



Training Guide

Senior managers of social and solidarity economy organizations

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1. Scope - Management training for SSE organizations ¹

The social and solidarity economy is by its nature a diverse and dynamic sector whose DNA blends fundamental values such as social/economic transformation and innovation with social equality and economic symmetry being its main currency. Building on these foundations, it defends the principles and values of sharing, positive, co-production, ethics, democracy, and social responsibility.

These organizations are currently facing several extreme and demanding challenges, particularly in terms of how they are funded and managed. SSE organizations are operating in an extremely pressurized environment. This situation is now becoming even more complicated, as we are seeing an intensification of competition with the private sector, which is creating a specific and emerging need for the professionalization and leveling-up of management skills. Additionally, there is an internal need to adapt the service provision, not only to fit the specific characteristics of the main service users – through personalized, human approach and by maintaining or (hopefully) improving service quality – but also to fit the new paradigms of social intervention in which these organizations are operating.

Based on conclusions drawn from various studies and reports conducted in ^{2 3} this particular area, which discuss the diversity of training initiatives by social operators, it is easy to see that these specific frameworks must be put in place within the context of training actions for the leaders of agile learning organizations, to allow them to effectively manage their processes of change. Creating methodologies for co-participation and co-responsibility, in the sense of training opportunities that can generate new models of governance.

Essentially, there is no common European framework of reference with a principal and specific focus on these management frameworks. Consequently, the construction and validation of this framework will bring great added value to the sector, by giving these organizations a coherent positioning within a competitive market. It will also help to internalize knowledge and skills which are key to their development and their contributions to the ecosystem in which they operate. It is crucially important to invest in the construction of a common training pathway, with the aim of reinforcing the managerial competencies of SSE organizations, as this is the first step towards European recognition of this type of training (European Certifications Framework).

The goal in launching this type of pilot training scheme is to promote, from a broader perspective, a culture of professionalization of the sector at the wider European level, but, most importantly, to support management in the processes of thinking about and designing operational forms of collective knowledge, decision-making and teamworking, which take into account the participation of individuals in a sustainable and effective way. The creation of collective learning spaces will improve the organizations' performance in the domain of management, by concentrating their actions on co-production, innovation and the constant search to achieve a balance between shifting paradigms and policies, and the quality of work.

2. Learning Notes ⁴

¹ In "Specific COMpetencies of managers / leaders of the Social Economy II COMCADES 2 – KA2 2020-1-LU01-KA202-063251 Intellectual Output 1 - Study Report on Training for Professional Roles

² COMCADES - COMpétences spécifiques des CADres/entrepreneurs De l'Économie Sociale - GRUNDTVIG 2008 |

³ Social enterprises and their ecosystems in Europe - <https://euricse.eu/en/social-enterprises-and-their-ecosystems-in-europe-mapping-study/>

⁴ In Specific COMpetencies of managers / leaders of the Social Economy II COMCADES 2 – KA2 2020-1-LU01-KA202-063251 Intellectual Output 2 - VOCATIONAL TRAINING FRAMEWORK

Introduction

With regard to the launch of a training pathway intended for the management of SSE organizations, certain aspects must be considered: these may have a direct, indirect, positive or negative influence on the goals to be reached.

First of all, it is necessary to address what appear to be the main issues, namely the way in which the training pathway as a whole is structured; clear identification of the outcomes to be obtained and an elaboration and recognition of the importance of the process of continuous and final assessment.

Structure

The training pathway that has been developed and validated is part of the enrichment of practices and skills development at European level.

It consists of a 4-module program divided into week-long sessions, for a total of 120 hours, 30 hours per module, 6 hours per day. The calendars for each training day will need to be adapted to suit the profiles and needs of the learners, and to the context in which they will be applied. A process of negotiation and co-responsibility will have to be accepted by all parties involved, in terms of the dates and deadlines.

The modules have been designed sequentially, and are based on the following key topics:

- Strategic development and management
Overall objective of this module: 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).
- Governance and management of human resources
Overall objective of this module: Sharing the values and ethics of the SSE in day-to-day working practices – this implies in particular the implementation of a government model that respects the organization’s project, and a reinforcement of the sense of agency and accountability of all stakeholders.
- Economic and financial management
Overall objective of this module: Knowing how to address the economic and financial challenges facing the SSE in Europe, in order to provide quality services.
- Social intervention in a community during a public health crisis
Overall objective of this module: To reflect on the post-pandemic situation and design proactive working measures in order to maintain the performance of the organization sustainably within its community.

Expected outcomes

As the training program is set in a European context, the management teams of the organizations in this sector should, after the 4 training modules, be able to:

- Adopt a reflective approach to the multidimensional, relational aspects of their organization’s diagnostic methods, also with regard to the decision-making and positioning processes.
- Develop collective management strategies and practices which are inclusive, participatory and co-productive, and are adapted to the evolving scenarios;

- Demonstrate a wide-ranging of skills in terms of agility, the management of complexity, the facilitation of self-expression and creativity both by their personnel and by the direct or indirect beneficiaries of the services they provide;
- Develop socially innovative responses to the needs identified in the areas of direct intervention;
- Create and maintain synergies and partnerships among the various stakeholders;
- Propose tools to maintain cohesion between economic performance, the quality of working life within the organizations and the promotion of SSE values, by increasing the organizations' responsibility for environmental and social issues.

It is therefore to be hoped that the target of this training program – the managerial personnel of SSE organizations – will strengthen their knowledge and competencies in strategic management (interpersonal skills, knowledge, know-how, doing and being) and their skills in participatory management, while respecting the principles and values of organizations in this sector.

Evaluation

Evaluation plays a fundamental role in training processes, as it fulfills multiple functions which are essential for successful, effective learning. It is a tool that allows the measurement of expectations, the advancement of knowledge gained by the learners, identifies gaps in knowledge and provides constructive feedback as well as advice on how to improve performance.

Evaluation also plays an important role in motivating the learners, by helping them to set clear objectives and expectations and by recognizing their efforts and achievements. However, the evaluation processed must be meticulously applied in order to stimulate learning and the acquisition of knowledge, and should become an essential part of the process of promoting continuous development and excellence in the training pathway.

In recognizing the importance of assessment within a training process, the following procedure has been designed:

□ Trainers

At the end of each module, the evaluation will take the form of a questionnaire, which will address very different questions such as: the learning methods used, an evaluation of the logistical conditions and available resources, the performance of the learners, the meeting of expectations and the obtaining of feedback for future courses.

□ Trainees

The learner evaluation process should be divided into two separate stages, namely:

- On-site evaluation on the last day of each training module

Methodology: A round table will be organized, based on the following questions: What in your opinion is the main added value of this training program? What are you taking away from it? Which questions about the topic of study have remained unanswered?

To ensure that this methodological model works properly, the learners must be allowed the time they consider sufficient to prepare their responses. The responses can either be written on Post-it notes or

provided in another way, considered most appropriate in the context. They must be collected by the training managers and/or the trainers.

The learners must also fill out an on-site evaluation questionnaire which will be included in the learning file.

- Further evaluation

Methodology: The training leaders, in collaboration with the trainers, will set up a discussion group with the learners. This methodology can be applied in-person or with the use of the new technologies. The primary aim is to set up a shared process of self-evaluation, focusing on the evolution of individual management skills and the impact of the training on the performance of the individual and/or of the organization.

3. Recommendations

Profile

○ Trainers

The role of the trainer in the context of this training program should be the subject of a joint reflection, between the trainer and the leadership team. A number of prerequisites need to be met, to ensure that the set objectives are reached effectively. A working meeting between these two key players is recommended, so that the desired learning impacts can be verified.

Trainers should also systematically facilitate the sharing of European practices and link the course content to elements of European policy in order to reinforce and level-up the learners' knowledge of the main European policies and guidelines in the area of the SSE.

It is very important that the trainer considers the characteristics of each learner, and recognizes and accepts that people learn at a different pace. The trainer must also be extremely aware of logistical issues such as the conditions in the setting, the ambient lighting, resources and other key elements.

You must also have the following skills:

- Have recognized knowledge and experience in the topic under discussion;
- The capacity to use diversified learning-training methods, adapted to the characteristics of the learners, to help them to consolidate their knowledge;
- Support the creation of co-productive group dynamics
- Act as facilitator for the acquisition and consolidation of knowledge
- Allow for frequent opportunities for shared reflection and encourage/support the learners in their search for knowledge

After this training was applied in a real-life context as part of a joint, multidimensional process of reflection (involving the training management team, the trainers and the learners), the following considerations also emerged:

- Introduce opportunities for comparative analysis during the course of the training process;
- Improve the creation of future employment networks among learners, which is desirable and, if possible:
 - Invest in practical exercises;
 - Find a balance between theory and practical learning;
 - Create regular opportunities for relaxation and refocusing;
 - Encourage the learners to discuss work tools and methods;
 - Apply interactive group approaches to learning and training, and co-production;
 - Encourage the sharing of good practices from the perspective of social innovation – be a creative space and an incubator for new ideas.

○ Trainees

This training offer is designed to be vocational training and is therefore primarily addressed to whole of the organization's existing management team (senior and/or middle managers), whose areas of responsibility can be summarized as follows (this list is non-exhaustive and depends on the level of responsibility within each organization):

- Areas of responsibility - General competencies:
 - Steers the project of the organization for which they are responsible, while partnering with all the stakeholders in a cooperative and co-productive approach.
 - Actively participates in designing the organization's strategic plan.
 - Leads one or more work teams.
 - Participates in preparing the budget, in negotiating with financiers, monitors the resources (financial, material and human) used by the organization.
 - Ensures that the organization is fully performing, while allocating the profits to its social purpose.
 - This is a key element in assuring the quality of service provision.
 - Elaborates fundraising strategies.
 - Represents the organization and works to make the SSE more visible in its community.
 - 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:
 - Respects the ethics and values of the organization.
 - Interested in new socioeconomic developments, such as the circular economy.
 - Equips the organization with human resources who have
 - adequate skills to deliver a quality service;
 - Interested in developing exchanges and sharing experiences nationally and at European level.

When selecting the candidates, a set of essential requirements must be identified; taking into account the different professional backgrounds of the candidates, these prerequisites may differ from one context to the next. The recommended essential requirements are:

- A degree or other secondary education diploma (baccalaureate or higher);
- Occupy a position with management responsibility and significant experience in this area (three years or more);
- Willingness to actively participate in the entire training pathway – 4 training sessions;
- Be interested in sharing their experience and in enriching their practices on a European level.
- Have an interest in learning about collaborative methodologies and tools.

Resources

As the area of intervention in which the managers will be operating is undergoing continuous and extensive changes, the same also applies to the processes and methods of continuous learning. In order to include in this training pathway a set of resources has been identified in order to introduce an innovative component for the sharing of good practices and collective involvement. After being duly validated in the context of the pilot training, these resources have clear benefits in the pursuit of the objectives to be reached.

A series of methodologies and strategies are presented below. This is in no way intended to be a list of the strategies which will actually be applied. Specifically:

- The training leadership team must provide the trainers and the learners with the international and European policies on the topics examined;
- During the training process you are required to create a space for systematic sharing of innovative/inspiring practices, which draw on the learners' responsibility - the Trainer must include, in the session plans for each module, specific opportunities for this activity and must create a working tool to identify and present the practice in question;

- To ensure that the content has a European perspective, the trainers should be asked to systematically create links between the European directives and the on-the-ground reality.
 - Favor the sharing of conceptual and methodological contributions on the co-productive and participative approaches within Europe.
 - Appropriation of tools (e.g. map of stakeholders, Gantt diagram etc.) through simulations, proposed either by the trainers or by the learners.
 - Videos to be used to share innovative European experiences in this area.
 - Provision of a bibliography and/or reference works on the topic.
 - Theoretical exploration of key concepts.
 - Problem-situation analysis/role-plays
 - Contributions concerning points of reference, methods and tools.
 - This might include success stories about the introduction of useful digital tools.
 - Advice may be given on how to source funding for digitalization projects.
 - Field visit, as an integral part of each module as such (one learning method among others): The partners have agreed that these visits are an important learning tool in terms of reaching the following objectives
 - Creating high-level opportunities for exchange among the participants and local organizations (peers in operation, also in the SSE sector)
 - Supporting the co-production of ideas
 - Favoring the generation of project ideas – social innovation
- Among others.

Structure of the learning pathway

After this training was applied in a real-life context as part of a joint, multidimensional process of reflection (involving the training management team, the trainers and the learners), the following considerations also emerged:

- Keep the same training leadership team;
- Form a diversified pool of trainers;
- Design a training pathway that is sequential, cohesive, and coherent, avoiding repetition in the content of the learning material;
- Form a homogenous group of trainees;
- Elaborate an individual learning plan: this is a plan designed to allow the student to put their knowledge into practice so that the impact of the learning on work performance can be evaluated in a pragmatic way.

4. European recognition of the training cycle⁵

Scoping

- In 2002, the Copenhagen process⁶ laid the foundations for a systematic approach to reforming vocational education and learning (VET) at European level. This enabled the elaboration of

⁵ Cedefop (2020). Strengthening European cooperation in the field of VET: results from the Riga cycle. Progress made with regard to common priorities for 2015-2020: final report. Cedefop reference series; No. 115.

<http://data.europa.eu/doi/10.2801/79719>

⁶ <https://eur-lex.europa.eu/legal-content/PT/TXT/?uri=legisum:ef0018>

tools and policy guidelines to help the various countries to modify their vocational learning systems.

The national systems have undergone substantial changes, to the benefit of the learners, the enterprises/organizations and society as a whole. Although the objectives, pace and progress will vary from one country to another, the basis for the intervention is the same: recognizing the importance of learning for work, equal access to VET and engagement, and to improve the qualifications of all stakeholders.

- The preamble to the European Council Recommendation on vocational education and training⁷ stipulates that innovative high-quality VET systems should give people the professional, personal development and citizenship skills they need in order to adapt to the processes of transition and to cope with crisis situations and economic shocks, while promoting economic growth and social cohesion. These systems thus provide people with the skills they need to find or create the jobs that meet the needs of the employment market.

A number of countries have already launched initiatives to promote excellence in vocational education and training and to strengthen the bond between VET and the ecosystems of innovation and skills. The concept of professional excellence centers is still under development, with a view to making them global landmarks for training in specific fields, both for initial training and also for continuous career progression and retraining.

Definition of vocational education and training

- "... education and training aimed at equipping young people and adults with the knowledge, aptitudes and skills required in certain occupations and on the employment market in general. The vocational education and training may be provided in formal and informal settings at every level of the European Certifications Framework, including higher education if necessary."

In COUNCIL RECOMMENDATION of 24 November 2020 on vocational education and training (VET) for sustainable competitiveness, social fairness and resilience (2020/C 417/01)

5. Annexes – Pilot scheme training pathway

Scoping

COMCADES is a European project that brings together 11 partners from Belgium, Spain, France, Italy, Luxembourg and Portugal. The project consists of creating an innovative training program on a European scale, for the leaders of the social economy.

In May 2022 the program, designed by the European partners and based on the development of research and exchange methodologies, was the subject of a pilot initiative with the active participation of 16 managers. The main objectives were:

- Knowing yourself as a manager;

⁷ <https://eur-lex.europa.eu/legal-content/PT/TXT/?uri=CELEX%3A32020H1202%2801%29>

- Reflecting on your role, positioning and profile;
- Gaining awareness of areas of responsibility within the organization and the surrounding community in general;
- Promoting inclusive, participatory and co-productive practices;
- Based on the various economic models already in existence, understanding different perspectives of economic performance.
- Promoting the factors of innovation – putting innovation at the service of the organization (mission | vision) to support the inclusion of the service users.
- Applying – in every aspect of the activity – the values and ethics of the social economy both within the organization itself and in the surrounding community.

Before the start of the training process

- Carry out a study – initial vocational training and ongoing training of managers – comparison between the contexts and the emerging and necessary professional skills
- Compilation of a glossary of keywords, to align the various concepts and approaches
- Arranging a series of work meetings for the training leaders, in order to:
 - Design a sequential and cohesive training plan
 - Session plans
 - Define the general learning objectives and the specific objectives of each module
 - Profile of the trainee
 - Profile of the trainers
 - Evaluation processes
 - Learning methods to be used
 - Setting up of the support tools – digital resources and procedures
- Defining and implementing the trainee selection process
- Defining and implementing the trainer selection process
- Learner enrollment form
- Image rights form
- Dissemination of the training initiative
- Training contract between the training provider and the learner
- Training contract between the training provider and the trainer
- Preparatory meetings with the trainers to ensure that the objectives are met
- Before the end of each module – send out a specific program for the module, in which the learner can find full information about: the travel required – how to get there; guidelines on the current pandemic-related restrictions; contact names; information about accommodation; information about the training venue; full program for the module.

During the training process

- Presentation and completion of the learning pathway
- Guide to field visits
- Sample good practices forms to be handed out during each module
- On Day 4, evaluation of training through a questionnaire

After the training process

- Evaluation questionnaires for learners and trainers

- Self-evaluation of the training – coordination meeting to be held with the learners
- General meeting of the training leaders, for evaluation of the training pathway
- Consolidation of the training plan

Training map (see file enclosed)

TRAINING MAP FOR PILOT COURSES

May 2022 – January 2023



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