



ePortfolio for training framework focused on Social Entrepreneurial Skills and Competences including Methodology

IN SITU - CE1494

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1. Project summary and document introduction

The economic and financial crisis a decade ago has left behind still very crucial socio-economic and demographic challenges. Especially the continued increase of unemployment resulting in poverty and social exclusion demands urgent sustainable solutions. Unqualified younger and older unemployed (50+) women and men are mainly affected. All partner regions have this 'new' disadvantaged group - the long-term unemployed.

Social innovation could offer answers but there is a lack of expertise and specialist business development services and support in the public and private sectors. And there is a lack of funding. The objective therefore is to jointly develop and implement a tailored business development service and support scheme to promote the integration of the disadvantaged groups into the labour market through social innovation and new social enterprises. The enterprises will be the result of specially developed trainings.

The scheme will have at its core regional triangles of key players coming from expert support, care and third sector organisations, social innovation and entrepreneurship experts and public/private funding initiatives. The reg. triangles will form an overarching joint triangle enabling a transnational approach to tackling intergenerational unemployment and social exclusion.

To reach the project's objective, reg. pilot actions to test and validate the support scheme and the strategy behind it will be implemented. This will lead to sustainable schemes in the six PP regions.

The project will bring together younger and the older (50+) unemployed citizens so that these two generations can learn from each other by exchanging experiences, bridging missing skills and competences. Also the key players in the reg. triangles will learn from each other and a dynamic capacity building process will take place throughout the project at different levels. IN SITU will be in every respect a learning project.

There are five transnationally shared challenges:

(1) In May 2017, over 19 million women and men in the EU were unemployed although many of them in age groups that should normally be productive and involved such as young people and the aged 50+. Many of them live in the PP regions. Youth unemployment rates: 6,5% (Stuttgart), 34,6% (Jadranska Hrvatska), 20,3% (Vienna) or 18,7% (Veneto); highest aged 55+ unemployment rates range from 50% to 64%. The migrant situation will only increase these figures.

(2) Within the unemployed there are differences. Some cannot find work due to lack of skills and competences; many aged 50+ are qualified but cannot find a job due to age. All of these citizens belong to the 'new' disadvantaged group of the long-term unemployed.

(3) Governments have to spend more on social costs for this 'new' group not to mention the future threat of societal old-age poverty.

(4) The traditional market economy will no longer be able to restore employment levels to pre-crisis figures. Technological transformation, digitization, AI, and globalisation are dramatically changing the job market and leaving behind disadvantaged groups like the unqualified and older unemployed. There is therefore a need for a complementary economy, a social economy that does not focus on profit, but on social impact and employment creation. This is the alternative growth model that PP regions need: social enterprises/initiatives in newly formed reg./local eco-systems in key growth sectors creating employment in particular for youth and the 50+ and attracting investor interest due to their scalability.

(5) However, there is a major drawback: 'a lack of specialist business development services and supports'; social enterprises/initiatives often need similar support as mainstream businesses, but also have specific features that create complex requirements needing tailored support schemes. These tailored support schemes are missing in PP regions and presumably in the programme area.



Thematic work package T2 - Social innovation trainings & support services - contributes to all specific objectives but in particular SO2 'Piloting the strategy blueprint..'. T2 will focus on trans. trainings and further tool development with the aim of building social innovation support schemes in PP regions by training PP staff and strategic triangle representatives who work with the disadvantaged groups.

Two outputs will achieve this:

O.T2.1 will reinforce the capacity building in O.T1.2 by giving PP staff and strategic triangle representatives the opportunity to personally learn 'in situ' about social innovation in other PP regions as well as outside the programme area (A.T2.1). As a result, methodology and materials will be jointly developed with a two-step result: materials for Socio-Cultural Education and for Social Entrepreneurial Skills and Competences compiled in trans. ePortfolios to be used at all training workshops. The trainers will become experts in developing both skills and competences of Socio-Cultural Education & Social Entrepreneurship and will be able to mentor social (community) initiatives as well as social businesses. All trainings (for trainers and for the disadvantaged group) will take place at reg. Social Innovation Hubs (implemented in WP3) and are all part of the reg. support schemes.

O.T2.2 will train the trainers who in turn will train the youth and 55+ aged unemployed at the Hubs. As a result of the training the trainers will also become mentors so that can support the creation of social enterprises/initiatives in the context of regional/local eco-systems.

DELIVERABLE D.T2.2.2

ePortfolio for training framework focused on Social Entrepreneurial Skills and Comp. incl. methodology

PP develop an ePortfolio for the joint training framework in the field of Social Entrepr. Skills and Competences incl. methodology. The ePortfolio¹ will be the basis for all trainings on Social Entrepr. Skills and Competences.

¹ An ePortfolio is a set of tools and materials paired with a support methodology.



2. Setting the scene and approach

The economic and financial crisis a decade ago has left behind still very crucial socio-economic and demographic challenges. Especially the continued increase of unemployment resulting in poverty and social exclusion demands urgent sustainable solutions. Unqualified younger and older unemployed (50+) women and men are mainly affected. All partner regions have this 'new' disadvantaged group - the long-term unemployed.

Social innovation could offer answers but there is a lack of expertise and specialist business development services and support in the public and private sectors. And there is a lack of funding. The objective therefore is to jointly develop and implement a tailored business development service and support scheme to promote the integration of the disadvantaged groups into the labour market through social innovation and new social enterprises.

Thus, the PP will develop and implement a strategy blueprint for an intergenerational social innovation development and support scheme. The clear goal is to foster social economy in the PP reg., which focus on social impact and employment creation for the long-term unemployed esp. among youth and the 50+.

Based on a classical understanding of social innovation, which focuses on new work and new forms of cooperation especially those that work towards a sustainable society and inspired by best practice examples, the PP will seek new ways to produce new work for the disadvantaged.

One avenue that will be explored is the use of 'Biomimicry'² as a concept to social innovation that looks for sustainable solutions by emulating nature's patterns and strategies. Simple lessons that are being emulated are: nature rewards cooperation, depends on the local, and relies on intergenerational exchange. Focusing mainly on three key economic growth sectors: eg. creative industries (incl. creative minds), healthcare, and well-being, PP will jointly use these simple lessons (cooperation, local, intergenerational exchange) to develop and implement a tailored social innovation support scheme in CE reg. that goes beyond existing practice. The basis will be a close network of cooperation between reg. expert support, care and third sector organisations already working with the unemployed, social innovation and entrepreneurship experts and public/private funding initiatives. These three form the strategic triangles that are the backbone of the project.

Secondly, the PP will focus on providing employment solutions by building and strengthening reg./loc. ecosystems through the implementation of reg. Social Innovation Hubs connected in a trans. network that will pilot the training and support scheme to create social enterprises/initiatives providing employment for the long-term unemployed.

Thirdly, relying on intergenerational exchange, the project will bring together the two peer groups of unemployed (younger-older/non-qualified-qualified) so that can they learn from each other by combining 'old knowledge with new ideas and new knowledge with previous experience'.

² <https://biomimicry.org/> and <https://toolbox.biomimicry.org/methods/>



3. The Social Innovation Hubs: Concept and Support Methodology

The concept of the IN SITU Social Innovation Hub (SIH) aims to create an optimal environment for idea generation, development, improvement and application individuals into community improvers and entrepreneurs, fostering responsible civil society engagement and social entrepreneurship in 6 Central European regions.

Social Innovation Hubs are seen as one-stop-shops with minimised “run-around,, where participants can easily access information on social innovation, social initiative and social business creation and development.

At the end of the six-month programme at the regional Social Innovation Hubs, 10+ ideas per round ought to be prepared for their entrepreneurship or community venture and for the creation of a start-up/community organisation adjusted to the regional needs.

The IN SITU Social Innovation Hub (SIH) is based on:

- an equipped physical space for idea development and start-up establishment,
- innovation creation and development of best practices coupled with
- specific local actions targeted to bridge regionally identified gaps and challenges.

Additionally, each Social Innovation Hub (SIH) can add their own sub-specialization (or focus) in the selection and developing ideas - from development of social or “non-profit” ideas to targeting specific sectors (creative, ICT, manufacturing etc.) or targeting specific beneficiaries’ segments (long term unemployed women, migrants, homeless, NEETS etc.).

Furthermore, each partner is free to adapt and expand activities in order to address local deficiencies and gas of social innovation ecosystem.

Thus, although the application form defines SIH participants should go through the entire six-month SIH support process, if partners regionally decide to opt for an “open door” policy, interested beneficiaries are welcome to join the process at any time. If allowed, late entry during Social Innovation Hub (SIH)s programme should be compensated with additional mentorship and accelerated development process.

Beneficiaries, that is SIH training participants will have access to a physical space - office or co-working zone.

Each Social Innovation Hub (SIH) will create a physical space according to the needs of their targeted beneficiaries’ segment and their capabilities. The physical space might be equipped with office furniture, basic IT infrastructure (computers, Wi-Fi, photocopier, phone), tools for creativity and networking. Beneficiaries will be supported along the whole idea development process during the six-month period. Partners can extend that support period or establish strategic partnerships with local strategic triangle institutions in order to assure undisrupted development cycles after the end of six-months period.



Basic Social Innovation Hub (SIH) premises and office infrastructure suggested availability is from regular working hours up to 24/7 availability, according to regional capacities.

Within the six-month programme, each Social Innovation Hub (SIH) will integrate the following activities:

- teaching in order to help SIH participant develop new knowledge and know-how (joint workshops and lectures, MOOC, eLearning modules);
- consulting in order to give advice on area of expertise and implement new knowledge (1on1);
- mentoring facilitating knowledge transfer from mentors to SIH beneficiaries (1on1).

The ratio of teaching/consulting/mentoring can be defined by each Social Innovation Hub (SIH) and adapted according to participants structure and needs.

In order to organize the Social Innovation Hub (SIH)s' activities in a productive and effective way, the suggested action logic is:

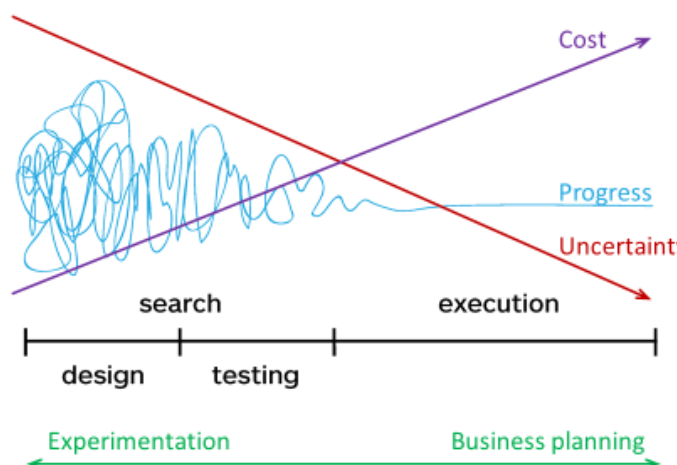
- 1) to have more joint activities during the first stages of the idea development (focus on common skills)
- 2) to gradually shift focus to individually based work and support of each participant later on (focus on individual and specific needs of each participant's project).

The topics and workplan consist of:

- standard social initiative and entrepreneurial support/development activities based on globally identified best practices and tools
- local specific activities aimed to constrain regional social innovation ecosystem deficiencies and shortfalls or to address regional topics defined by partners and regional stakeholders.

The support programme consists of a series of activities with the aim of individual and community empowerment, idea formulating and improvement, civic needs, customer and market understanding, product/service and business model development, formulation of appropriate competitive strategies, development implementation and financing the social venture, be it a social initiative or enterprise.

The mentioned activities will be merged into context and adapted to each specific regional Social Innovation Hub (SIH) and its participants.



Social Innovation Hub (SIH) activities will be listed as a linear process - as a sequence of steps, decisions, tests and achieved results. It is important to understand that this is just a theoretical model.

Moreover, each participant might also need to go through the process in a non-linear way.

In real life, the process is iterative and chaotic - very soon after the start, needs and interests of each participating idea will diverge.

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3 Source: Damien Newman, Central / Alex Osterwalder, Strategyzer. Osterwalder, Alexander; Pigneur, Yves; Smith, Alan; Bernarda, Gregory; Papadakis, Patricia (2014): Value Proposition Design: How to Create Products and Services Customers Want (Strategyzer); published by John Wiley & Sons.

Social Innovation Hub (SIH) management should combine joint training activities and individual consulting and mentorship according to the real needs of each participant.

Therefore, staffing is an essential point of establishing the SIH's sustainability - each SIH should be able to ensure capability to address needs of every participants through internal SIH staff, or through external expertise. Moreover, it is essential that SIH staff takes active part in the dedicated Train the Trainers trainings.

Summing up, the support programme aims to lead SIH participants during the chaotic stage of designing and testing - searching for the right solution that creates value and social impact, enables the creation of a sustainable and potentially scalable social business and/or contributes to regional and national society wellbeing in general.

The aim of the process is to reduce the initial uncertainty through experimentation and focused actions at initial stage, while the costs are still low, minimizing the risks and allowing fact-based decision making and organisational planning.

IN SITU SIH 6-month long training and mentoring programmes for both social businesses and for social initiatives will be run simultaneously, and the core support methodology will be the same for both businesses and initiatives, what will differ are eventual materials, tools and workshop topics.

Although these two elements can be regarded as separate, in order to create better synergies, initiatives and businesses will not be separated and will run simultaneously, with all parties being invited to all workshop, regardless of the fact that a workshop would be more tailored to either social initiatives or businesses. Community building and learning, as well as skill-sharing, is seen as essential.

During the tutoring and mentoring phase, social initiatives and social businesses will be ensured tailored support for their exact needs, on a 1-on1 basis with the mentor/consultant.

3.1. Intergenerational learning

Some of the central biomimicry concepts are that nature rewards cooperation and relies on intergenerational exchange.

Inspired by biomimicry as a social innovation concept that looks for sustainable solutions by emulating nature's patterns and strategies, the IN SITU support methodologies also relies on intergenerational exchange and learning. This will be achieved following another biomimicry concept, that of cooperation.

An efficient structure enabling intergenerational exchange and learning will be established at regional SIHs.

At a pace defined by the regional PPs, based on their ecosystems, regular events enabling symbiosis between both age groups of the defined target group will be set. These will ensure intergenerational skill sharing and skill matching, bridging gaps among generations and further pursuing the intergenerational element needed for long term social innovation sustainability.

Intergenerational learning, focused on interaction and exchange of talents and resources benefits both the individual and the community and, as a result, it directly fosters intergenerational and intercultural solidarity.

Examples of intergenerational learning events can range from meetups on personal experiences through a shared meal/coffee, to "speed dating" regarding a defined issue, social labs, transgenerational hackathons, DIY/learn how to do it workshops from one generation to the other, support groups and many other symbiotic happenings.

4. The IN SITU Social Innovation Hub (SIH): Target groups

According to the approved Application Form, all partner regions have this ‘new’ disadvantaged group - the long-term unemployed. This means the long-term unemployed represent the main target group to be involved in WP T3 “Social innovation pilot initiatives”. However, PPs are free to further specify their target group into other specific categories (for example long-term unemployed women, long-term unemployed migrants, etc.).

In the specific Social Innovation Hub (SIH) regional customization, each IN SITU Social Innovation Hub (SIH) is free to define their own regional target group within their own regional pilot actions (D.T3.2.4-D.T3.2.9).

4.1. The IN SITU Social Innovation Hub (SIH): Attracting Target Group

In order for the IN SITU and SIH innovation ecosystems to inspire and improve the skills and competences of the participants, these have to be motivated and, in the first place, interested to take part in the training. Beneficiaries can be motivated through various dissemination channels, the ones most considered most suitable for the region. Info Days are one wide reaching option that is considered appropriate for reaching the target group, especially if organised in cooperation with the regional stakeholders’ triangle who can help spread and effectively reach the desired target group. Stakeholder engagement is crucial at this stage of implementation.

4.2. Promotional activities

Non-prescriptive dissemination activities:

- Social Innovation Hub Info Day
- Targeted presentations at partner’s premises
- Newsletters
- Participation to related events
- Co-organisation of related events
- Social media (Facebook, LinkedIn, Twitter, etc.)
- Media (newspaper, TV, radio)
- Brochures and posters at targeted premises

4.3. Dedicated promotional extra events

If time and budget allow it, mini side events, such as design thinking workshops, social labs, impact hackathons (*impacthons*), capacity building or self-reflection empowerment events can be used for promotion during the Info days or on the side, as extra promotional activities.

These events can have a few major aims:

- As promotion of the Social Innovation Hub (SIH) - to attract potential Social Innovation Hub (SIH) beneficiaries;
- As Idea generation event - to help participants to develop and formulate their idea;



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- As Idea (pre)selection event - to start the process of identification and selection of potential Social Innovation Hub (SIH) beneficiaries;
 - As mini “bootcamp” - to improve skills and competences of participants.

These mini events could be one possible starting point during which participants are guided and supported in formulating the idea.

5. The IN SITU Social Innovation Hub (SIH): Application Procedure

The application procedure to the Programme will consist of three rounds:

1. checking of administrative requirements;
2. selection of best candidates;
3. final interview.

To facilitate the application procedure, a template will be created and sent to all partners.

The template will contain relevant data that has to be sent in order to fully evaluate the innovative ideas.

Selected participants will be asked to send the CV of the individual/team and a copy of the ID card or some other document for identification.⁴

In order to ensure maximum project participation, regional PPs and selected SIH participants will all sign a participation contract, defining all parties' rights and obligations.

The application deadline must be at least 3 weeks before the start of the six-month training, so a detailed selection can take place.

Documentation will be sent to the dedicated Social Innovation Hub (SIH) email address and evaluated by the IN SITU project team and the SIH trained trainers.

One call will be open for both social entrepreneurs and for social initiatives, inviting all interested parties with a socially innovative idea to apply.

IN SITU project team and the SIH trained trainers, based on the possible profitability of the idea, decide if the selected idea would fit better as initiative and what as business and, once selected, the participants will be informed on the category their idea fall in. However, this is not mandatory, since during the 6-month regional IN SITU training and mentoring program, a social initiative can be tweaked into a real social business.

However, if based on the selected regional target group this kind of application procedure is not possible, a different approach can be applied. Partners are free to determine the best way to reach their regional target group. Thus, the different approach can be any kind of approach that best suits the assurance of the target group's long-term engagement, such as working directly with partnering institutions working with or in frequent contact with the defined regional target group, by helping select and refer possible beneficiaries to the SIH staff.

5.1. Application template - elements

Regional Social Innovation Hub (SIH)s are welcome to translate template elements into national languages.

Basic knowledge of English is important for the presentation of ideas during fairs planned in WP Communication, but not for the initial selection of ideas so idea applications in national languages are to be regarded as acceptable, especially since it eases filling the entire application process.

⁴ Personal data has to be treated according to the privacy policies in effect at the time of receipt of the application.



Regional Social Innovation Hubs (SIH) can adapt wording of the template, as the template content itself.

Basic info

- Project name/Idea title
- Team leader name
- Address (Street, City, ZIP, Country)
- Email
- Phone
- Team members (if any)

Description of the project idea

- Please describe your idea. What is socially innovative about your idea? Do you solve an identified regional, national or international need or problem? (max. 1500 characters)

Does your idea address a sustainable development goal? If yes, which? More about the SDGs [here](#).

- 1) No Poverty
- 2) Zero Hunger
- 3) Good Health and Well-being
- 4) Quality Education
- 5) Gender Equality
- 6) Clean Water and Sanitation
- 7) Affordable and Clean Energy
- 8) Decent Work and Economic Growth
- 9) Industry, Innovation, and Infrastructure
- 10) Reducing Inequality
- 11) Sustainable Cities and Communities
- 12) Responsible Consumption and Production
- 13) Climate Action
- 14) Life Below Water
- 15) Life on Land
- 16) Peace, Justice, and Strong Institutions
- 17) Partnerships for the Goals

Risks and opportunities

- What are the risks and what are the opportunities of your idea? (max. 1000 characters)

Financial sustainability

- Which financial requirements are expected? How do you plan to cover these requirements? (max. 1500 characters)



Team

- If you have a team, please describe the skills of your team members. (max. 1000 characters)

English level

- None
- Basic
- Intermediate
- Team Advanced

Have you already established a company or an initiative/NGO?

- Yes/No

Please insert a personal data disclaimer to your application forms, such as “Personal data collected via this form will be used for IN SITU project information and will not be disclosed to third parties.” Or any other personal data template you have readily available at your organisation.

If you will use google drive for collecting applications, please also insert this DISCLAIMER: You also acknowledge that you understand Google's policies regarding the collection and storage of personal information, regarding which you can learn more about: <https://cloud.google.com/security/gdpr>

If regional SIH decide to implement also dedicated promotional extra events to promote innovative idea creation, as foreseen in Chapter 4.3., a similar template for collecting participation expressions of interest can be used, or the question regarding interest (**Would you like to join this programme but do not have an idea yet? Join our ide generation event on XY/XY/202X.**) can be added to the template above.

6. The IN SITU Social Innovation Hubs: Selection criteria

After attracting beneficiaries, the next step is the selection process of Social Innovation Hub (SIH) cohort trainees.

The main selection criteria below have to be applied within the selection process:

- 1) sustainable development goal tackled (17 SDGs)
- 2) relevance to an identified social need/lacking
- 3) even distribution of genders

Each Social Innovation Hub (SIH) can add additional criteria according to their priorities and area of expertise and interest.

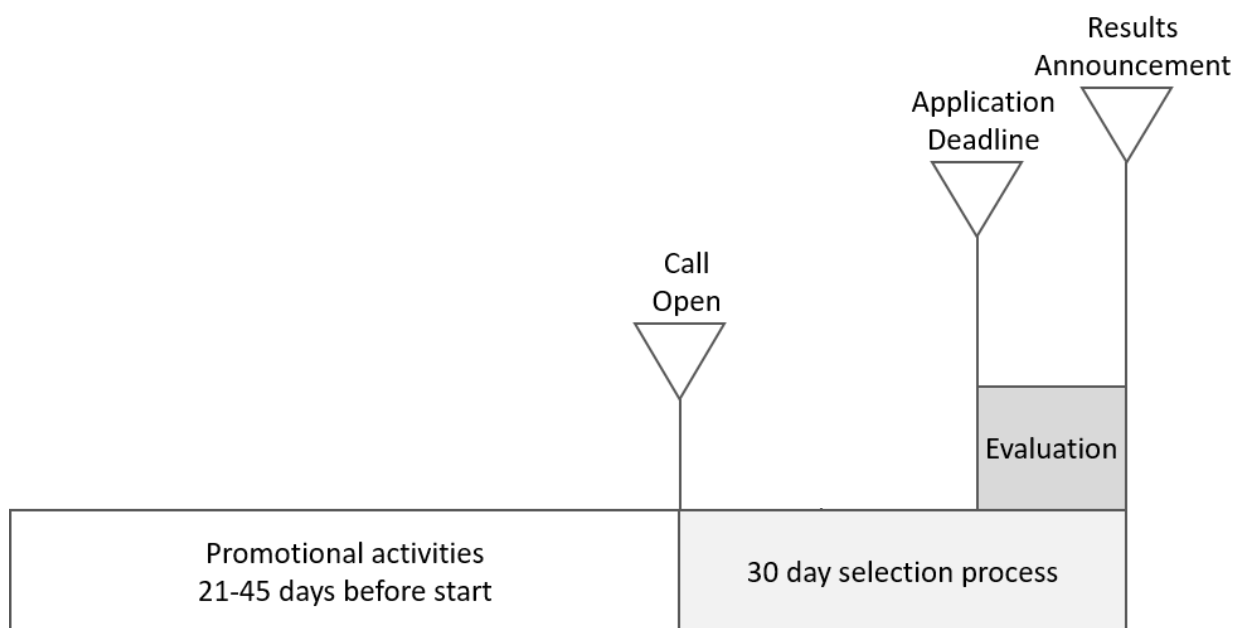
Furthermore, depending on foreseen target group to be engaged, the identification of the most appropriate candidates can be supported by adding additional criteria as:

- 1) innovation degree of the idea
- 2) impact and scalability of the idea
- 3) additional regionally defined criteria.

As stated above, given the specificity of the regional target group, a different selection process is allowed.

Suggested estimated timeline of the 30-day selection process:

- Promotional activities (21-45 days before start)
- Day 1 Open call, application form active/available for download
- Day 20 deadline for applications
- Day 30 Results announcement.⁵



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It is important to mention that this is a suggested timeline. PPs are free to adapt the activities timeline to their regional needs.

⁵ The IN SITU Work Plan has defined deadlines for both regional IN SITU training and mentoring programs.

⁶ Source: Figure created by PP10 - STEP RI.



A proficient level of English is not mandatory, but will be needed for active for participation in the Social Innovation Hub (SIH) international fairs. It is strongly suggested that at least one member of each team can communicate in English in order to present the idea and is able to participate in the Social Innovation Hub (SIH)s fair.

In case too many good ideas apply each regional Social Innovation Hub (SIH) will set an upper limit based on specific regional capacities.

However, at least the 10+ best per region are chosen for each of the 6-month social innovation trainings.

Waiting lists and possibility of late acceptance ought to be introduced within each Social Innovation Hub (SIH) in order to assure full usage of existing capacities and a greater number of beneficiaries.

If allowed, late entry during Social Innovation Hub (SIH)s programme should be compensated with additional mentorship and accelerated development process.

This “late-entry” option is recommended in order to allow multiplication of possible social innovation best practices in the region.

Strong emphasis should be given to retaining beneficiaries and achieving planned outputs. Due to the programme limitations, the selection process and the criteria for idea and team assessment represent the very first step and are the critical factors for retaining beneficiaries within the programme.

Moreover, in order to motivate and empower the target group, the first phase of the training and support programme are individual and community empowerment, as well as and capacity building activities, in order to ease the participants, especially if joining this kind of support programme is a new setting for them. Ice breakers and other team building initiatives are also highly recommended for community building among participants, motivating them to stay in the programme and better fostering more sustainable final outcomes.



7. The IN SITU Social Innovation Hub (SIH): Six-month Programme

In order to improve skills and competences of participants an integrated bottom-up approach involving and coordinating all relevant actors must be implemented.

During the six-month comprehensive training at the regional Social Innovation Hub (SIH), apart from regional support and mentoring activities, participants will have the opportunity to take part in international fairs, present their ideas internationally, etc. The best regional ideas will be also selected for crowdsourcing campaigns (1 campaign in total per region), while the best ideas among all SIHs will be awarded the IN SITU Social Impact Award (1 award per round in the entire SIH network).

Finally, participants will be asked to evaluate their whole training and support experience leading to an optimisation of the project's strategy and methodologies.

Staying true to its name, the IN SITU project activities will be implemented “in situ”⁷ at Social Innovation Hubs' premises. However, since “in situ” also means “in the correct place”, should it arise that a more efficient target group involvement is possible if the activities are brought closer to the target group, the IN SITU mentoring and training activities can be implemented also elsewhere, making target group access easier.

As mentioned above, the six-month support and mentoring programme will be unique for both social initiatives and social businesses. However, participants of these two groups will get tailored counselling for their specific need on a 1-on-1 basis during the mentoring and counselling phase.

7.1. Six-month Activities Timeline

The standard SIH activities are listed as if there is a linear, straightforward development process but implemented in an iterative “design-test-review-adapt-repeat” modus operandi.

These phases are:

1. The Empowerment phase during which individual and community empowerment along with self-assessment activities are carried out. Since unemployment, especially if long-term, is proven to have one of the biggest negative effects on self-esteem, self-assessment and capacity building activities, matched with activities boosting labour market reinsertion skills in order to empower participants are carried out in this phase. The phase ideally ends with participants motivated to take on a proactive role starting their own social business or initiative.
2. The Idea design phase during which SIH participants formulate their socially innovative idea, followed by fine tuning and pivoting activities by improving their understanding of clients/members, creating drafts of their business models and initiative development cycles. An important part of this phase is related to the human element of participants.
3. The Idea growth phase is based on initial implementation activities - establishing links with other companies and initiatives, looking for partnerships, understanding the financial and resource related challenges, learning about impact and human resources, developing prototypes and pilots.
4. The Scale-up phase during which participants start with implementation of incubated idea from initiating the establishment of the company or initiative, initial production and go to market

⁷ Oxford dictionary definition of in situ: in the original or correct place

activities, piloting and hiring, searching for financial support to scale up and internationalization activities. In this phase beneficiaries will learn and apply formal skills and competences of running business, paying taxes, hiring, preparing formal business plans and proposals, engaging communities, marketing and promotion, etc. Real content and activities of the placement phase will substantially differ among participants, depending on the idea's development phase of each participant, their capacities and capabilities and maturity of their idea that will define their readiness for realisation.

This phase also brings the entire process to the final step of assessment and evaluation during which participants evaluate the support programme and the skills acquired.

Each Social Innovation Hub (SIH) will (within the respective regional pilot actions) define the ratio and distribution of teaching, consulting and mentoring activities.

The suggested ratio and frequency of activities per type are:

- Teaching: 4 to 15 events, minimum 20 hours of joint workshops and lectures;
- Consulting: 1 to 2 meetings a week, minimum 10 hours per team;
- Mentoring: 1 to 2 meetings a week, minimum 10 hours per team.

The estimated total effort ranges from 220 to 1.000 hours per cohort, depending on the mentor structure and capabilities, Social Innovation Hub (SIH) characteristics and participants composition. Each partner will adapt the estimated time effort and frequency of activities so that it best suits the needs of the regional Social Innovation Hub (SIH) beneficiaries.

7.2. Social Innovation Hub (SIH) action concept and logic

Social Innovation Hub (SIH) actions aim to guide participants during their idea development process and transforming it into viable social businesses or initiatives. It is an iterative process during which participants search for a viable operational model by designing and testing key elements of their idea and all necessary components for successful market introduction. Once the answers are there and a manageable level of uncertainty is established, execution can take place.

The key principle is that during the search phase participants are focused on experimentation (using limited resources and funds) preparing themselves for take-off once they have sufficient knowledge of their potential customers (if social business) or members and stakeholders (if social initiative), competitors, risks, funding needs, environment and any other aspect that is crucial for successful take off and continuation of their operations.

Following that logic, the subsequent steps, outlined as groups of topics within the four respective phases mentioned above are identified:



EMPOWERMENT

1. Competence assessment activities - identifying the potential that lies within the individual and the community
2. Capacity building - motivation and self-esteem boosting activities
3. General skills to re-enter labour market - how to write a CV, how to write a successful job application, job interview hints
4. Creativity boosting activities - design thinking and other idea generation activities
5. Entrepreneurial and activist spirit boosting activities - events promoting the positive effects of entrepreneurship and civil society, as well as other types of proactive behaviour
6. Community needs assessment activities - after empowering and motivating future SIH participants, in order to have ideas in line with regional needs, participants are invited to assess the current state of the communities they live or operate in

IDEA DESIGN

7. Idea formulation – initial description and definition of key elements that allows clear and focused understanding of the idea and necessary development actions
8. Customer/user/member understanding – initial description of targeted users and customers
9. Market understanding – the market is defined by competitors, suppliers, risks, social, demographic and various key characteristics of targeted users
10. Offer and value proposition – each new initiative, product, service or business model brings different value and benefits to targeted users
11. Business model & story – initial definition of key business model elements, their interrelations and prerequisites for sustainable commercial, social and environmental elements of running business/initiative - the legal entity type should be defined by this stage
12. Financial model – the prerequisite for sustainable business and initiative creation is thorough understanding of finance, costs, incomes and its dynamics
13. Assumption based strategy formulation – implementation of customer development process

IDEA GROWTH

14. Human resources - understanding the human capital (positions, tasks, volunteers) needed to put the idea into practice in the long run
15. Interactions with customers/users/stakeholders – a crucial part of assumptions testing and new idea/business development are the interactions with customers, users, beneficiaries in order to identify their perception of the idea and values it creates
16. Leadership - comprehending different types of leadership, familiarisation with the skills of a good leader and participatory decisions
17. Crowdsourcing and partnering - introduction to crowdsourcing options in order to develop one's idea, as well as partnering with peers and stakeholders
18. Impact assessment - a key element is identifying the eventual impact of the venture

SCALE-UP

19. Presentation and advocacy skills - preparation for pitching to investors and wider public, debating skills
20. Fundraising – preparation for access to the regular and alternative source of capital
21. Project management - introduction to project logic and project design, project management, as well as quality assessment, time and money
22. PR and marketing - introduction to main PR as well as marketing skills and tools in order to successfully communicate the project's mission, at the same time engaging community
23. Readiness assessment – the initiative or business is assessed through the help of mentors, and realisation readiness is evaluated, giving tips for future actions
24. Evaluation – the initiative is asked to evaluate the mentoring process, in order to objectively evaluate the entire support and mentoring programme



Intergenerational learning activities have to be implemented in all phases, in the means specified above, in order to ensure intergenerational skill and experience sharing.

Social Innovation Hub (SIH) staff should be able to support and guide Social Innovation Hub (SIH) beneficiaries during the whole process, regardless of the format (lectures, mentoring or consulting) of the services, at the basic and general level.

In case of need for specific knowledge, regarding technology, IPR, international law or similar, Social Innovation Hub (SIH) mentors are expected to understand the problem and find the most appropriate available temporary mentor in the region.

During all SIH support phases participants should be given plenty real-life tips and tricks in all of the given steps.

8. Social Entrepreneurial Skills and Competences Training materials

A non-exhaustive list of training materials to be used during the regional training and mentoring program of ideas selected and identified as social enterprises at the regional Social Innovation Hubs can be found below. These materials, tools and topics can be combined in parallel with the Socio-Cultural Education training, and all SIH participants are welcome to join all trainings. Some of the materials below will coincide with the tools to be used during the Socio-Cultural Education training, since they are considered state-of-the-art tools for social innovation.

The key tools and concepts will be presented during the Joint Social Entrepreneurial Skills and Competences training (Train the Trainers - D.T2.4.2). It is expected that each Social Innovation Hub (SIH) mentor would be able to present and apply them while working with participants.

The six-month Programme process and related usage use of tools and concepts is iterative.

Moreover, SIH managers and mentors are expected to create an introduction to each of the tools they plan to use during the workshop, avoiding a mere presentation/hand-out and ensuring a meaningful task fulfilment by SIH participants.

The list of tools is non-exhaustive; each partner is free to add additional tools and to expand the proposed practice during their work with cohorts, according to their specific participants needs.

Tool usage and experience should be documented and exchanged among partners in order to enable best practices and to assure improvement of Social Innovation Hub (SIH) activities and impact.

As already stated, the list is not exhaustive, thus all partners are welcome to introduce additional materials and tools and share their experiences and insights within the IN SITU network.

Materials below are listed in the order of the 4 development and support phases identified above. Each phase's section is divided into the given 24 steps. Tools, materials and application approaches are given for each step. Although described as linear, the support programme and thus also the tools are iterative, so they do not need to be used in the order listed below.

Unless otherwise indicated, the material listed below is licensed under the Creative Commons Licenses⁸, it can thus be used for **non-commercial purposes** such as the SIH training purposes, with **mandatory** mentioning of source and author. However, please ensure all legal requirements are met before handing out the materials below, as well as any other materials, to SIH participants.

⁸ <https://creativecommons.org/>

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Empowerment phase

1. Competence assessment tools

5 GOOD THINGS ABOUT ME

In this self-assessment tool, each individual is invited to think about himself in an unrestrictedly positive way and to become (more) aware of intrinsic good qualities. Formulating these positive things and then presenting them in front of the class promotes self-confidence.

To start, each participant is asked to write down 5 good things about him/herself! The facilitator should provide a couple examples for good character traits (e.g. helpful, reliable, tidy, etc.) and good skills (e.g. can cook well, repair things, speak good English, etc.) and clearly explain that there is no space for self-criticism or self-restriction. Some participants might not feel at ease talking about themselves in first person, so paraphrases are also possible ("My friends think that I am always very kind..."). After all participants have finished, each one of them comes in front of the group one by one and tells about himself or herself which five things he or she likes about himself or herself.

If other participants wish, they can add some more positive attributes before the person leaves "the stage". A round of applause is due after each presentation.

MY NAME IS	5 GOOD THINGS ABOUT ME ARE

SOURCE AND FURTHER INFO:

<https://www.nfte.de/>

<https://www.nfte.de/lehrerinnen-lehrer/cet-exklusivbereich/>

<https://www.nfte.com/entrepreneurial-mindset/>



DIVERISTY BINGO

Create a “bingo” card and make enough copies for each participant. The bingo card should contain a grid of squares each containing a statement or question that will apply to some members of your group and is in line with the objectives of empowerment and capacity awareness building.

Hand out the bingo cards and instruct participants to mingle around introducing themselves and finding other participants who can sign their cards indicating that a statement applies to the interlocutor. Each person can only sign one square on the bingo card. This teambuilding method can be used for various purposes, but within SIHs the point is to get to know the participants - encourage people to mingle with more people rather than “win” the game.

Speaks another language	Has memorized a poem	Knows a good joke	Overcome a fear
Talked to someone in another country today	Can play a musical instrument	Checked how the stock market was doing today	Was inspired by someone today
Signed a petition recently	Is a foreigner	Is a member of an NGO	Exercised today
Has a regular meditation practice	Travelled over 1000 miles to get here	Recently celebrated someone else's success	Has a cause they are passionate about
Is passionate about a long-term goal	Currently serves as a mentor	Describes him/herself as a “social intrapreneur”	Has a silly habit

SOURCE AND FURTHER INFO: https://www.teampedia.net/wiki/Diversity_Bingo

2. Capacity building

Mentors in SIH as well as participants could benefit from this approach when respecting the vulnerability experience and background when entering the SIH. Although target groups are already set for each PP, the communities enjoying the benefits of the SIH opportunities, mentoring and counselling will however need to be equipped with communications skills - target groups and mentors could benefit from the latter. Externalizing art of conversation can help participants/target groups to move away from their greatest problem/challenge (as per point of view of unemployment/marginalisation and other) towards diminishing the stigma they already are facing because of their situation and on the other hand to feel more empowered.

Externalizing conversations in counselling/mentoring sessions /in group setting can be used as practice in pairs and or groups. The underlying idea of this approach is based in narrative therapy for bringing the focus away from the problem. In the simplest way of explaining this (also) conversational approach can be seen from the famous quotation from Michael White and David Epstein “The problem is the problem; the person is not the problem“. For simplifying this approach to mentors and staff of SIH the latter means that in real life situation the SIH staff can refocus their way of communication with potential future participants/applicants when working on introductory activities for team building activities/mutual and intergenerational learning and also throughout the whole time of participation in the SIH. The art of leading an externalizing conversation with the participants can catalyse personal liberation from different feelings (shame, guilt...). It is strongly connected to overcome self-limiting ideas for the purpose of deconstructing the prevalent or limiting stories in participants lives (I am shy...I have no power...I am not able to...). One way of practice this through concrete exercises from SIH hubs is through couple of exercises. The participant is to be addressed in the sense to expose or describe characteristics of one of his/her problems but in a way shown below:

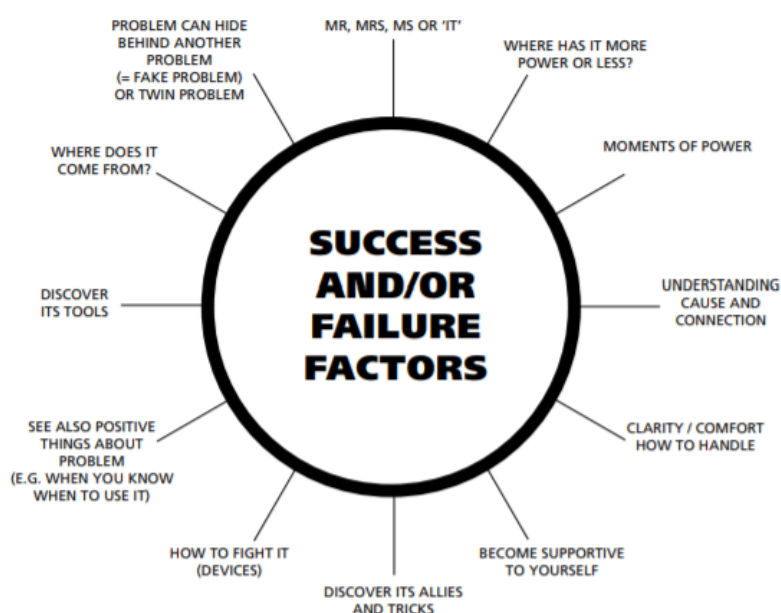


Image: Externalizing the problem (by InDialogue in: Frühmann et al, 2016)

The following circle describes the way how the mentor can lead the externalising conversation with the participant(s) by asking them specific questions about “the problem” - like i.e. the traits of the problem

(how would you name it..., when does it have most power over you, who are his allies, how does it work against you, what have you done till now to handle his traits...) - in this way, the emphasis is on all elements that “nurture” the problem on the long run, narrative practices serve for constructing alternative, preferred and achievable (future) narratives. To put this approach into practice, one exercise can be done while using this externalization map mentioned above (Frezza in StoryTeller, 2019):

PICTURE YOUR MONSTER

This tool is used in the following way:

- Participants draw their problem Picture your ‘monster’ in 10’ (→ a way of ‘mapping’ the problem) They should think of an issue that is bothering them regularly in a disruptive way: it can be a problematic habit, a pattern, a fear, and so on. Try to draw it. It can be an animal, a person, a thing, a monster... A drawing of that monster can be done to help to describe its features.
- Participants describe their ‘monster’ in 50’ - 75’ (depending on group size)
- The moderator captures key words and phrases and if necessary, uses additional questions to encourage the participant rather than stories about other
- Sharing ideas on solution building (app. 30’) - Make a second drawing of the monster / problem: “How does it look now?”

THE MANY-HEADED HELPER

This exercise can be used complementary to the basic one named “The Many-headed Helper” (Frezza in StoryTeller, 2019) where one person is asked to impersonate a real-life person/situation that is affected by a certain problem (can be emotional, relational, physical etc.). Other participants are included by taking action in a way that they explore the person’s story (different questions, no questions are handed in advance to those who ask). The exercise continues with group work/work in pairs to answer 2 type of questions (writing down 2 questions/statements that you asked to the exposed person and for which you believed have helped this person - share in a group, reflect on answers given about empowering and disempowering questions).

Interesting path of this approach underpins the idea that describing the problem, visualising it, describe its strategies and allies can help a person to manage it, since he/she understand it better and can distance himself from it - clarifying entities of self and problem, and thinking towards preferred future outcomes as the dominant personal story can shift into an alternative or preferred one.

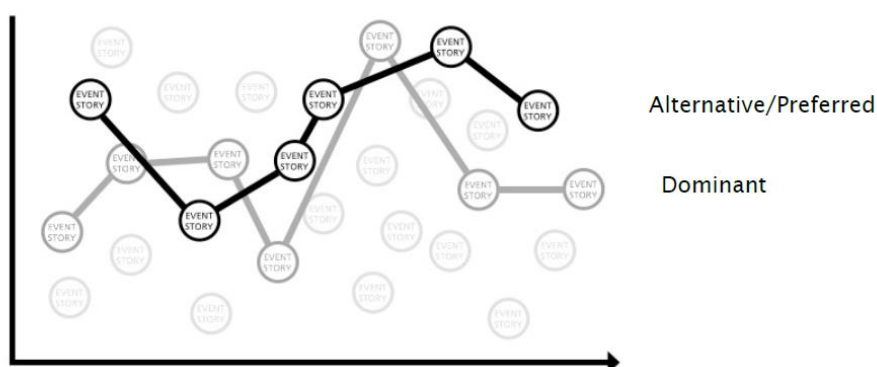


Image: Storybag in StoryTeller, 2019

SOURCE AND FURTHER INFO:

- Fröhmann P., Hamilton N., Broer Y., Mogensen L., Frezza L., Hamilton J. (2016). Raising Strong and Resilient Communities. A narrative and story approach to empower cooperation, cohesion and change in communities through non - formal education. SVF in cooperation with Storybag. ISBN 978-952-7076-34-7; available at: <https://rsrc.eu/outputs.html>
- StoryTeller - Empowerment of persons under risk of exclusion through development of storytelling professional training in under-equipped EU countries (2016 - 2019). THE STORYTELLER CURRICULUM 'WORKING WITH STORIES'. Available at: <http://learnstorytelling.eu/en/results/>

3. General skills to re-enter labour market

In this step participants ought to be empowered with general labour market re-entering skills. Mentors should instruct on how to write a good and job-relevant Curriculum Vitae (CV), as well as how to create an interesting cover letter. Tools like *Europass* should be presented, with all its options and tools, as well as other relevant CV building tools.

Moreover, a showcase of all regionally available job databases should be presented and usage explained. As a third step, mentors should present to beneficiaries the regular protocol and best practices for job interviews - from how to prepare, what to bring, what to ask, etc.

SOURCE AND FURTHER INFO:

https://ec.europa.eu/info/sites/info/files/european-semester_thematic-factsheet_skills-for-labour-market_en_0.pdf

<https://europass.cedefop.europa.eu/>

<https://www.ideo.com/blog/an-ideo-recruiters-3-strategies-for-writing-a-better-resume>

<https://www.indeed.com/career-advice/interviewing/job-interview-tips-how-to-make-a-great-impression>

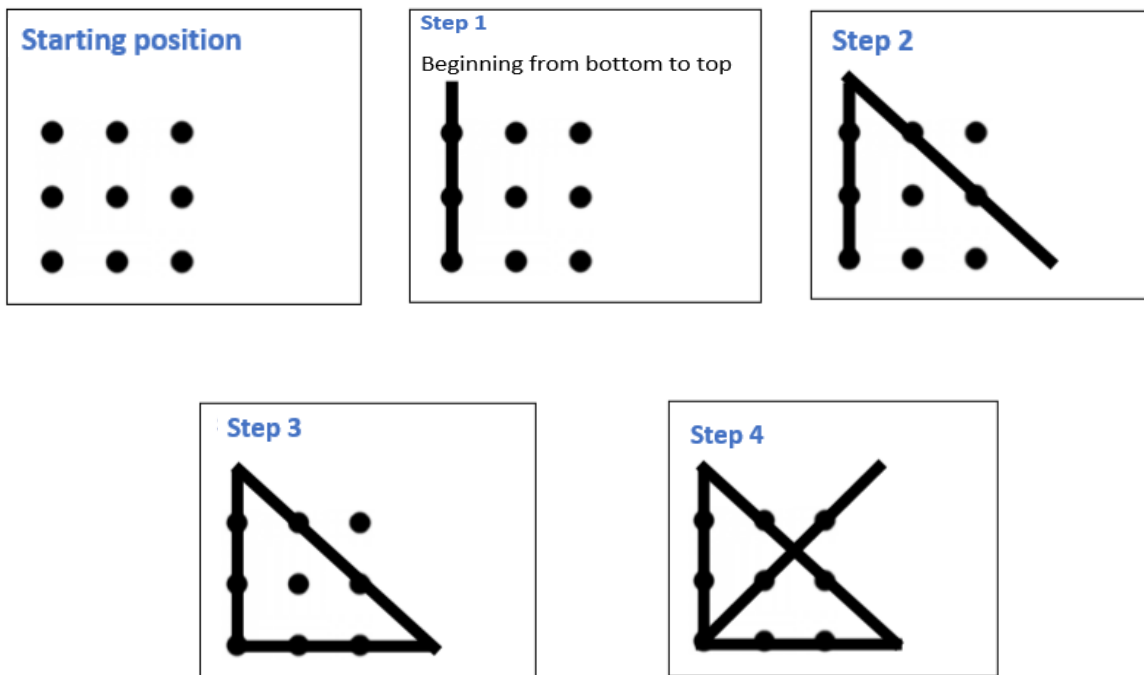
4. Creativity boosting activities

9 DOTS PUZZLE

This tool is used to motivate participants to think outside the box, using an unconventional approach ("lateral thinking").

Steps to be carried out:

1. The starting point is an image consisting of 9 dots to be presented to the participants. You can print the 9 dots on a sheet of paper, draw the 9 dots on a whiteboard/flipchart or simply print out the worksheet in the CET area.
2. Instruct participants to connect the 9 dots through 4 straight lines without lowering the pen. All dots need to be included.
3. If needed, the facilitator can give two hints:
 - a. Instruct to use larger lines, that override the area of the 9 dots.
 - b. Use the second image below as an example and connect the first 3 dots that are positioned vertically on top of each other through one line.
4. The images below are for the facilitator's knowledge only.



SOURCE AND FURTHER INFO:

<https://ninedotsprize.org/>
<https://www.nfte.de/>
<https://www.nfte.de/lehrerinnen-lehrer/cet-exklusivbereich/>



MARSHMALLOW CHALLENGE

The marshmallow challenge, called also Spaghetti Marshmallow Challenge or Spaghetti Challenge, is an activity through which participants understand the importance of teamwork, innovation and creative thinking.

The participants have to be divided into teams, and each team has to build the tallest free-standing structure in just 18 minutes using no more than 20 sticks of spaghetti, one meter of tape, one meter of string, and one marshmallow. The marshmallow must be on top and must remain in its original shape, other items can be modified. The structure has to stand firmly on its own; it cannot be propped up, held, or suspended from the ceiling. Each group has to build the tallest freestanding structure possible in order to win- the winning team is the one that has the tallest structure measured from the tabletop surface to the top of the marshmallow.

At the end of the challenge, the facilitator has to measure the height of the structures and pronounce the winner.

SOURCE AND FURTHER INFO:

<http://www.peterskillmandesign.com/spaghetti-tower-design-challenge>

<https://dschool.stanford.edu/resources/spaghetti-marshmallow-challenge>

5. Activist spirit boosting activities

SHOWCASE BEST PRACTICES

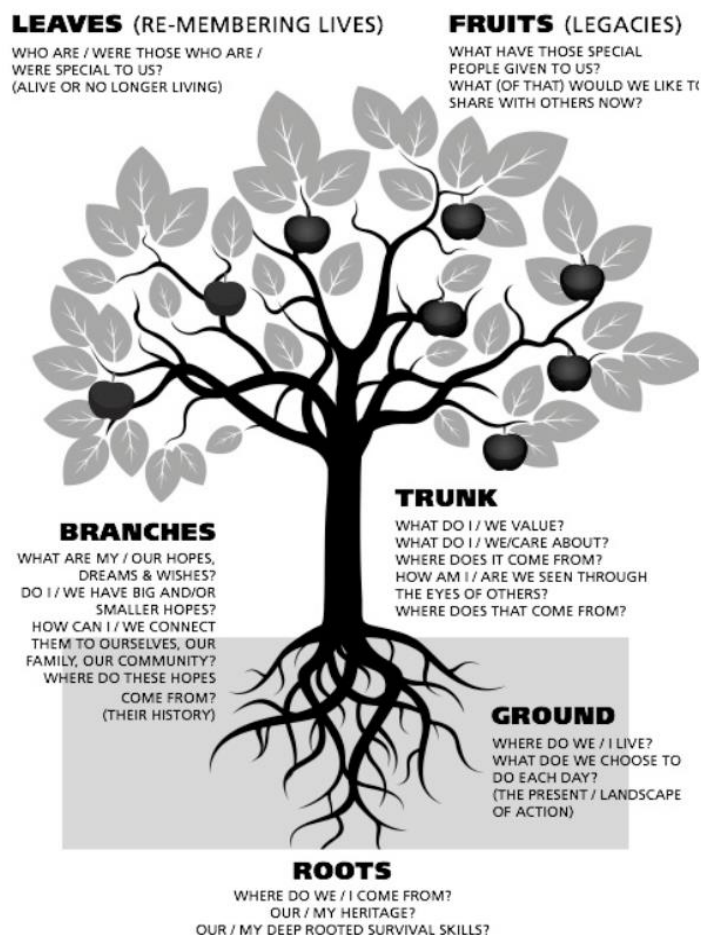
In order to show that starting a social enterprise is feasible, an initial activity for this phase would be for the SIH trainers to research, collect and showcase successful social entrepreneurs, especially those embedding social innovation into their work. A good idea would be to include the intergenerational element into this kind of workshop, as well as inviting successful social entrepreneurs to talk to SIH participants in order to inspire them. This step is of crucial importance. SIHs have to organize an interesting and inspiring event, in order to ensure that current participants take an active role in the entirety of the 6month support programme.

THE TREE OF LIFE

Drawing the “Tree of life” - (from individual to collective - stories of future) (REPSSI and Dulwich Centre Foundation in Frühmann et al, 2016). This approach can serve for individual and group work.

At this point of the SIH programme, asking participants to compile a tree of life can help to understand their values and passions - discovering what they strive for and cherish can help in creating a sustainable social business having community impact in the future.

The basic structure for individual and/or group work is shown below:



When everyone has made his individual tree, there can be an exhibition of the ‘Forest of Life’ and stories can be shared and reflected on, also stories connected to the future (desires, wishes, what do we want to give to the world). It is important to look for (empowering) similarities to build a sense of community. This is moving from the individual to the collective (‘unity in diversity’) (StoryTeller, 2019).

SOURCE AND FURTHER INFO:

- Fröhmann P., Hamilton N., Broer Y., Mogensen L., Frezza L., Hamilton J. (2016). Raising Strong and Resilient Communities. A narrative and story approach to empower cooperation, cohesion and change in communities through non - formal education. SVF in cooperation with Storybag. ISBN 978-952-7076-34-7; available at: <https://rsrc.eu/outputs.html>
- StoryTeller - Empowerment of persons under risk of exclusion through development of storytelling professional training in under-equipped EU countries (2016 - 2019). THE STORYTELLER CURRICULUM ‘WORKING WITH STORIES’. Available at: <http://learnstorytelling.eu/en/results/>

MY SOCIAL BUSINESS

In order to raise SIH participants interest into creating their own social enterprise, after having identified their values with the Tree of Life, the “My social business” tool which maps a person’s values and ways in which a person can contribute to promote those values can be used to further promote self-awareness and proactivity. The SIH participants can use this tool for a drafting a first idea of a business idea that would motivate them or that inspired them.

Core values are a proven generator of social start-ups, thus visualizing these values, skills and activities in a simple tool helps define elements for a possible future business. After completing the tool, the SIH mentors ought to check it and provide the participant with best practices similar to the topics included in the tool by each participant, in order to motivate them further in understand everyone can be a changemaker.

MY VALUES (WHY I HELP)	MY SKILLS (HOW I HELP)	MY CONTRIBUTION (WHO I HELP)	MY NETWORK (WHO HELPS ME)

6. Community needs assessment activities

MAP YOUR COMMUNITY

Once core values have been somewhat identified, it can be useful to map the community that could also be influenced by these same values and activities. Community needs assessment is an important step for revealing different needs and perspectives of a community, regardless of its size (it can be a town, a region, a family, etc.), thus also of a possible future social or cultural initiative.

A community mapping activity will get participants to:

- Identify who their community is and how it is structured
- Realise which needs their community might have
- Discuss how they might improve their community
- Generate ideas for community improvement which could be the base for a future social or cultural initiative




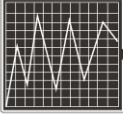

SOURCE AND FURTHER INFO: A Guide to Assessing Needs Essential Tools for Collecting Information, Making Decisions, and Achieving Development Results (Watkins, West Meiers, Visser, The World Bank)
<https://openknowledge.worldbank.org/bitstream/handle/10986/2231/663920PUB0EPI00essing09780821388686.pdf?sequence=1&isAllowed=y>
[Community assessment tools - A resource for Rotary projects](#)

PROBLEM DEFINITION

Once a need is identified and backed with data review, there is always an underlying problem. Thus, the following tool developed by Kimbell and Julier (The Social Design Methods Menu) can be used.

Problem definition

Use this to find and define the issue

	What is the issue?	
	Who is it a problem for?	
	What social/cultural factors shape this problem?	
	What evidence do you have that this is a significant problem?	
	Can you think of this problem in a different way? Can you reframe it?	

Source: Kimbell and Julier, 2012. The Social Design Methods Menu

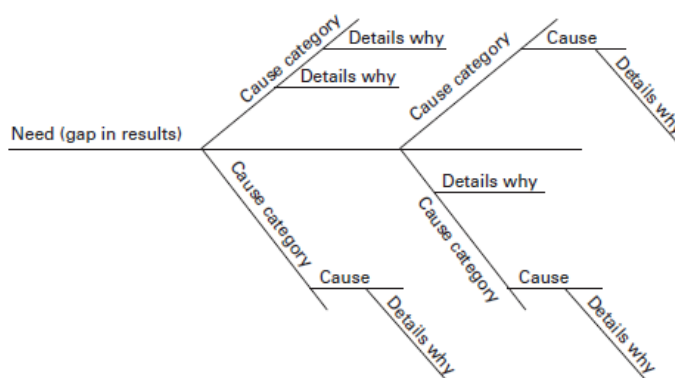
In order to define the problem correctly, SIH participants should be helped in available data and document collection and analysis.

SOURCE AND FURTHER INFO: Julier J., Kimbell L. (2012) Problem Definition. p30. In: The Social Design Methods Menu - http://www.lucykimbell.com/stuff/Fieldstudio_SocialDesignMethodsMenu.pdf
<https://diytoolkit.org/tools/problem-definition-2/>

FISHBONE DIAGRAM (ISHIKAWA DIAGRAM)

The fishbone diagram is a tool that helps identify real and potential cause(s) of a defined problem. It can be used as an assessment tool, as well an interview or group discussion structuring tool.

Figure 3B.1 A Basic Fishbone Diagram



SOURCE AND FURTHER INFO:

A Guide to Assessing Needs Essential Tools for Collecting Information, Making Decisions, and Achieving Development Results (Watkins, West Meiers, Visser, The World Bank)
<https://openknowledge.worldbank.org/bitstream/handle/10986/2231/663920PUB0EPI00essing09780821388686.pdf?sequence=1&isAllowed=y>

PARTICIPATORY PROCESSES

In order to truly assess the needs of an identified community, as well as the feasibility of a certain problem-solving idea or concept for a future social business, the application of participatory processes is advised. These can be simulated in the regional SIH, with SIH participants taking on a role of different member of the mapped community, or organised with real community members to get an even more realistic needs feedback. A clear aim, in the sense of question which wants to be researched and answered, has to be set before starting a participative process. Please check D.T2.2.1 for further information.

Idea design phase

Once the SIH participants have been introduced to and motivated to create a social enterprise, the second phase (Idea design) steps in in order to help them create a first draft of the idea. A non-exhaustive list of materials, tool and methods listed below can be used for this phase.

7. Idea formulation

DESIGN THINKING

Design thinking is an innovative problem-solving and idea creation process. It includes five stages: Empathise, Define (the problem), Ideate, Prototype, and Test, all of which are accompanied by a set of tools to use during each stage. What differentiates it from other methodologies is that Design thinking has a human-centred core, which ensures ideas and solutions which are truly applicable. Keep in mind design thinking is not a linear process, so stages do not have to be sequential in real life.

S T A G E	EMPHATISE	DEFINE	IDEATE	PROTOTYPE	TEST
A C T I V I T Y	Ensure deep and empathic understanding of a certain situation or problem	Define a clear problem based on user needs	Create as many ideas as possible and choose one idea/solution to work on	Create a (cheap) physical prototype	Test the solution and collect feedback
M E T H O D	Read, observe and Interview the target group, choose a specific persona	Interpret and synthesise collected data and define a human-centred (3 rd person) problem	Brainstorm, brainwrite, hot potato, SCAMPER, thinking hat, meditate, choose with dotmocracy (or similar)	Draw, build, use Lego, create simulation, rehearse act	Distribute solution among community, collect feedback, reiterate

SOURCE AND FURTHER INFO:

<https://designthinking.ideo.com/>

<https://mitsloan.mit.edu/ideas-made-to-matter/design-thinking-explained>

<https://dschool.stanford.edu/resources>

<https://www.sessionlab.com/blog/design-thinking-online-tools/>

<https://hpi.de/en/school-of-design-thinking.html>

BIOMIMICRY DESIGN SPIRAL

The Biomimicry Design Spiral is a tool developed by the Biomimicry Institute that offers a concise description of the essential elements of a design process that has nature as the guide for creating solutions. It is made of the six important steps to take when looking for biomimetic solutions to a certain problem or challenge, using biological models for inspiration.

DEFINE

Challenge

BIOLOGIZE

Function & Context

DISCOVER

Biological Strategies

ABSTRACT

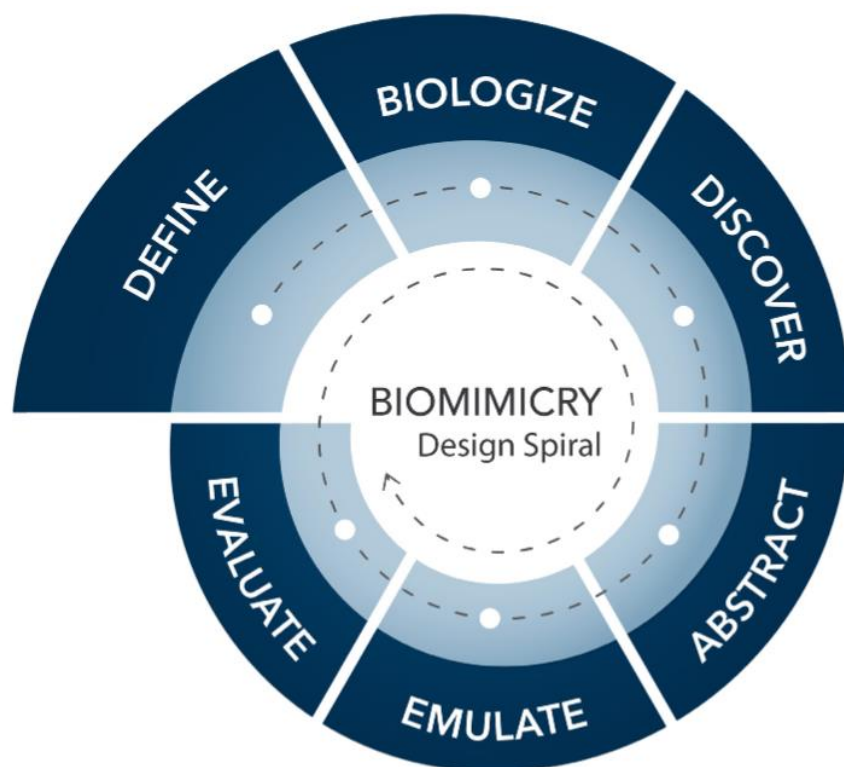
Design Strategies

EMULATE

Nature's Lessons

EVALUATE

Fit and Functionality



SOURCE AND FURTHER INFO:

<https://toolbox.biomimicry.org/methods/>

https://toolbox.biomimicry.org/wp-content/uploads/2017/10/Design.Spiral-Diagram_10.17.pdf

<https://biomimicry.org/>



IDEA NAPKIN

The Idea Napkin is a simple visualisation tool for idea generation.

Idea Napkin v5

name of this idea: What's the idea?

designer's name(s): What's your name(s)?

who are you?

Who are you? Who's on your team?

what are you offering?

What are you offering to others?

what are your distinctive competencies?

What makes you the right person / team to offer this and what makes it hard for others to imitate you?

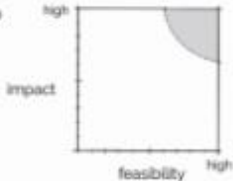
who are you offering it to?

Who are you offering it to? Who will benefit from it? (Don't name a market or industry here - name a single human being.).


why does that person care?

What value or benefit does the person you're offering it to see in it? Why do they care?

Seek the top right corner of this chart:



proudly made available under creative commons by **the innographer**

the Straight Up  **Business Institute**
straightupbusinessinstitute/toolkit

SOURCE AND FURTHER INFO:

<https://www.straightupbusiness.institute/tools/idea-napkin/>

<https://straightupbusiness.institute/toolkit>

Creator: Dr. Alex Bruton, The Innographer Ltd., The Straight Up Business Institute



SIMPLE PLANNING TOOL


The Simple Planning Tools eases the shift from idea generation to idea implementation.

STRATEGY _____ START DATE _____ TIME FRAME _____

	1	2	3	4	5
VISION What do you want to create? What outcomes do you want to see? Capture it here. Don't hold back. Think big.					
NEEDS In order for your vision to be realized, what needs to happen? What do you need? Who can help you meet these needs? Write one need in each box. Think ideally.					
COMMITMENTS What actions can you take to help meet each need you described above? When will you do these things? Over what period of time? For how long? Write a commitment in each box below the need it corresponds to. Think specific.					
PURPOSE What makes this vision important? Why does it matter? This is where action comes from. Think deep.					



The Simple Planning Tool
 Concept & Design by Caleb Dean & Emily Kanter
www.owlfoxdean.com

The Simple Planning Tool is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.


SOURCE AND FURTHER INFO:

<http://www.owlfoxdean.com/>

<http://www.owlfoxdean.com/simple-planning-tool>

<http://www.owlfoxdean.com/blog/2016/2/15/introducing-the-simple-planning-tool>

8. Customer understanding

PERSONA MAPPING

The aim is to describe the customer based on a specific individual - a real person representing the possible customer of the social enterprise. Description includes every information available that will enable understanding of that particular segment beyond usual moments of interaction with business like: personal detail, demographics, social status, preferences and values, etc.

Picture	Name
Demographics	Goals and challenges
	Values and fears

SOURCE AND FURTHER INFO:

<https://diytoolkit.org/tools/personas/>

<https://blog.bufferapp.com/marketing-personas-beginners-guide>

<https://blog.hubspot.com/blog/tabid/6307/bid/33491/Everything-Marketers-Need-to-Research-Create-DetailedBuyer-Personas-Template.aspx>



EMPATHY MAP

An empathy map is a visualization tool used to articulate what we know about a particular type of person (customer). In the empathy map we insert what the person sees, feels, hears and says/does, in order to sum up the persona's pains (frustrations and fear) and gains (benefits) and how we might influence these.

Empathy Map Worksheet

Designed for:	Designed by:	Date:	Version:
---------------	--------------	-------	----------

1. WHO are we empathizing with?
 - Who is the person we want to understand?
 - What is the situation they are in?
 - What is their role in the situation?
2. What do we want them to DO?
 - What do they need to do differently?
 - What job(s) do they want or need to get done?
 - What decision(s) do they need to make?
 - How will we know they were successful?
3. What do they SEE?
 - What do they see in the marketplace?
 - What do they see in their immediate environment?
 - What do they see others saying?
 - What do they see others doing?
 - What are they watching and reading?
4. What are they SAYING?
 - What have we heard them say?
 - What can we imagine them saying?
5. What do they DO?
 - What do they do today?
 - What behavior have we observed?
 - What can we imagine them doing?
6. What do they HEAR?
 - What are they hearing others say?
 - What are they hearing from friends?
 - What are they hearing from colleagues?
 - What are they hearing second-hand?
7. What do they THINK & FEEL?

PAINS
What are their fears, frustrations, and anxieties?

GAINS
What are their wants, needs, hopes and dreams?

1. WHO are we empathizing with?
GOAL
2. What do we want them to DO?

6. What do they HEAR?
7. What do they THINK & FEEL?
3. What do they SEE?

PAINS
GAINS

(

)

_

)

What other thoughts & feelings might motivate their behavior?

4. What do they SAY?
5. What do they DO?

XPLANE®

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SOURCE AND FURTHER INFO:

<https://x.xplane.com/empathymap>

<https://www.xplane.com/>

<https://medium.com/swlh/what-is-an-empathy-map-and-why-is-it-valuable-for-your-business-14236be4fdf4>

<https://www.youtube.com/watch?v=kAdbbsZolOw>

9. Market understanding

JOB TO BE DONE (JTBD)

The definition of the main customer problem(s) shifts perspective to targeted customer segment for which the company aims to develop service. The social enterprise needs to be focused on the problem that their customers are trying to solve (the Job to Be Done concept).

The main task of this tool is to introduce the customer's perspective into understanding of the enterprise's activity. This is a condensed tool that allows descriptions of the three interrelated topics related to the social enterprise's offering:

- **Customers:** Who the customers are?

Describe people that buy or use the product, which could be defined as individual persons, professionals, family or any other social group members.

- **Reasons for buying the product/service:** Why do the customers buy or use our product?

Describe how is the product used to solve a problem that occurs in customer's life or enable customer to achieve something, improve living conditions or avoid unwanted outcomes and consequences.

- **Circumstances:** When and (sometimes) where customers buy and use our products/services?

Circumstances define behaviour of the customer groups - size of the market is not limited by the number of the customers but by the occurrence of the favourable circumstances for the company's product.

Product: _____

Customer segment	Problem or "job to be done"	Buying/using circumstances
Who is our customer?	Why customers buy/use?	When customers buy/use?

SOURCE AND FURTHER INFO:

<https://hbr.org/2016/09/know-your-customers-jobs-to-be-done>

<https://strategyn.com/jobs-to-be-done/>

<https://jobs-to-be-done.com/define-the-market-around-the-customers-job-to-be-done-49b65324e5bd>



TARGET GROUP

This tool can be used to help SIH participants define their target group(s).

DIY 16

I want to know the people I'm working with
by better defining who I am trying to reach

TARGET GROUP

WHAT DO YOU CALL THIS GROUP?				
CAN YOU DRAW THEM? (OR STICK A PICTURE HERE THAT REPRESENTS THEM)	WHAT ARE THEIR NEEDS?			
	WHAT ARE YOU OFFERING THEM?			
	HOW MANY ARE THERE?	HOW MANY OF THOSE WILL YOU REACH?	HOW FREQUENTLY WILL YOU INTERACT?	WHAT DO YOU GET IN RETURN?

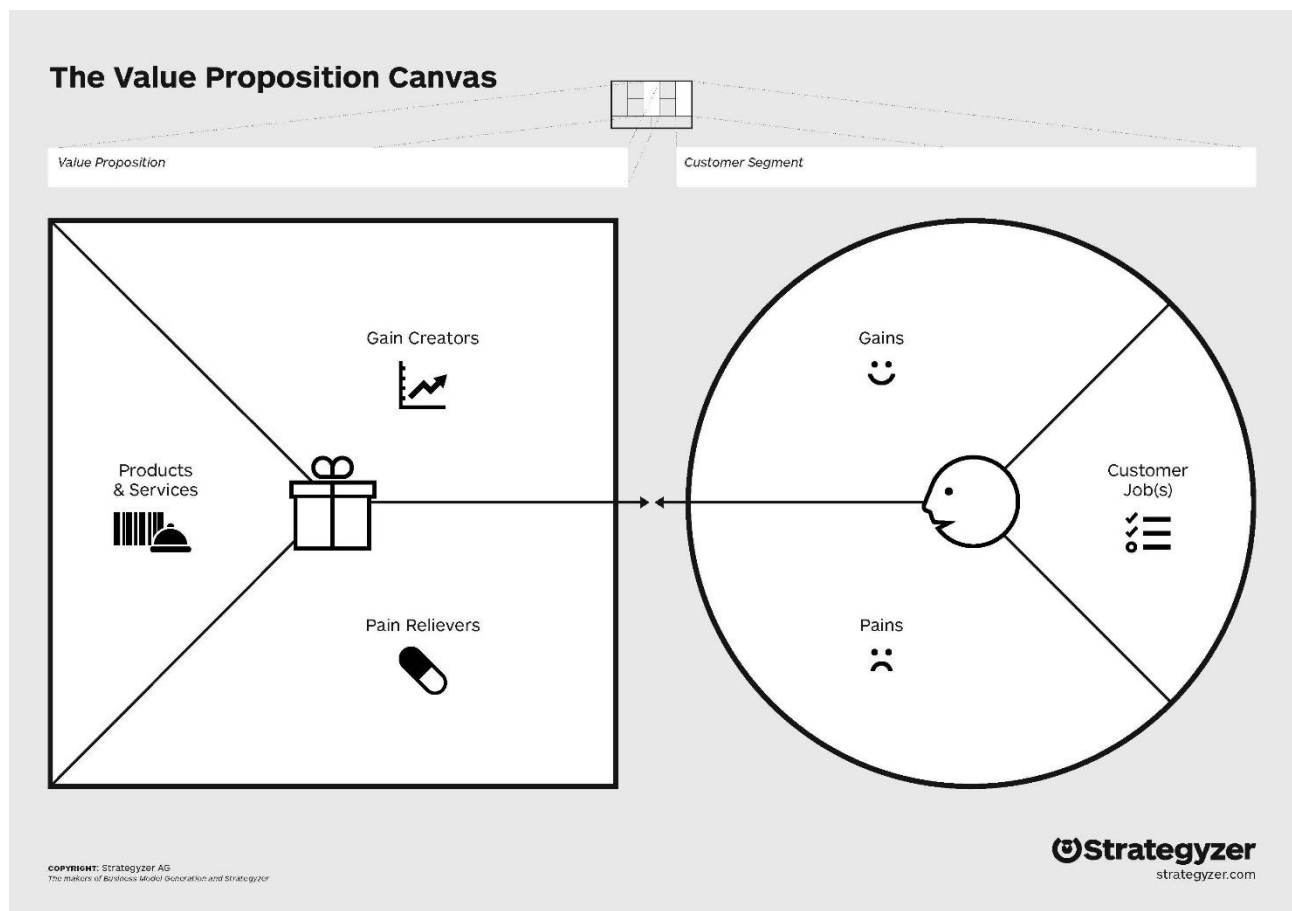
SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/target-group/> and inspired by: Nesta (2009) Worksheet 3a: Your Customers. In: Creative Enterprise Toolkit <https://www.nesta.org.uk/toolkit/creative-enterprise-toolkit/>

10. Offer and value proposition

VALUE PROPOSITION CANVAS

The main purpose of the Value Proposition Canvas is to transform previously defined social enterprise's features and activities into customer perceived benefits - through created "gains" and/or avoided or reduced "pains".



SOURCE AND FURTHER INFO:

Osterwalder, A.; Pigneur, Y.; Bernarda, G.; Smith, A.: Value Proposition Design, John Wiley and Sons, Inc., Hoboken, New Jersey, USA, 2014

<https://strategyzer.com/canvas/value-proposition-canvas>

<https://medium.com/upperstory/the-flow-of-a-value-proposition-canvas-b63b68f0e28b>

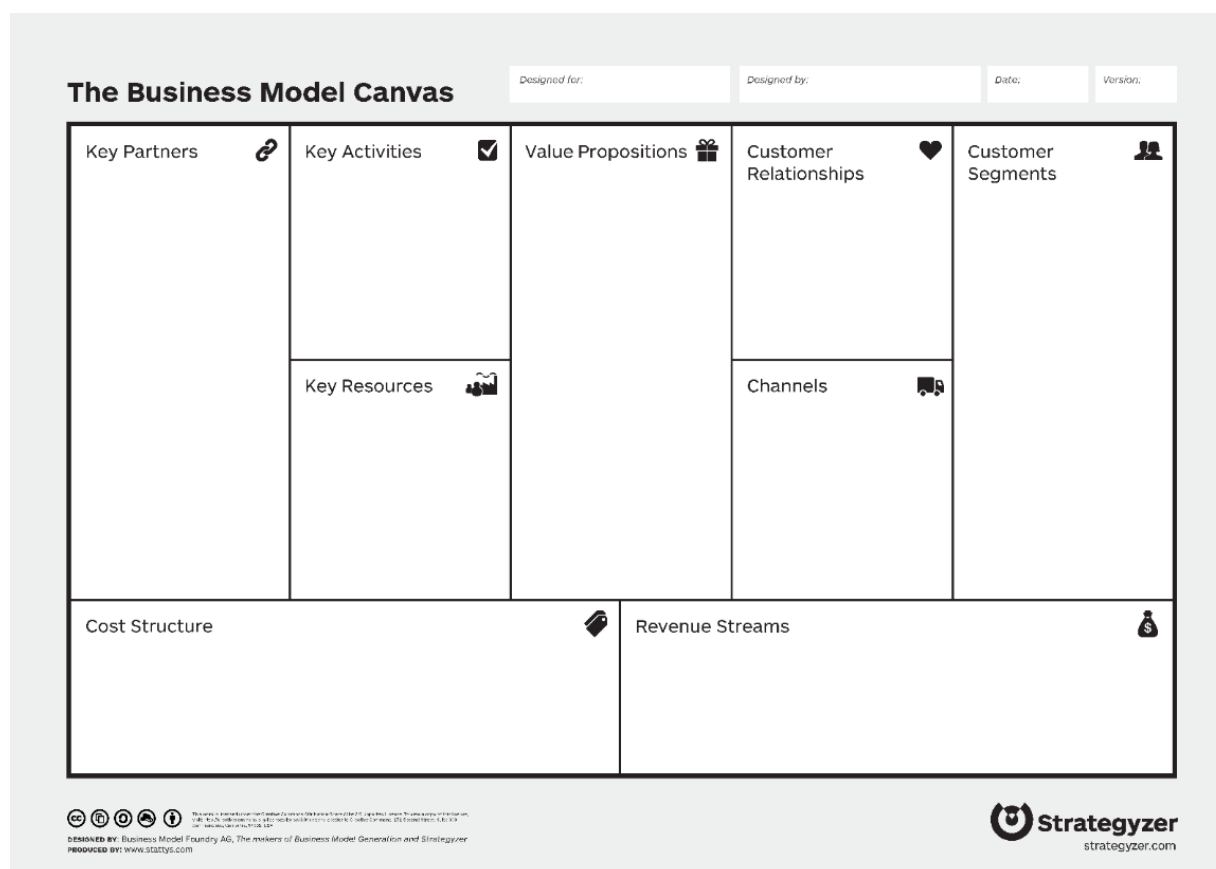
<https://www.peterjthomson.com/2013/11/value-proposition-canvas/>

<https://www.strategyzer.com/blog/value-proposition-canvas-a-tool-to-understand-what-customers-really-want>

OVERVIEW OF LEGAL ENTITY TYPES FOR SOCIAL ENTERPRISES

In order to make the initial definition of key business model elements, their interrelations and prerequisites for sustainable commercial, social and environmental elements of running a social or social enterprise, the following canvas tools can be used.

The Business Model Canvas is used as a checklist for identifying the key elements of the business model - the rationale of creating, delivering and capturing value. It is a visual chart with elements describing an enterprise's value proposition, infrastructure, customers, and finances. It assists firms in aligning their activities by illustrating potential trade-offs.



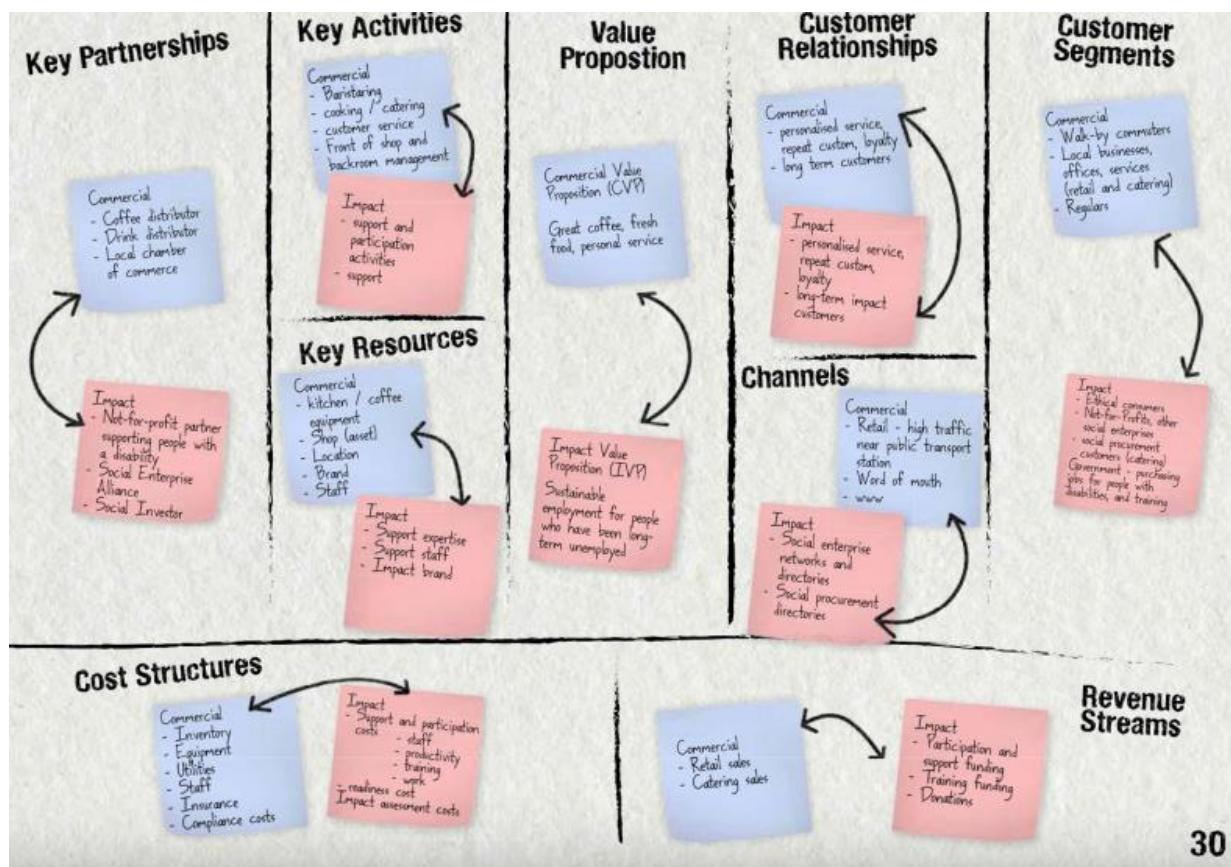
<https://strategyzer.com/canvas/business-model-canvas>
<http://thetoolkitproject.com/tool/business-model-canvas#sthash.Yi3aD81z.dpbs>
https://en.wikipedia.org/wiki/Business_Model_Canvas#Application



<https://strategyzer.com/books/business-model-generation>
<https://www.youtube.com/user/businessmodeltv/featured>
<https://learn.marsdd.com/article/social-enterprise-business-models/>
<https://diytoolkit.org/tools/business-plan-2/>

BUSINESS MODEL CANVAS FOR SOCIAL ENTERPRISES

This canvas tool focuses not only on commercial sustainability but also on social impact of the social enterprise.



SOURCE AND FURTHER INFO:

Business Model Canvas for Social Enterprise Design, Ingrid Burkett Knode

https://issuu.com/ingridburkett2/docs/bmc4se_lr_for_web

<https://www.strategyzer.com/books/business-model-generation>

<https://socialenterpriseinstitute.co/wp-content/uploads/2018/12/Social-Business-Model-Canvas.pdf>

<https://www.bitc.org.uk/the-responsible-business-map/>

12. Financial model

RESOURCE MAP

Mapping existing resources is needed to assess the stats-quo, as well as to define eventual future actions of the social enterprise. Resource categories are non-exhaustive - SIH trainers can add new categories or leave them blank for SIH participants to fill in, according to case.

RESOURCES	HR	EQUIPMENT	FACILITES	INTELLECTUALLY PROPERTY
CAPABILITES	ADMINISTRATIVE	PROFESSIONAL	FINANCIAL	UNIQUE SKILLS
MARKET	CLIENTS	SUPPORTERS	FUNDERS	PARTNERS

SOURCE AND FURTHER INFO:

Tools for citizens - <https://civilsocietytoolbox.org/imprint/>

https://civilsocietytoolbox.org/wp-content/uploads/2018/07/WS_17_Mapping-Resources_A3.pdf

PRICING

SIH mentors should help SIH participants in the definition of prices for their goods and services. Mentors should help define COGS - Cost of goods sold (labour, materials, packing, shipping, sales commissions, etc.) and overheads (rent, utilities, etc.), helping a clear definition of all the costs to be covered each month and the revenues that the business ought to generate to cover these costs.

CASHFLOW

In accounting, cash flow is the difference in amount of **cash** available at the beginning of a period (opening balance) and the amount at the end of that period (closing balance). It includes all income and expenses, over a set period of time, usually a fiscal year. An experienced accountant or financial expert



should help SIH social enterprises predict and fill out their cashflow form, in order to understand all possible underlying costs that a business might incur.

Example. For training purposes only. Do not distribute.

Twelve-month cash flow

Enter Enterprise Name Here

Fiscal Year Begins: sij.05

	Pre-Startup EST	sij.05	vlj.05	ožu.05	tra.05	svi.05	lip.05	srp.05	kol.05	ruj.05	lis.05	stu.05	pro.05	Total Item EST
Cash on Hand (beginning of month)		0	0	0	0	0	0	0	0	0	0	0	0	0

CASH RECEIPTS														
Cash Sales														
Collections fm CR accounts														
Loan/ other cash inj.														
Other														
TOTAL CASH RECEIPTS	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Total Cash Available (before cash out)	0	0	0	0	0	0	0	0	0	0	0	0	0	0

CASH PAID OUT														
Purchases (merchandise)														
Purchases (specify)														
Purchases (specify)														
Gross wages (exact withdrawal)														
Payroll expenses (taxes, etc.)														
Outside services														
Supplies (office & oper.)														
Repairs & maintenance														
Advertising														
Car, delivery & travel														
Accounting & legal														
Rent														
Telephone														



Utilities														
Insurance														
Taxes (real estate, etc.)														
Interest														
Other expenses (specify)														
Other (specify)														
Other (specify)														
Miscellaneous														
SUBTOTAL	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Loan principal payment														
Capital purchase (specify)														
Other costs														
Reserve and/or Escrow														
Owners' Withdrawal														
TOTAL CASH PAID OUT	0	0	0	0	0	0	0	0	0	0	0	0	0	0
Cash Position (end of month)	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE AND FURTHER INFO:

<https://www.slideshare.net/OTUSGroup/cashflow-management-for-social-enterprises-95011004>

<http://www.socialenterprisecanada.ca/en/learn/nav/resourcelibrary.html?page=resourceDetail.tpt&iddoc=320944>

Tools for citizens https://civilsocietytoolbox.org/wp-content/uploads/2018/07/WS_19_Cash-Flow_A3.pdf

<https://enterise.info/lessons/social-enterprise-resources.html>

13. Assumption based strategy formulation

ONE PAGE STRATEGY

One Page Strategy is a simple yet powerful strategy management tool, useful to set the social enterprise's long-term strategy.

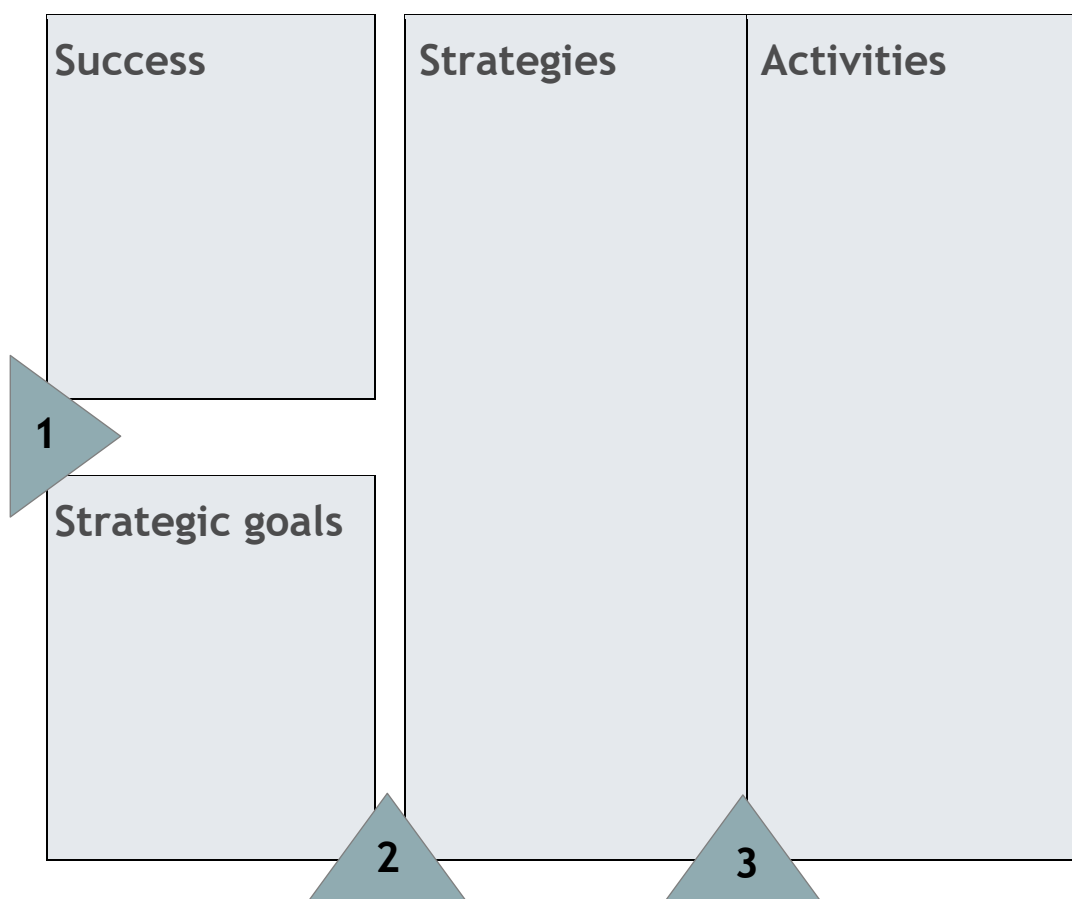
Moreover, the One Page Strategy is an effective way of creating a strategic plan which is short (one page), clear, simple, feasible, measurable and applicable in diverse settings.

The process of creating the One Page Strategy is based on two simple questions: What? and How?, respectively "What is Success?" and "How Do We Realize It?". The canvas for the One Page Strategy is composed of two main sections intended to be filled up with references that provide answers to these questions. The section concerning What? contains blocks concerning Success and Goals, while section concerning How? contains blocks concerning Strategies and Activities.

One Page Strategy is an effective way of making a strategic plan that is:

- short - on just one page
- clear and simple - easy to understand, explain and see the link between the plan and the activity
- feasible and measurable - each implementation activity has a responsible person, deadline and result indicator.

The process implies making some tough decisions: to limit the description of success in one sentence, to choose a few key goals, to list what we have to do and what we will not do, all with the aim of being focused on those ideas, jobs and strategies that bring success.



SOURCE AND FURTHER INFO:

<http://www.step.uniri.hr/portfolio/strategija-na-a4/>

<https://www.slideshare.net/dragon.hr/strategija-na-a4-predavanje-2009>

ASSUMPTIONS LIST

One result of the One Page Strategy is a great number of assumptions regarding environment, market, customers and clients but also organizational and individual capabilities. Management based on assumptions allows swifter response and better adjustment which is more in line with the lean startup thinking than traditional, inert approach. This is thus also applicable for social enterprise development.

The following form can be used to describe and document the assumptions that are presumed during the elaboration of the strategy. The assumptions are built around the enterprise's environment, its capabilities and resources and persons responsible for particular actions.

Assumptions about:

1. Environment	2. Company	3. People

SOURCE AND FURTHER INFO:

INTERREG CE THINGS+ Key tools portfolio for servitisation (3, 4, 5)

<https://www.interreg-central.eu/Content.Node/THINGS-.html>

<https://www.ideo.com/blog/design-an-organizations-purpose-statement-with-this-tool>

TEST AND LEARNING CARDS

These Strategyzer tools are useful to test hypothesis and assumptions, as well as to assess them after implementation.

Test Card

Test Name	Deadline
Assigned to	Duration

STEP 1: HYPOTHESIS

We believe that Translation

Critical:   

STEP 2: TEST

To verify that, we will Translation

Test Cost:    Data Reliability:   

STEP 3: METRIC

And measure Translation

Time Required:   

STEP 4: CRITERIA

We are right if Translation

Copyright Business Model Foundry AG The makers of Business Model Generation and Strategyzer

Learning Card

Insight Name	Date of Learning
Person Responsible	

STEP 1: HYPOTHESIS

We believed that Translation

STEP 2: OBSERVATION

We observed Translation

Data Reliability:   

STEP 3: LEARNINGS AND INSIGHTS

From that we learned that Translation

Action Required:   

STEP 4: DECISIONS AND ACTIONS

Therefore, we will Translation

Copyright Business Model Foundry AG The makers of Business Model Generation and Strategyzer

SOURCE AND FURTHER INFO:

Strategyzer AG <https://www.strategyzer.com/>

<https://assets.strategyzer.com/assets/resources/the-test-card.pdf>

<https://www.strategyzer.com/blog/posts/2015/3/9/capture-customer-insights-and-actions-with-the-learning-card>



IDEA GROWTH PHASE

14. Human resources

ROLE MAPPING

Understanding each role in the social enterprise is important to understand the human capital needed to put the idea in practice in the long run.

POSITION/ROLE	TASK	SKILLS	RESOURCES	OBSTACLES
CEO				
CTO				
PROJECT MANAGER				
...				

SOURCE AND FURTHER INFO:

<https://www.dummies.com/careers/project-management/the-5-scrum-values/>

Tools for citizens - <https://civilsocietytoolbox.org/imprint/>

<https://civilsocietytoolbox.org/library/worksheets/roles-and-responsibilities-2/>

SKILL MATRIX

After defining roles, the next step could be a more detailed insight into skills with the skills matrix.

SKILL MATRIX TEMPLATE										
Capabilities	NAME 1		NAME 2		NAME 3		NAME 4		NAME 5	
	Proficiency	Interest	Proficiency	Interest	Proficiency	Interest	Proficiency	Interest	Proficiency	Interest
CAPABILITY 1	4	1	4	1	1	1	2	1	2	1
CAPABILITY 2	1	1	2	1	4	1	3	1	3	1
CAPABILITY 3	1	0	1	0	2	1	1	0	1	0
CAPABILITY 4	2	0	1	0	4	1	2	1	2	1
CAPABILITY 5	3	1	4	1	2	0	2	1	2	1
CAPABILITY 6	1	1	1	0	2	0	4	1	4	1

Proficiency level
0 = No capability
1 = Basic level
2 = Intermediate level
3 = Advanced level

Interest
0 = Has no interest in applying this capability
1 = Is interested in applying this capability

SOURCE AND FURTHER INFO:

<https://www.analyticsinhr.com/blog/create-skills-matrix-competency-matrix/>

<https://3jd8gl2iires146kaw2hgqy9-wpengine.netdna-ssl.com/wp-content/uploads/2018/02/SKILL-MATRIX-EXCEL-TEMPLATE.xlsx>

<https://www.dummies.com/careers/project-management/how-to-create-a-skills-matrix/>

<https://www.dummies.com/careers/project-management/the-5-scrum-values/>

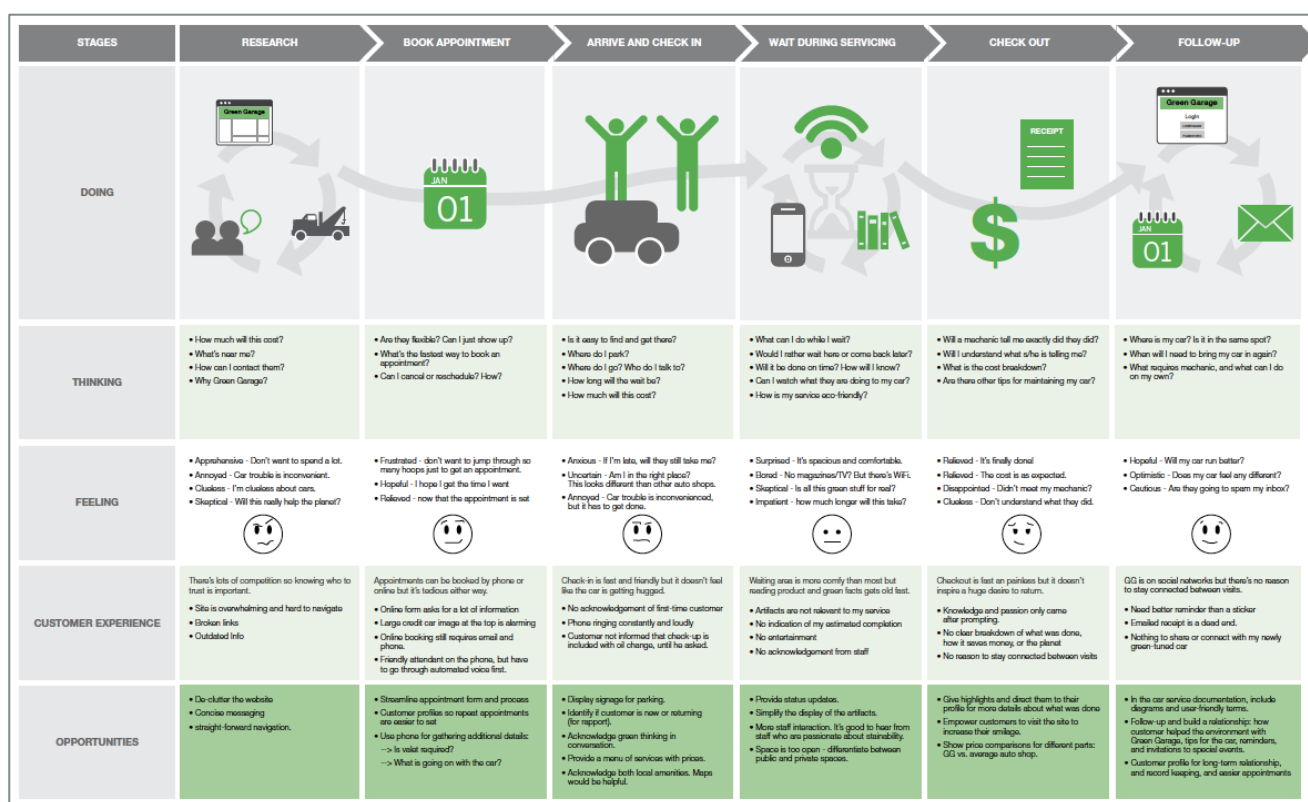
<https://www.toolshero.com/human-resources-hr/human-resource-development-hrd/>

15. Interactions with customers and stakeholders

CUSTOMER JOURNEY

In order to effectively communicate with our clients and deliver value, one first needs to understand how the client interacts with the enterprise. The customer journey tool is used to visually capture the entire cycle of customer's experience from the moment the customer's problem emerges until after the solution is applied. Stages of the journey can be generic (preparation, purchase, delivery, use, supplements, maintenance, disposal) or more precisely defined. After all stages are defined, customer behaviour at every stage should be analysed (define what is the customer doing-thinking-feeling) so any unsatisfactory experience (pain points) can be identified and recognized as possible opportunity.

Customer journey gives overview of key interactions that the customer has with the enterprise by describing customer's feelings, motivations and goals for each of the touchpoints. It provides insight into customer motivation for what they wish to achieve and what are their expectations of the organization. This information allows companies to identify opportunities and possibilities to improve their offer and the overall experience.



Example of a filled-out Customer Journey (source: <https://uxplanet.org/>)



Stages:	Getting information Preparing	...					
Doing							
Thinking							
Feeling Experience							
Front end Touchpoints							
Back end Infrastructure							
Pains Opportunities							

SOURCE AND FURTHER INFO:

<https://see3.com/how-nonprofits-can-use-customer-journey-mapping/>
<https://www.patlive.com/blog/customer-journey-mapping-for-small-business/>
<https://www.sailthru.com/marketing-blog/customer-journey-mapping-need-to-know/>
<https://conversionxl.com/blog/customer-journey-mapping-examples/>
<https://hbr.org/2013/09/the-truth-about-customer-experience>
<https://uxplanet.org/>

Stickdorn, M.; Schnaider, J.; et al.: This is service design thinking, John Wiley & Sons, Hoboken, New Jersey, 2011



EXPERIENCE MAP

A tool built on the Customer Journey is the Experience map. The experience map helps visualise different routes and points at which customers become aware of, connect with, and feel about the social enterprise's activities. Identifying and highlighting the interactions, helps reflect on how interactions are made and develop the business.



I want to test and improve
by creating an overview of how I engage with my stakeholders

EXPERIENCE MAP

	AWARENESS How did this person hear about you? (E.G. PR, social media, word of mouth) What relevant previous experience did he or she have?	KEY USAGE What points of contact happened between you and this person? What were the critical moments, such as especially good or bad experiences?	OUTCOME What was the feedback from this person? (e.g. via social media or word of mouth) Was there any follow up from your side?
OBSERVATIONS			
LEARNINGS			

SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/experience-map/>

Stickdorn, M.; Schnaider, J.; et al.: This is service design thinking, John Wiley & Sons, Hoboken, New Jersey, 2011



16. LEADERSHIP

WHAT MAKES A GOOD LEADER?

At this stage, SIH participants should be introduced to leadership skills. SIH participants should learn how to effectively communicate, inspire and empower, stay focused on the social enterprise's goal, lead

The social enterprise and promote transformation. It is advisable to use best practices from regional realities, in order to better showcase and rely to values needed for leading a social enterprise.

SOURCE AND FURTHER INFO:

<https://www.intrac.org/resources/praxis-paper-10-ngo-leadership-development-review-literature/>
<https://www.toolshero.com/leadership/>


PERSONAL LEADERSHIP CANVAS

NAME _____ DATE _____

VISION				
STRESS	LOYAL SOLDIERS	VOICE	INTENTIONS	STRENGTHS
PATTERNS	PURPOSE		ENERGY	
SCARCITY BELIEFS		VALUES	ABUNDANCE BELIEFS	

The Personal Leadership Canvas
Concept & Design by Caleb Dean & Emily Kanter
www.owlfoxdean.com

Inspired by The Business Model Canvas
The Personal Leadership Canvas is licensed under a Creative Commons
Attribution-ShareAlike 3.0 Unported License.



SOURCE AND FURTHER INFO:

<http://www.owlfoxdean.com/>
<http://www.owlfoxdean.com/leadership-canvas>
<http://www.owlfoxdean.com/blog/2014/2/10/g8zhr5tu7s4337e99l4g1icz7buwob>



17. CROWDSOURCING AND PARTNERING

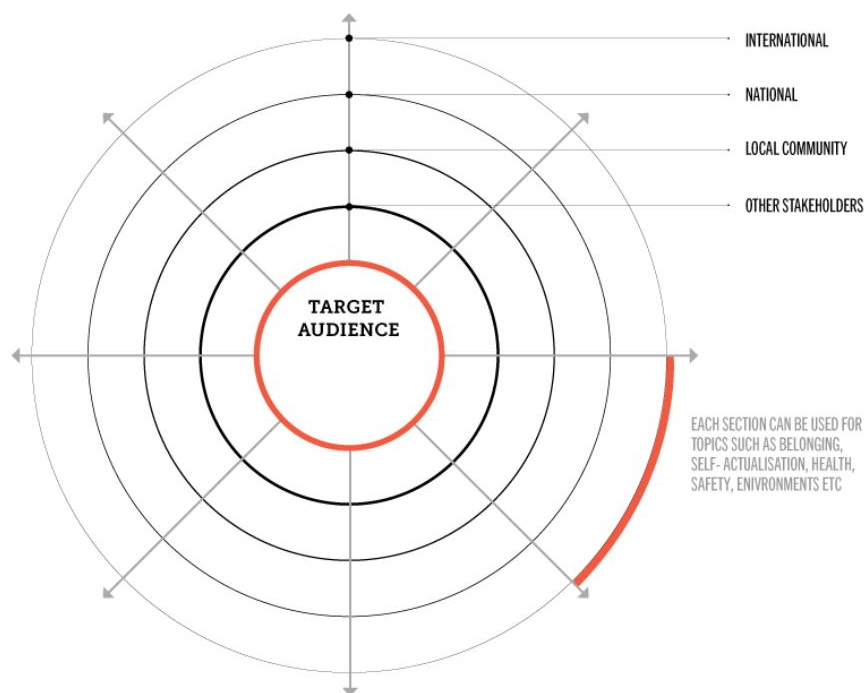
PEOPLE & CONNECTIONS MAP

This tool can be used to map all relevant stakeholders, and thus also partners that could help the social enterprise reach its goal. With the people and connections map, social enterprises can also map crowdsourcing and partnering opportunities.

DIY 15

I want to know the people I'm working with
by clarifying relationships between stakeholders

PEOPLE & CONNECTIONS MAP



SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/people-connections-map/> inspired by: Namahn and Yellow Window Service Design, Design Flanders (2012) Stakeholder Mapping. In: [Service design toolkit](https://www.idealware.org/how-crowdsourcing-can-help-your-nonprofit/)
<https://www.idealware.org/how-crowdsourcing-can-help-your-nonprofit/>
<https://visegradinsight.eu/DemocraCE/>
https://www.undp.org/content/dam/undp/documents/partners/civil_society/publications/2010_UNDP_A-Users-Guide-to-Civil-Society-Assessments_EN.pdf



BUILDING PARTNERSHIPS MAP

This tool can be used to develop an action plan for working with peers, customers, stakeholders and possible partners.

DIY 05

I want to develop a clear plan
for working with other groups that have the same vision as me.

BUILDING PARTNERSHIPS MAP



SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/building-partnerships-map-2/> inspired by Tennyson R. (2003) 12 Phases in the Partnering Process, p4. In: [The Partnering Toolbook](#).



18. IMPACT ASSESSMENT

SWOT ANALYSIS

The SWOT analysis is used to assess positive and negative internal and external factors impacting the social enterprise.

Strengths What do you do well? What unique resources can you draw on? What do others see as your strengths?	Weaknesses What could you improve? Where do you have fewer resources than others? What are others likely to see as weaknesses?
Opportunities What opportunities are open to you? What trends could you take advantage of? How can you turn your strengths into opportunities?	Threats What threats could harm you? What is your competition doing? What threats do your weaknesses expose to you?

SOURCE AND FURTHER INFO:

MindTools https://www.mindtools.com/pages/article/newTMC_05.htm

https://www.mindtools.com/media/Diagrams/SWOT_Analysis_New_Figure_1.jpg

<https://diyt toolkit.org/tools/swot-analysis-2/>

SEVEN QUESTIONS TO ASSESS YOUR BUSINESS MODEL DESIGN

This simple visualisation tool can be used to help SIH participants their business model design, identifying strengths and weaknesses, and thus also the eventual impact the business might have.

Seven Questions to Assess Your Business Model Design

Great value propositions should be embedded in great business models. Some are better than others by design and will produce better financial results, will be more difficult to copy, and will outperform competitors.

Assess your business model design. Circle how you perform on a scale from 0 to 10

	1. Switching Costs Translate	0 ————— 10	Nothing holds my customers back from leaving me	My customers are locked in for several years
	2. Recurring Revenues Translate	0 ————— 10	100% of my sales are transactional	100% of my sales lead to automatically recurring revenues
	3. Earning vs. Spending Translate	0 ————— 10	I incur 100% of my costs of COGs before earning revenues	I earn 100% of my revenues before incurring costs of goods & services sold (COGs)
	4. Game-changing Cost Structure Translate	0 ————— 10	My cost structure is at least 30% higher than my competitors	My cost structure is at least 30% lower than my competitors
	5. Others Who Do the Work Translate	0 ————— 10	I incur costs for all the value created in my business model	All the value created in my business model is created for free by external parties
	6. Scalability Translate	0 ————— 10	Growing my business model requires substantial resources and effort	My business model has virtually no limits to growth
	7. Protection from Competition Translate	0 ————— 10	My business model has no moats, and I'm vulnerable to competition.	My business model provides substantial moats that are hard to overcome

Copyright Strategyzer A.G.
The makers of Business Model Generation and Strategyzer

Strategyzer
www.strategyzer.com/vpd

SOURCE AND FURTHER INFO:

Strategyzer AG <https://www.strategyzer.com/>

<https://www.strategyzer.com/vpd>

<http://strategyzer.s3.amazonaws.com/assets/vpd/resources/seven-questions-to-assess-your-business-model-design.pdf>



SCALE-UP PHASE

19. Presentation skills

At this stage, SIH participants should be further instructed with additional presentation skills and mentored in the process of their public pitch preparation.

PITCH PREPARATION

To ensure a persuading pitch, the Pitch Canvas tool can be used, including all elements needed to prepare an interesting presentation of the social enterprise.

The Pitch Canvas®
An entrepreneurial brainstorming tool that helps you structure and visualise your pitch on one page

<p style="text-align: center;">Simple Statement of what change you and your product are making in the world.</p> <p style="text-align: center;">A memorable one-sentence explanation of what you do for customers.</p>	
<p>Pain (+ Gain)</p> <p>What problem are you solving for your customers? What does the pain result in? Can you make the pain a human problem, that everyone can relate to? How many people need this problem solved – market size? Have you validated that people will pay to have it solved?</p>	<p>Product</p> <p>As simply as possible: How does it work? What does your product do for customers? What can your customers do as a result of your product? What opportunities do you provide for people to be faster, more cost-effective, more efficient, happier, safer? How have you tested it with customers? (Be sure not to let the product dominate the pitch.)</p>
<p>Product Demo</p> <p>Live demo? (always risky, but powerful if it works...) A screenflow movie of a working App convinces this is for real. Physical product convinces you can execute. Screenshots are also OK, but can look like a mock-up – moving product on screen is better. Can you show a real customer using it?</p>	<p>What's Unique</p> <p>Technology/Relationships/Partnerships. How do you help your customers get results differently to your competition, or alternatives? What's new and innovative about your solution? Show you have researched the market and know what competition is out there.</p>
<p>Customer Traction</p> <p>Success so far? Pilot customers? Major brands? Progression in users or downloads? Customer reference quotes or movies? PR coverage? Competition wins? Use data and facts to strengthen your case.</p>	<p>Business Model</p> <p>How do you get paid? What's the opportunity for growth? How can you scale beyond your current scope: new industries, territories, applications of partnerships and technology?</p>
<p>Investment</p> <p>Have you invested money yourself? Have you raised money so far? How much are you looking for now? What big next steps will you use the investment for? What milestones will you reach with the money? How many, and what type of investor are you looking for? What expectations do you have of your investors; network, expertise?</p>	<p>Team</p> <p>What relevant experience and skills does your team have that supports your story? Brands worked for? Achievements? Sales success? What binds you together as people and as entrepreneurs to fix this problem? What's special about the character of your team, that will make you stand out and be memorable?</p>
<p style="text-align: center;">Call To Action and End Statement</p> <p style="text-align: center;">Finish the pitch strongly with a clear request for the audience to take action – what is their first next step?</p>	
<p style="text-align: center;">Why You?</p> <p style="text-align: center;">NOTE: Why You? can show up in any part of the pitch. Why do you care about solving this problem for your customers? How has your life been affected by this industry? Why should your audience have confidence that you are driven to do what you promise, no matter what?</p>	

DESIGNED BY: Best3Minutes
Developed from an original idea by David Beckett

Version 7.91. Produced by David Beckett and Geert van Vlijmen. Illustrations: Biglit5mit.com
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Best 3 Minutes
Please feel free to share The Pitch Canvas®.
Ensure you reference Best3Minutes.com after each use.

SOURCE AND FURTHER INFO:

<https://best3minutes.com/>

https://best3minutes.com/wp-content/uploads/2018/06/The-Pitch-Canvas%C2%A9_V7_9.pdf

<https://pitchdeck.improvepresentation.com/what-is-a-pitch-deck>



20. Fundraising

During the Fundraising learning step, SIH beneficiaries should prepare for access to regular and alternative sources of capital. An overview of all options should be provided, and the ideal option for capital acquisition chosen and a path toward this capital developed.

CROWDFUNDING

This canvas can be used if SIH participants decide to organise a Crowdfunding campaign (donation, reward, equity, lending).

PLEDGEME CROWDFUNDING CANVAS

Download (File > Download > Microsoft Word) or make your own copy (File > Make a Copy) of this canvas and fill it out while you're getting ready to launch your campaign. Full education guides [here](#).

PEOPLE Who are you? People fund people, so show off your team & talk about their role during the campaign (pics & bios).	FUNDING How much / what do you need the funding for? Break down your budget & make sure to include fees / costs.	CROWD Who are the people you know that want to fund you? Write down your First 50 - eg. family, friends, customers.	SPREADING THE WORD How will you communicate with your crowd? Comms plan: pidg.me/commsplan Eg. Newsletter, Social media, IRL events.	WHAT YOU OFFER What's being offered through the campaign? (eg. rewards, shares, or loan notes)							
	WHAT WE DO What do you do? What's your short and snappy one line ear-catching description?			VIDEO AND IMAGERY What media have you created already and what else do you need to make?							
SKILLS NEEDED What help do you need (for this campaign)? eg. Project Manager		WHY CROWDFUNDING? Why do you want your crowd to fund your idea?									
TIMELINE - PRE Note down dates for getting your campaign ready and communicating with your crowd.			TIMELINE - DURING & POST Write down what you'll do on day 1 and each week of your campaign (both communication & big tasks)								
6 weeks out	5 weeks out	4 weeks out	3 weeks out	2 weeks out	1 week out	3 days out	1 day out	Launch day	Week 1	Week 2	Week 3

SOURCE AND FURTHER INFO:

<https://blog.pledgeme.co.nz/how-to-create-your-crowdfunding-canvas/>

https://docs.google.com/document/d/10o4V8WMLfwvJfCU-s_UIP1musarPzvptyRF5tOv59Wc/edit

<https://eurocrowd.org/>

<https://support.indiegogo.com/hc/en-us/sections/360000093167-Planning-Your-Campaign>

<https://help.kickstarter.com/hc/en-us>

https://civilsocietytoolbox.org/wp-content/uploads/2019/05/WS_26_Crowdfunding-Gameplan_A3.pdf



BUSINESS PLAN

In order to apply for various kinds of investments, a social enterprise should have a clear and sound business plan in place. SIH mentors are expected to help SIH participants develop and write down their business plans as a whole, including all 7 elements of a classic business plan (Executive Summary, Company Description, Market Analysis, Competitive Analysis, Management & Operations, Marketing and Sales, Financial Summary).

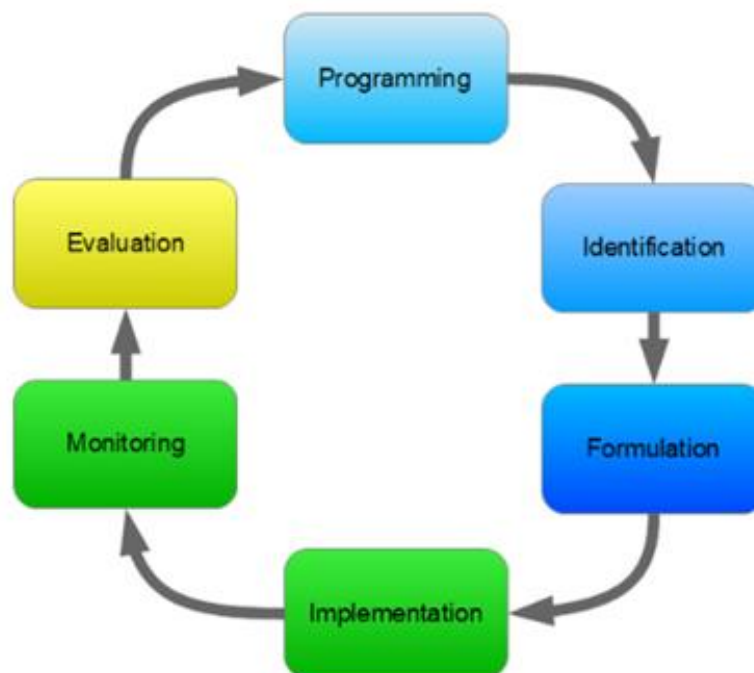
SOURCE AND FURTHER INFO:

<https://www.propelnonprofits.org/resources/social-enterprise-business-plan/>
<https://learn.marsdd.com/article/business-plans-for-social-enterprises-se-and-social-businesses/>
<https://learn.marsdd.com/article/create-a-business-plan-to-win-investors-template/>
<https://www.hbs.edu/newventurecompetition/Documents/SE-TrackDevelopingSEBusinessPlan2015.pdf>

21. Project management

Project management is an important skill for effectively and efficiently managing an business or any other kind of organisation. Since currently an important part of capital for social enterprises comes from EU funds, SIH beneficiaries should be taught via workshop and mentoring how the Project Cycle Management (PCM) process works, and, ideally, helped frame their idea into an EU Fund.

PROJECT MANAGEMENT CYCLE



SOURCE AND FURTHER INFO:

<https://www.logframer.eu/book/export/html/125>
<https://joinup.ec.europa.eu/solution/pm2-project-management-methodology-guide>
<https://europa.eu/capacity4dev/dear-programme/documents/europeaid-project-cycle-management-guidelines>




22. PR and marketing

At this stage and introduction to main PR as well as marketing skills and tools has to take place in order to teach SIH participants how to successfully communicate the project's mission, at the same time engaging community.

MARKETING MIX

The Marketing Mix is a toll structured to help the social enterprise examine its work from the public's perspective, highlighting positive PR opportunities.



I want to sustain and implement
by better engaging people that can benefit from my work

MARKETING MIX

<p>PRODUCT</p> <p>Describe the 'Unique Selling Proposition' that clearly states the features & benefits that make your work unique.</p>	<p>PLACE</p> <p>Where is your work available to people & how does it get there?</p>	<p>PRICE</p> <p>What are the returns you receive for your work?</p>
<p>PHYSICAL ENVIRONMENT</p> <p>What impression does your workplace give to your audience, suppliers and staff?</p>	<p>PROCESS</p> <p>What are the procedures that your company uses to deliver your work?</p>	<p>PEOPLE</p> <p>Who of your staff or representatives are involved?</p>
<p>PROMOTION</p> <p>What are your means to make your audience aware of your work?</p>		


SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/marketing-mix/> inspired by Nesta (2009) Worksheet 4a: Marketing Mix.
In: Creative Enterprise Toolkit.



VISUAL COMMUNICATION PLANNER

The visual communication planner tool helps visually analyse, highlight and create a graphic plan for the enterprise's communication strategy.



VISUAL COMMUNICATION PLANNER

Company _____

Date _____

Project _____

<div style="border: 2px solid orange; padding: 5px; margin-bottom: 5px;">MARKETING DISTINGUO</div> <div style="border: 2px solid blue; padding: 5px; margin-bottom: 5px;">CONTENTS</div> <div style="border: 2px solid orange; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <div>INVESTMENTS</div> <div>Adv budget</div> <div>In-house staff</div> <div>Outsourcing</div> </div> </div>	<div style="border: 2px solid purple; padding: 5px; margin-bottom: 5px;">TARGET MARKETS</div> <div style="border: 2px solid red; padding: 5px; margin-bottom: 5px;">CHANNELS AND ACTIVITIES</div>	<div style="border: 2px solid green; padding: 5px; margin-bottom: 5px;">GOALS</div> <div style="border: 2px solid brown; padding: 5px; margin-bottom: 5px;">KPIs</div>
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ACTIVITY TIMELINE

01

02

03

04

05

06

07


08

09

10

11

12

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www.visualcommunicationplanner.com - v3.0

SOURCE AND FURTHER INFO:

Visual Communication Planner by Gabriele Carboni - Weevo <https://visualcommunicationplanner.com/>

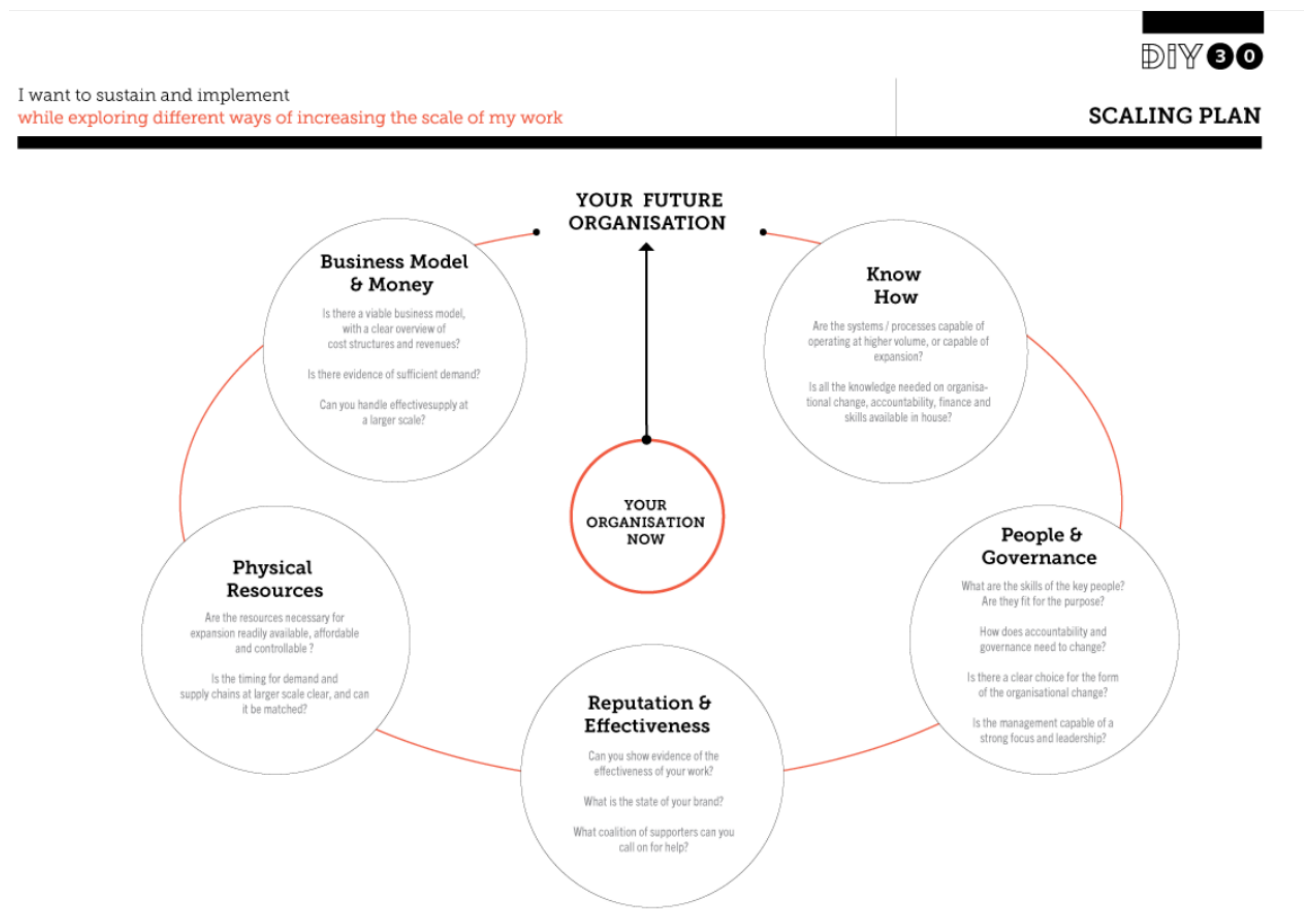


23. Readiness assessment

At this very final point, the social enterprise is assessed through various methods (self-assessment, peer review and expert review). Depending on the assessment result advice for further scaling steps is advised, or a last mentoring session in one of the “weakest” aspects of the social enterprise is offered.

SCALING PLAN

The scaling plan tool can be used to developing a scaling plan and strategy, while assessing the social enterprise’s resources and readiness for growth.



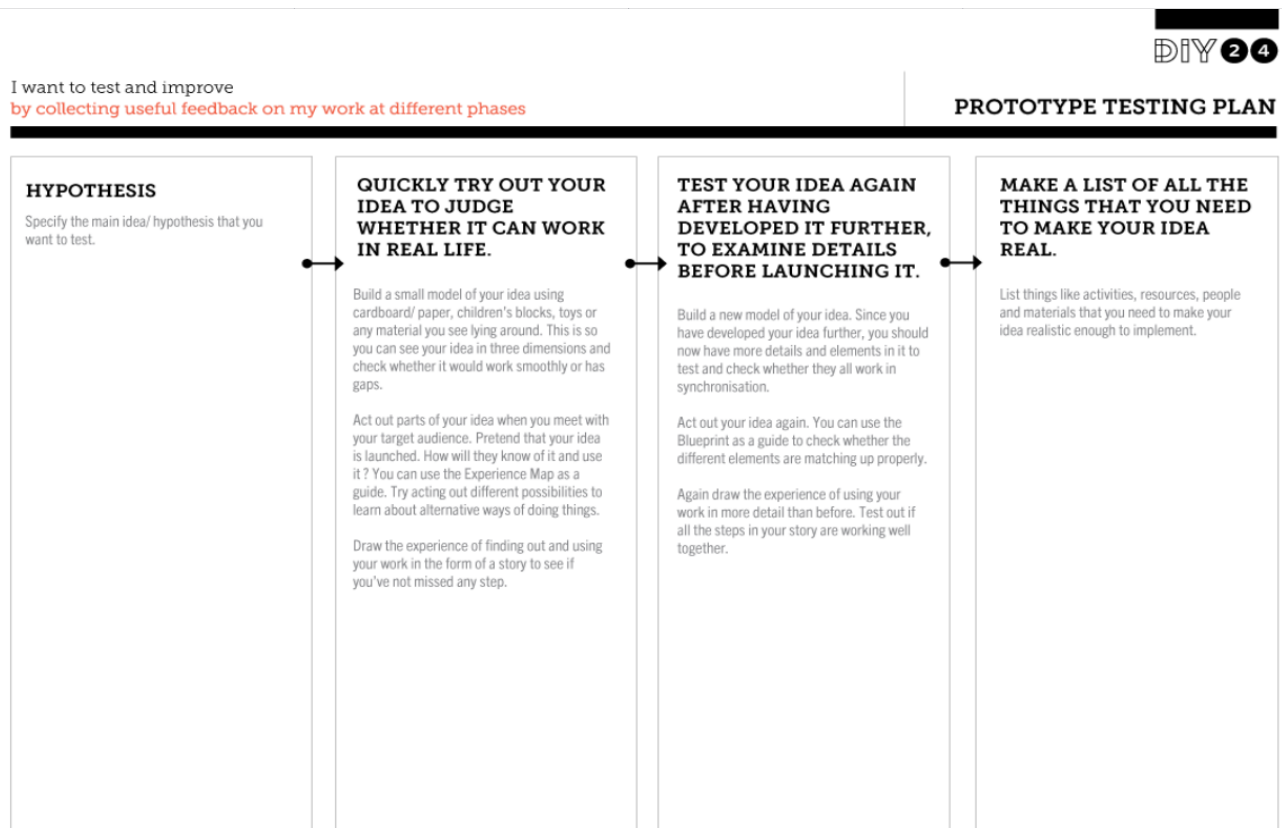
SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/scaling-plan-tool/> inspired by Ali R., Mulgan G., Halkett R., Sanders B. (2007) *In and out of sync: The challenge of growing social innovations*. London, Nesta.



PRTOTYPE TESTING PLAN

The Prototype Testing Plan is a tool that enables overview of the ways in which the social enterprise can test its work and future development ideas.



SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/prototype-testing-plan/> inspired by Nesta (2011) [Prototyping in Public Spaces](#).

24. Evaluation

A questionnaire should be provided at the end of every group workshop. An informal feedback collection option should be made available online, and after every mentoring&consulting session, participants are invited to fill in the feedback form. A form encompassing all of the phases and activities held during the



6-month support programme should be created as the final evaluation questionnaire for the participant. The example questionnaire can be modified according to regional programs.

FINAL QUESTIONNAIRE FOR PARTICIPANT

1. Did the support programme meet your organisational expectations i.e. did everything function as you expected it to? (eg. invitation, preparation, meeting premises, time and duration, etc.) If not please let us know what we should improve organisationally.

2. Did the support programme meet your thematic expectations? If not please let us know what we should improve thematically.

3. What was the most and the least useful part?

4. Which skills have you improved or acquired?

5. Overall Evaluation (1=very bad, 10= very good)

1	2	3	4	5	6	7	8	9	10

6. Additional comments



WORKSHOP EVALUATION SHEET

Name of the workshop:

Lecturer:

Venue and date:

1. Please evaluate the workshop

The workshop met my expectations	1	2	3	4	5
The knowledge learned is applicable in practice	1	2	3	4	5
The content was well structured and easy to follow	1	2	3	4	5
The knowledge I have acquired will help me work better	1	2	3	4	5
The lecturer is expert and knows how to transfer knowledge	1	2	3	4	5
Seminar organization and space adequacy	1	2	3	4	5

* Rating 1 is the lowest, rating 5 is the highest

2. Strengths and weaknesses of the workshop and the lecturer

3. Did the workshop meet your expectations?

4. Suggestions and Remarks
