



FINAL PUBLICATION

INTELLECTUAL OUTPUT 4



Co-funded by the
Erasmus+ Programme
of the European Union



INTRODUCTION

The social and solidarity economy (SSE) is focused on the human being. SSE activities are geared towards goals of solidarity and social utility. Over the past two decades, we have witnessed significant changes in Europe in terms of how services for disadvantaged groups are organised and delivered, particularly for people with disabilities. These services now have to take into account new elements such as social inclusion, respect for the basic rights of the beneficiaries, the opening up of services to the social environment and proximity to the community. These new elements have a bearing on the skills required from professionals working with people who have specific needs, and also in terms of the management of services and the structure of leadership bodies.

This need for training and professional development can be seen as part of a broader perspective which concerns the SSE as a whole. More than ever before, the people responsible for delivering these services (senior/middle managers and leaders) require high-level training within 'agile' organisations which are able to effectively manage change and deliver quality services to the beneficiaries, in accordance with their rights and prerogatives.

Following an initial analysis of the various professional training systems available in the social sector in Europe (the COMCADES project), a group of



organisations in the [ARFIE](#) network undertook to work on a new, innovative project ([COMCADES-2](#)) with the aim of analysing the training needs for the social sector, and of developing a European-wide professional training model aimed at the managers and leaders of ESS enterprises operating in the field of disabilities (health and social) and to then test this model in pilot schemes in each country taking part.

Three years and many hours of work later, we are pleased to present the results of this 'adventure' which we have named COMCADES-2, as told by the participants.

1. OVERVIEW OF THE DIFFERENT NATIONAL TRAINING AND CERTIFICATION SCENARIOS FOR THE SSE

The social and solidarity economy (SSE) is a sector made up of multidimensional organisations whose entrepreneurial approach reflects the values of transformation and innovation, both on a social and economic level and, more generally, societal transformation with a view to achieving social equity and economic harmony. Through their fundamental philosophies, these organisations defend the principles and values of sharing, ethics, democracy and social responsibility. They are also undergoing a transformation in terms of the sources of finance, management and the intensification of private-sector competition; this is creating a specific need for the professional development and upgrading of the skills of leaders in the sector.

Back in 2008, the project GRUNDTVIG COMCADES (Specific Competencies for

Managers and Leaders of the Social Economy) highlighted the diversity of training scenarios, through the lens of managerial training focused on social intervention. This project showed:

- That it is more important than ever before to train the managers of these leaders within 'agile' organisations, capable of facilitating self-expression and creativity and managing change;
- That the diversity of training provision for managers with a focus on social intervention – taken individually in each national context, to the extent that such provision exists – has almost no common frame of reference;
- The areas of specific expertise for social sector managers need to be developed by means of a common frame of reference for training, in order to remedy the weaknesses in the existing training provision at European level.

The SSE environment is currently undergoing major changes: there is a trend among inclusive societies towards the decomposition of sectors in certain countries; elsewhere, the structures are growing in size and service enterprises fulfilling support functions are growing as a result. This implies a review of the role of the administrators and an evolution of governance which is finding it hard to reconcile both ends: the quality of the support/relationship with service users and the management models. In the medical-social and socio-sanitary sector, there is

also a trend towards de-institutionalisation, which requires the development of outreach services provided directly at the user's home. This is highlighting the need to adapt the skills of service operators and leaders/managers to include multiple skill areas, particularly in the social sector and legal constraints, social support for service users, the management of commercial enterprises with all the constraints of a competitive market, marketing, financial equilibrium, investment, entrepreneurship, innovation and adaptation to change.

All of these things, as well as the extensive study process undertaken with the target groups during the first phase of the project, have highlighted the need to work to ensure that the profiles of SSE managers are updated in terms of the skills available to them so that they can manage change in a way that is innovative and profitable for the organisations and in particular for the beneficiaries. Service users need to receive high quality services adapted to their needs and which represent the founding values of SSE enterprises: namely putting the central focus on the individual user, as the co-player/co-producer of the project in order to guarantee inclusion and acceptance, particularly with regard to the most vulnerable groups such as people with disabilities and the elderly.

After a series of European studies, such as "Social enterprises and their ecosystems in Europe. A comparative summary" [1] published by the European Commission, the

main challenge appears to be that of reinforcing the new stream of entrepreneurial thinking, by drawing on a variety of skills balanced across a range of functions, the capacity of these enterprises to gain a broader awareness of the organisation's social purpose and of horizontal and inclusive governance, focusing on the mission of the services that the key roles, senior and middle managers and leaders need to develop. This requires continuous adaptation, innovation and a willingness to embrace change. In this regard it would be helpful to underline the importance of providing support to SSE managers in terms of designing and planning collective approaches to decision-making and teamwork, which take into consideration the efficient, long-term participation of the people involved. Allowing managers and people in roles of responsibility within the sector to find space to share and discuss their experiences at European level may provide leverage.

In this regard, middle managers also require skills in business development and strategy, the development of methodology, impact analysis and in how to manage a broad spectrum of stakeholders, including clients, staff and volunteers. While professional development is on the increase in some countries, constant efforts are required to update skills and key roles, as is the case for managers, who play a central role within organisations. They must be able to give a response in terms of offering direction to the organisation but also to their co-workers, particularly in high-pressure settings such as welfare, which is particularly exposed to complex and critical issues such as during the COVID-19 pandemic.

The question of updating and adapting managerial skills is particularly important, as the process through which roles are allocated does not always require people to have had management training before working as part of a management team. In many cases, the career path within the organisation is based on length of service or development programmes, and allows managerial roles to be given to people who were previously working as educators, nurses or social workers. Investments thus need to be made in terms of skills acquisition, with a global vision that encompasses values, organisational management, economic and financial management.

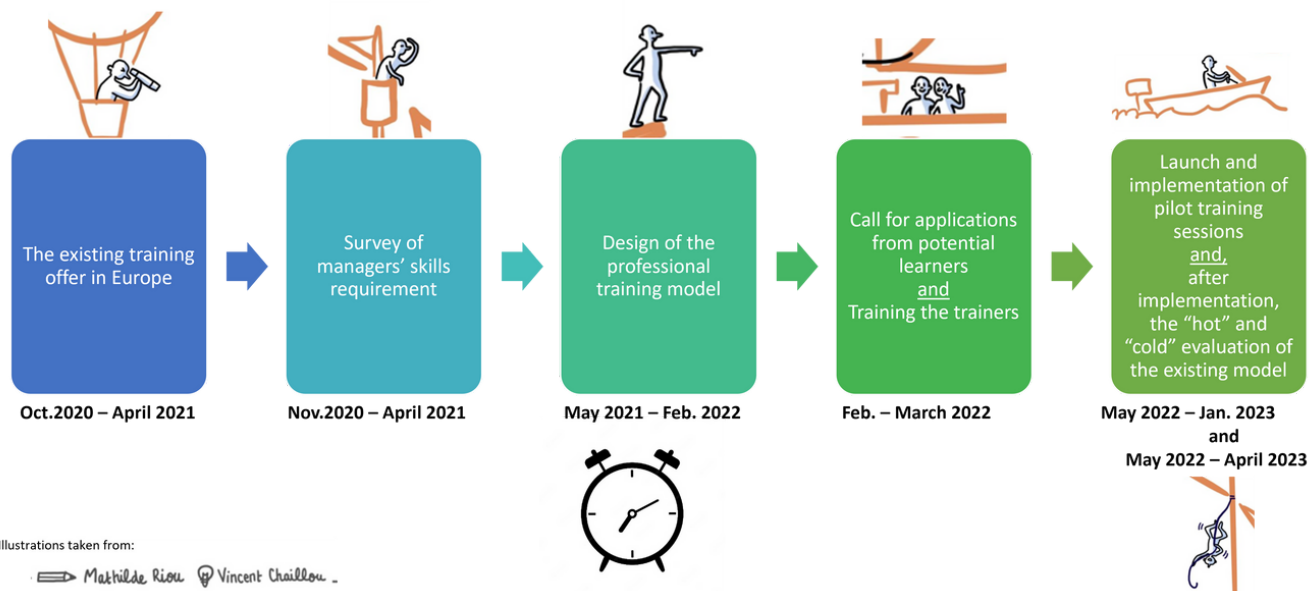
[1] <https://www.google.com/url?sa=i&rct=j&q=&esrc=s&source=web&cd=&ved=0CAIQw7AJahcKEwjQmuv1j4WBaxUAAAAAHQAAAAAQAg&url=https%3A%2F%2Fec.europa.eu%2Fsocial%2FblobServlet%3FdocId%3D22384%26langId%3Dfr&psig=AOvVawOR8KcSVopECuq2HcpXvGc5&ust=1693510367327412&opi=89978449>

During our research, we did not find a “European perspective” in any of the training systems in the EU countries we studied; in other words the skills framework aimed at improving the positioning of SSE organisations in a European context, requires a generic knowledge of ‘social’ Europe, its legislation and EU policies on the circular and social economy, particularly with regard to the rights of people with disabilities, the UNCRPD and finally EC priorities and, more generally, the ecosystem of European cooperation in the field of social and medico-social services. It is thus important to support SSE managers, particularly in terms of their managerial roles, so that - beyond national contexts and internal regulations - they can focus their action on co-production, innovation and constantly seeking to adapt to changing paradigms and guidelines on the one hand, and quality of their work on the other.

It is essential to centre this study on the managers’ expertise, knowing how to act and knowing how to be, whatever their position within the organisational chart (on-the-ground or strategic level) in an innovative and evolving European context.



Key moments in the project engineering process?



2. THE AREAS OF COMPETENCIES

The target of the COMCADES-2 project consists of directors, managers, leaders and in general anyone with managerial responsibility within the SSE. The areas of responsibility within this sector are very broad but can be described as follows (this is a non-exhaustive list which depends on the level of responsibility within the organisation):

Areas of responsibility - General competencies :

- Steers the project of the organisation for which they are responsible, while partnering with all the stakeholders in a cooperative, co-productive approach
- Participates in the strategic thinking processes within the organisation.
- Manages one (or more) employment collectives or social groups.
- Participates in the preparation of the budget, negotiations with lenders and clients/originators; also monitors the available resources (financial, material, human).
- Oversees the performance of their organisation while allocating its results to its social object (= inclusion of the service recipients).
- Within their organisation, they are stewards of the quality of the service offered and given to the service users.
- Willing to seek new sources of finance.
- Represents the organisation externally and to achieve greater transparency for the SSE in their region.
- Cultivates the partnership network based on a good knowledge of its ecosystem, with a view to making a long-term societal and environmental impact.



Areas of responsibility - Specific competencies (linked to the general competencies):

- Act as a carrier and transmitter of the ethics and values of their organisation.
- Interested in new socioeconomic data such as the circular economy.
- Surrounded by team members with adequate skills; also adapts to the existing teams.
- Open to discussion of working practices, also at European level.

On this basis, and based on the information gathered from the European survey and multiple focus group sessions with all the stakeholders concerned, the partnership has developed a European training model which is linked to a professional development programme aimed at SSE directors and/or managers operating in the social, medico-social and healthcare areas, at European level.

3. GENERAL AND OPERATIONAL OBJECTIVES OF TRAINING (THE MODEL)

At the core of the COMCADES-2 project is the training model, which is the result of efforts by all the partners downstream of its preparation and implementation in pilot sessions.

Developments in the context specific to organisations operating in the sector of disabilities and more widely in the social, medico-social and healthcare fields at European level, have an impact on the competencies which are expected from directors and managers. The work already started during COMCADES 1, and which has been updated during this project, has enabled the identification of mutual concerns at European level relative to the SSE and thus to the collective expertise and managerial skills that require development. The work completed as part of the 'Intellectual Output', namely the analysis of the different scenarios for training and certification in the context of the social and solidarity economy, has enabled the fine-tuning of these observations, and the highlighting of the additional points listed below:

- Inclusive society - Trend towards decompartmentalisation of sectors, the need to develop multi-disciplinarity by linking different professional backgrounds (protection of minors, the fight against exclusion, health, disabilities etc).
- Increased size of support structures, with the need to work with multiple centres or services - Development of support functions - Reinforcement of management rationales.
- Trend towards de-institutionalisation - this involves the development of outreach services, provided at the users' homes or in other locations and spaces they may visit; it highlights the need to adapt the operators' skills and the approach to service users/clients.

These transformations are impacting the work of senior and middle managers, and therefore there is a need to find a balance between the quality of care provided to users, and the economic equilibrium of the support structure.

The training model developed by the COMCADES-2 partnership is aimed at laying the solid foundations of a training model for SSE managers, both senior and intermediate, operating in the social, medico-social and healthcare sector in the European Union. Behind this project, there is the desire to contribute to the concept of a form of 'social Europe': to create a European network of SSE decision-makers who can in turn share and disseminate all the values and instruments used in this sector. This framework for professional training will complement the European dimension, as a main axis of training: it is about enabling the learners to fully grasp the issues, rationale and strategic resources involved.

One of the issues is to develop a training offer that will develop the knowledge, know-how and 'knowing how to be', in an approach based on knowledge sharing at European level, along cross-disciplinary lines and based on specific strategic managerial and participatory skills that reflect the values of the SSE:

1. Cross-disciplinary competencies

Professional role

Enrichment of professional role through the exchange of practices.

Questioning individual roles and functions in a participatory, co-constructive approach.

Knowing your limits, delegating, demonstrating adaptability.

Managing uncertainty and adapting to crisis situations and risks.

Updating knowledge and engaging in lifelong learning.

Social and partnership innovation

Being creative in constantly-evolving situations.

Using collective intelligence in matters of governance and teamwork.

Promoting inclusive, participatory and co-productive practices.

Developing a cross-sector, multi-disciplinary approach to providing support for the target users.

Growing professional networks on a European level.

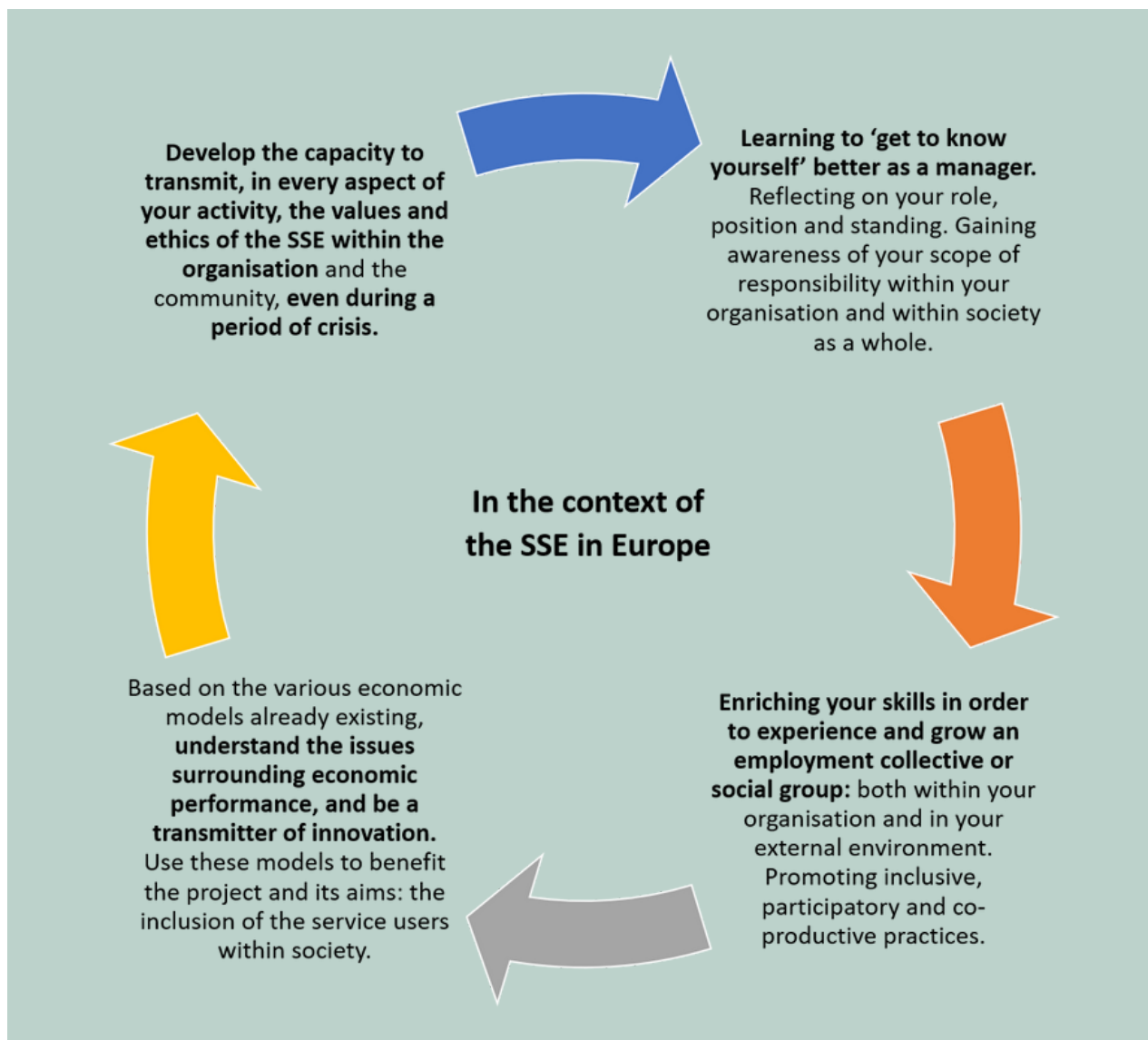
2. Specific managerial, strategic and participatory competencies:

This content is part of the enrichment of practices and of developing skills at European level. The starting point for this part of the offer is a 4-module programme, in the form of 4 sessions, each lasting one week (total training: 120 hours).

The working titles for these modules are:

1. The design and strategic leadership of a project
2. Governance and management of human resources
3. The economic and financial management of an association, establishment or service
4. Social intervention in a community, during a public health crisis

Hence all the organisations taking part in the project would like the target audience to rely on the managerial competencies (knowledge, know-how, know how to be, know how to act), as indicated below:



4. THE COMCADES2 TRAINING PROGRAMME

The COMCADES2 training programme is aimed at implementing the training model. It is built around 4 modules, which focus on the topics considered as priorities in the management of an organisation.

Module 1 - Designing and leading a strategic project.

Designing and leading the strategic and operational aspects of a project in the SSE sector.

The focus of the first module is on building and implementing a project - in strategic and operational terms - which is innovative, applies to the specific SSE context in Europe and is measurable in terms of impact (economic, social and environmental). The learning objectives specific to this module will give future trainees the ability to:

- Actively contribute to strategic or operational thinking within their organisation—thinking which is intended to respect the values of the SSE.
- Know how to prepare a 'diagnosis' (organisation, population) and carry out the strategic and operational 'questioning' of their organisation's project, by putting to good use the stakeholders' capabilities at the various stages of co-production of the project (from the clarification stage through to its evaluation).
- Consolidate the knowledge and application of the methods and tools of co-production, and the methods and tools used in evaluation and in measuring social utility.
- Benefit from the European scale of the training project, by drawing on international experiences and developing their capacity to identify useful experiences from the local, national and European context.

Module 2 - Governance and management of human resources: create and grow social groups and employment collectives.

The focus of this module is the professional role, and the capacity to convey and transmit the values of the social solidarity economy into the day-to-day management practices. This implies, in particular, a discussion about a form of governance that respects the organisation's strategic project, and the reinforcement of empowerment among its collaborators.

Module 3 - The economic and financial management of an association, establishment or service: Adopting responsible, durable management techniques.

The focus of this module has been on understanding the economic and financial issues which are relevant to the SSE in Europe, in order to favour the provision of quality care and support both today and tomorrow, so that learners can:

- Fully understand the economic, financial and logistical issues concerning their organisation.
- Easily track the activities and growth of their organisation, based on key data (indicators). Measure the economic impact of the organisation, using digital and/or electronic tools, as far as possible.
- Master the use of innovative techniques and tools to source funding (or co-funding).
- Reinforce the capacity to evaluate the resources required by the organisation to launch its project.
- Reinforce the capacity to negotiate those resources, whether they be internal or external.

Module 4 - Social intervention in a community in the context of a public health crisis. From crisis to recovery: the quality and innovation of social intervention in the community.

The objective of this module has been to learn, with distance and hindsight distance, the lessons arising from a crisis such as the Covid-19 pandemic, in order to pursue social intervention in a durable long-term perspective at the local level, so that the learners can:

- Identify their ecosystem on different levels (local, national and European) and locate the internal and/or external resources which can be used in the long term (partnerships, certifications, labels etc.), even during a public health crisis, in order to secure their organisation's long-term future.
- Identify the opportunities, limitations and risks faced by their organisation in this ecosystem, in a scenario such as the Covid-19 pandemic.
- Whatever the context, remain able to continue to innovate and promote the expertise of their organisation in order to provide a quality service to the beneficiaries.
- Learn to bounce back from a crisis, both professionally and personally; show resilience and the capacity to anticipate.

5. IMPLEMENTING THE TRAINING PROGRAMME: RECOMMENDATIONS FOR EACH COUNTRY TAKING PART IN THE TEST

The training model and programme developed as part of 'Intellectual Output No. 2' were tested in pilot schemes as part of training events (mixed mobility).

After developing the training model, the partnership also developed a suite of training modules in order to test the model's efficacy in a real training scenario, and to gather feedback and information in order to identify any weaknesses or areas requiring improvement/correction:

- Module 1: Designing and leading a strategic project in the SSE sector;
- Module 2: Governance of human resources;
- Module 3: Managing the economic, financial and logistics aspects of an establishment or service;
- Module 4: Management of risks (including medical risks) and the quality of the service rendered to users.

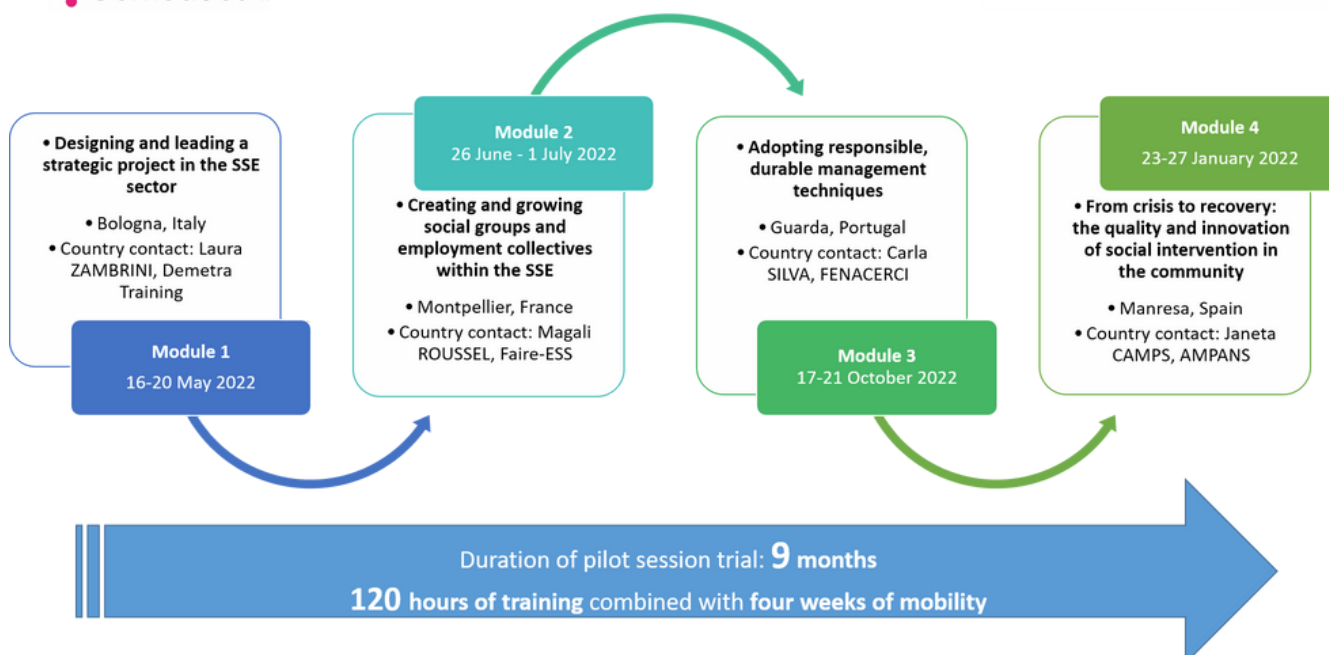
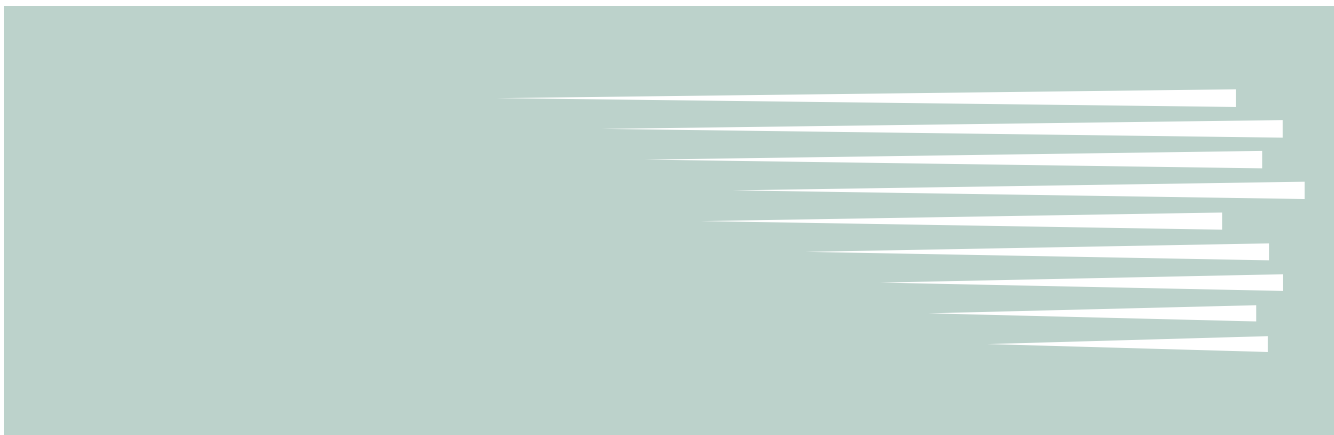
The content of these models was also pre-tested by the partnership during a Short Term Training session for trainers, which gave the partners the opportunity to revise the modules and organise their development with the trainers who took part. The pre-test session was a crucial moment in finalising the organisation and rollout of the pilot schemes and in terms of adding the key elements to make them more effective:

- A glossary of the main concepts, to be handed to the learners before the pilot sessions and produced with contributions from all the partners;
- A 'good practices' discussion to be held during each pilot session, to encourage learning through different experiences: In each module, 4 learners (different ones for each module) were tasked with presenting their experiences from their own organisations, in relation to the topic of the module;
- The identification of experts in the module topics, who were asked to intervene in the training sessions.

Each training module involved sector experts and was enriched with a series of on-the-ground visits so that the learners could see the aspects they were studying in practical contexts, and discover a different way of managing an SSE establishment. The learners also participated directly in each each module, by presenting good practices from their regions, in relation to the topics of the training module.



The pilot sessions were then evaluated from three different perspectives, to gain feedback from the learners, trainers and partners involved in the project. The pilot sessions and evaluation processes yielded important feedback, enabling the updating of the training model and programme and also helping to draw conclusions on the COMCADES-2 experience and the training set up.



CONCLUSIONS

COMCADE-2 was conceived in order to respond to the questions posed by the COMCADES project from 2008. The project recommendations are that:

- Managers of social enterprises should be trained in “agile” organisations which can facilitate self-expression and creative contributions, generating change.
- The diversity of training scenarios in the context of the SSE has almost no common framework.
- Specific skills need to be developed in the context of a common training model, to remedy the lack of existing training provision at European level.

The aim of the COMCADES-2 partnership is to take up the baton and lead an action with the aim of:

- Analysing and comparing the issues and impacts of the SSE in the various European countries.
- Advocating a new European training model to benefit a “new governance” with the accent on an inclusive, co-productive approach.
- Give a European profile to SSE managers.

Three years and many hours of work later, we can now say that COMCADES-2 can be seen as a good practice in terms of social innovation at European level. COMCADES-2 has been:

- An experimental training project in the field of the social and solidarity economy, specifically in the area of supporting people with disabilities.
- With European partners from 6 different countries: Belgium, Spain, France, Italy, Luxembourg and Portugal.
- With learner-managers and trainers also from 5 different countries, each with their own individual skillset and unique professional background.
- Plus a strong desire on the part of all stakeholders (employers' federations, employers, managers, learner-managers, trainers and contributors) to anchor this experiment both in the real professional environment and in a response that closely fits the needs of the managers, to be developed along with the chosen theoretical and methodological contributions.

This experience has involved a team of training professionals from the social sector, who have worked without interruption for three years in order to build and deliver a training model for social enterprise managers.

“Specific skills need to be developed in the context of a common training model, to remedy the lack of existing training provision at European level.”

“With the aim of contributing to the thinking behind a ‘Social Europe’, in other words a European network of SSE decision-makers who can share and disseminate the values and instruments used in this sector, one possibility would be a form of horizontal training”

It is hard to envisage a single training type that could apply to all ‘duty bearers’ in the social sector in Europe, as the differences between countries and regions are often profound. During the research project, it was not possible to identify a “European perspective” in any of the training systems in the EU countries considered; this means that the skills framework, in order to optimise the positioning of SSE organisations in the European context, requires a general knowledge of the ‘social’ in Europe, of European laws and EU policy on the circular and social economy, especially with regard to the rights of people with disabilities, the UNCRPD and also EC priorities, and more generally, the ecosystem of European cooperation in the field of social and medico-social services. With the aim of contributing to the thinking behind a ‘Social Europe’, in other words a European network of SSE decision-makers who can share and disseminate the values and instruments used in this sector, one possibility would be a form of horizontal training based on the fundamentals of managing an organisation, in the UN Convention, the fundamental rights of Europe and the action guidelines issued by Institutions and Member States, such as the European strategy for people with disabilities; this could be enriched by on-the-ground discussions and visits in order to give a concrete dimension to management, applied to the specific reality in each country. These discussions and exchanges are among the strengths of this project, and have allowed us to see how managers in the social sector operate in the participating countries, thus improving the professional standing of the learners, with regard to:

- Learning to ‘get to know yourself’ better as a manager. Reflecting on your role, position and standing. Gaining awareness of your scope of responsibility within your organisation and within society as a whole
- Enriching your skills in order to experience and grow an employment collective or social group, both within your organisation and in your external environment.
- Promoting inclusive, participatory and co-productive practices.
- Based on the various economic models already existing, understand the issues surrounding economic performance, and be a transmitter of innovation. Use these models to benefit the project and its aims: the inclusion of the service users within society.
- Developing the capacity to transmit, in every aspect of your activity, the values and ethics of the SSE within the organisation and region, even during a period of crisis.

The work done in connection with COMCADES 2 has pinpointed and affirmed the priority areas for the construction of a European training pathway for SSE professionals:

- *The need for professionalisation:* The SSE sector, and specifically the field of social services for people with disabilities, requires professional roles who must be trained and qualified in order to provide adequate support for the people who need it.
- *Inclusive society:* In view of the trend towards decompartmentalisation, there is a need to develop multi-disciplinarity, by linking different professional backgrounds (protection of minors, the fight against exclusion, health, disabilities etc.) and by favouring the construction of a common language among the professionals specialised in different areas of the service users' lives.
- *The need to strengthen operational logistics:* we are seeing an increase in the size of the support structures and the need to work through multiple centres or services, but also the wider extension of the offer, in order to cater for all the demands for services.
- *The need for an adapted offer, in accordance with the UNCRPD:* there is a trend towards de-institutionalisation, which involves the development of outreach services for the community, i.e. services provided in users' homes or in the places or spaces they attend, and this highlights the need to adapt the skills of the service providers and the approach to the user or "client".
- *The need to ensure efficient economic management without compromising the offer:* the transformations now affecting the social sector also impact the work of the senior and middle managers, and the finances of the support structures. This requires an effective, transparent form of financial and economic management that is open to fully sustainable development models, but without compromising the offer or quality of the service provided.
- *Validating management:* There is a need to highlight the professional role of managers and of service leaders, as well as their complex responsibilities, in close relationship to the quality of the services, by giving a training response that closely fits the managers' skills requirement. Senior and middle managers will have to permanently adapt to the changing contexts and crisis situations such as the pandemic, and to complex and urgent scenarios. This requires agility, creativity or innovation.
- *Promoting on-the-ground exchanges and experiences:* The response must be anchored in real professional environments, particularly in the form of many on-the-ground visits and exchanges of good practices, which must be systematically organised in each module. The exchange of views between professionals, and cross-border exchanges of experiences are key to the enrichment of professionals who have leadership or

management responsibilities. The possibility of discussing experiences with other professionals at European level will help to create a feeling of professional validation, but will also develop a European awareness, in the sector of care and support for people with disabilities.

- *Favouring a hybrid training approach:* There is a need to design a hybrid training model that is adapted to the local context and reflects the full extent of Europe's diversity, but which can rely on the classic European standard of training, enriched by on-the-ground visits and the exchange of good practices.
- *Favouring the visibility of the social sector:* it is important to draw attention - both at political level and in terms of public opinion - as to the importance of acquiring managerial skills in the field of the social and solidarity economy. It will also be possible to enhance the attractiveness of the sector of personal care services, which has seen a decline in the number of young talents since the COVID pandemic.

This framework for professional training will complement the European dimension, as a main axis of training: it is about enabling the learners to fully grasp the issues, rationale and strategic resources involved.



COMCADES-2

(Specific competencies of managers / entrepreneurs in the Social Economy
- Strategic partnership project KA2, project no. 2020-1-LU01-KA202-06325)
is supported by the Erasmus+ programme of the European Union.



Erasmus+

The European Commission's support for this publication does not constitute an endorsement of its contents, which only reflect the opinions of the authors.

The European Commission may not under any circumstances be held responsible for any use which may be made of the contents of this document.