



□

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

IN SITU - CE1494

Final version

Deliverable D.T2.2.2

3 2020



Table of Contents

1. Project summary and document introduction	3
2. Setting the scene and approach	5
3. The Social Innovation Hubs: Concept and Support Methodology	6
3.1. Intergenerational learning	8
4. The IN SITU Social Innovation Hub (SIH): Target groups	9
4.1. The IN SITU Social Innovation Hub (SIH): Attracting Target Group	9
4.2. Promotional activities	9
4.3. Dedicated promotional extra events	9
5. The IN SITU Social Innovation Hub (SIH): Application Procedure	11
5.1. Application template - elements	11
6. The IN SITU Social Innovation Hubs: Selection criteria	14
7. The IN SITU Social Innovation Hub (SIH): Six-month Programme	16
7.1. Six-month Activities Timeline	16
7.2. Social Innovation Hub (SIH) action concept and logic	17
8. Social Entrepreneurial Skills and Competences Training materials	19

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 social business and social initiative 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 and initiatives 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 social business and social initiative 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 gaps 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) 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 uninterrupted 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:

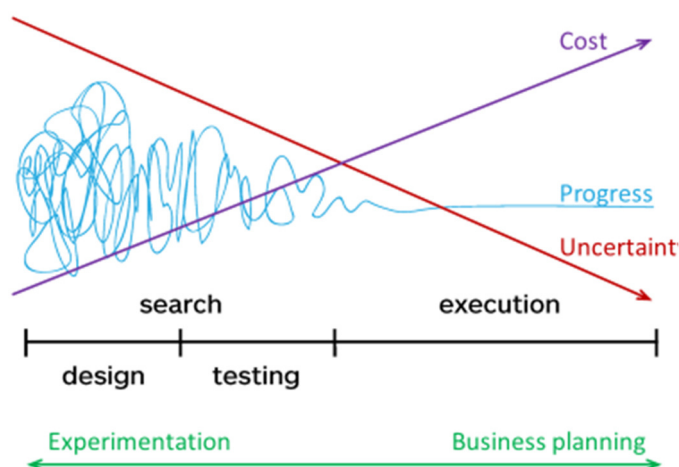
- 1) to have more joint activities during the first stages of the idea development (focus on common skills)
- 2) to gradually shift focus to individually based work and support of each participant later on (focus on individual and specific needs of each participant's project).

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.

3

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.

Appropriate motivational boosting activities (intergenerational skill sharing, interviews with successful social initiatives or social enterprises, communication workshops and similar) have to be envisaged during the 6-month support programme.

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, workshop and mentoring 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. As is often the case in real life, social businesses grow from successful social initiatives. Community building and learning, as well as skill-sharing, is therefore 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 rely 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;
 - 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 ought to 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 ought to 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.

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



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.

Regional Social Innovation Hubs (SIH) can adapt wording of the template, as the template content itself (questions regarding motivation, unemployment duration,..).

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.

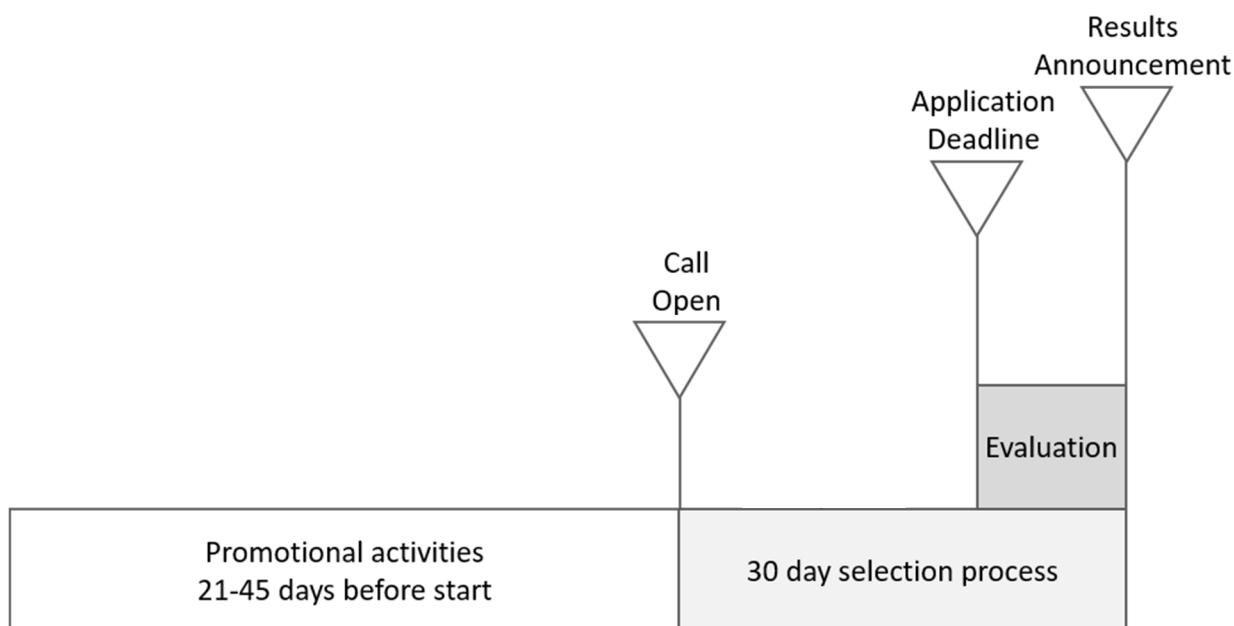
Furthermore, depending on foreseen target group to be engaged, the identification of the most appropriate candidates can be supported by adding additional criteria as:

- 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



6

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 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. Of course, if this is not possible, the regional SIH staff ought to ensure translation in order to ensure maximum inclusion.

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. Thus, frequent motivational activities ought to be planned in the programme, along with thematic workshops, lectures, mentoring and intergenerational learning.

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 motivation boosting activities, learn from best practices, join 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.

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.
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 ideally start with implementation of incubated idea from initiating the establishment of the company or initiative, initial production and go to

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

market 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 round, 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 and society 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. The same is true for motivation boosting activities.

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 and since the process of idea generation and idea development coincides in many parts, regardless whether the idea has profit (social business) or non-profit (social initiative) potential.

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 SIH beneficiaries, 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 total 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.

Empowerment phase

1. Competence assessment tools

LOVELIST/HATELIST

Lovelist: Getting into the topic of interests. Could give trainers inspiration for next trainings.

Hatelist: can mirror, what activities within occupations are not meant for us. At the same time it can show us, where we want to have a change, which could be a starting point for a social innovation.

Materials needed: Pens and handouts.

1. Every participant gets a two-sided paper. On the one side is the hatelist, the other one the lovelist. Mentioning that the list is just for themselves.
2. Lovelist: They have 5 minutes to write down anything that comes up in their mind what they love - in key words, not phrases. They should not censor themselves and think too much!
3. Popcorn: If someone wants to share a word. (e.g. "Breakfast", "Football", "Friends", etc.)
4. Hatelist: They have 5 minutes to write down anything that comes up in their mind what they hate - in key words, not phrases. They should not censor themselves and think too much!
5. Popcorn: If someone wants to share a word. (e.g. "Work", "Boredom", "Anger", etc.)
6. Reflection: "Are there any insights or surprises for you that came up?"

Note: This tool should not be done isolated and out of context! It is an "opener" for further, eventually longer and more intense methods to explore and discover their interests, abilities, ...

A possible next step could be:

THE LIFE-PUZZLE (50-60 MINUTES)

Goal: Tackle the interests and desires. Could be combined with thinking about a suitable occupation/ profession

Materials needed: A blank paper & pens for everyone, eventually crayons

1. The main question of that exercise is: "What do I want to integrate (more) in my life?" Should be written down somewhere, so that everyone sees the question. And an example of how this life-puzzle could look at the end.
2. Everyone starts in the middle of the paper, drawing a piece of a puzzle. Inside they write down the first thing, that comes into their mind (e.g. Sports). Then they continue drawing around it more pieces, writing down in each one what they want to have more in their lives. (10-15 Minutes)
3. Reflection: "Is there something you want to share?" "Are there any surprises?"

"That shows you where your curiosity and interests are. Maybe there is something that you could start with today? If not, what would you need for it? Or maybe there is something that you have already integrated into your life?"

⁸ <https://creativecommons.org/>



Depending on the group motivation and atmosphere:

4. “When you think about your dream-career. What puzzle pieces would be most important for you to have in your career? Please write them on the other side paper down.”
4. In pairs: One person tells the other its written down words. Together they think about, (1) what is needed (skills, resources, etc.) to achieve that and (2) possible suitable professions. Then reverse. (10-15 Minutes for each)
4. Reflection: “What professions do we have in our room?”

SOURCE AND FURTHER INFO for Competence assessment tools above: Wirtschaftsuniversität Wien (PP2)

2. Capacity building

MY TALENTS OUR TALENTS

For any kind of Collaborative Learning throughout the trainings, a basic knowledge of other people's talents can be very helpful. This fosters synergies, networking and fruitful conversations:

Appreciative Inquiry: Tell your story (20 min)

- Group setting: (15 min)
In groups of 2-3: One person tells their stories; Other(s): listen and write down talents and ask questions
‘Tell your story’ assignment: Describe your tasks in your everyday life, what are your hobbies, work experience, project experience etc.
- Individual setting: (5 min)
Add talents, skills you forgot to mention

People start when they are ready to add their talents to the flipchart....

What common resources do you have? (25 min)

- Pool the knowledge that is there...if one talent is already on the board...just write your name with it or stick your post it on it!
- Together cluster it/change it, finalize it!

Differentiation between Needs and Availability (10min)

- Finding the Gaps and how to close them.
- Network, open Tasks: good to know for the trainers

SOURCE AND FURTHER INFO: Wirtschaftsuniversität Wien (PP2)

EXTERNALIZING THE PROBLEM

Externalizing conversations in counselling/mentoring sessions /in group setting can be used as practice in pairs and or groups. 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 help to feel more empowered. 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 a 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:

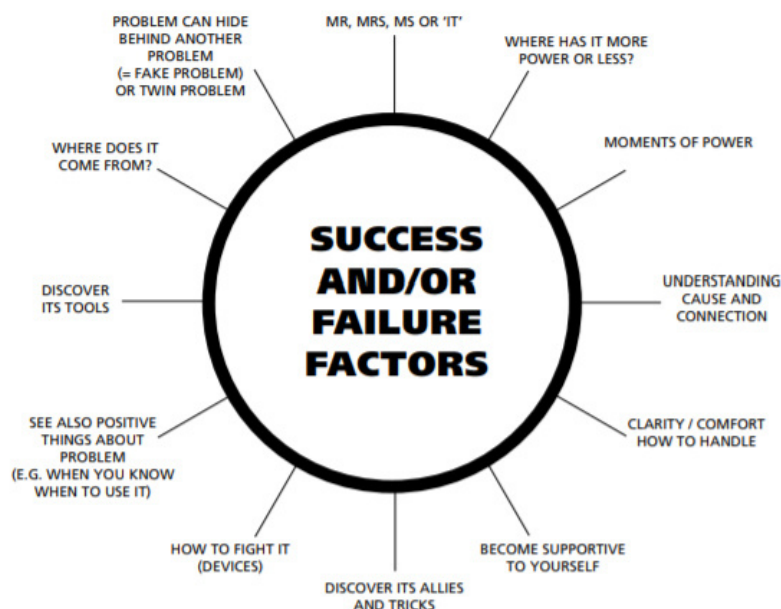


Image: Externalizing the problem (by InDialogue in: Fröhmann et al, 2016)

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).

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.

WHAT DO I OFFER ON THE LABOR MARKET?

This quick tool can be used for empowering participants, making them visualise what they offer on the labour market, making it easier to insert these skills, talents and knowledge in their CV.

WHAT DO I OFFER ON THE LABOR MARKET?
The abilities, the talents I offer (what I do well, I can do better than others)
The knowledge I offer (schools, courses, work experience, hobbies, sports...)
The skills I offer (schools, courses, experience, hobbies, sports)

SOURCE AND FURTHER INFO:

<https://www.centaroptimum.hr/>



DREAM JOB COMPETENCE PLAN

If the participants have a clear idea of the job they would like to do, it is useful to compile the toll below in order to assess whether all requirements are met, making clearly visible whether some skills and competences are to be yet acquired.

DREAM JOB COMPETENCE PLAN

WHAT PREDISPOSITIONS ARE NEEDED (physical strength, problem solving skills, soft skills...)	
WHAT KNOWLEDGE IS NEEDED (language, expertise in...) I have / I need to acquire	
WHAT SKILLS ARE NEEDED (tool handling, speed typing, sales skills, management skills, communication...) I have / I need to acquire	
WHERE CAN I DO THIS JOB	
HOW CAN I GET IN TOUCH WITH EMPLOYER	

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.centaroptimum.hr/>

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



4. Creativity boosting activities

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. Entrepreneurial 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. Round tables, interviews, podcasts depicting successful social entrepreneurs (ideally if regional) should be organised regularly (ideally every 3-4 weeks).

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

PESTLE ANALYSIS

PESTLE stands for P for Political, E for Economic, S for Social, T for Technological, L for Legal, and E for Environmental. It is a tool usually as situational analysis for business assessments, but since it gives an overview of the complete environment from many different perspectives it is thus also useful when assessing the needs of a community, making problem definition (later stage) easier.

SOURCE AND FURTHER INFO:

<https://pestleanalysis.com/what-is-pestle-analysis/>

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, which can be the root for the development of the social business. Thus, it is needed that at the end of the empowerment phase a problem is identified, on the basis of which idea generation can take place.

WHAT IS THE PROBLEM?	WHY IS IT A PROBLEM?	FOR WHOM IS IT A PROBLEM?	IS THERE ALREADY A SOLUTION/WORKAROUND?

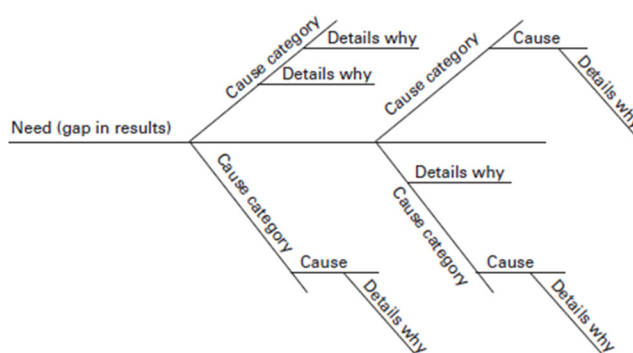
In order to define the problem correctly, SIH participants should be helped in available data and document collection and analysis.

SOURCE AND FURTHER INFO: <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>



Idea design phase

Once the SIH participants have been introduced to and motivated to create a social enterprise, based on an underlying passion and/or identified problem, 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>



IDEA 1.0

The Idea 1.0 tool is a simple visualisation tool for idea generation and initial sketch/definition of the identified idea.

Idea 1.0	
1 Name	4 Success Rationale for success today
2 Sketch	
3 Story	Rationale for success in 3 years

STEPRI

SOURCE AND FURTHER INFO: <https://www.step.uniri.hr/> Creator: Golob/STEP RI

WHO, WHY, WHEN, HOW MANY

This tool is a visualisation tool useful for further elaboration the first draft of the idea, identifying better the possible customers and their underlying motivation for using the product/service of the social business.

Who	Why	When	How many
Who pays, uses, benefits... Who are customers, donors, beneficiaries, stakeholders...?	Problem/job-to-be- done Why do they pay, use, consume...?	"Customer" circumstances When do they pay, use, consume...?	Relevant for whom? How many "customers" with relevant "job" or problem?

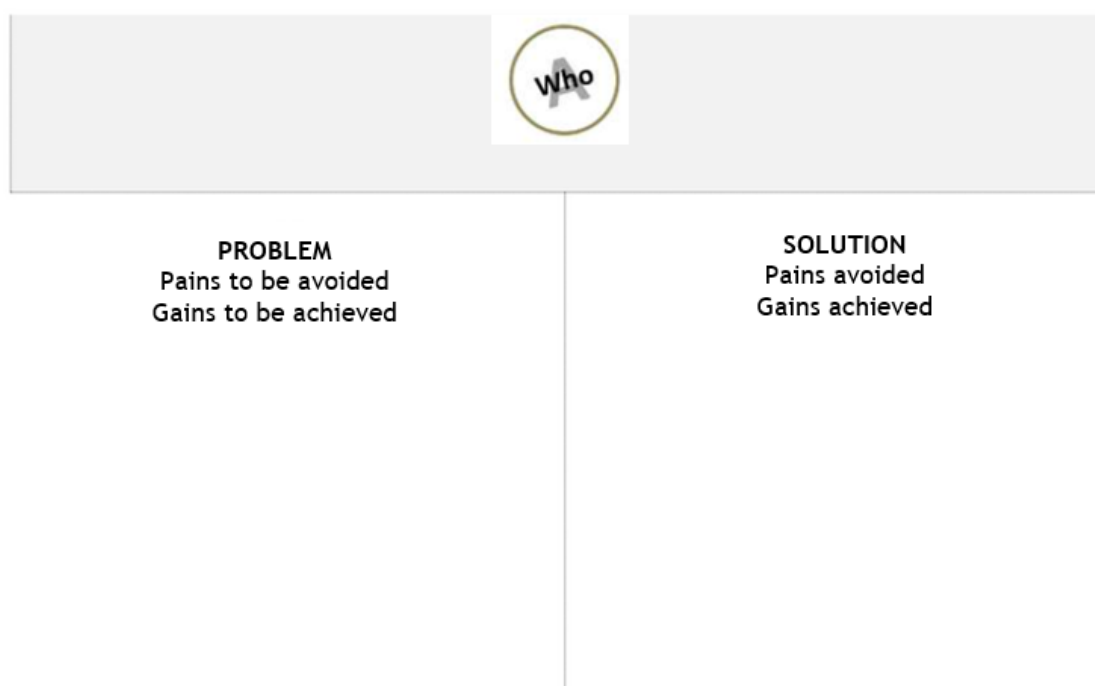
STEPRI

SOURCE AND FURTHER INFO: <https://www.step.uniri.hr/> Creator: Golob/STEP RI



PROBLEM SOLUTION FIT

The Problem Solution fit Tools serves as a double check to see whether the generated idea solves the identified problem (pains and gain are to be seen in the Value Proposition and Empathy map tools below as well), easing the idea into the next phase, that of idea growth and scaling.



STEP 1

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?

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

PAINS

GAINS

What other thoughts & feelings might motivate their behavior?

XPLANE™

©2019 XPLANE | www.xplane.com

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>

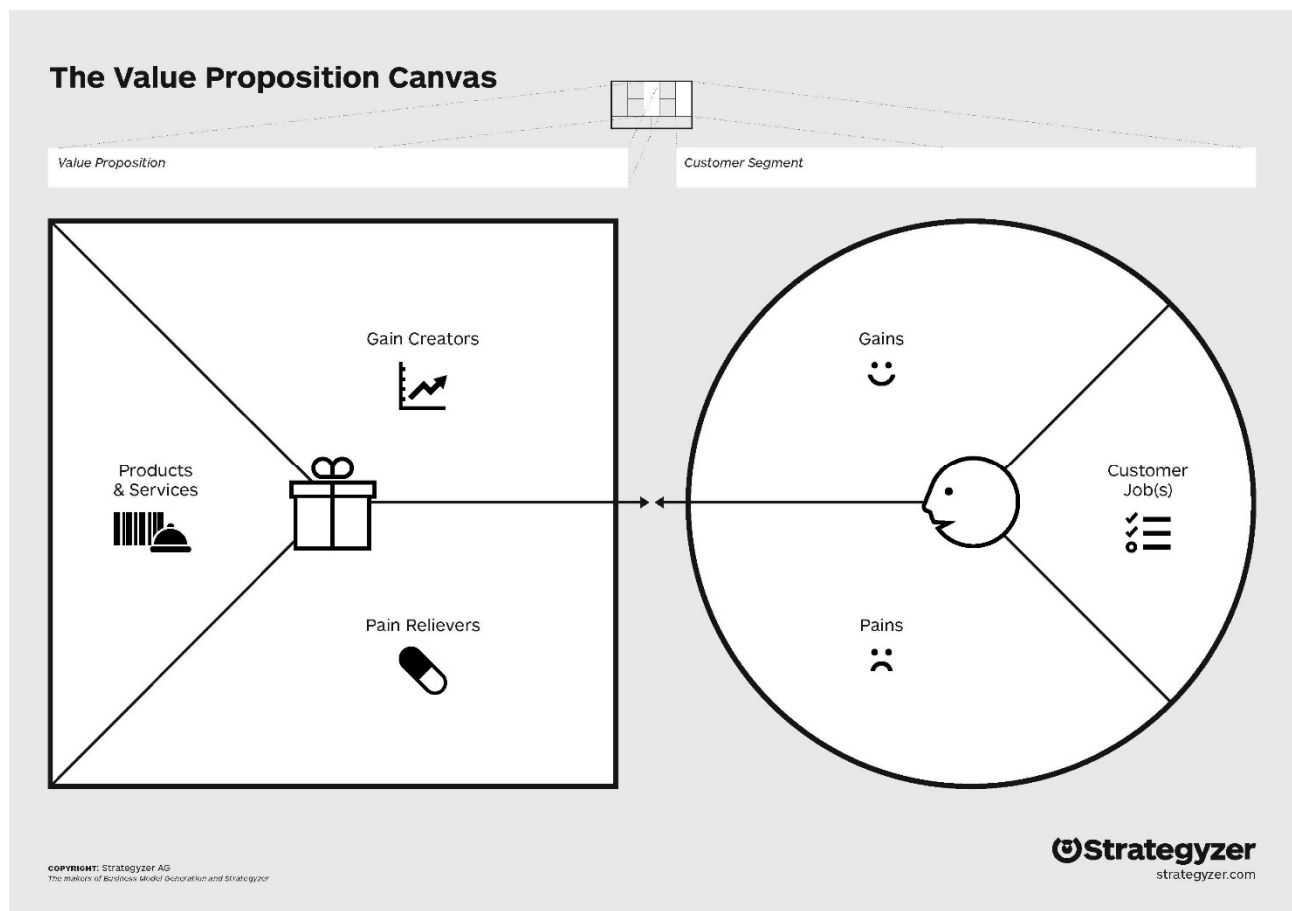
<https://strategyn.com/jobs-to-be-done/>

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

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/>

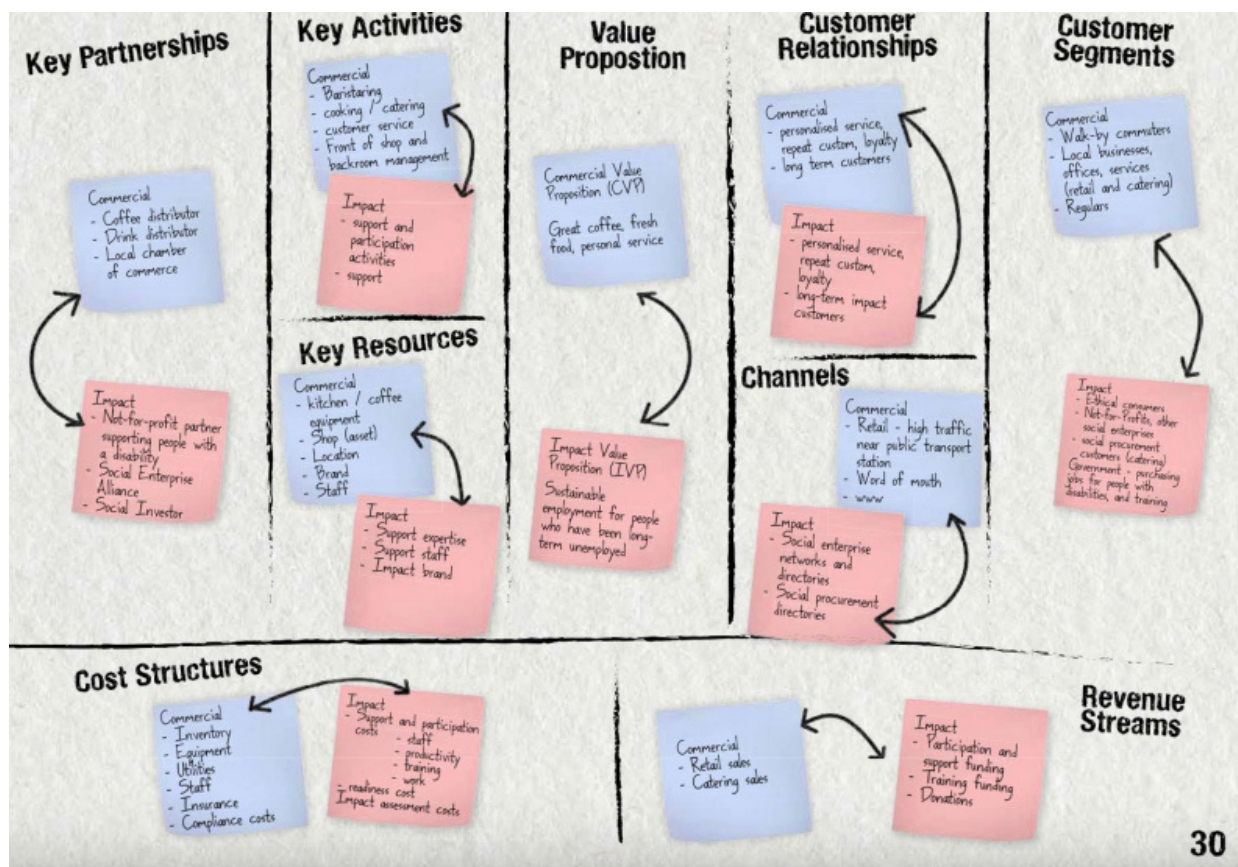
<https://www.strategyzer.com/blog/value-proposition-canvas-a-tool-to-understand-what-customers-really-want>



<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	INTELLECTUALY 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.

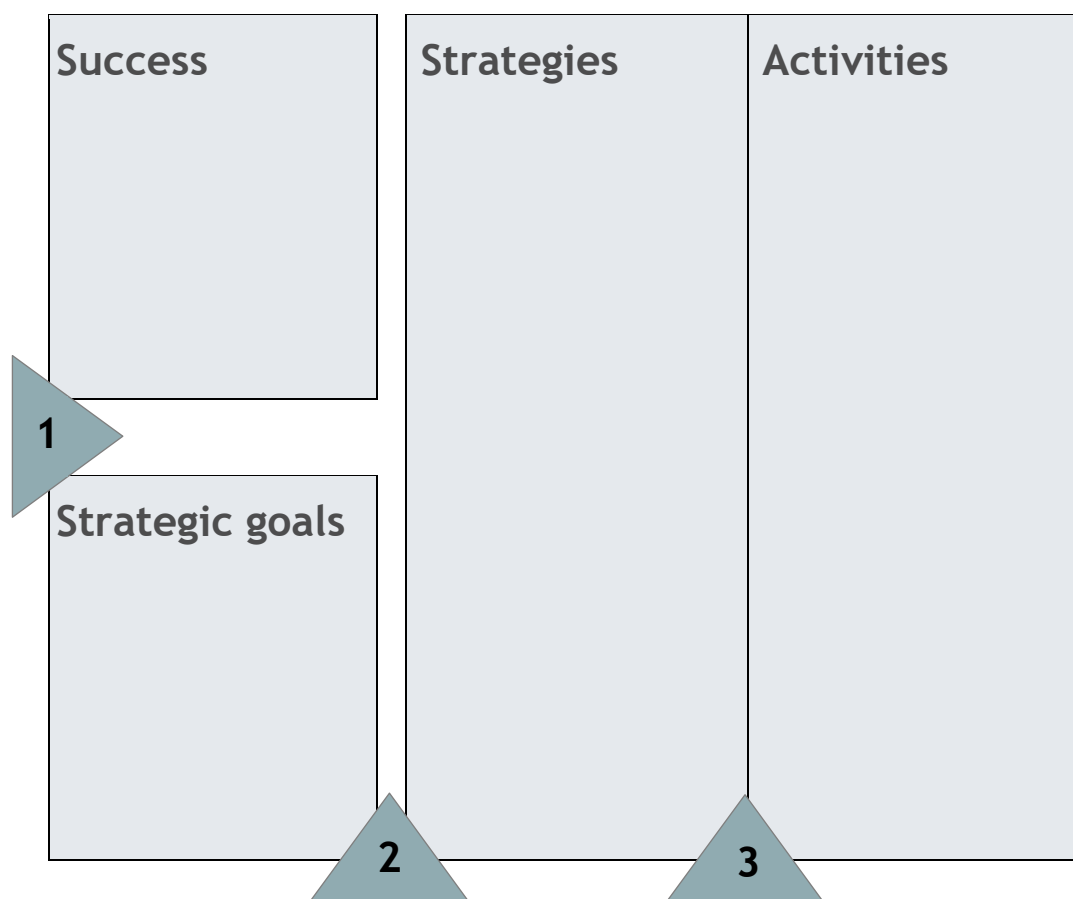


The process of creating the One Page Strategy is based on two simple questions: What? and How?, respectively "What is Success?" and "How Do We Realize It?". The canvas for the One Page Strategy is composed of two main sections intended to be filled up with references that provide answers to these questions. 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	Learning Card
Test Card 	Learning Card 
Test Name: <input type="text"/> Deadline: <input type="text"/>	Insight Name: <input type="text"/> Date of Learning: <input type="text"/>
Assigned to: <input type="text"/> Duration: <input type="text"/>	Person Responsible: <input type="text"/>
STEP 1: HYPOTHESIS We believe that <input type="text"/> Translation <input type="text"/> Critical: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	STEP 1: HYPOTHESIS We believed that <input type="text"/> Translation <input type="text"/>
STEP 2: TEST To verify that, we will <input type="text"/> Translation <input type="text"/> Test Cost: <input type="text"/> Data Reliability: <input type="text"/>	STEP 2: OBSERVATION We observed <input type="text"/> Translation <input type="text"/> Data Reliability: <input type="text"/>
STEP 3: METRIC And measure <input type="text"/> Translation <input type="text"/> Time Required: <input type="text"/>	STEP 3: LEARNINGS AND INSIGHTS From that we learned that <input type="text"/> Translation <input type="text"/> Action Required: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
STEP 4: CRITERIA We are right if <input type="text"/> Translation <input type="text"/>	STEP 4: DECISIONS AND ACTIONS Therefore, we will <input type="text"/> Translation <input type="text"/>
<small>Copyright Business Model Foundry AG The makers of Business Model Generation and Strategyzer</small>	<small>Copyright Business Model Foundry AG The makers of Business Model Generation and Strategyzer</small>

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>

BUSINESS PLAN

At the end of the second support phase, having developed their business model, financial model and assumptions, participants are invited to write a first draft of their business plan. This business plan is of course an iterative document, to which participants are expected to come back in order to insert changes and novelties in their business idea.

A regular business plan should include the following elements, however since the project tackles social enterprises, this element ought to be also highlighted in the business plan. Of course, national regulation is to be taken into consideration.

TABLE OF CONTENTS

- I. Executive summary
- II. General Company Description
- III. Products and services
- IV. Marketing Plan
- V. Operational Plan
- VI. Management and Organization
- VII. Startup expenses
- VIII. Financial plan



SOURCE AND FURTHER INFO:

<https://www.eu-startups.com/2018/07/how-to-write-a-simple-but-good-business-plan-for-your-startup/>

<https://www.propelnonprofits.org/resources/social-enterprise-business-plan/>

<https://www.inc.com/jeff-haden/how-to-write-perfect-business-plan-a-comprehensive-guide.html>

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.

POISITION/ROLE	TASK	SKILLS	RESOURCES	OBSTACLES
CEO				
CTO				
PROJECT MANAGER				
PROJECT ASSISTANT				
OFFICE MANAGER				

Ideally, there should be at least a basic systematisation, so every team member has a clear view of tasks and duties. This makes onboarding process of new team member also much easier.

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://3jd8gl2iies146kaw2hgqy9-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

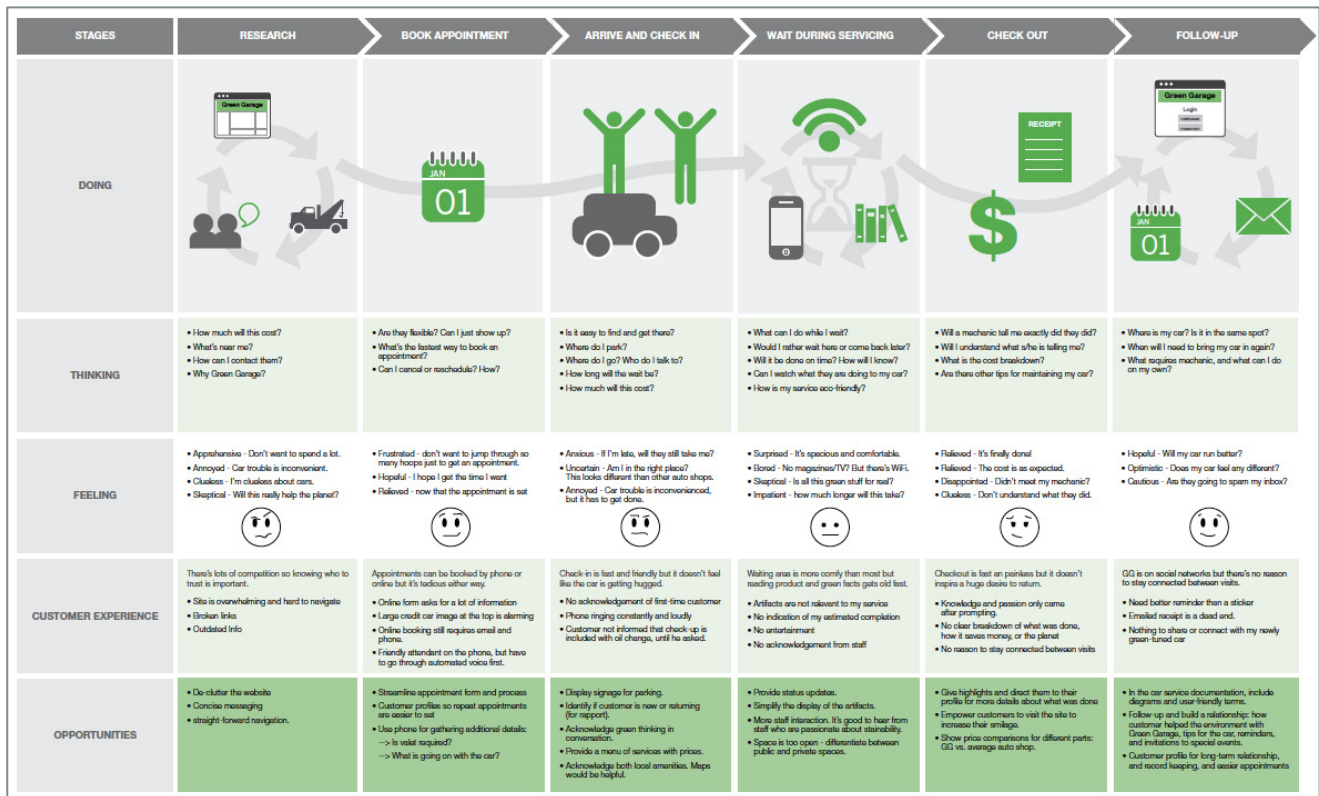
CUSTOMER JOURNEY

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



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:

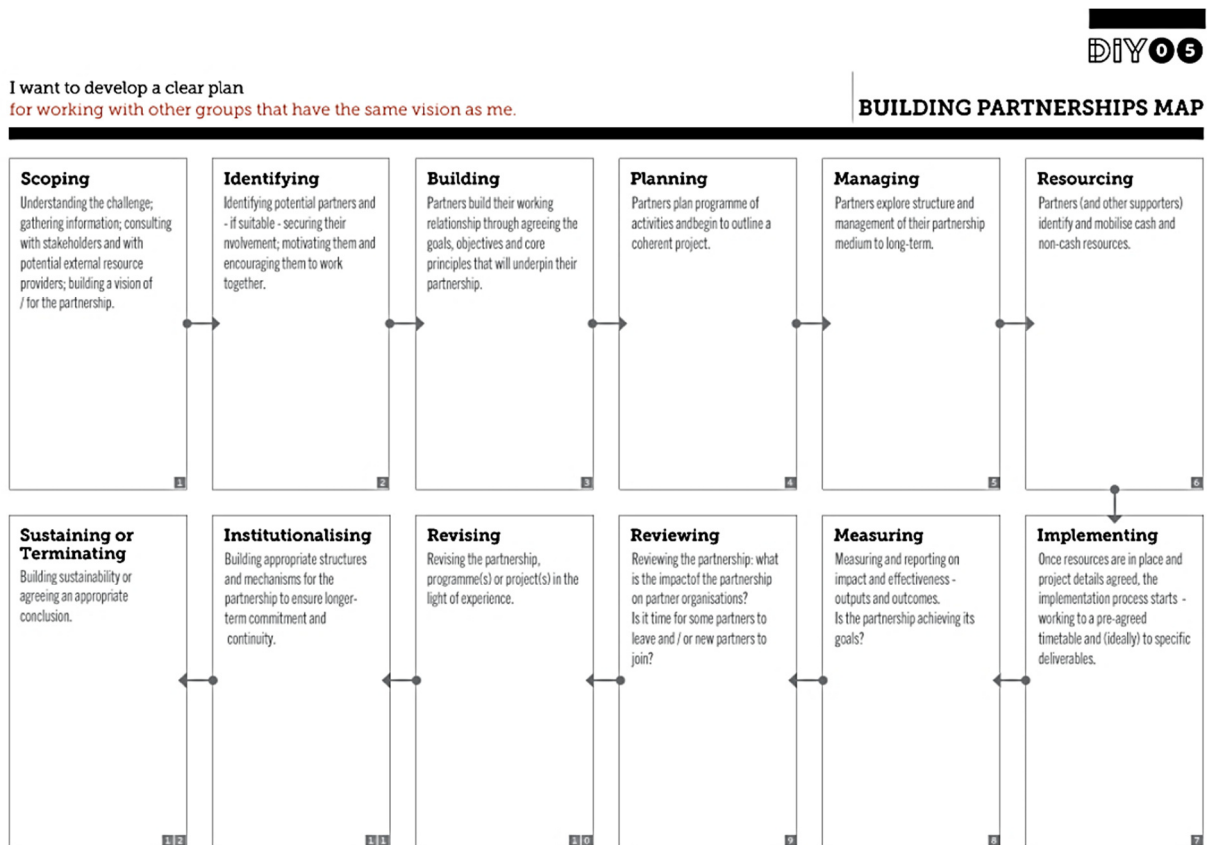
<http://www.owlfoxdean.com/>
<http://www.owlfoxdean.com/leadership-canvas>
<http://www.owlfoxdean.com/blog/2014/2/10/g8zhr5tu7s4337e99l4g1icz7buwob>



17. Crowdsourcing and partnering

BUILDING PARTNERSHIPS MAP

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



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

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:

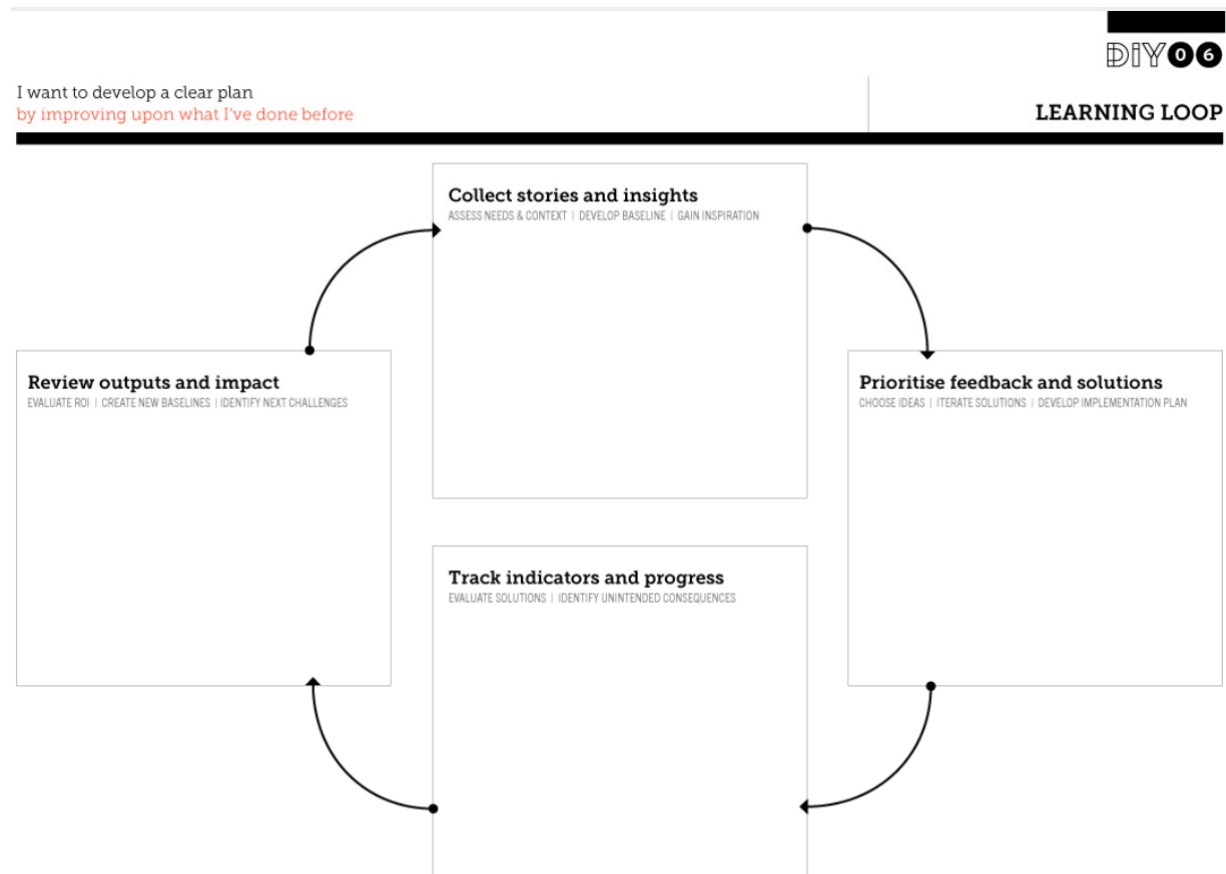
Strategyzer AG <https://www.strategyzer.com/>

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

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

LEARNING LOOP

The Learning Loop is a tool that helps assess impact by visually describing activities and channelling next steps.



SOURCE AND FURTHER INFO:

The DIY Toolkit <https://diytoolkit.org/tools/learning-loop/> and inspired by INSPIRED BY : IDEO (2011) Deliver: Create a learning plan, p145. In: IDEO, [Human Centered Design Toolkit](#). Edition - 2. London: IDEO.



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 2.01. Produced by David Beckett and Geert van Vlijmen. Illustrations: Birgit Smil.com
This work is licensed under a Creative Commons Attribution-ShareAlike 4.0 International License.
To view a copy of this license, go to: <http://creativecommons.org/licenses/by-sa/4.0/> or send a letter to Creative Commons, 171 Second Street, Suite 300, San Francisco, California, 94105, USA.

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: pledg.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

At the end of the second support phase, the first draft of the business plan was mentioned. By now, the social enterprise should have a clearer goal of its future steps regarding investments and thus a proper business plan ought to be finalised at this stage.

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).

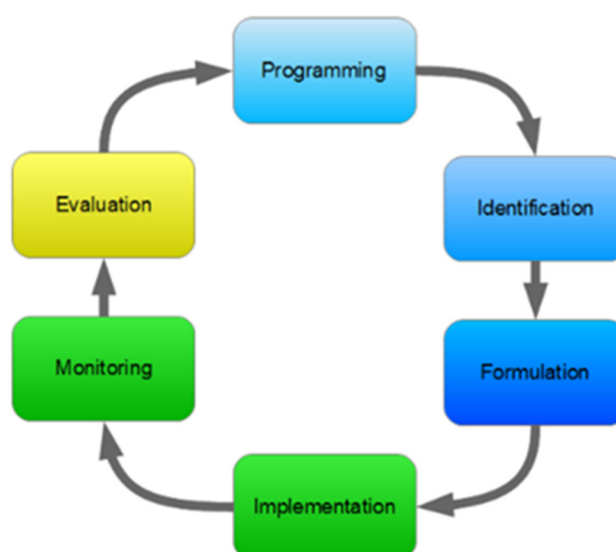
SOURCE AND FURTHER INFO:

<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.



Company

Date

Project

MARKETING DISTINGUO

TARGET MARKETS

GOALS

CONTENTS

CHANNELS AND ACTIVITIES

KPIs

INVESTMENTS

Adv budget

In-house staff

Outsourcing



 This work is licensed under the Creative Commons Attribution-ShareAlike 4.0 International License. To view a copy of this license, visit <http://creativecommons.org/licenses/by-sa/4.0/>.

www.visualcommunicationplanner.com - v.3.0

SOURCE AND FURTHER INFO:

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

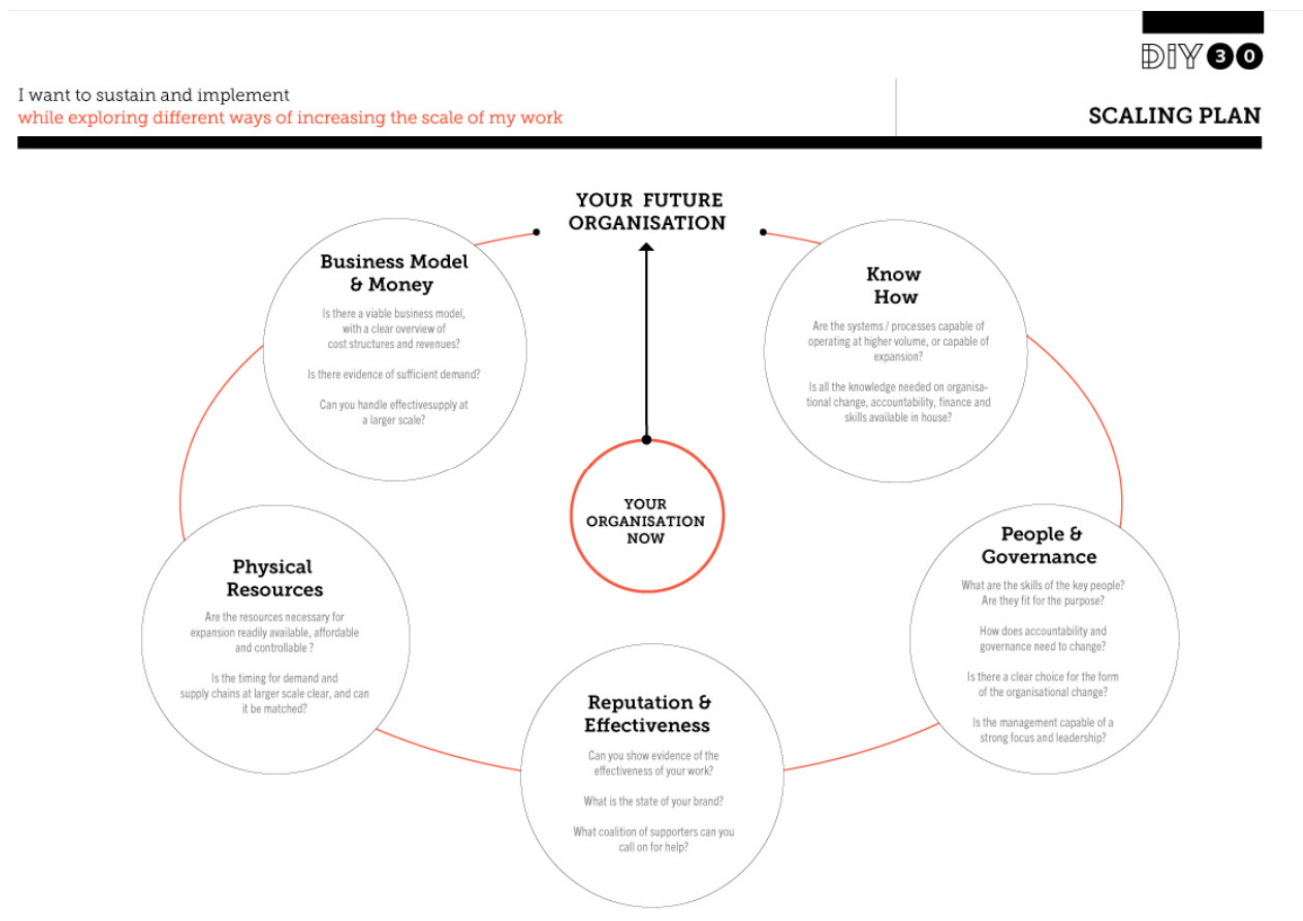


23. Readiness assessment

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.



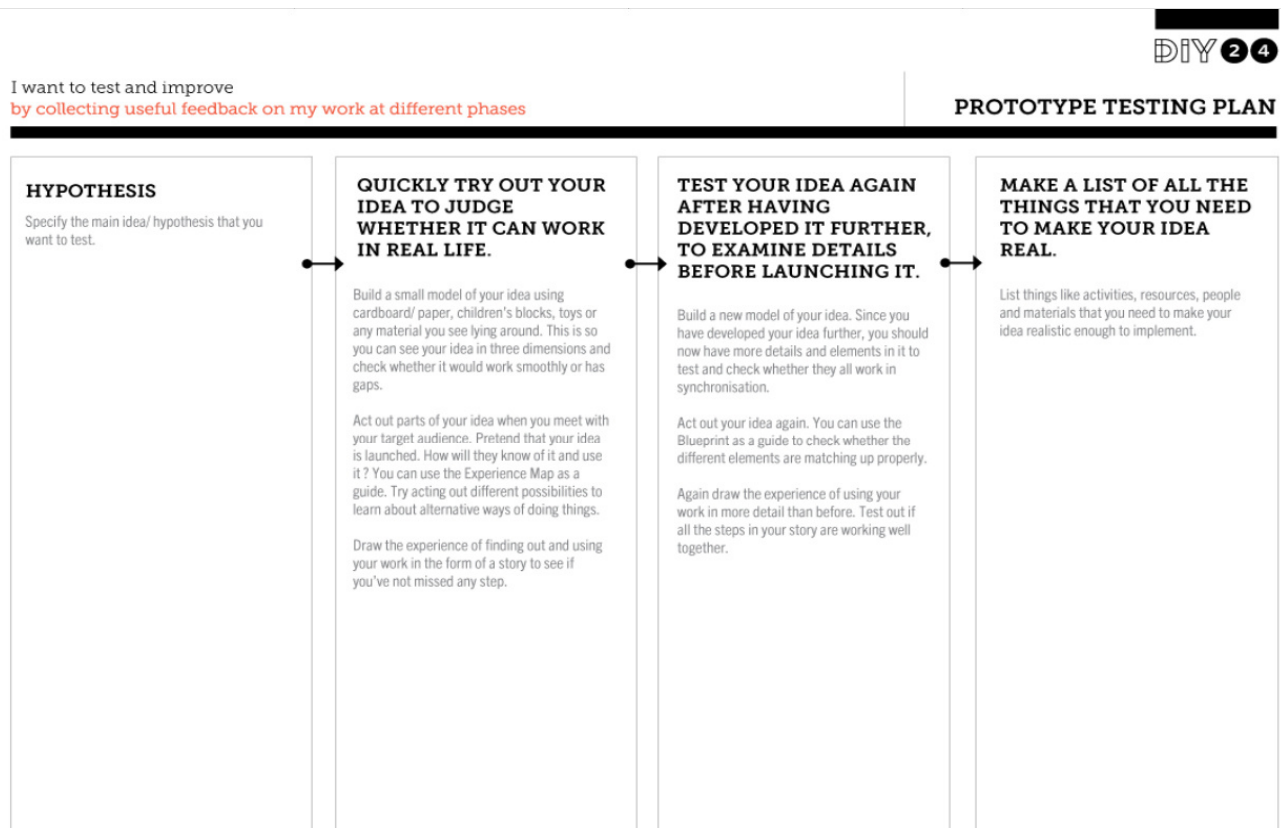
SOURCE AND FURTHER INFO:

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



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

IN SITU - CE1494
Deliverable D.T2.2.2

Annex 1
5 2021



1. DELIVERABLE D.T2.2.2

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

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.

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 during which IN SITU SIH participants should be supported, outlined as groups of topics within the four respective phases, are identified:

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



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



3. Social Entrepreneurial Skills and Competences Training materials - novel tools

In the final version of IN SITU D.T2.2.2 ePortfolio for training framework focused on Social Entrepreneurial skills and competences, 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 (entrepreneurial ventures)** at the regional Social Innovation Hubs was listed.

Materials were 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 were 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 as listed below

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

We kindly ask you to contribute to the exchange of materials by listing and describing the newly discovered specific tools and methods used for supporting participants developing social enterprises (profit). This means tools should not be already listed in the final versions of the training materials finalised in March 2020.

Unless otherwise indicated, the material listed below is licensed under the Creative Commons Licenses², 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.

² <https://creativecommons.org/>

Are your rights affected? Our apologies! Please contact us and we will check the problem immediately: step-ri@uniri.hr



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB VENETO

NAME: LIFE'S PRINCIPLES Biomimicry DesignLens

DESCRIPTION: Life's Principles are design lessons from nature. Based on the recognition that Life on Earth is interconnected and interdependent, and subject to the same set of operating conditions, Life has evolved a set of strategies that have sustained over 3.8 billion years. Life's Principles represent these overarching patterns found amongst the species surviving and thriving on Earth. Life integrates and optimizes these strategies to create conditions conducive to life. By learning from these deep design lessons, we can model innovative strategies, measure our designs against these sustainable benchmarks, and allow ourselves to be mentored by nature's genius using Life's Principles as our aspirational ideals.

USED FOR WHICH SUPPORT PHASE: EMPOWERMENT/IDEA DESIGN/IDEA GROWTH/SCALEUP

SOURCE: Biomimicry

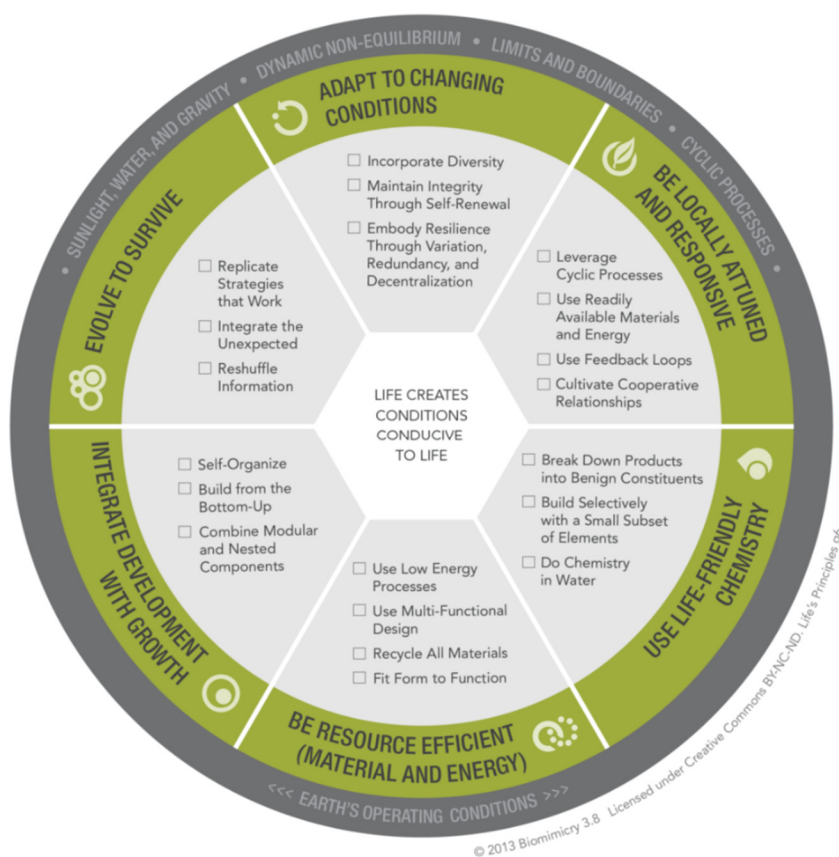


IMAGE:

Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB PODRAVJE

PLEASE LIST THE TOOLS AND METHODS USED AND BRIEFLY DESCRIBE THEIR KEY FEATURES AND HOW TO USE IT. ALSO STATE A SOURCE WHERE FURTHER INFORMATION CAN BE FOUND. IF POSSIBLE, ALSO ADD AN IMAGE OF THE TOOL OR METHOD.

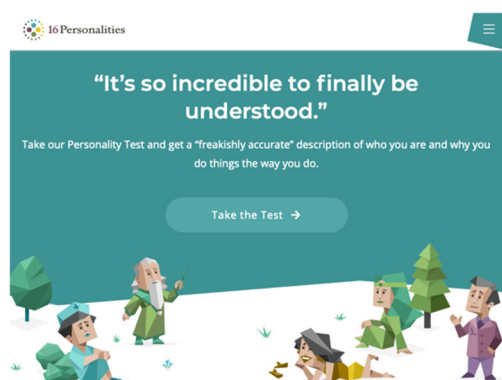
NAME: **16 personalities test**

DESCRIPTION: The test is based on the Carl Gustav Jung theory of psychological types and the Myers-Briggs Type Indicator (MBTI). The questionnaire is available online in several languages and helps the person to learn more about own personality traits - mind, energy, tactics and identity.

USED FOR WHICH SUPPORT PHASE: **EMPOWERMENT**

SOURCE: www.16personalities.com

IMAGE:



NAME: **Strategic planning questionnaire**

DESCRIPTION: A questionnaire that participants were using during the programme process. Following specific training sessions, part of the answers could be prepared and thus enabling the participant to elaborate the idea from different angles.

USED FOR WHICH SUPPORT PHASE: **IDEA DESIGN/IDEA GROWTH**

SOURCE: the questionnaire was adopted by the Business Strategic Planning Questionnaire designed by Bryan Tracy, <https://www.briantracy.com/blog/business-success/business-development-8-questions-you-should-never-stop-asking-as-a-business-owner-strategic-plan/>

<http://www.insituproject.eu/wp-content/uploads/2021/01/VPRASALNIK-ZA-PRIPRAVO-STRATESKEGA-NACRTA-POSLOVNE-IDEJE.pdf>

IMAGE:



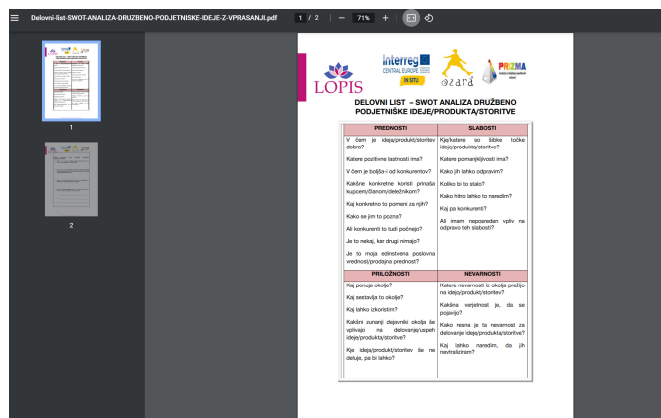
NAME: SWOT analysis of social business idea/product/service

DESCRIPTION: A tool, which uses the classical SWOT matrix with supporting questions to define the strengths, weaknesses, opportunities, and threats. The second part of the tool guides towards formulation of proposal of amendments.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN/IDEA GROWTH

SOURCE: <http://www.insituproject.eu/wp-content/uploads/2021/01/Delovni-list-SWOT-ANALIZA-DRUZBENO-PODJETNISKE-IDEJE-Z-VPRASANJI.pdf>

IMAGE:



NAME: S.C.A.M.P.E.R.

DESCRIPTION: the tool helps generate ideas for new products and services by encouraging to think about how you could improve existing ones.

S-substitute, C-combine, A-adapt, M-modify, P-put to another use, E-eliminate, R-reverse.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN/IDEA GROWTH

SOURCE: https://www.mindtools.com/pages/article/newCT_02.htm

<https://www.youtube.com/watch?v=vqnlEtIp9d8&t=2s>

IMAGE:





Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Stuttgart Region

PLEASE LIST THE TOOLS AND METHODS USED AND BRIEFLY DESCRIBE THEIR KEY FEATURES AND HOW TO USE IT. ALSO STATE A SOURCE WHERE FURTHER INFORMATION CAN BE FOUND. IF POSSIBLE, ALSO ADD AN IMAGE OF THE TOOL OR METHOD.

NAME: Growth Hacking Prototyping

DESCRIPTION: Finding a name | Branding and corporate identity | Creating prototype mockups | Creating clips yourself | Presenting in front of a camera | Editing on a smartphone

USED FOR WHICH SUPPORT PHASE: IDEA GROWTH

SOURCE: Stuttgart Media University

IMAGE: Video-Tutorials <https://www.notion.so/Prototyping-for-Growth-Hackers-7bfbb23ef1314fe3a3666fcee0ed5c47>

Prototyping for Growth Hackers

1/1 backlink

Erfolgreiche Startups wissen genau auf welchen Kanälen sie ihre Zielgruppe wie am besten erreichen und von ihrem Produkt überzeugen können. In diesem Workshop zeigen wir gute und preiswerte Tools, die auf dem Weg bis zum marktfähigen Produkt helfen können.

Introduction

1. Grundlagen und Branding

- 1.1 Namensfindung
- 1.2 Visual Identity
- 1.3 Webseite/ Webshop
- 1.4 Stock Elemente
- 1.5 Content Marketing
- 1.6 Social Media

2. Fokus auf dem Produkt

- 2.1 Geschäftsmodel validieren
- 2.2 Digitales Prototyping

NAME: Design Thinking / Customer Discovery

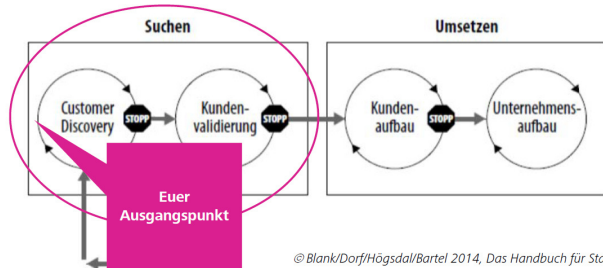
DESCRIPTION: Using Design Thinking Methodology to understand customers, create a Jobs-to-be-done concept, conduct problem interviews, create a persona

USED FOR WHICH SUPPORT PHASE: EMPOWERMENT/IDEA DESIGN

SOURCE: Stuttgart Media University



Customer Discovery (Lean Startup) als Methode, um Annahmen zu überprüfen



© Blank/Dorf/Högsdal/Bartel 2014, Das Handbuch für Startups

IMAGE:

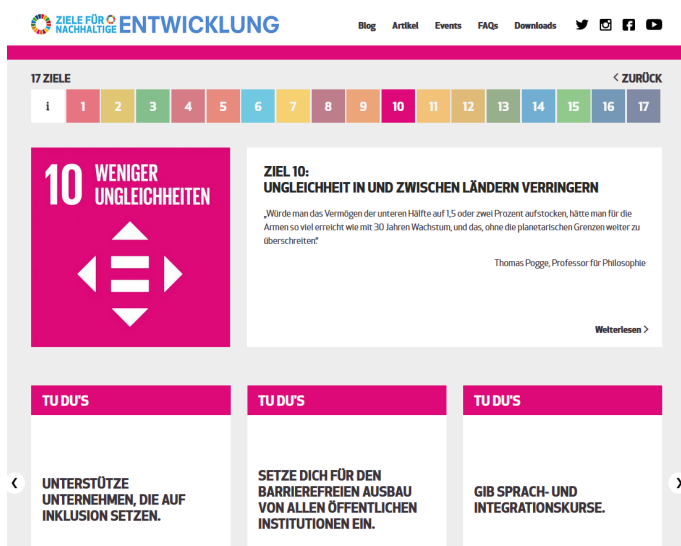
NAME: Sustainable Development Goals

DESCRIPTION: Work with the SDG's as a base for the ideation. Tackling different challenges and see how they can solve them. Always coming back to these and check whether the solution they came up with is contributing to one of the goals. We also worked with videos and questions that the German page 17ziele.de offers in order to help everyone understand the importance of the SDG's.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: <https://www.un.org/sustainabledevelopment/sustainable-development-goals/> & <https://17ziele.de/>

IMAGE:





NAME: Social Impact Navigator | Impact Measuring | I-O-O-I

DESCRIPTION: Impact orientation means that a project is being planned and implemented with the specific goal of achieving certain results at the outcome and impact levels. The desired results are expressed as concrete objectives, toward which the entire work of the project is subsequently oriented. There are three core stages of impact-oriented projects, each with sub-stages, the totality of which produces the project cycle.

USED FOR WHICH SUPPORT PHASE: IDEA GROWTH / SCALE UP

SOURCE: https://www.phineo.org/uploads/Downloads/PHINEO_Social_Impact_Navigator.pdf

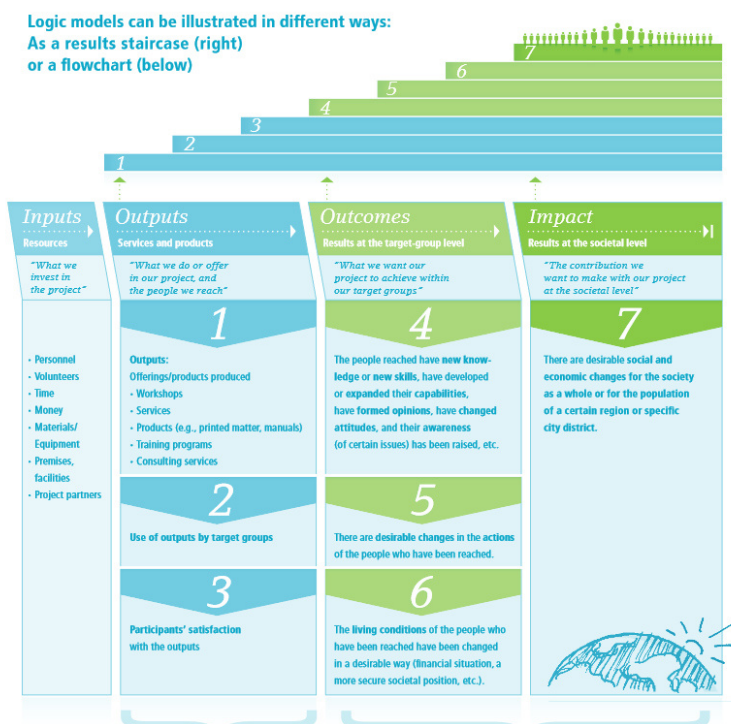


IMAGE:



NAME: “Build it, break it, fix it!”

DESCRIPTION: The **Build it, break it, fix it** toolkit was designed to collaboratively **develop** an idea as a team. In this exercise, different team members are asked to look at the idea from different concepts and to **build** upon each others work. The goal is to iterate in order to refine the original concept.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: <https://www.boardofinnovation.com/tools/build-it-break-it-fix-it/#contact-us>

IMAGE:



NAME: Brain Sketching

DESCRIPTION: Brainsketching is an idea generation technique, based on brainwriting, that uses sketching as the primary means of recording ideas. During brainsketching, participants sketch their ideas individually on large sheets of paper pasted on the wall. After a few minutes, the participants explain their idea sketches, switch places and continue sketching. Usually, about five such rounds of idea sketching take place. In an experimental set-up brainsketching was compared to brainstorming. Linkography was used as a method for analyzing the process characteristics of both techniques. Results show that during brainstorming, participants generated significantly more ideas, and that during brainsketching participants generated significantly more connections with earlier ideas. Also, during brainsketching participants made more incremental connections while maintaining a similar level of 'wild leap' connections. Conclusion of this study was that brainsketching does not necessarily provide a better idea generation process; rather, it provides a different process, which may serve different purposes. Some steps towards further development of the brainsketching technique are indicated. Suggestions are provided for stimulating the group to reflect on their ideas. Finally, some suggestions are made for applying the brainsketching technique with groups of non-designers, mainly directed at removing the participants' hesitation to draw in public.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: Stuttgart Media University

IMAGE:





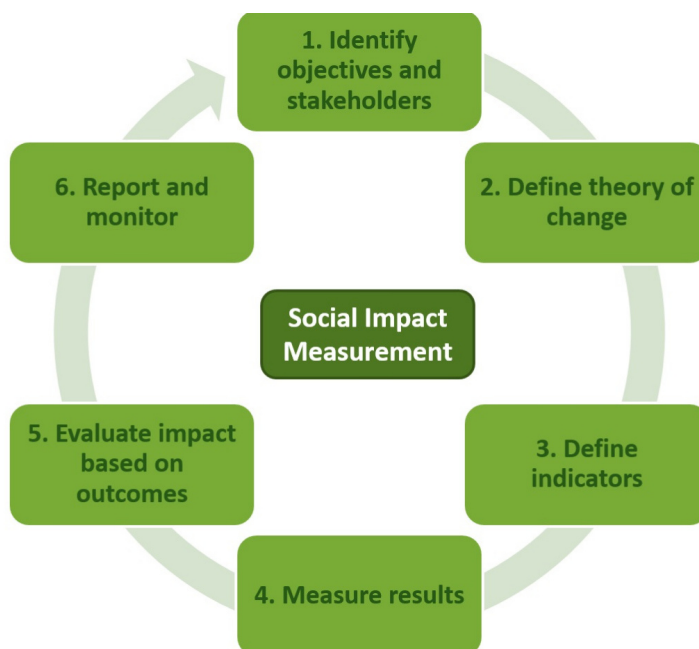
NAME: Social Impact Measurement // SROI (Social Return on Investment)

DESCRIPTION: **Social impact measurement** aims to assess the **social** value and **impact** produced by the activities or operations of any for-profit or non-profit organisation. Regardless of whether they meet these criteria or not, **social** enterprises that seek funding are expected to **measure** their **social impact**.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN / SCALE UP

SOURCE: www.180dc.org

IMAGE:





Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Vienna

NAME: Social Business Model Canvas

DESCRIPTION: The goal is to support social innovators by designing their Business Models. Social Businesses focus on the impact they create for beneficiaries rather than creating profits. Therefore, the tool takes additional aspects into account which helps in creating a social business model.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: Social Innovation Lab / Social Entrepreneurship Netzwerk Deutschland e.V., <https://start-green.net/tools/material-fur-trainer-dozenten/>


Social Business Model Canvas 				
Key Resources <small>What resources will you need to run your activities? People, finance, access?</small>	Key Activities <small>What programme and non-programme activities will your organisation be carrying out?</small>	Type of Intervention <small>What is the format of your intervention? Is it a workshop? A service? A product?</small>	Segments <small>Beneficiary</small> <hr/> <small>Customer</small>	Value Proposition <small>Social Value Proposition</small> <hr/> <small>Impact Measures</small> <hr/> <small>How will you show that you are creating social impact?</small> <hr/> <small>Customer Value Proposition</small>
Partners + Key Stakeholders <small>Who are the essential groups you will need to involve to deliver your programme? Do you need special access or permissions?</small>		Channels <small>How are you reaching your beneficiaries and customers?</small>	<small>Who are the people or organisations who will pay to address this issue?</small>	<small>What do your customers want to get out of this initiative?</small>
Cost Structure <small>What are your biggest expenditure areas? How do they change as you scale up?</small>		Surplus <small>Where do you plan to invest your profits?</small>	Revenue <small>Break down your revenue sources by %</small>	

IMAGE:

Inspired by The Business Model Canvas



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Śląskie

PLEASE LIST THE TOOLS AND METHODS USED AND BRIEFLY DESCRIBE THEIR KEY FEATURES AND HOW TO USE IT. ALSO STATE A SOURCE WHERE FURTHER INFORMATION CAN BE FOUND. IF POSSIBLE, ALSO ADD AN IMAGE OF THE TOOL OR METHOD.

NAME: Analysis of funding sources

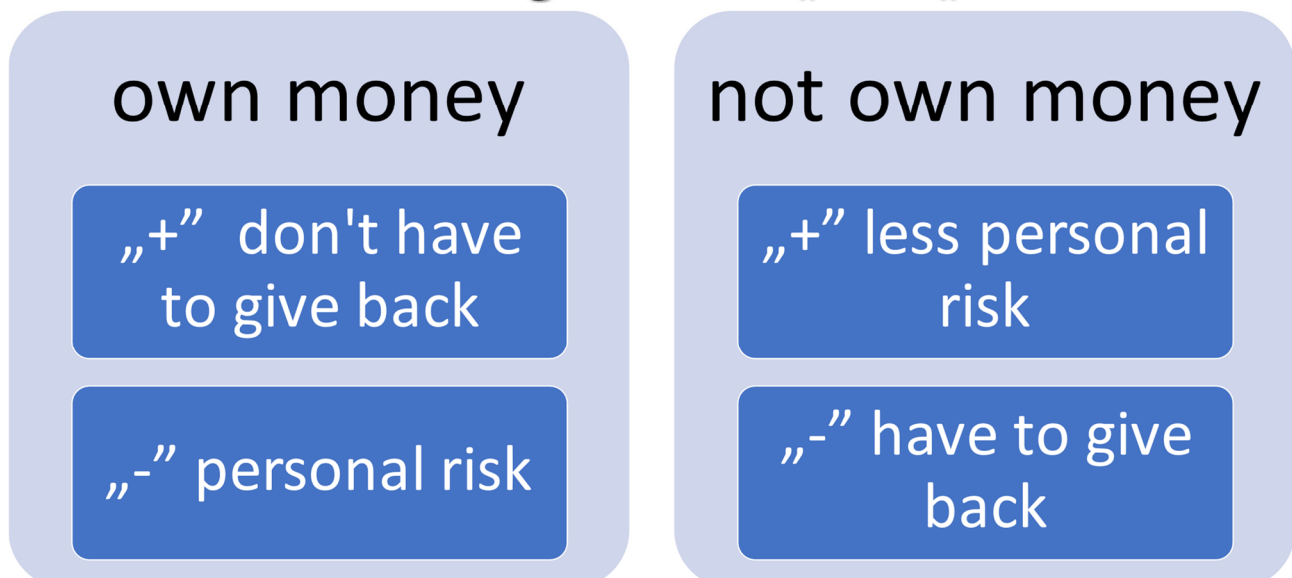
DESCRIPTION: Analysis of financing sources, broken down into own and external funds. Review of the possibilities of obtaining refundable and non-refundable money. Advantages and disadvantages of individual solutions, specific requirements related to them. Making financial decisions and their possible consequences.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: <http://www.insituproject.eu/wp-content/uploads/2021/02/Pieniadze-szczescia-nie-daja.pdf>

IMAGE:

Financing sources – „+” & „-”



NAME: Getting financing step by step

DESCRIPTION: Proceedings after choosing the method of financing the activity. Preparation of the offer / documents necessary when applying for money. Proper presentation of the idea and marketing. Cost



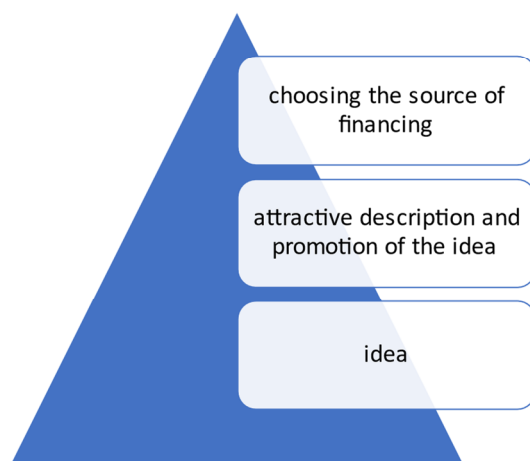
analysis with a detailed breakdown of costs and sources of financing into categories. This forms the basis for the preparation of a reliable CANVAS model for the idea.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: <http://www.insituproject.eu/wp-content/uploads/2021/02/Pieniadze-szczescia-nie-daja.pdf>

IMAGE:

Getting money – step by step



.....

Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Rijeka

NAME: Marketing plan tool

DESCRIPTION: Marketing planning tool useful for successful planning the means, content, cost and duration of marketing activities needed to communicate the enterprises's story and product/service.

USED FOR WHICH SUPPORT PHASE: IDEA GROTH, IDEA SCALEUP

SOURCE: STEP RI <https://www.step.uniri.hr/>

IMAGE:

Activity name / short description		
Reasons for introduction	Target audience	Expected results
Content of activities	Basic message	
	Means of communication	
	Cost plan	
	Duration and schedule	
Prerequisites / resources	Persons to implement and schedule tasks in time	
Responsible person and powers		





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

IN SITU - CE1494

Annex 2

Deliverable D.T2.2.2

11 2021



1. DELIVERABLE D.T2.2.2

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

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

The present annex serves as a collection of tools used during the implementation of the second round of the IN SITU SOCIAL INNOVATION HUB in your region. Regional partners should fill in one unique version of the annex.

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 during which IN SITU SIH participants should be supported, outlined as groups of topics within the four respective phases, are identified:

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



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



3. Social Entrepreneurial Skills and Competences Training materials

In the final version of IN SITU D.T2.2.2 ePortfolio for training framework focused on Social Entrepreneurial skills and competences, 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 (entrepreneurial ventures)** at the regional Social Innovation Hubs was listed.

Materials were 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 were 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 as listed below.

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

We kindly ask you to contribute to the exchange of materials by listing and describing the specific tools and methods used for supporting participants developing social enterprises (profit).

Unless otherwise indicated, the material listed below is licensed under the Creative Commons Licenses², 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.

² <https://creativecommons.org/>

Are your rights affected? Our apologies! Please contact us and we will check the problem immediately: step-ri@uniri.hr



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Stuttgart Region

NAME: Workshop & Mentoring

DESCRIPTION: Social Innovation Hub (SIH) Stuttgart Region combined joint training activities and individual consulting and mentorship according to the real needs of each participant.

USED FOR WHICH SUPPORT PHASE: From beginning to the end of the program (EMPOWERMENT/IDEA DESIGN/IDEA GROWTH/SCALEUP) participants were accompanied by personal mentors and attended the joint training activities.

SOURCE: <https://insitu.startupcenter-stuttgart.de/trainingsprogramm/>

IMAGE: Instagram: @empowered_by_entrepreneurship

NAME: Problem Exploration

DESCRIPTION: Participants learned, that at the beginning of an innovation process, it is about the perception of a problem. It is also about observing and understanding this problem area in its complexity. Questioning and adapting problems.

USED FOR WHICH SUPPORT PHASE: Empowerment / Idea Design

SOURCE: Stuttgart Media University

NAME: Osborn Checklist

DESCRIPTION: The Osborn Checklist is an old but still very powerful method named after its powerful method, named after its inventor Alex Osborn. It serves as a kind of guide for a systematic, almost forced generation of ideas. This technique focuses mainly on product and process innovations and process innovations, and it always gives you the good feeling of that you haven't forgotten any important aspect forgotten. The checklist was first published around 1957 and has lost none of its validity to this day. The checklist has proved particularly useful in the further development of existing solutions, products or processes. Also as a technique to follow up a brainstorming or mind mapping session.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: Stuttgart Media University

NAME: Scamper

DESCRIPTION: SCAMPER is a beautiful, clearly laid out checklist technique that was developed by Bob Eberle (1997) and has a firm place among creative among creative techniques. Once a challenge has been precisely defined and described SCAMPER quickly helps to think ahead in different directions. SCAMPER can thus also be used as a starting point for lateral thinking processes. lateral thinking processes. A further development of SCAMPER itself is SCAMPERR. The well-known Osborn checklist is also a technique closely related to SCAMPER. SCAMPER is particularly suitable for the further development of new products or processes derived from existing ones. SCAMPER is also a good follow-up method to brainstorming. SCAMPER is also well suited as a follow-up method to brainstorming.

USED FOR WHICH SUPPORT PHASE: Empowerment, IDEA DESIGN

SOURCE: Stuttgart Media University



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Śląskie Region

NAME: Christmas tree methodology

DESCRIPTION: The idea arose while working with a group of project participants - people with intellectual disabilities. When it was necessary to visualize their needs, the trainers asked the participants to think about what they needed to start the activities by describing their dreams / wishes. The easiest and, at the same time, the most effective way turned out to be the presentation of the needs as the dream Christmas gifts. Each gift is a service, product or something else needed to complete a given project.

The advantage of the method is the use of positive associations and emotions related to Christmas gifts. By working in this way, the participants "awaken the child", become creative, are able to plan unconventional resources, and at the same time extremely useful in future activities.

This method of planning allows you to organize and hierarchize the resources you need, which is graphically represented as groups of gifts under the Christmas tree.

The methodology developed in this way has enormous potential, can be used and adapted to other planning needs. It is an effective tool supporting commonly used methods. Its development is limited only by your imagination.

USED FOR WHICH SUPPORT PHASE: **IDEA DESIGN**

SOURCE: ourselves research, experience and practice

IMAGE: n/a



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Podravje Region

NAME: APPRAISING IDEAS

DESCRIPTION: This method can be used to evaluate your ideas using divergent and convergent thinking.

1. Pick up 3 ideas with most potential in terms of what you want to achieve.
2. Take idea(s) and assess them following steps 3 and 4:
3. Divergent appraisal

STRENGTHS: What is good about this idea?

Find at least 5 strengths in 3 minutes

POTENTIAL: What else can you do, where to can this idea lead?

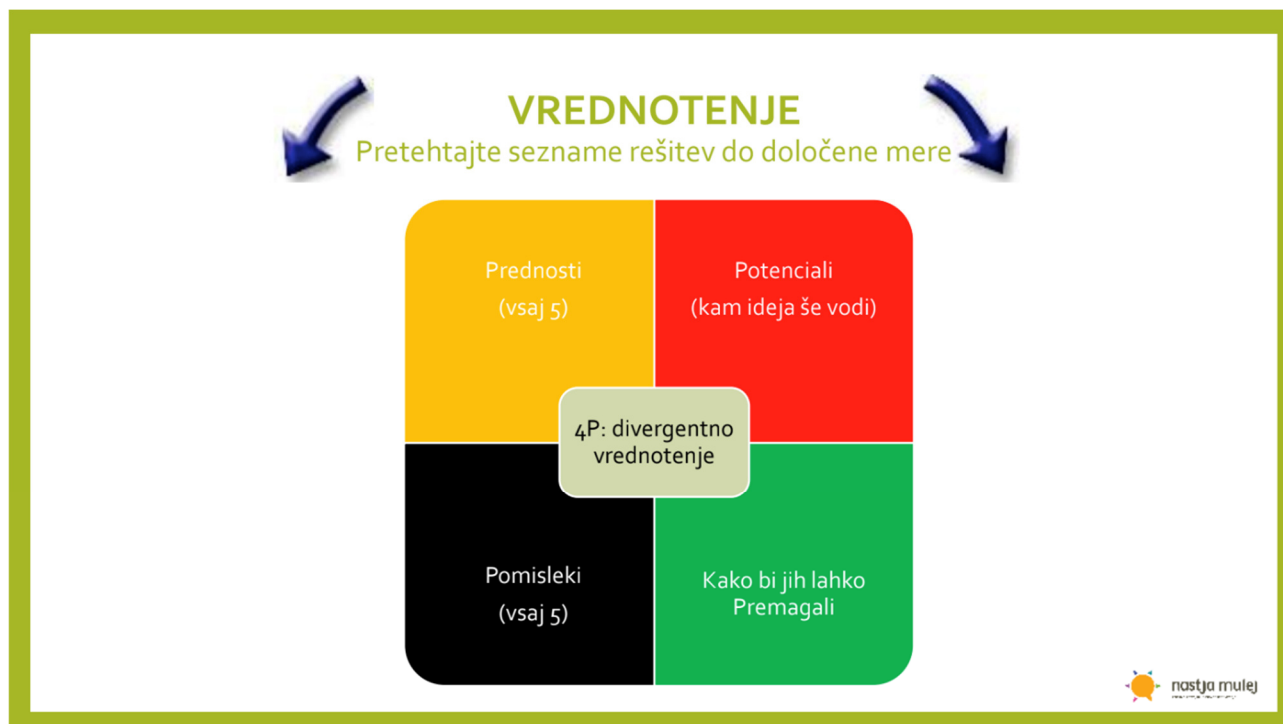
3 minutes

SECOND THOUGHTS/DILEMMAS:

What is bad about the idea? At least 5 items, 3 minutes

OVERCOMING WEAKNESSES:

Find at least 3 solutions for 1 dilemma, 3 minutes





4. Convergent appraisal

Appraise each idea by criteria on a scale from zero 0, 1, 2, 3 (max)

	VALUE	ORIGINALITY	FEASIBILITY	YOUR CRITERION
IDEA 1	0/1/2/3			
IDEA 2				
IDEA 3				

Vaš izziv

VREDNOTENJE (Appraise)

Konvergiramo
Ovrednotite vsako idejo in izberite najboljšo

Ovrednotite vsako idejo po kriterijih:
o (nič), 1, 2, 3 (največ)

	VREDNOST	ORIGINALNOST	IZVEDLJIVOST	VAŠ KRITERIJ
1. IDEJA	0 / 1 / 2 / 3			
2. IDEJA				
3. IDEJA				

 **nastja mulej**
www.nastjamulej.com

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: Nastja Mulej, www.nastjamulej.com

IMAGE: above



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Veneto Region

NAME: **ECONOMIC & FINANCIAL FORECAST**

DESCRIPTION:

Doing the economic-financial planning of a business idea means transforming the 'storytelling' already provided into economic-financial forecast data. This is carried out through the preparation of a budget that has a duration of at least three years. From this budget it must emerge that the revenues achieved in the years following the opening of the business will be greater than the costs incurred. In addition to that, it must highlight that the monetary income will be greater than the monetary expenditure.

This tool is based on 3 different sheets:

1. Cost structure where all the costs generated are listed and quantified
2. Revenue streams where the different revenues streams are listed and quantified
3. Profits and losses analysis

USED FOR WHICH SUPPORT PHASE: **BUSINESS DEFINITION**

SOURCE:

https://docs.google.com/spreadsheets/d/1YdjR5KDXv-Mb_Jvz3MIWAXscRDE_ldn2/edit?usp=sharing&ouid=105822721187140163604&rtpof=true&sd=true

http://www.insituproject.eu/wp-content/uploads/2021/02/IN-SITU_EcoFin_charts.xlsx

IMAGE:



COST STRUCTURE

Description	Year 1			Year 2			Year 3		
	€ unit	n° unit	Total	€ unit	n° unit	Total	€ unit	n° unit	Total
Direct costs per service									
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
			€ 0,00			€ 0,00			€ 0,00
Investments	total value	depreciation rate (%)	Yearly value (depreciation)	total value	depreciation rate (%)	Yearly value (depreciation)	total value	depreciation rate (%)	Yearly value (depreciation)
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
...			€ 0,00			€ 0,00			€ 0,00
			€ 0,00			€ 0,00			€ 0,00
Staff (per price category)	€ unit x year	n° unit	Total	€ unit x year	n° unit	Total	€ unit x year	n° unit	Total
A)			€ 0,00			€ 0,00			€ 0,00
B)			€ 0,00			€ 0,00			€ 0,00
C)			€ 0,00			€ 0,00			€ 0,00
D)			€ 0,00			€ 0,00			€ 0,00
E)			€ 0,00			€ 0,00			€ 0,00
F)			€ 0,00			€ 0,00			€ 0,00
			€ 0,00			€ 0,00			€ 0,00
Operating costs	€ unit	n° unit	Total	€ unit	n° unit	Total	€ unit	n° unit	Total
Electric energy			€ 0,00			€ 0,00			€ 0,00
Various utilities			€ 0,00			€ 0,00			€ 0,00
Telephone and mail			€ 0,00			€ 0,00			€ 0,00
Different insurance			€ 0,00			€ 0,00			€ 0,00
Administrative and payrolls			€ 0,00			€ 0,00			€ 0,00
Bank			€ 0,00			€ 0,00			€ 0,00
Various legal			€ 0,00			€ 0,00			€ 0,00
Chancellery and printers			€ 0,00			€ 0,00			€ 0,00
Maintenance and repairs			€ 0,00			€ 0,00			€ 0,00
External consultancy fees (MKTG)			€ 0,00			€ 0,00			€ 0,00
Promotion fees / fairs			€ 0,00			€ 0,00			€ 0,00
Miles reimbursement			€ 0,00			€ 0,00			€ 0,00
Board / lodging			€ 0,00			€ 0,00			€ 0,00
Trains / aircraft tickets			€ 0,00			€ 0,00			€ 0,00
Paypal management of 29e / month purchase			€ 0,00			€ 0,00			€ 0,00
Website			€ 0,00			€ 0,00			€ 0,00
Rents for real estate property and accessories charges			€ 0,00			€ 0,00			€ 0,00
Charges for the financial leasing of property, plant, machinery, motor vehicles, etc. (Leasing)			€ 0,00			€ 0,00			€ 0,00
Periodic royalties			€ 0,00			€ 0,00			€ 0,00
			€ 0,00			€ 0,00			€ 0,00
Total in the year			€ 0,00			€ 0,00			€ 0,00



REVENUE STREAMS

Service code & description		Total volume (year)	Revenue per unit	Total revenue	Total direct cost	Margin
		A	B	E=AxB	D=AxC	F=E-D
YEAR 1		0		0,00	0,00	0,00
1	...	0	0,00	0,00	0,00	0,00
2	...	0	0,00	0,00	0,00	0,00
3	...	0	0,00	0,00	0,00	0,00
4	...	0	0,00	0,00	0,00	0,00
5	...	0	0,00	0,00	0,00	0,00
6	...	0	0,00	0,00	0,00	0,00
I	Public donors			0,00		
II	Private donors			0,00		
TOTAL				0,00		
YEAR 2		0		0,00	0,00	0,00
1	...	0	0,00	0,00	0,00	0,00
2	...	0	0,00	0,00	0,00	0,00
3	...	0	0,00	0,00	0,00	0,00
4	...	0	0,00	0,00	0,00	0,00
5	...	0	0,00	0,00	0,00	0,00
6	...	0	0,00	0,00	0,00	0,00
I	Public donors			0,00		
II	Private donors			0,00		
TOTAL				0,00		
YEAR 3		0		0,00	0,00	0,00
1	...	0	0,00	0,00	0,00	0,00
2	...	0	0,00	0,00	0,00	0,00
3	...	0	0,00	0,00	0,00	0,00
4	...	0	0,00	0,00	0,00	0,00
5	...	0	0,00	0,00	0,00	0,00
6	...	0	0,00	0,00	0,00	0,00
I	Public donors			0,00		
II	Private donors			0,00		
TOTAL				0,00		



PROFITS AND LOSSES ANALYSIS

Description	YEAR 1		YEAR 2		YEAR 3	
	Total	%	Total	%	Total	%
A) Revenues	0,00		0,00		0,00	
core activity	0,00		0,00		0,00	
donors	0,00		0,00		0,00	
minor activities	0,00		0,00		0,00	
B) Direct costs	0,00		0,00		0,00	
direct production costs	0,00		0,00		0,00	
other direct production minor costs	0,00		0,00		0,00	
commissions	0,00		0,00		0,00	
Contribution Margin (C=A-B)	0,00		0,00		0,00	
(D) Staff costs	0,00		0,00		0,00	
E) MC - labour costs (E=C-D)	0,00		0,00		0,00	
(F) Operating costs	0,00		0,00		0,00	
G) EBITDA (G=E-F) <Gross Operating Margin>	0,00		0,00		0,00	
(H) Depreciation	0,00		0,00		0,00	
I) EBIT (I=G-H)	0,00		0,00		0,00	
(L) Financial charges v/s incomes	0,00		0,00		0,00	
M) Pre-tax income (M=I+L)	0,00		0,00		0,00	
(N) Taxes	0,00		0,00		0,00	
O) Net Income (O=M-N)	0,00		0,00		0,00	



NAME: BUSINESS MODEL YOU

DESCRIPTION:

The model is a practical tool for drawing “personal business models” that show fresh ways individuals can adapt to changing marketplace needs – or create new, more satisfying work possibilities. This role-focused, visual approach enables people to see the entire context in which they work, not merely hear a portion of it described in words. This gently requires people to understand how the entire organization works. Experience shows that an overwhelming majority find this process extremely enjoyable and inspiring. The model has been produced by the same team that created the Business Model Generation.

USED FOR WHICH SUPPORT PHASE: EMPOWEREMENT

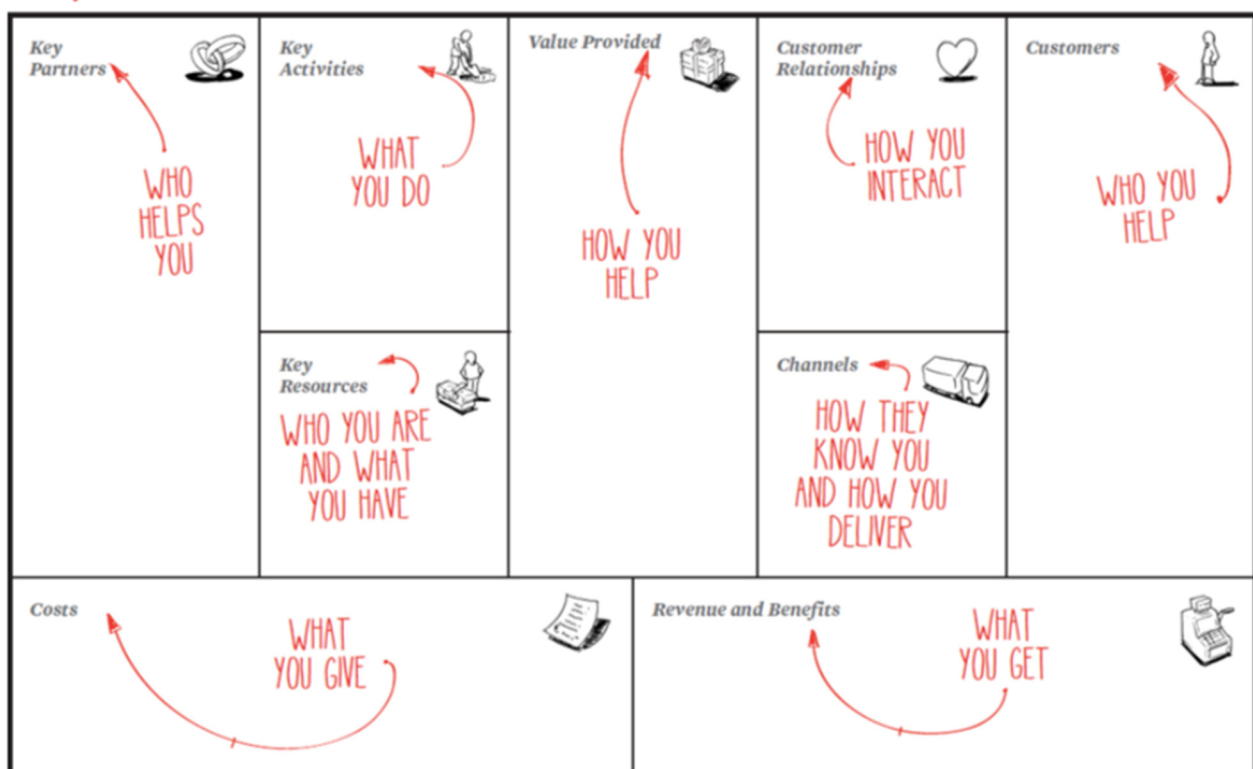
SOURCE:

<https://businessmodelyou.com>

<http://www.insituproject.eu/wp-content/uploads/2021/02/Personal-Business-Model-canvas.pdf>

IMAGE:

PERSONAL
The Business Model Canvas



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Rijeka Region

NAME: 7 Questions to Assess Your Business Model Design

DESCRIPTION: This visual tool helps teams meet their work goals and project objectives by helping reduce miscommunication and stress.





USED FOR WHICH SUPPORT PHASE: IDEA GROWTH

SOURCE: Alexander Osterwalder, Strategyzer AG


IMAGE: <https://www.strategyzer.com/resources/canvas-tools-guides/team-alignment-map>

Team Alignment Map

Mission:
Period:

Joint Objectives  What do we intend to achieve together?	Joint Commitments  Who does what and with whom?	Joint Resources  What resources do we need?	Joint Risks  What can prevent us from succeeding?
		↻	↻

© 2020 Stefano Mastrogiacomio. All rights reserved. www.teamalignment.co

 Strategyzer



Social Entrepreneurial Skills and Competences tools and methods used in IN SITU SOCIAL INNOVATION HUB Vienna Region

NAME: Biomimicry Brainstorming Activity

DESCRIPTION: This method helps brainstorm ways to discover and apply bio-inspired design strategies.

USED FOR WHICH SUPPORT PHASE: IDEA DESIGN

SOURCE: Biomimicry Institute, <https://toolbox.biomimicry.org/methods/emulate/>

IMAGE:

Biomimicry Brainstorming

This activity is designed to help you brainstorm ways to apply your bio-inspired design strategies to the design problem you are working on.

Supplies Needed:

Large sheet of paper or flip chart, markers, sticky notes, index cards, and you the design strategies you have abstracted from your biological models.

Instructions:

1. Get together with your design team and write your design question ("How might we...") across the top of a large piece of paper.
2. Look over your abstracted design strategies and select the ones you think are most interesting and inspiring. Write each of them on an index card (one strategy per card). Place the completed index cards in a pile in the center of the table.
3. As a team, take turns reading the design strategies aloud from the stack of index cards. After each strategy is read, spend a few minutes brainstorming an answer to the question "How can this strategy help solve our design problem?"
4. Record all of the ideas generated on sticky notes and attach them to the large paper. Try to capture ideas as doodles, sketches, or short statements. It's okay if the ideas are incomplete or in the form of questions; each note may represent only a single component or elements of a larger possible solution.
5. After about 30 minutes or when you have explored all of the design strategy cards, study the collection of ideas you have captured and cluster them by moving the sticky notes around the large piece of paper.
6. Look for patterns and relationships between the ideas and clusters. Ask yourselves: Do any of the ideas seem to fit together? Can we recombine or mix them to arrive at new ideas? Draw lines, arrows, and add notes as needed to capture your observations and additional ideas.

Suggestions:

The point of brainstorming is to generate a large number of potential solutions, so it is important to keep an open mind and encourage all ideas—even if they don't seem realistic at first. Be generous with your ideas and withhold criticism of ideas offered by your teammates. It also may be beneficial to brainstorm on your own and then come back together as a group to share all ideas.

You may be tempted to focus on strategies that fit a design solution you already have in mind or that already exists in the world in a similar form. Try to avoid this. Instead, focus on strategies that best match the context and what it is your team wants the design solution to do (function).