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Del. 2.1 - Curriculum for training of partners on social enterprises and WISEs management

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ERASMUS + EUROPEAN PROJECT

Basic social enterprise skills

- 1- Social entrepreneurship vs. Classic entrepreneurship
- 2- Inclusion of vulnerable groups
- 3- Business skills: Your market and your presentation
- 4- Business skills: Financial literacy

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CURRICULUM PROPOSAL: SOCIAL ENTREPRENEURSHIP BASICS (SEB)

INTRODUCTION

This curriculum is designed to confer basic and general skills and knowledge for social entrepreneurs entering the field. It is by no means comprehensive enough to ensure success or guarantees complete knowledge of country-specific requirements that entrepreneurs might face. Its objective is to equip prospective employers with the skills required to get started. The proposed curriculum is divided into 4 separate parts:

1) Social entrepreneurship vs. Classic entrepreneurship

In this part, participants will learn about the differences between what a social enterprise is and does and how it differs from a “classic”, non-social enterprise.

2) Inclusion of vulnerable groups

Participants will be informed of the importance of employment for vulnerable groups.

3) Business skills: Your market and your presentation

This part of the curriculum focuses on basics of establishing a WISE in practice. We will examine the market for WISEs and see how existing social enterprises market themselves.

4) Business skills: Financial literacy

The goals here will be for participants to master the very basics of business financial literacy.

Goals:

Part 1:

- Why establish a social enterprise in the first place?
- What are the principles of a social enterprise? What makes it “social”?
- Upsides, downsides and risks associated with social enterprises?
- Different forms of social enterprises
- Requirements for establishing such an enterprise

Part 2:

- Who are the socially vulnerable?
- What do the terms “skills development”, “social interaction”, “functionality” and “personal development” mean?
- Opportunities for inclusion
- The limits of vulnerable groups

Part 3:

- WISE profitability
- Common WISE business models



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- Market share
- Typical means of generating profit
- WISE presentation, advertisement and image

Part 4:

- Reading a budget
- Expenses
- Profit in a non-profit
- Employment
- Government aid mechanisms

Participants:

- As required in the project documentation



Competences

The participants should acquire competences allowing them to start effectively learning about the necessities of their proposed business and have enough basics to establish their business without unacceptable risks.

Content

The content is divided into two major parts: Basic business skills required to avoid the worst risks and confer the most essential skills required to be competitive. The other major part is on social economy and the basics of doing business with vulnerable groups.

Duration: 24 hours

1st day:

Social entrepreneurship vs. Classic entrepreneurship: 3 hours

Inclusion of vulnerable groups: 3 hours

2nd day:

Business skills: Your market and your presentation: 6 hours

3rd day:

Business skills: Financial literacy: 6 hours

Methodology:

In order to achieve the above goals, it was necessary to establish a methodological approach to learning. This takes into account the following premises:

- It is adapted to the capacity of the target groups.
- Learning is based on experience and practical skills.
- The participation of the participants is necessary, which means that the lessons will be based on activities that will involve and connect the participants and promote communication.
- Throughout the course, there will be a mentor who will support the participants throughout the duration of the course.
- The course is based on a "scaffolding" approach - basic lessons will be mastered and reviewed before advanced ones.

Preparations:

- **Face-to-face:** An appropriate space with sufficient seating, writing surfaces, airflow and all necessary measures for the course to continue even in case of health restrictions. All materials to be adapted to the local spoken language where possible.



Time / Duration	Description
180'	First workshop:
15'	<p>Introduction:</p> <p>The lecturer has prepared and looked through all associated materials. He/she welcomes all attending participants and reviews the general goals of this curriculum, reviews expectations and presents the project itself.</p> <p>The lecturer has all the participants sign the attendance sheets.</p>
20'	<p>The teacher goes over the definition of a social enterprise. The trainer provides definition based on local legislation. → EU definition. Participants are asked to come up with an example of a social enterprise.</p> <p>Key question: Why would anyone establish a social enterprise instead of a commercial enterprise?</p> <p>Discussion-5-10 minutes</p> <p>Participants are given PDF_DOC1, in which the basic principles of a social enterprises are described.</p>
30'	<p>The lecturer describes the principles as follows-social mission over financial mission. Innovative solution to social problems. Self-sustaining business model. Practical examples of each are given.</p> <p>Participants are given examples of enterprises with basic descriptions (on DOC-1) and asked to categorise them as “social” and “non-social”.</p>
15'	Short recess



<p>15'</p>	<p>Short exercise- the participants are welcomed back with a key question: How can an enterprise achieve social, cultural, community economic and/or environmental outcomes; and at the same time earn revenue?</p> <p>Explanation-generation of revenue does not contradict positive outcomes, but there is an ethical question involved, namely what can be sacrificed or promoted in seeking revenue. The lecturer transitions from this question into:</p> <p>Upsides, downsides and risks associated with social enterprises?</p>
<p>45'</p>	<p>The lecturer presents PPT_1, showing risks typically associated with social entrepreneurship-i.e. Lack of know-how, low profitability, low-skilled labor force, dependence on government assistance, low technology etc.</p> <p>The participants are asked to come up with a single practical example based on their personal experience.</p> <p>The lecturer then transitions into upsides-i.e. Stability, social effect, assistance, connection with community, government aid, ensured pool of laborers etc.</p> <p>The participants are encouraged to discuss each point; lecturer provides practical examples.</p> <p>Different forms of social enterprises:</p>
<p>15'</p>	<p>The lecturer transitions from the previous topic by explaining that there exist different forms of social enterprises that bear different risks and receive various upsides or benefits. Depending on local legislation they list them and offer practical examples of each and requirements for establishing them.</p> <p>The participants are given anonymized case studies of each enterprise (simple histories).</p>



25'	<p>Conclusion:</p> <p>The lecturer goes over the main points of the presentation: What are the basic principles, what types of SE exist and how the curriculum will continue. They reference the case studies they have just issued and asks the participants to form groups and determine, for each case study, the primary reason for its success or failure.</p> <p>The key question for this part is: What contributes most to the success or failure of a social enterprise?</p> <p>This allows for the transition on to the next major topic. The employees-vulnerable groups.</p> <p>Material:</p> <ul style="list-style-type: none"> • PDF_DOC1 • PPT_1 • Case studies
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Duration	Opis
30'	<p>Inclusion of vulnerable groups</p> <p>Introduction</p> <p>The lecturer makes sure that all participants sign the attendance sheet for the second part of the lecture.</p> <p>They open up (PPT_2) and slowly, with practical examples describe the various groups of vulnerable people. This is not in relation to employment just yet, but rather in general terms.</p>



<p>30'</p>	<p>The key question for this part is: "Who are the socially vulnerable?"</p> <p>Exercise 1: 10 examples of potential employees are given. The group attempts to classify them as vulnerable or non-vulnerable.</p> <p>Vulnerability and employment</p> <p>Local legislation dependent.</p> <p>The lecturer now, with assistance of the PPT describes vulnerable groups as related to employment, according to local legislation: e.g., disabled with work capacity reduced by 50% or more, disabled with their work capacity reduced by less than 50%. The lecturer then points out that one of the main responsibilities of a social enterprise manager is to provide employment and security to vulnerable employees. A transition is made to the basics of social responsibilities a manager has.</p> <p>Short recess</p>
<p>15'</p>	<p>Exercise 2</p>
<p>15'</p>	<p>A diagram of all the steps any employee needs to take from when he is diagnosed to when he starts to work is given to participants (DOC_2). The diagram needs to be numbered or arranged by the participants in the correct order.</p>
<p>45'</p>	<p>How do you include a vulnerable worker?</p> <p>+ contacts for national situations</p> <p>The lecturer has shown that the process an employee faces is long and challenging. How does a manager then employ a person? What are the manger's responsibilities?</p>



<p>15'</p>	<p>The lecturer uses the PPT to describe the employment process from the WISE perspective, first theoretically and then in practice.</p> <p>Exercise 3</p> <p>Same as before, use the process of employment from the WISE perspective.</p> <p>The lecturer then explains that the managers responsibilities extend beyond ensuring that there are employment opportunities available. They are also responsible to provide employment in such a way that it contributes to a positive outcome for a vulnerable group. The first step in that direction is realising the limits a vulnerable person may have and how to adapt to them. The lecturer shows a number (etc 5-10) adaptations to the workplace in order to accommodate disability.</p> <p>Short recess and setup</p> <p>The lecturer uses the profiles used earlier in the introduction. The group is asked to come up with accommodations for their disability or special requirement, without sacrificing much productivity. The lecturer comments on their choices.</p> <p>Conclusion</p> <ul style="list-style-type: none">• The lecturer sums up : What a vulnerable person is, their relation to WISEs and that both the worker and manager need to accommodate their special status.
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30'	<p>Material:</p> <ul style="list-style-type: none"> • PPT • Profiles • Attendance sheets
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Duration	Description
15'	<p>Business and marketing</p> <p>Introduction</p> <p>The lecturer welcomes everyone back and explains that the lesson is going to last for 6 hours, with 2 hours of recess for lunch as well as shorter breaks. The lesson will focus on basics of establishing a WISE in practice. We will examine the market for WISEs and see how existing social enterprises market themselves.</p> <p>He asks everyone to sign the attendance sheet.</p>
30'	<p>WISE profitability</p> <p>Participants are shown a PPT (PPT_3) presentation of what a WISEs economic performance looks like. This is one via an example, in simple graphic. The lecturer demonstrates the two main sources of income:</p> <ul style="list-style-type: none"> - Aid - Profit from activity <p>The lecturer enumerates what the types of aid are (not being very detailed) and shows that the WISE can be profitable, but earnings are not as (potentially) high as in the for-profit sector. They demonstrate, based on what was shown about the nature of employees the previous day, the need for simple, safe, easy to learn work. Such work is not extremely profitable. They show the typical areas in which WISE engage in business locally: e.g. green area maintenance, assembly, etc...</p> <p>Common WISE business models</p>



45'	<p>Using the previous topic, the lecturer gives out a set of anonymous examples of WISE businesses (DOC_3). These examples show how WISEs operate and how they stay in business. Participants are asked to pick one and come up with an assessment of risks, opportunities and strengths for said WISE in no more than 200 words. They are asked to present their findings.</p>
45'	<p>The lecturer will write down any remarks that are not realistic or not congruous with the role of a WISE or its business model and comments on them.</p>
	<p>Short recess</p>
	<p>Market share</p>
15'	<p>The lecturer uses the outliers the participants have mentioned before to show that there are often unrealistic expectations of what a WISE or social enterprise actually is or its position in the open market. The lecturer uses the following 45' to explain the position of social enterprises in 1.) The EU and associated statistics and positions and 2.) the situation of social entrepreneurship nationally. There is no need to go in to too much detail, the PPT.</p>
45'	<p>Recess</p>
	<p>Generating profit</p> <p>The lecturer acknowledges that the topic of generating profit has been briefly discussed. Both mechanisms have been mentioned but have not been explained in detail. The lecturer takes this opportunity to show what are the main types of income for a WISE and mentions other options (project work etc.) and describes the main options in detail.</p>



5'	Exercise 4:
60'	<p>The participants are given an example of a product or service that the WISE offers with:</p> <ol style="list-style-type: none">1) Labour cost2) Service/product cost3) Overhead estimate4) Time requirement5) Aid/benefit amount <p>The participants are asked to calculate the profit for the service in the example and then estimate whether their own proposed business could generate a profit. This does not have to be precise but rather an estimate.</p> <p>The lecturer should remind the participants not to disregard that employees will take time off, be ill or need additional time or accommodations to participate in the work process.</p> <p>The lecturer will thank the participants and conclude that the purpose of the exercise was to clarify:</p> <ol style="list-style-type: none">1) WISE are not “easy” in the sense that they are fully supported by the state or donations2) That WISE need careful managing of human and other resources to be profitable <p>Lunch</p> <p>WISE presentation, advertisement and image</p> <p>The lecturer welcomes the participants back from lunch. He acknowledges that while the results of the previous exercise may have been discouraging, there are many examples of successful WISEs and that, traditionally, WISEs have an issue competing on the open market due to several factors and specifically, not taking advantage of advancements made by companies not relying on vulnerable labour. To mitigate this, the most basic skill is to present the WISE and service/product as competitively as possible and to provide information about them to the open market.</p>



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60'	<p>The lecturer uses (DOC-7) and associated PPT to take them through the topic. They reinforce that with additional training in basic finances, participants should have the basic minimum of practical information to offer a competitive service.</p> <p>Materials:</p> <ul style="list-style-type: none"> • Attendance sheets • DOC3-7 • PPTs • WISE service sheet
90'	

Duration	Description
30'	<p>Finances</p> <p>Introduction</p> <p>The lecturer welcomes everyone and ensures that everyone has signed the attendance sheet. He explains that the focus of this day's lecture will be working on our basic financial skills, to ensure that all emerging WISEs will be able to make beneficial decisions.</p> <p>They use the (PPT_4) to explain the main areas of a company's financial statement.</p> <p>(This section is HEAVILY dependent on local legislation, so ŠENT advises that the partner offering the lesson uses their in-house accountant or financial advisor to advise on the topic).</p> <p>Budget</p>



45'	<p>The first and most basic topic of any financial discussion is understanding a budget. Participants are given a yearly report (DOC_8) and are asked to explain:</p> <ul style="list-style-type: none"> - Yearly income - Outcome - Labor costs - Deferred costs - Understand each category. <p>The lecturer or assistant show the actual results and explain the categories and why they might differ from participants' estimates.</p> <p>Short recess</p> <p>Budget & expenses</p> <p>This section is meant to illustrate the functioning of an enterprise, financially, on a more realistic basis. Participants are provided with an account card with fictional values. They are given a financial report for this fictional WISE to fill out (DOC_9). After 25', the lecturer explains the classic issues in understanding monthly financial flow and how a WISE operate with regards to aid. They follow the PPT and explain:</p>
15'	
60'	<ul style="list-style-type: none"> 1) Variety of expenses (why so many?) 2) Sources of income 3) Labor cost differentiation 4) Non-assigned costs 5) Material costs 6) Service costs <p>The lecturer and assistant conclude that now that the participants have the overview of yearly and monthly financial flow of a WISE, we can move on to WISE specifics.</p> <p>Short recess</p> <p>Government aid mechanisms</p>



	<p>(This section is to be adapted to local legislation). The lecturer uses the PPT to introduce the Quota system, the labor financing mechanism, the benefits system etc.) This is a pure lecture, based on a practical example to illustrate different types.</p>
	<p>Lunch</p>
15'	<p>Financial costs specific to WISEs</p>
60'	<p>In this section, the lecturer presents costs specific to WISEs. Costs of accommodating workspaces, costs of receiving work efficiency estimates, costs related to absences etc. (Again, this information is localised to Slovenia, but should be adapted locally).</p>
	<p>Conclusion:</p>
60'	<p>The lecturer thanks everyone for attendance and explains that the knowledge presented today should give the participants enough basic know-how to at least recognise risks and find appropriate further education.</p>
	<p>+ practical demonstration of financial work</p>
60'	<p>+ understanding financial documentation connection to business strategy</p>