes				
Learning Unit	Knowledge	Skills	Competences	Duration
LU 1: History and evolution of SE in Europe and Governance of SE	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Understand the main features, the origin and the profiles of Social Enterprise, across Europe Identify the main elements of the Social Enterprise spectrum 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> Recognize best practises and worst-case scenarios of Social Enterprises to face social need 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> Become more effective to maximise social impact rather than economic profit 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
LU 2: Reshape business value chain into social value chain	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Be familiar with the concepts of value co-creation, value chain and multiple bottom line 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> Apply the concept of social value to the business value chain to promote impact-driven business development 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> Outline the several components of the social value chain, recognizing differences and similarities between the public and business value chains 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>

<p>LU 3: Introduction to Social Innovation</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Define social innovation frameworks and concepts, principles and practices 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> Address social needs through innovative sustainable solutions 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> Identify the main element of Social Innovation process 	<p>40 hours from which:</p> <p>8h for face-to-face training and/or synchronous E-Learning,</p> <p>4h of self-directed learning,</p> <p>12h of asynchronous E-Learning, and</p> <p>16h for WBL</p>
<p>LU 4- Good Governance in Social Enterprises</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Identify the <u>concepts</u> 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 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> Evaluate and apply measures for accountability, transparency, democratic processes, and social responsibility in the SEs <u>Identify</u> the appropriate governance practices for developing an effective and dynamic board 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> Assess changes in SEs related to accountability, transparency, democratic processes, and social responsibility and board management. 	<p>40 hours from which:</p> <p>8h for face-to-face training and/or synchronous E-Learning,</p> <p>4h of self-directed learning,</p> <p>12h of asynchronous E-Learning, and</p> <p>16h for WBL</p>

<p>LU 5- EU projects - EU opportunities for the development and funding of social enterprises</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> ● Be familiar with the European funding framework: EU portal, EU programmes, stakeholders and networks opportunities 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> ● Tailor a project idea for a proposal call and choose the most appropriate funding opportunity 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> ● Successfully navigate to the EU funding portal 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 6- Procurements processes, funding applications and proposals writing</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> ● Be acquainted with the key principles of proposal writing and the proposal lifecycle 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> ● Apply the process of proposal writing and submitting 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> ● Recruit the right partners for a project proposal ● Develop a project proposal including work plan, work packages, deliverables, management structure, milestones and procedures 	<p>40 hours from which:</p> <p>8h for face-to-face training and/or synchronous E-Learning,</p> <p>4h of self-directed learning,</p> <p>12h of asynchronous E-Learning, and</p> <p>16h for WBL</p>

<p>LU 7: Project Management</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> • Apply the principles and processes of project and risk management 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> • Illustrate good practises of project management (e.g.,budgeting, cost estimation, scheduling, scope and risk management tools etc.) 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU8 – Soft Skills</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> • 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 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>

<p>LU 9- The role of Human Resources Management</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Specify the main functions of HRM, their application, the relation with performance of staff (paid –unpaid) in an SE 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> Seek achieving competitive advantage through the strategic deployment of human resources assets and the development of HR strategies 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 10- Recruitment and Selection of Employees and Volunteers</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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. 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> 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 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>

<p>LU 11- Managing Employee Performance</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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. 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> Select various learning and development opportunities for enhancing volunteers' commitment and engagement Develop strategies on how to promote employees' and volunteers' motivation 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> Assess learning and development practices for enhancing employees' personal development and volunteers' retention 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 12- Leadership and Leadership Communication for maximum impact</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> 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) 	<p>40 hours from which:</p> <p>8h for face-to-face training and/or synchronous E-Learning,</p> <p>4h of self-directed learning,</p> <p>12h of asynchronous E-Learning, and</p> <p>16h for WBL</p>

<p>LU 13: Introduction to Social Impact Assessment</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> Set up a social value assessment 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> Identify the main elements of the Social Impact Value Chain 	<p>20 hours from which:</p> <p>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</p>
<p>LU 14: Social impact assessment tools and techniques</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Be familiar with the main processes and methodologies of Social Impact Assessment: Theory of Change and Social Return on Investment. 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> Design and handle all the steps linked to the assessment process with the SROI and TOC model 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> Identify the outcome areas and related indicators, using both ToC and SROI as well as mapping the changes generated by a project/services/program. 	<p>40 hours from which:</p> <p>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</p>

<p>LU 15: Data analysis and visualization</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • Be familiar with data collection methods, typology of data analysis and data visualization IT tools 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> • Apply data collection methods, and visualise data using IT tools 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> • compile and prepare a data collection plan and represent data using the appropriate charts and graphs 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 16: The importance of communicating social impact to key stakeholders</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> • Apply the principles of good communication of social impact 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> • 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 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>

<p>LU 17: Strategic planning and the life cycle of Social Enterprises</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> Develop a business strategy for a social enterprise 	<p>After the completion of this learning unit, you will be competent to:</p> <ul style="list-style-type: none"> Identify key components of strategic planning process for SE 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 18: How to build a business plan</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be able to:</p> <ul style="list-style-type: none"> Design a Social Business Canvas according to the identified main contents Prepare a Business Plan based on a business model 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> 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. 	<p>40 hours from which:</p> <p>8h for face-to-face training and/or synchronous E-Learning,</p> <p>4h of self-directed learning,</p> <p>12h of asynchronous E-Learning, and</p> <p>16h for WBL</p>

<p>LU 19: Financial planning and cash flow constraints</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> Define key concepts of financial planning, economic management, cash flow, budgeting activities 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> Read and interpret an economic report and foreseeing final year results 	<p>20 hours from which:</p> <p>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</p>
<p>LU 20: Access to credit and opportunities for social enterprises: the role of Social Finance and Social Impact Finance</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> 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 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> Design an outcome payer scheme 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> Identify the key players needed to develop a Social Impact Bond scheme, and the role played by the Social Enterprise within a SIB 	<p>20 hours from which:</p> <p>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</p>

<p>LU 21: Growth strategies and long- term profitability of Social Enterprise projects</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> • 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 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 22: Market evaluation and assessing competitiveness</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • Describe how to prepare market research and competition analysis • Define market segmentation and recognize the importance of targeting and positioning 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> • Set up market research steps and product life cycle <p>Set up consumer research</p>	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> • Undertake costumers and competition analysis 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>

<p>LU 23: Fundraising and funding models for SEs</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • Be familiar with different tools and methods of fundraising • Define the different types of crowdfunding (eg. equity crowdfunding, lending crowdfunding, reward crowdfunding) 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> • Initiate the main steps of fundraising campaign 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> • Identify the best funding model for a campaign 	<p>20 hours from which:</p> <p>4h for face-to-face training and/or synchronous E-Learning,</p> <p>2h of self-directed learning,</p> <p>6h of asynchronous E-Learning, and</p> <p>8h for WBL</p>
<p>LU 24: Marketing, Sales and Networking skills</p>	<p>After the completion of this learning unit, you will :</p> <ul style="list-style-type: none"> • 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 	<p>After the completion of this learning unit, you will be able to :</p> <ul style="list-style-type: none"> • Develop a basic marketing strategy for a social enterprise • Explore network opportunities that may contribute to successful marketing and sales campaigns and activities 	<p>After the completion of this learning unit, you will be competent to :</p> <ul style="list-style-type: none"> • Create a basic marketing campaign • Design and build a networking strategy 	<p>40 hours from which:</p> <p>8h for face-to-face training and/or synchronous E-Learning,</p> <p>4h of self-directed learning,</p> <p>12h of asynchronous E-Learning, and</p> <p>16h for WBL</p>

2 THEORETICAL BACKGROUND IN THE RECOMMENDED TRAINING METHODOLOGY IN SOCIALB

The theoretical background of the recommended training methodology in the frame of SocialB project is leaning on the following pillars:

- The theories of constructivism and social constructivism
- Theories and pedagogies applied in social entrepreneurship education
- The principles of experiential and action learning
- The transformative learning
- Pedagogies applied in entrepreneurship and management education
- The principles of adult education
- Online learning theories and training principles

As a result, the proposed training methodology is based on both theoretical and empirical approaches that have been proven successful in adult education and training in the field of social entrepreneurship.

2.1 THEORIES OF CONSTRUCTIVISM AND SOCIAL CONSTRUCTIVISM

The SocialB training approach adopts the constructivist learning theory. In the constructivist approach, the learners are in the centre of the learning process, and they are active creators and constructors of their own knowledge (TIME, 2016). Trainees have significant autonomy and control over the learning process. The main implications of constructivism theory that are employed in SocialB training methodology [TIME, 2016; Cedefop, 2010) are:

- ✓ The learners construct their own reality based on their beliefs, mental structure and previous experience
- ✓ Their pre-existing knowledge and conceptions are very important which are explored and addressed through training and new knowledge is built on it.
- ✓ The learners reflect on their assumptions, expectations and previous experiences and develop critical thinking by analyzing and evaluating new knowledge in safe environments. By this way, they are able to understand the topic addressed in a new way.
- ✓ They are responsible for their own learning, it is up to them to participate actively in the training process and explore
- ✓ They develop metacognitive skills, and are able to analyze, monitor and evaluate the learning process. They need to know how to learn and develop their own learning strategies.
- ✓ They construct their own reality and interpret information in different ways. Constructivism allows for multiple interpretations and expressions of learning
- ✓ The training in real work environments is very important since trainees can deal with real tasks within communities of practice, supported by experts

- ✓ The educators/trainers act as facilitators, helping trainees to construct knowledge rather than to reproduce a series of facts. Problem-based learning, situated learning, experimental learning, action learning have a pivotal role. By providing resources and effective use of questions trainers can facilitate discovery on behalf of the learners.
- ✓ The encouragement of group work and collaboration in constructing knowledge and not competition supports collaborative learning. Thus, peer learning is supported. Trainers are encouraged to provide opportunities for more and less expert participants to learn from each other. Discussion and debates are promoted.

Elements from the socio-constructivism learning theory are also employed in SocialB training. The social constructivism suggests that knowledge is built when people engage socially in conversation and action on shared projects or problems (Bélanger, 2011). The key concepts or social constructivism followed by SocialB are:

- ✓ Cognitive conflict, contradiction, and resolution of dilemma
- ✓ Learning is an interactive process between subjective construction and external structure
- ✓ Situated learning
- ✓ Social mediation, dialogue, interaction
- ✓ Dialectics between the subject and the socio-cultural structure, between the acting person and the constituted order
- ✓ Community of practices
- ✓ Peripheral legitimate participation
- ✓ Interactive process between subject and context

2.2 THEORIES AND PEDAGOGIES APPLIED IN SOCIAL ENTREPRENEURSHIP EDUCATION

Little systematic analysis has been conducted regarding the specific challenges of educating future or existing social entrepreneurs and the applied learning theories and pedagogies. Social entrepreneurs, according to Howorth et al. (2012) are the kind of entrepreneurs that provide enterprising solutions for solving social issues. One of the main challenges that they face is the problem that arises when the positioning of trading as a route to sustainability undermines the social purpose of their social enterprises. Managing social and commercial goals can lead to confused identity, mission drift and sometimes might contribute to failure.

The complexities and uncertainties of social entrepreneurs' worlds often require them to juggle social and business aims. Using social theories of learning, deeper understanding of learning within social entrepreneurship education is provided. Social learning theories are interested in the kinds of social engagement that provides the best context for learning. The attention shifts from processing of information to the participation and integration that provides sustainability and real context of learning, participation in the social world and community involvement.

Reflective thinking and communities of practice are developed under the concept of social learning theory to equip social entrepreneurs for their unique circumstances. Challenges and success in the cultivation of a community of practice reveal the importance of learner identity and psychological safety. Social theories of learning help the understanding of the importance of learning as a socially situated activity and how peer-to-peer learning can be just or more

important than the formal elements of taught learning. Some principles can aid social entrepreneurship education, such as:

- ✓ Focus on the social entrepreneurs' identities as learners. This enables social entrepreneurs to step outside their contested identities and focus on achieving their learning goals. Educators should not presume that social entrepreneurs should be treated differently when it comes to their identities as learners.
- ✓ Cultivate a community of practice by incorporating design principles, in public and private spaces, creating a rhythm to activities, ensuring value, and cultivating excitement as well as familiarity.
- ✓ Activities and interventions should be designed to build psychological safety. Positive, intense experiences may be effective at building positive relations, familiarity and trust. Some social entrepreneurs may have an antipathy toward education, thus attention needs to be focused on developing psychological safety in the relationship with educators and the university or the training provider.
- ✓ A culture of reflective thinking should be built

Social learning theorists believe that individuals learn by observing, imitating and modelling other people. Communities provide a foundation for such learning by allowing people to observe the behaviour of others and interact with experts and colleagues in safe and efficient contexts. Social learning has given rise to the notion of experiential learning, which is defined as learning from reflections on ones own's actual experiences resulting from interactions with trainers and other learners, in addition to interactions with the real world (Kolb & Kolb, 2009).

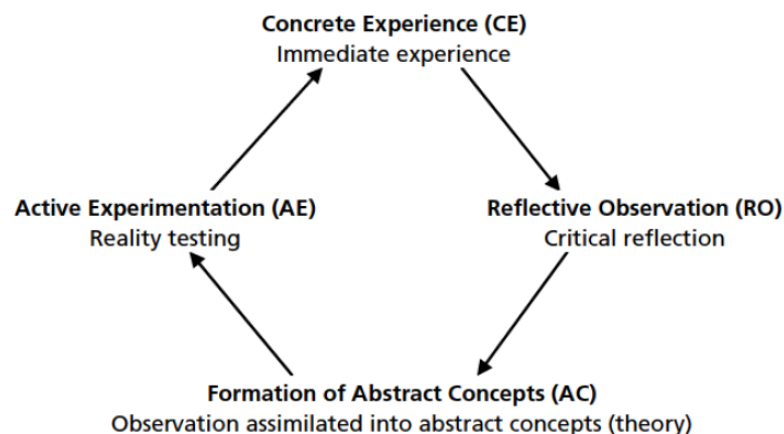
Social identity and self-efficacy approach have also been used in social entrepreneurship training (Smith & Woodworth, 2012). According to social identity theory people form social identities in a sense that they belong to a certain social category, which in turn influences a person's self-concept and behaviour. An identity approach in the frame of social entrepreneurship education encourages the identification of the social entrepreneurship community as a social category in which learners become active members. Learners are given the opportunity to begin identifying their selves as social entrepreneurs and develop consistent behaviour. Following this theory, educators can facilitate the identification process for learners defining the social category, giving "prototypes" examples of other social entrepreneurs and their characteristics, providing opportunities for active engagement of the learners as members of the social entrepreneurship community. Exposing learners to prototypes can help them understand how their own unique characteristics and abilities can be utilized within the social entrepreneurship community. Another important element of supporting learners to form their identity is the provision of opportunities for active engagement in activities that create social impact.

Self- efficacy concerns the people's belief in their capabilities to mobilize the motivation, cognitive resources and action needed to exercise control over events in their lives. An individual with high self-efficacy related to social entrepreneurship is more likely to be engaged and perform well when he/she implements activities that create social value. Three processes have been viewed as relevant to social entrepreneurship education by which self-efficacy is influenced: a) mastery experiences, b) modeling (ie learning by observing others), and c) social persuasion (ie realistic encouragement).

2.3 EXPERIENTIAL LEARNING

The key concept of experiential learning is the reflective practice, based on experience and prior tacit and explicit knowledge, focused on problem definition and problem solving, making judgment on action to be taken and on action oriented and deliberate action (Bélanger, 2011). This is a powerful form of learning because it involves direct experience of the phenomenon being studied rather than simply reading or thinking about it (Chang et al., 2014). Kolb in early 70s developed a model based on consecutive steps to better understand how individuals learn from their experience. He defined learning as "the process whereby knowledge is created through the transformation of experience", with knowledge resulting from "the combination of grasping and transforming experience" (Kolb, 1984) (Figure 1).

Figure 1. Experiential Learning Cycle (ELC)



Source: Kolb (1984, p.141) cited in Bélanger (2011)

The key concepts of Kolb's Experiential Learning Theory are (a) the learner-centered training approach, (b) the key role of experience in learning life course, (c) the learning which is, initially, an inductive process, (d) the experience, which is turned into learning through reflection, (e) the spiral learning, (f) the experience-based learning system, and (g) the autonomy-adaptation.

2.4 ACTION LEARNING

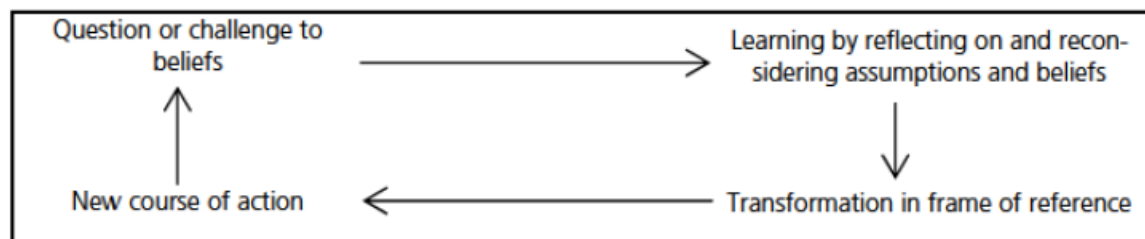
Action learning refers to the implementation of learning within groups and is conducted through the reflection on learners' experience (Hoes et al., 2008). It follows the same cyclic process with the experiential learning, as proposed by Kolb (1984), where learning follows the stages of experience, reflection, conceptualization, and new experience through experimentation. Action learning promotes the "learning by doing something different" rather than just "learning by doing" (Olsson et al., 2010) promoted by experiential learning. According to Revans (1982) action learning includes the creation of a problem-solving strategy, its realization and the

relation of the strategy with the learning process. In action learning trainees participate equally in their learning groups and are asked to solve problems where no right solution is given (Marsick & O' Neil, 1999). In this process groups of equals are encouraged to develop questions and utilize critical thinking to solve problems. By this way it encourages participants' interactions and the development of mutual support and provides a safe environment for participants to be inspired, form ideas, frame problems, take action and reframe (Leitch & Harrison, 1999).

2.5 TRANSFORMATIVE LEARNING

"Transformative learning is learning that transforms problematic frames of reference (...) to make them more inclusive, discriminating, open, reflective, and emotionally able to change. Such frames of reference (...) are more likely to generate beliefs and opinions that will prove more time or justified to guide action." (Mezirow, 2003, p. 59).

Figure 2. Mezirow's transformative learning process as an ongoing cyclical development



Source: Bélanger (2011, p.44)

The key concepts of transformative learning (Bélanger,2011), promoted in SocialB are:

- ✓ Social change: adaptive or transformative
- ✓ Interpretation of experience and knowledge
- ✓ Scheme of reference, meaning, perspective (lens through which one sees his or her reality, the world)
- ✓ Emancipation: freedom from previous beliefs and interpretation that distort reality
- ✓ Critical reflection of assumptions through which one revises usual ways of seeing oneself and one's relationship, habits of mind or points of view
- ✓ Decentration, distanciation, perspective taking
- ✓ Catalyst role of the educator

2.6 PEDAGOGIES APPLIED IN ENTREPRENEURSHIP AND MANAGEMENT EDUCATION

Pedagogies applied in traditional entrepreneurship and management education are also employed in SocialB.

2.6.1 THE COLLABORATIVE LEARNING APPROACH (CL)

The collaborative learning approach emphasizes team efforts rather than transmission of knowledge, it personalizes knowledge by socializing it (Bruffee, 1984), providing learners with a social context of learning with peers with whom they are engaged on conceptual issues. The focus shifts from the transmission of knowledge to the generation of it (Sheridan et al., 1989). The collaborative learning is connected with social constructivism (Applefield, Huber, and Moallem, 2000). Learning is being centered on learners-based activities rather than being trainer focused, and gives emphasis on learners assisting each other to find answers to areas of common inquiry rather than seeking answers from trainers. Learning is based on problems solving using data gathering, analysis and discussion by learners groups. Collaborative learning has been recognized as an effective teaching methodology, learners learn to take advantage of each of team member’s expertise and to experience first-hand the problems of coordinating a team effort. It leads to a higher degree of satisfaction with the learning process, to a greater motivation to learn, and to better performance (Flynn, 1992).

2.6.2 PROBLEM-BASED LEARNING (PBL)

Problem-based learning is a pedagogical approach that is gaining importance using real problems or situations as a context for learning. It is an approach encompassing interdisciplinary learning and pedagogy specifically created for the integration of content knowledge and skill development (Figure 3). Problem-based learning develops critical thinking and problem-solving skills, problem synthesis skills, imagination and creativity, information search and evaluation skills, ability to deal with ambiguity and uncertainty, oral and written communication skills, and collaboration skills (Ungaretti et al., 2015). It supports the need to engage learners, and facilitates the accomplishment of learning outcomes and learner satisfaction (Dean & Jolly, 2012).

Figure 3. The problem-based learning process



Source: (Ungaretti, et al., 2015)

In a Problem-based learning (PBL) model, learners engage complex, challenging problems and collaboratively work toward their resolution. Teams identify what they already know what they need to know, and how and where to access new information that may lead to resolution of the problem (Lodz University of Technology, 2015). Problem-based learning (PBL) is a teaching and learning method in which learners learn about a subject through the experience of solving an open-ended problem. During the process learners learn to analyze, search, discuss, evaluate a topic or question, compare, choose, and finally search for and propose solutions.

2.6.3 METHODOLOGY OF DESIGN THINKING (DT)

Design thinking has moved from product and process design to becoming a key element in company strategy (Camillus, 2008) and for this reason learning based on the design thinking is so important in business. Design thinking is a creative process that enables trainers to meet learners' needs and to raise innovative individuals; it emerges as a contemporary pedagogic tool. It is a method to develop and promote creativity and innovation in problem solving through the use of prototyping (Piotrowska, 2015). It includes (Brown, 2008): empathy, integrative thinking, optimism, and collaboration to transform the way a company develops products, processes, and strategy.

2.6.4 SIMULATION AND GAMING

In the context of management education (Mahboubian, 2010), simulation tools are used to help people understand the dynamics behind "the choices that people make when running a business". Educational simulation games can increase the motivation to learn. Games increase the students' internal motivation learning performances (Terrell and Rendulic, 1996) as well as their interaction with each other. Some simulations provide a safe environment in which to make mistakes and allow learning to take place without pulling expensive equipment offline (Mahboubian, 2010).

2.7 ADULT EDUCATION PRINCIPLES

In the development of the training methodology of SocialB the following adult education principles are applied (SENDING, 2019):

Table 2. Principles of Adult Education

Principle	Application in SocialB
Adult learners bring their life experiences and knowledge to the learning environment.	<ul style="list-style-type: none"> • Trainees' experience and expertise are considered as resources of training and learning • Training encourages them to actively participate in the creation and sharing of new experiences • Learning activities applied reinforce the use of their experience and knowledge.
Adults prefer self-directed and autonomous learning	<ul style="list-style-type: none"> • Learners have control over the learning process; they select, manage and evaluate their learning. • They set learning goals and make decisions.

	<ul style="list-style-type: none"> • They direct their own learning. • Action-planning tools and templates are provided to help them to develop and focus their self-directed efforts and facilitate learning.
Adults have preferences for the way in which they learn	<ul style="list-style-type: none"> • Customized learning approach according to learners' needs is provided so as to develop the appropriate learning strategies for them. • A wide variety of methods corresponding to all learners' preferences is used.
Adults learn best through collaboration and reciprocity.	<ul style="list-style-type: none"> • Low-risk learning environment is provided, capitalizing the different levels of knowledge and skills. • Learners' self-esteem is strengthened through team-based learning based in mutual trust and respect and the elaboration of communities of practice.
Adults are motivated to learn by several factors	<ul style="list-style-type: none"> • Learning correspond to learners' needs, interests and real-life problems, is meaningful and relevant. • Relevance is the key factor to trainees motivation • Learners are invited to identify the link between learning and satisfaction of their personal needs. • A connection is pursued between the training content and their long term objectives in work and life.
Adult learners are goal, relevancy and practical oriented	<ul style="list-style-type: none"> • Learners are asked to identify what they would like to learn. • Specific learning objectives are established and explained as well their relation to training activities. • They are engaged in identifying the challenges they face and the value of addressing them • Learning content and activities show relevance to their job or other interests. • Learning is applicable to their work duties or other responsibilities and focus on practical skills, tools, methods. • Opportunities are given to them so as to apply their practical skills and solve problems.
Adult learners need to be respected and learn in an appropriate learning environment	<ul style="list-style-type: none"> • Respect, trust and acceptance are ensured • Learners feel safe in order to participate freely, take initiatives, experiment, and express themselves. • Mistakes are viewed and used as improvement aids and not as failures. • Creativity is balanced with cognitive achievements, stability, and clarity of purpose. • The importance of knowledge and experiences the participants bring to training is acknowledged. • Learners are treated as equals and are allowed to voice their opinions freely.
Adults prefer active learning	<ul style="list-style-type: none"> • Learners are actively engaged in training activities
Adults want guidance	<ul style="list-style-type: none"> • Learners are informed about the learning process • They are not being told what to do, they choose options based on their needs.

<p>Adults have different learning styles</p>	<ul style="list-style-type: none"> • Every individual has his/her own learning style depending on the preferred perception channel - visual, auditory, or kinaesthetic. • Techniques and activities appropriate for all types of learners are used and combined in such a way that different perception channels are employed. • The preferred learning styles are acknowledged, in order for the learning experience to be modified accordingly.
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2.8 ONLINE LEARNING THEORIES AND TRAINING PRINCIPLES

SocialB employs the most recent e-learning approaches as presented below (Picciano, 2017):

2.8.1 COMMUNITY OF INQUIRY (CoI)

The Community of Inquiry (CoI) is a theoretical framework that is based on a social constructivist model for the design of online learning and blended environments. This framework supports critical thinking, social and teaching presence as well as cognitive presence facilitating educational procedure in online education (Anderson, 2017). The Community of Inquiry (CoI) is an interactive model that has become popular in online and combined courses. Some popular practices in this context are using discussion boards, blogs, wikis, and videoconferencing.

2.8.2 CONNECTIVISM

It is a theoretical framework for understanding learning in a digital age. It emphasizes how internet technologies such as web browsers, search engines, wikis, online discussion forums, and social networks contributed to new avenues of learning. Connectivism manages information based on new technologies and distinguishing between important and insignificant information is vital to learning. Knowledge and information flow and change due to huge data communication networks.

2.8.3 ONLINE COLLABORATIVE LEARNING (OCL)

It refers to a didactic approach where learners are encouraged or required to work together to solve problems or accomplish learning tasks. This learning theory is in line with the philosophy of social constructivism, where active participation in collective processes focuses on the social aspects-practices of the joint development of concepts and meanings and not on the practices of individuals in social environments. Collaborative learning, based on ICT, is considered one of the most promising methods, which offers increased opportunities to improve teaching and learning outcomes.

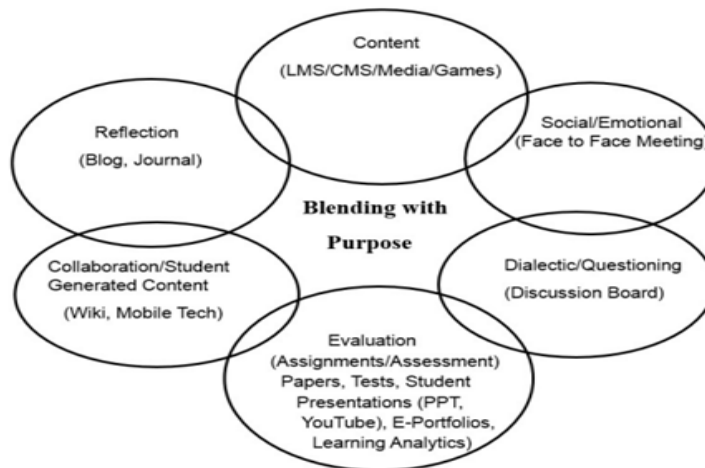
Content comes in a variety of formats and course management (CMS / LMS) systems such as Blackboard, Canvas or Moodle and provides many visualization options including image, audio, video, and other multimedia. Games have also evolved and now play a bigger role in educational content (Picciano, 2017). Educational planning supports learners socially and emotionally as the learning process is a social activity.

2.8.4 BLENDING WITH PEDAGOGICAL PURPOSE MODEL

This model integrates pedagogy and technology for appropriate educational design (Bosch, 2016). The model as shown in the figure 4 is flexible and suggests different activities and

approaches in different ways to make learning effective and to cover a wide range of learners. The model proposes a combination of distance activities or combined courses. The model consists of six components (Picciano, 2017).

Figure 4. Blending with Pedagogical Purpose Model



Source: Picciano, 2017

- a) Content is offered in a variety of formats and course management (CMS / LMS) systems such as Blackboard, Canvas or Moodle and provides many visualization options including image, audio, video, and other multimedia. Games have also evolved and play a bigger role in educational content
- b) The second component of the model is social presence. Educational planning supports learners socially and emotionally as the learning process is a social activity. Trainees at all levels of education need support from trainers and this is a practice that is achieved through face to face meeting.
- c) The third component of the model is based on the Socratic Method and allows educators to use discussion to build knowledge. The questions serve to develop critical thinking to evaluate knowledge and give their own perspective. This strategy is achieved in online education with forums or with an online discussion board.
- d) Reflection is a key pedagogical strategy. It is based on the learner's ability to think, learn to reflect, expand his knowledge, and share it. Various technology tools allow this technique such as: Blogging and Use of Multimedia and Open Educational Resources (OER).
- e) Collaborative learning has been widely used in recent years and is considered a technique that helps the ability to solve problems between the groups. Email, mobile technology, and other forms of electronic communication are some of the technologies that enable collaborative learning. Wikis also allow students to create content that can be shared with others.

SocialB also incorporates the following pedagogical principles that have been identified as important factors for the successful e-learning provision (Anderson and McCormick, 2005):

- ✓ Inclusion: inclusive practices are seen in terms of different types and range of achievement, physical disabilities, different social and ethnic groups and gender.
- ✓ Learner engagement: learners are engaged and motivated, activities employed have a worthwhile educational aim, not just to occupy the learners, but be enjoyable without producing adverse emotional reactions, improving the learning atmosphere.
- ✓ Effective learning: personalized learning is promoted as well as learner autonomy; metacognitive thinking and collaboration is encouraged, providing authentic learning exhibiting multiple perspectives on the topic of training.
- ✓ Formative and summative assessment is provided for the purposes of improving learners' performance.
- ✓ Coherence, consistency and transparency: objectives, content, activities, and assessment match to each other. They are clear to the user and they know what to expect.
- ✓ Ease of use: learning resources are open and accessible, intuitive and not requiring guidance on use, providing appropriate guidance to learners

3 RECOMMENDED TRAINING METHODOLOGY FOR FACE-TO-FACE TRAINING

3.1 RECOMMENDED TRAINING METHODS AND TECHNIQUES

Based on the learning theories, pedagogies and approaches presented, the training methods and techniques recommended for the SocialB training courses are selected with respect to content and duration of the face to face training and the desired learning outcomes.

More specific, the training methods to be employed:

- ✓ Promote experiential, collaborative, action, transformational and self-directed learning.
- ✓ Address visual, auditory and kinaesthetic perception channels as well as cater for different learning styles, when they are used in combination (TIME, 2016)).
- ✓ Vary according to the learning activity type (TIME, 2016): a) Exploitation activities reveal existing representations, experience and knowledge, provide reflection and critical thinking, and lead to the realization of training or reconstruction needs. b) Presentation of information provides new material for the construction of new schemes, knowledge, attitudes and skills in harmony with the desired learning outcomes. c) Application in practice leads to the acquisition and consolidation of new skills, competences and experiences.

The trainers are free to determine the frequency and the extent to which each teaching technique can be used, taking into account the unique characteristics of learners and their learning styles. Training techniques can be added or omitted according to the needs.

The training techniques per learning activity recommended in SocialB are presented in the following table 3. Their use is not obligatory; it depends on the needs of the learners and the choices of the trainers:

Table 3: Training techniques to be used in face to face training

Exploration	Presentation of information	Application in practice
Representation exercises	Lecture	Brainstorming
Memory activation	Demonstration	Role-play
Questions	Use of multimedia	Simulation, Games
Reflection	Flipped learning	Exercises
Brainstorming	Support with handbooks or other material	Case study
Self-observation	Interview/lecture from expert	Experimenting
Group activities	Self-study	Working in teams
Group discussion	Learning platform	Teambuilding and groups activities
Self-assessment	Group discussion	Presentation by learner
Theory/paper critiquing		Peer learning
		Workshops
		Moral dilemma exercises
		Self-assessment
		Reflection
		Individual coaching session
		Action plan
		Concept writing

More information about these techniques can be found in the following links

http://mediation-time.eu/images/TIME_O5_Trainer_Course_Module_2.pdf (pages 19-24)

Role Playing simulations are of particular importance in SocialB since they can facilitate the development of problem solving, demonstration skills, change of attitudes regarding interpersonal relations, behavior modification, resistance to change etc.

Role-playing is a scenic representation of a personal interaction that involves the assumption of a behavior in an imaginary situation. It consists in asking some learners to play, for a limited time, the role of "actors", that is, to represent some roles, interacting with each other, while other participants in the class act as "observers" of the contents and processes that the representation manifests. This allows a subsequent analysis of the experiences, of the interpersonal dynamics, of the ways of exercising specific roles, and more generally of the communication processes carried out in the represented context.

The trainer introduces a problem with a few general hints, and participants interpret the part assigned to them using any material provided to them describing the roles and the context in

which the problem is to be inserted. Once the interpretation of the parties is finished, a general discussion takes place with the participation, as well as those who have acted, also of the whole group. There is also an internal subdivision between role-playing which sees two types:

- ✓ Structured role-playing (there are precise rules regarding the roles, contents and conduct of discussions. The problem is strongly addressed by precise constraints and, moreover, it facilitates a critical evaluation of individual behaviors through the comparison between given role, played role and the results of the game).
- ✓ Unstructured or free role-playing (the focus of the analytic process shifts to the discovery of new models of action, spontaneity, feedback. Careful preparation of the materials in advance is omitted; the group chooses the topics directly that he perceives as important; moreover the individual can impersonate any role, for example, himself, existing or imaginary characters; the situation represented can be imaginary or actually happened).
- ✓

To make the technique richer there are numerous variations, of which we mention only the most important:

- ✓ Inversion of roles: often used in unstructured role-playing, when there is considerable divergence of views between two people. It consists in the simple inversion of the parts of the actors, this greatly facilitates the understanding of the points of view of others. The results of this procedure are generally: to strengthen the flexibility and spontaneity of behaviors and to increase the ability to look within and sensitivity to others;
- ✓ Soliloquy: occurs when the trainer can interrupt one of the actors and through an interview push him to express thoughts and impressions aloud so far not clearly expressed;
- ✓ Mirror technique: one of the participants plays, for example, the part of another member of the group rather hesitant to play his role: the person whose participation is to be encouraged thus sees himself reflected as in a mirror and portrays himself useful feedback for his behavior;
- ✓ Multiple role-playing: the group is divided into sub-groups, each of which experiences the assigned roles separately. Then the behavior of each group is analyzed in a joint session and this is particularly useful for discussion;
- ✓ Rotation of roles: it is particularly effective when you want to subject all participants to a certain role, one after the other. Thus, at the end, a vast series of behaviors are collected as a response to an identical stimulus, with obvious advantages for training purposes. Think, for example, of the possibility of asking each member of the group to impersonate the boss dealing with a certain type of employee who must be motivated to provide a certain amount of information and ideas aimed at solving a complex problem in order to then compare the dynamics of the interview closed circuit).

Trainers can also use the innovative training techniques provided in the O3.4 Innovative Training Techniques report.

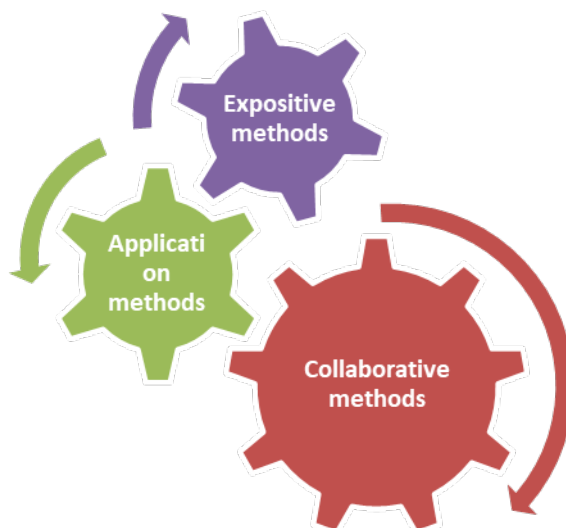
4 RECOMMENDED TRAINING METHODOLOGY FOR ON-LINE LEARNING

The training methodology recommended for the delivery of SocialB, follows the theoretical background presented before, and corresponds to the needs of the target groups and the general scope of the project and it is presented below:

- **Synchronous e-learning:** takes place in real time and can replace face to face training, particularly when emergencies (i.e covid pandemic) make the physical presence of trainees in the class difficult. It promotes the synchronous communication between trainers and trainees and requires them to be present at a given time.
- **Asynchronous online training:** to promote learner autonomy. Asynchronous e-learning activities are time-independent, so learners are able to participate in the online training according to their time availability and scheduling. It can take place at any time.
- **Self-paced online training:** to make learning flexible, it makes the participation in training easy. It can also improve learning retention, as the learners often retain content better when they have time to absorb concepts between courses.
- **Learner-centred content:** to provide self-reflection, enable personalization and respond to individuals' needs. Online Open Educational Resources provided are relevant and specific to learner's needs and responsibilities in their professional life.
- **Personalization:** to promote effective learning. Offered self-study courses are customizable to reflect learner's interests and needs. Learners are able to build their own customized learning paths; they are allowed to choose what they want to learn.
- **Social interaction and online collaboration:** to facilitate the social interaction and collaboration by the learners through the e-learning content.

Under the frame of the above methodology the training methods presented in Figure 5 and described below are going to be followed (FAO learning academy, 2021) in SocialB.

Figure 5 : Online training methods



The **expositive methods** require learners to listen and read or observe. The trainer/ training platform delivers knowledge on a given topic, which can be complemented by tests and exercises to assess learners’ understanding of the content. They are used for acquiring information, but they can also be combined with other methods to create different types of learning courses. The expositive component is normally used to provide orientation and basic concepts before going into more practical and complex stages. The expositive methods include:

- ✓ Presentations: organized information
- ✓ Case studies: real, significant cases
- ✓ Work examples: examples of the topic with comments and references to the theory
- ✓ Demonstrations: illustrations of how a task can be performed

These methods are delivered in SocialB through a number of techniques as presented in table 4

Table 4. Techniques that serve expositive methods employed in SocialB

Synchronous e-learning	Asynchronous e-learning
<ul style="list-style-type: none"> – Presentation through video conference, virtual classroom: the trainer presents the content to group of learners, connected to the platform at the same time. Learners can interact, ask questions and receive feedback using video conference, audio conference or chat. – The trainer use special software that includes a range of synchronous tools such as whiteboard, application sharing, audio conference and chat. Learners can use these tools to interact 	<ul style="list-style-type: none"> – Simple learning content, such as PDF documents and PowerPoint presentations, with no interactivity. – Interactive e-lessons using text, images, audio

with the trainer and other learners, ask and answer questions, vote, etc.	
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The **application methods** involve the learners in practical activities, which can range from simple exercises to more complex activities, such as simulations or research activities. These methods perform better if a tutor or instructor is employed to provide guidance and facilitate the reflection of learners. Application methods include:

- ✓ demonstration-practice method: is used to teach a procedure using directive learning. The procedure is first demonstrated and the learners are asked to practice and produce by interacting with a system or software
- ✓ job aids: provide just-in time knowledge, they offer immediate answers to specific questions, helping users to accomplish specific tasks. For example learners may be provided for example with a checklist to help them draft a communication strategy
- ✓ scenario-based exercises, experiential simulations and learning games: are used to develop cognitive skills in a specific domain. Learners are asked to apply knowledge and principles to a concrete situation. Typically, they present a challenging situation where learners are required to make decisions by choosing from different options.
- ✓ role play: is used to develop interpersonal skills. Learners are asked to apply behaviour-related principles (e.g. communication principles) to a concrete situation. Feedback is provided to learners about their behaviour
- ✓ guided research and project work: The trainer can task learners with conducting research on a topic. Can guide learners in collecting and organizing information (guided research). The trainer provides suggestions to learners on how to find the required information and how to illustrate it. Project work means that the trainer asks learners to develop a product or a project by applying learned principles and concepts to their specific context.

Collaborative methods are based on dialogue and discussion among trainers/facilitators and learners. They add a social dimension to the learning experience, applying the principles of social constructivism and collaborative learning. They allow learners to benefit from having discussion partners and receiving personal feedback. These methods include:

- ✓ online guided discussions: are designed to facilitate learning and improve knowledge and skills. The facilitator asks learners questions to stimulate and guide reflection and critical thinking. Such discussions usually complement other methods such as a presentation, research or a case-based exercise. They also facilitate communication and knowledge sharing among learners.
- ✓ collaborative work: Learners work together to perform different types of activity, such as evaluation, analysis or development of an assignment or a project. This method requires learners to collaborate, listen to each other, argue and negotiate; they develop interpersonal skills and problem – solving skills

- ✓ peer tutoring: Learners monitor and support each other. They have the opportunity to learn from each other's work and to practise tutoring methods.

Table 6. Techniques that serve collaborative methods employed in SocialB

Synchronous e-learning	Asynchronous e-learning
Online guided discussions	
– Chats or audio or video conferences	– Discussion forums, e-mails.
Collaborative work	
– Chats. Audio or video conferences using whiteboards, screen sharing and breakout rooms for group work. – Visual collaboration workspace platforms.	– Discussion forums, e-mails, wikis, blogs and shared documents. – Visual collaboration workspace platforms
Peer tutoring	
– Chats, audio or video conferences.	– Discussion forums, e-mails, wikis, blogs.

Furthermore, the following conditions followed by the training providers foster a conducive interactive e-learning (SESBA, 2018) within SocialB.

Table 7: Condition that facilitates e-learning

Training provider <ul style="list-style-type: none"> – Provide clear and adequate guidance – Use action research regularly to evaluate the success/failure of the course and meet learners concerns – Use of variety of communication techniques to provide greater empathy and personal approach – Plan for increased time for learners' interactions – Forward responses to frequently asked questions to all learners to avoid duplication – Provide learners with continuous, frequent support and feedback – Monitoring of each learner progress – Clearly delineate course requirements – Create opportunities to coach and facilitate learners' construction of knowledge and skills
Technology Support <ul style="list-style-type: none"> – Ensure a low level of technological difficulties in accessing online material and communication – Provide adequate, friendly, easy, and continuous technical support
Learning environment <ul style="list-style-type: none"> – Use structured activities to provide effective framework for online training

- Create social interaction through the community of practice
- Present course content in a manner that hierarchically structures the sequence of information
- Organize website and online community to enable learners to interact with the content, other learners
- Create welcoming, safe, nurturing online environment
- Present problem-solving situations in realistic contexts
- Create opportunities for learners to communicate with each other to share understanding of course content
- Promote peer learning, provide opportunities to collaboratively construct knowledge based on multiple perspectives, discussion and reflection
- Provide opportunities for learners to articulate and revise their thinking to ensure accuracy of knowledge construction
- Ensure that equitable environment exists for all, for differences in learning styles, reduction of barriers to participation and communication
- Allow time for reflection
- Provide opportunities for trainees to control online learning and structure it for themselves
- Provide discussion forums encouraging open dialogue

5 MONITORING AND ASSESSMENT OF FACE-TO-FACE AND ONLINE TRAINING ACTIVITIES

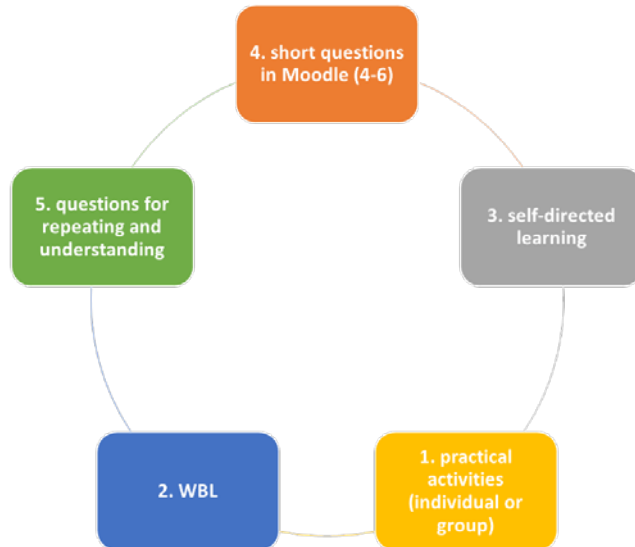
For the assessment, it is vital that the **student knows and understands how he or she will be assessed**. The teacher/trainee knows what the end product should look like, and it is his/her responsibility to **effectively convey that expectation to the students** (Burke 2011).

5.1 RECOMMENDED ASSESSMENT METHODS AND TOOLS

According to the learning objectives, learning outcomes, skills and competences of students recommended assessment methods and tools in SOCIALB training are (Fig. 1):

- 1) practical activities;
- 2) work-based learning;
- 3) self-directed learning;
- 4) short questions in Moodle with provided answers;
- 5) questions for repeating and understanding.

FIGURE 6: IDENTIFIED 5 WAYS OF STUDENTS' ASSESSMENT IN SOCIALB TRAINING.



5.1.1 PRACTICAL ACTIVITIES: INDIVIDUAL OR GROUP WORK ASSESSMENT

For assessment, three initial decisions should be undertaken.

- The trainer should decide **what is being assessed**: the final product (e.g. an essay, a report), the process, or both.
- It is necessary to decide **who assigns the grade**: the trainer, the students, or both.
- A decision on an **individual or group grade** is to be made:
 - a. the trainer might assess each member of a group with the same grade, which may promote unhappiness if some members devote more time and effort to the group and get the same grade; it is suggested that the project or presentation should not count for more than a small percentage of the student's final grade (Burke 2011);
 - b. the trainer might assess each group member with an individual grade, which may or may not foster competition within the group and may undermine the group solidarity.

Individual or group work assessment. Students will work individually and in groups. From the trainer perspective it is much easier to assess individual work. Group (or teamwork, collaborative) work needs to be designed, supervised, and assessed in a way that promotes meaningful teamwork and deep collaboration. Group work can be applicable in learning/training situations when the students should »think harder and dig deeper«. Although students can complete these activities individually, collaboration lets them practice skills and ways of thinking which can be a benefit to all. Group work can focus on case study, problem-solving, gamification, etc. and present findings to their peers. Assessment of a group is a difficult task and the instructor should have a clear idea of how he/she wants to assess the group work.

If the instructor is interested in assessing the group process and final product, two separate rubrics need to be created:

- a. for the **process**, assessment might include: attendance and participation in meetings, time management skills, active listening, evidence of cooperative behaviour, and professionalism and engagement with the task;
- b. for the **product**, assessment might include: content, structure, organization, accuracy, thoroughness, and other technicalities.

Student's group assessment allows the instructor to assess the group process and apply the most effective methods to future group projects. The students should be able to:

- a. list their contributions, their group member's contributions, and the process as a whole;
- b. identify the aspects that worked and the aspects that did not work.

For practical activities, the SocialB assessment tool (see Tab. 9) enables trainer/teacher to assess different criteria: knowledge and understanding, application, critical thinking, and also to be flexible (if LU provides this) by including also reading, & research, presentation, and teamwork. **50% of total grade is assigned to activities within the Practical Activities.**

5.1.2 WORK-BASED LEARNING (WBL)

Work-based learning (WBL) is used to describe VET or HEI programmes of study where the learning is undertaken primarily **at** and **through work** and **is for the purposes of work**. Gibbs and Garnett (2007: 411) define WBL as *"a learning process which focuses university level critical thinking upon work (paid or unpaid), in order to facilitate the recognition, acquisition and application of individual and collective knowledge, skills and abilities, to achieve specific outcomes of significance to the learner, their work and the university."* WBL has the potential to be a major way in which VETs/HEIs can respond to the challenge of demonstrating relevance to the knowledge economy.

In WBL, three major parties are involved in the co-creation of **three-way negotiated learning agreement** which includes:

- ✓ the learner/student,
- ✓ the external organization or community of practice where an important part of WBL in practice is taking place, and
- ✓ VET/HEI organization which accredited the learning program.

In this common model of WBL, the learner/trainee/student has the opportunity to co-construct a higher education programme which is a personal learning journey addressing real-life work issues. The challenge is to produce a customised programme demonstrating coherence and progression from individual student learning to a WBL programme designed not only to meet the academic requirements of the university, but also to be of value to the employer or stakeholders or broader society. The learning agreement identifies the learning that will be undertaken in the form of work-based projects, and/or, taught subjects where applicable.

WBL programmes are negotiated and, most significantly, derived from the needs of the workplace, society as a whole and the learner, and with Bologna HEI reform more endeavours and flexibility has come also from the traditional disciplinary curriculum of the university. Flexibility may require HEIs to work in partnership with employers, NGOs or collaboratively with other providers of high level learning in order to meet the learning and development needs of organizations as well as individual learners. Durrant et al (2009:2) say *“WBL programmes are designed to promote professional and personal development and intended to benefit both learners and the workplace. A major aspect of work-based programmes is the relationship between individual learning and organizational change”*.

In WBL it is often the work-based project that is the main mechanism for developing new learning and providing tangible outcomes of direct potential benefit to the employer, learner and VET/HEI. WBL was usually concerned with knowledge that was highly contextual, practically focused and often unsystematic (Scott, 1994 – quoted in Garnett, 2016). But a contemporary view on WBL is more associated with transdisciplinary – that is concerned with creating new integrative knowledge to address the complex problems of the world.

It is the aim of SocialB to co-construct such a WBL learning environment where topics relevant for social entrepreneurs (24 LUs) will be addressed theoretically (face-to-face learning, synchronous and asynchronous learning) and further developed in the cooperation with SE, NGOs in the field of social economy, advisors to SEs, etc. The essential is the active role of student/learner/trainee who is participating in WBL and is accomplishing different assigned WBL activities.

Assessment practices in SocialB encourage **authentic assessment** which is based on a set of activities (practical, observation, critical thinking, etc.) connected to the real life practice of SE, topic of particular LU and well aligned with the SocialB descriptors, learning outcomes, skills and competences. **50% of total grade is assigned to activities within the WBL.** Assessment of WBL is to be provided by trainer or by mentor in the SE and is done by structured grading rubric (see Tab. 9).

5.1.3 SELF-DIRECTED LEARNING

Self-directed learning is learning in which the conceptualization, design, conduct and assessment of a learning project are directed by the learner (Brookfield 2009). This does not mean that self-directed learning is highly individualized learning always conducted in isolation or working without human contact. Learners can work in self-directed ways while engaged in group-learning settings. It is important to monitor the way learners move in and out of learning networks and consult a range of peers. In self-directed learning all decisions about how and what to learn, and how or whether to consult external resources, rest with the learner. On-line and asynchronous learning grants a degree of control to learners over the location and timing of learning, and might create new possibilities for self-directed learning.

Self-directed learners use qualified, credible peers as valuable evaluative touchstones. When judging their progress, learners would typically consult the person or persons in their particular network or learning community whom they felt were best judged to give a credible verdict on how well learners were doing and what might be their next steps in a learning project. In SocialB this might include: SocialB partners, trainers, WBL mentors, etc.

Teachers/trainers function as coaches, counsellors, mentors and advisers, therefore they can contribute to self-directed learning in several ways:

1. **giving advice on learning resources:** in SocialB project this is the preferable literature, videos, website links, list of potential social enterprises to be analysed and human resources;
2. **designing the learning plan:** in SocialB this includes a schedule, detailed instructions for individual or group work related to self-directed learning;
3. **formative assessment** (monitoring student work and motivation): in SocialB this is an update on every learning unit.

Self-directed learning is mostly associated with the **formative assessment:** a trainer monitors student learning to provide ongoing feedback that can be used by trainers to improve their teaching and by students to improve their learning. More specifically, formative assessment:

- helps students identify their strengths and weaknesses and target areas that need work,
- helps trainers recognize where students are struggling and address problems immediately.

Formative assessments are generally low stakes, which means that they have low or no point value.

5.1.4 SHORT QUESTIONS IN MOODLE

Short questions in Moodle are suitable for student's self-assessment and are related to understanding the particular topic.

SocialB project partners prepared 4-6 closed questions for each LU, the most relevant topics are addressed. Student is asked to choose (multiple choice questions, true/false, etc.) the right answer and will receive feedback on right answer immediately. Short answer questions require a concise and focused response that may be factual, interpretive or a combination of the two.

5.1.5 QUESTIONS FOR REPEATING AND UNDERSTANDING

Questions for repeating and understanding might be short or more complex, they might be used also in a non-examination situation or as part of self-assessment tasks. They are generally open-ended questions that require students to construct a response.

In SocialB several LUs provide questions for repeating and understanding and students will use this as a part of self-assessment:

- questions are written to reveal a student's ability to describe, explain, reason, create, analyse, synthesise, and evaluate;
- questions give opportunities for students to demonstrate higher level skills and knowledge;
- questions allow students to elaborate on responses and herewith to prepare themselves for other ways of assessment;
- questions are structured in a range of different ways that require a range of responses from a few words to a paragraph.

5.2 ASSESSMENT STRUCTURE

Assessment structure in SocialB training is following:







- 1) practical activities (assessed by trainer);
- 2) work-based learning (assessed by trainer or SE supervisor);
- 3) self-directed learning (self-assessment);
- 4) short questions in Moodle with provided answers (self-assessment);
- 5) questions for repeating and understanding (self-assessment).

In SocialB assessment, **50% of final grade is assigned to activities within the Practical Activities** (assessed by trainer) and **50% of final grade is assigned to WBL** (assessed by trainer or supervisor). Student must pass both activities.

5.3 ASSESSMENT TOOL






Different tools of assessment might be applied. The SocialB assessment tool (Tab. 8) enables trainers/teachers to assess different criteria: knowledge and understanding, application, critical thinking, and also to be flexible (if LU provides this) by including also reading&research, presentation, and teamwork.

TABLE 8: DIFFERENT CRITERIA APPLICABLE FOR ASSESSMENT.

	<p>Knowledge& understanding</p>	<p>Structured grading rubric is a scoring tool applicable for individual and group assessment of activities. Structured grading rubric lists the criteria by which a paper or presentation, a product will be assessed. Rubrics can be helpful for both students and trainers/instructors; they outline expectations and allow instructors to assign grades on a more objective basis. Rubrics provide detailed breakdowns of points that are awarded for each criteria and how those points are awarded. Additionally, rubrics are useful beyond grading; they also help students conceptualize the assignment. The rubric lists, not only the criteria by which the work is judged, but also the student’s mastery of the material. The use of rubrics allows the instructor to convey expectations to the students, help students focus their efforts, improve student achievement, reduce grading time for the instructor and improve the effectiveness of feedback (Tab. 9).</p>
	<p>Application</p>	
	<p>Critical Thinking</p>	
	<p>Reading& Research</p>	
	<p>Presentation&style</p>	
	<p>Teamwork</p>	

Structured grading rubric lists the criteria by which a paper or a presentation, a product will be assessed. **For each criterion, student can receive up to 5 points. Final grade of the task is calculated by average.** The formula to calculate average is the sum of a set of numbers divided by the count which is the number of the values being added (Tab. 10).

TABLE 9: STRUCTURED GRADING RUBRIC.

	LEVEL 1: FAIL	LEVEL 2: BASIC	LEVEL 3: GOOD	LEVEL 4: ADVANCED	LEVEL 5: EXCELLENT
Criteria	If the student is not reaching minimal standard, you give him/her 1 point.	If the student is reaching minimal standard, you give him/her 2 points.	If the student has descriptive understanding - knowing about several topics, you give him/her 3 points.	If the student is relating facts together and understanding theory, you give him/her 4 points.	If the student is going beyond what is taught and dealing creatively with situations, you give him/her 5 points.
 Knowledge & understanding		Understanding of basic principles, concepts, theories and terminology.	Level 2 + Knowledge of discourse within the context of LUs.	Level 2 and 3 + Ability to make justified decisions about validity of principles, concepts and combine approaches from different modules/LUs.	Level 2, 3 and 4 + Ability to combine with approaches from other disciplines in a variety of theoretical and practical contexts, dealing with situations creatively.
 Application		Appropriate use of relevant theories, concepts and/or techniques from the LU to solve/explain familiar scenarios.	Level 2 + Application of relevant theories, concepts and/or techniques outside of the context of the LU.	Level 2 and 3 + Ability to develop viable solutions.	Level 2, 3 and 4 + Ability to judge between multiple viable solutions.
 Critical Thinking		Identification of principles and concepts underlying theoretical frameworks or approaches, identifying their strengths and weaknesses.	Level 2 + Recognition of competing perspectives and ability to make justified choices about which approach to take.	Level 2 and 3 + Ability to identify the possibility of new concepts within existing knowledge frameworks and approaches.	Level 2, 3 and 4 + Ability to develop new approaches to problems based on theory, methodology or practise.
 Reading & Research		Correct referencing and use of reliable sources of information. Understanding of own research/reading.	Level 2 + Use of appropriate theoretical models/concepts to judge the significance of data collected.	Level 2 and 3 + Ability to identify patterns and relationships in research and between LUs/different modules.	Level 2, 3 and 4 + Ability to design and undertake complex investigations involving conflicting data to address significant areas of theory and/or practise.
 Presentation & Style		Accurate and effective communication with structured and coherent arguments.	Level 2 + Ability to explain competing points of view and ambiguities.	Level 2 and 3 + Ability to communicate viable solutions.	Level 2, 3 and 4 + Ability to communicate complex and contradictory information coherently.










 Teamwork		<p>Ability to work effectively within a team, and recognize when factors are interfering with team performance.</p>	<p>Level 2 + Ability to effectively manage group conflicts.</p>	<p>Level 2 and 3 + Ability to negotiate in a professional manner and be a proactive resolver of conflicts.</p>	<p>Level 2, 3 and 4 + Sufficient self-awareness to be able to adapt different team contexts.</p>
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Table 10 : Example of students' assessment for one LU.

Criteria	Practical Activity 1	Practical Activity 2	Practical Activity 3	... insert more practical activities if needed	WBL
 Knowledge & understanding	4	4	4		4
 Application	4	5	4		5
 Critical Thinking	3	5	5		4
 Reading & Research (if applicable)	/	/	4		4
 Presentation & Style (if applicable)	/	/	/		3
 Teamwork (if applicable)	4	/	5		5
FINAL MARK OF THE TASK (average)	3,75	4,67	4,50		4,17
FINAL MARK OF ALL PRACTICAL ACTIVITIES (please, calculate average)	4,31				
FINAL MARK OF WBL (please, insert)	4,17				
FINAL MARK OF LU (please, calculate average - 50 % practical activities, 50% WBL)	4,24				
KNOWLEDGE LEVEL	4 : ADVANCED				

Description of grading is following:

Number of points	Description of grading
1	FAIL
2	BASIC KNOWLEDGE
3	GOOD KNOWLEDGE
4	ADVANCED KNOWLEDGE
5	EXCELLENT KNOWLEDGE

5.4 RECOMMENDED MONITORING ACTIVITIES AND TOOLS

5.4.1 DESCRIPTION

Formative assessment has a **monitoring function**, enabling trainers and trainees to track progress, estimate the effectiveness of the training methods and make adaptations where necessary. In other words formative assessment serves three key purposes a) where learners are in their learning, b) where they need to go, and c) how to get there. Formative assessment involves a continuing cycle of activities which includes the following key elements: a) the provision of clear goals which are shared with the learners, b) learners are in the centre of the process. c) learners take part in gathering and interpreting evidence regarding the accomplishment of goals, d) trainers (if available) and learners make decisions together related to the next steps, e) feedback is provided to learners which is used to adjust training. Formative assessment is therefore the process that leads to the enhancement of learning during learning and feed forward rather than provide feedback after learning.

Monitoring will be ongoing and it will be implemented throughout the duration of face-to-face training and online training (synchronous) using specific tools and exploiting data provided by assessment.

5.4.2 MONITORING STRUCTURE AND TOOLS

Monitoring of face-to-face learning will be based on objective and subjective approaches. Monitoring will be done through observations, analysis of attendance and complementary data and answering in questionnaires.

Through observation, learners will be monitored on how they participate in face-to-face and online (synchronous) learning activities, if they need more clarifications and on their performance. Trainers' guidance and encouragement can also be used as feedback for students' learning. Attendance in face-to-face training and in online (synchronous) training as well, is considered as an important element of the students' learning process. Complementary data that may refer to attendance sheets, comments etc. can be used for the measurement of indicators and the monitoring of several aspects of training.

Furthermore, checklists are going to be employed to monitor learning implementation and trainees' performance serving the identification of areas that need more work and reflection. The outcomes of formative evaluation will also be used for monitoring purposes. Questionnaires are going to be used in order to measure the perspectives of trainees regarding their participation, performance and satisfaction (see section 6.1.1.1).

5.4.2.1 MONITORING TOOLS (DEVELOPED BY OT)

- Attendance list for Trainers and Trainees
- Lesson sheet with observations by Trainers
- Template for Training Report per partner country