D.5.1
Pilot implementation and monitoring plan

University of Bologna

PROJECT

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Contents

Introduction

The intention of this deliverable is grounded on the outcomes of SE4Ces project preliminary activities. It will provide the methodology that was step on the developed SE Living-Lab framework and specify how the educational materials has been implemented in the different pilot institutions: defining the roles of all SE Living-Lab participants, the implementation timetables, the reporting periods and any details to be taken into account to ensure the smooth implementation in each location. It also includes instruments and indicators that will help evaluate to what extent the SE Living Labs reach their objectives.

This deliverable is built upon the overall SE Living Labs framework and educational material that were produced in the document under the name D.4.1: Social Economy Living Labs framework.

The responsible partner for pilot implementation activities is the University of Bologna (UNIBO), as one of the four pilot universities of the project. The rest of project partners (apart from the other pilot universities) can provide access to SE organisations that has been actively involved in common academic activities with pilot universities.

In the first part "Our approach", is referring to the overall approach or methodology being used for the SE Living Labs framework.

The second part, "Ignition meetings per countries" is a brief description on positive and negative aspects during each ignition meeting. **The third section** "Results and decisions on the pilot phase per country", suggests that there have been pilot phases conducted in different countries, and that the organisation is involved in analysing the results and making decisions based on those results.

Finally, in the section dedicated to "Expected outputs from the pilots" we will refer to the desired outcomes or results from the pilot phases, such as improved student engagement, increased understanding of social economy concepts, or successful implementation of the SE Living Labs framework.

Last but not least, the chapter focused on **Evaluation** is an important view on the efficiency and the success of pilots.

This deliverable complies to give the methodology that will be based on the SE Living-Lab framework and specify how the implementation will be conducted to ensure a smooth application in each location.

1. Our approach

1.1 SE Living Labs methodology

SE4Ces adopts the tool of the Social Economy Living Labs in order to improve the SE educational offer in HEIs, particularly by reinforcing the collaboration among multiple SE actors, such as educators and trainers, students, SE organizations, umbrella organizations, local communities, etc. The project builds on the *SE Living Labs (SE LL) methodology,* which gives indications on how to carry on this collaborative process. This methodology dives into the core elements of the SE Living Labs' implementation, from the first co-creation moments aimed at defining specific clusters of SE-related topics to the refining and pilot testing of the innovative educational material related to these topics. Also, it explains the different innovation phases and the leveraged approaches surrounding the operationalization of SE Living Labs framework.

It might be interesting to repeat what a SE Living Lab is. It is defined (D. V. Keyson, O. Guerra-Santin, D. Lockton, 2017) as a form of ***multi-actor partnership*** that brings together various SE stakeholders who are involved in Higher Education (HEIs in SE area, students, SE organizations) who join their forces for co-creating and co-testing a set of educational material based on selected SE thematic blocks. One of the final outputs of this partnership will be to offer a basis for a prototype of a joint professional online master's programme on SE that will be launched after the end of the project. The master will include the innovative educational material created, tested and validated during the SE Living Labs.

The Social Economy Living Labs will include different phases and activities, as explained in the previous deliverables. The following figure illustrates visually the different phases and activities of the SE Living Lab.
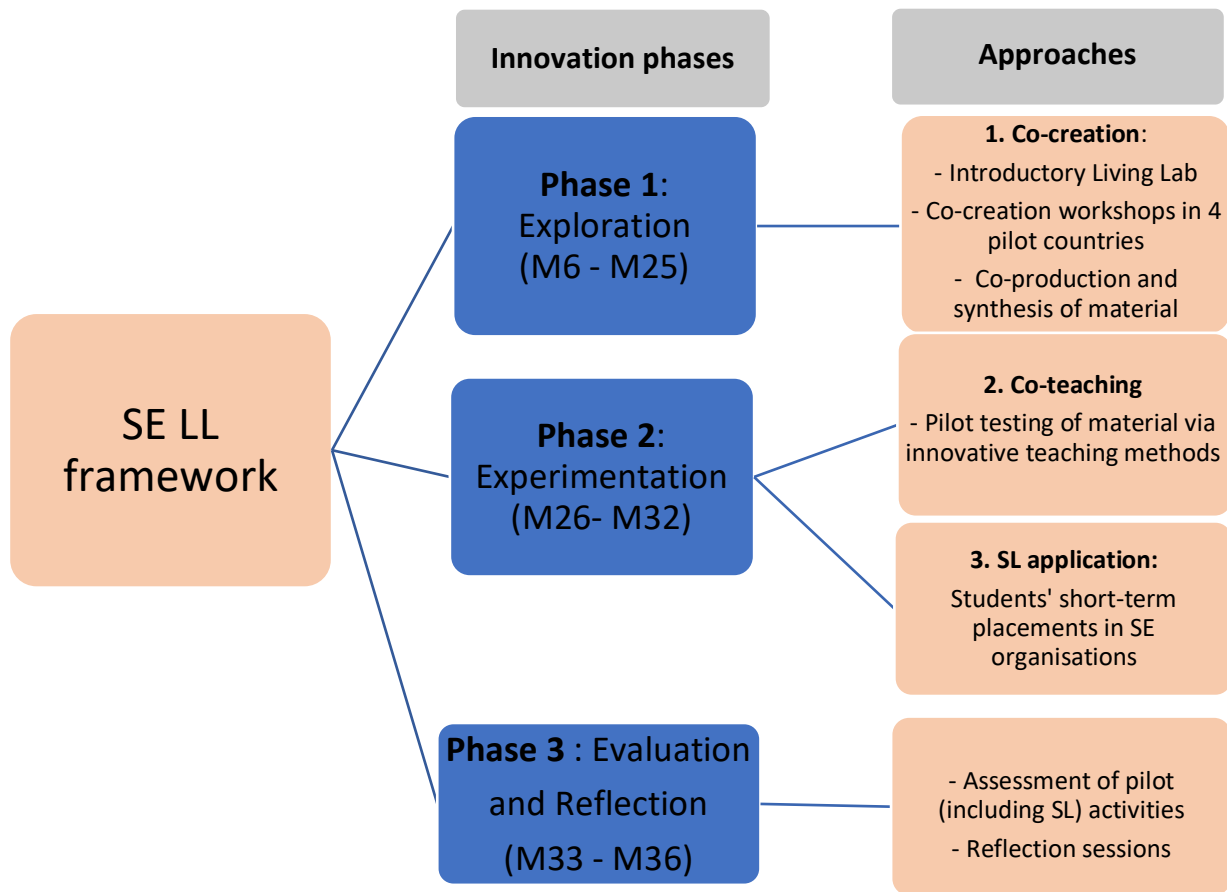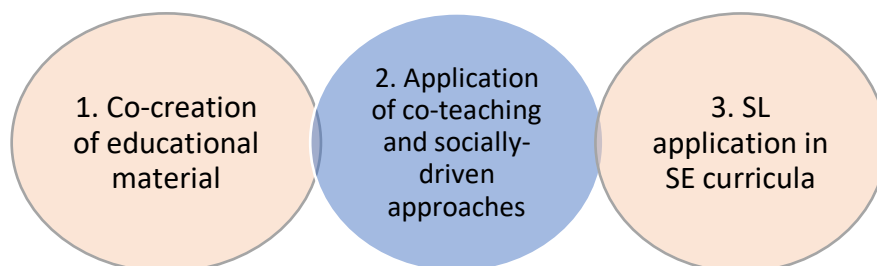
Figure 5 SE Living Labs framework's phases and activities

The framework encompasses three interconnected general approaches for the whole implementation of SE Living Labs, as depicted in the following image.

Figure 6. Approaches of SE Living Lab framework

These phases and activities can be divided into three innovation phases, inspired by Living Lab (LL) theories, as follows: The ***Exploration**, the **Experimentation,** and the **Evaluation***. Following the Exploration phase and the first co-creation activities, the next phase of SE Living Lab's operation is the ***Experimentation***. The approach of co-teaching is the second key element that structures, as approach, the SE Living Lab framework and is related to this phase. The main goal is to enable SE Living labs participants to experiment with the exchange of knowledge/experiences between HEIs and SE organizations, with the purpose of testing socially driven methods of collaborative teaching.

The phase including the ignition meeting and the refinement of the educational material co-created previously is in continuity with the end of phase 1, trespassing into the beginning of phase 2.

Ignition meetings are a type of meeting that are designed to spark new ideas and initiatives within an organization. They are usually held at the beginning of a project or a strategic cycle, and involve a diverse group of stakeholders who can contribute different perspectives and insights. The purpose of ignition meetings is to generate a shared vision, identify opportunities and challenges, and create a roadmap for action. Ignition meetings are often facilitated by an external consultant or coach who can help guide the process and ensure that the participants are engaged and aligned.

The ignition meetings and the following definition of the pilot and monitoring plan is functional to the organization of the experimentation phase, where the material will be piloted. Therefore, these activities can be seen as the preparation for the co-teaching happening in the experimentation phase.

Overall, Social Economy living labs are innovative and participatory approaches to addressing social and economic challenges, promoting collaboration, experimentation, and learning among stakeholders from the social economy sector.

1.2 Co-teaching in Living Labs methodology

Before delving into the critical role of co-teaching for the SE Living Lab framework's operation, it is important to first shed light on some theoretical aspects of this approach, its characteristics, and its popularity in HEIs area.

Based on in-depth research that was conducted under WP4, co-teaching has already begun to be widely adopted as a pedagogical approach in K-12 and in some tertiary learning environments for some decades. However, its practical application in HEIs only recently started to grow in popularity. Regarding its definition, co-teaching is often referred to as team *teaching* or *teaming*. In particular, **co-teaching** has been interpreted as a process where '*two or more individuals come together in a collaborative relationship for the purpose of shared work…for the outcome of achieving what none could have done alone*' (Lock et. al, 2016). Co-teaching has also been defined as '*two instructors who team teach by providing simultaneous instruction to a large group of students in a course over a period of time*' (Kelly, 2018). 2 Co-teaching can also be seen as a form of peer learning.

There can be various approaches to collaborative teaching. The main element is that, in every collaboration (as the partnership of SE actors through the SE Living Lab) including co-teaching, a shift of thinking or role is required. In fact, SE educators, students and professionals will become equal co-learners and actors of the educational process, by shifting into different roles to test both academically and practically the co-designed material under a new teaching perspective.

The actual implementation of co-teaching constitutes an important step towards the establishment of an EU-wide Community of Practice and of the foreseen, pioneering master's programme. As overall, **co-teaching practices aim to facilitate the exchange of knowledge/experiences between HEIs and SE organizations**, with the purpose of testing innovative and socially driven methods of collaborative teaching. This approach has also the advantage of promoting the integration of local and communitarian societal issues into the curricula and the application of problem-based learning opportunities focused on community problems. Co-teaching also enforces the co-creation of academic knowledge.

1.3 The beginning of the experimentation phase

At the end of the exploration phase, the pilot partners (the four HEIs) will take care of refining the co-created material before the testing, considering the suggested ideas of invited

stakeholders from the previous co-creation activities. This phase will be followed by the actual validation of the material during the pilots (experimentation phase). The scope of the refinement process is to help SE Living Labs' stakeholders to review the material and reflect on which collaborative teaching approaches fit better to be tested in practice. In this way, the facilitators and the participants of the pilots will have the chance to proceed with all necessary adjustments according to their local contexts/needs.

The examination of co-creation material' quality and their refinement will be achieved through two preparation activities: 1) the organization of two ignition meetings and 2) a learning mobility training workshop for educators and SE professionals. During these processes, SE Living Labs actors (i.e., professors, SE professionals. etc.) will be trained on the synthesized material and will reflect on the suggested methods and topics before the official pilot period begins.

For the activity of preparation (so called ignition meeting) were divided the meetings into several days to work on the preparation of learning mobility. Events took place in local pilot sites in partner HEIs (Thessaloniki, Bologna/Forli, Bristol and Barcelona) where all identified key SE Living Labs stakeholders to establish a common baseline and produce a comprehensive pilot implementation and monitoring plan.

The ignition meeting 1 will clarify how SE Living Labs will be implemented in the different pilot contexts, defining roles, timetables and details that should be taken into account to ensure the smooth pilot implementation in each location. During these meetings participants will also identify opportunities for linking their community challenges with the educational material produced in WP4 in order to provide a more practical educational aspect.

Overall, Table 3 summarizes the foreseen activities included under the Experimentation phase before the official pilot testing:

1. Synthesis and co-development of educational package - under WP4	2. Validation and refinement of material - under WP5:	3. Learning training mobility (M25) – under WP5:	4. On the ground testing of co-developed material (M25-M32) – under WP5
	2 ignition meetings (1 before and 1 after the learning mobility)	Training workshop for SE entrepreneurs, SE training staff and university teachers **before** the initiation of the actual pilot testing activities.	Professors, students, SE professionals test the co-created material, with the pilot partner's guidance

Table 3. Preparatory activities before the actual pilot testing

In terms of types of co-teaching approaches that will be applied during the pilot activities of the educational package, the sub-section 3.3.3 of the D.4.1 (Living Labs framework) offers indicative examples that were suggested by surveys' participants and can be leveraged by the pilot stakeholders. Additionally, the D.4.2 (*training toolkit*) complements these examples with other mapped ideas through online research, by clarifying the role of each stakeholder in the experimentation phase in which the application of co-teaching/ collaborative learning approaches is included.

1.4 Learning Mobility

After co-creating innovative educational material with teachers, students and Se stakeholders, the team is ready to start piloting it within actual classes in the university. The Learning Mobility gives the opportunity to train teachers and stakeholders on **how to adopt and implement these new methodologies**. Furthermore, it gives the consortium the opportunity to discuss the structure and content for the online Joint Master on "Social Economy and Community Development Strategies", created thanks to the inputs of Living Labs participants, and the SE 4Ces Wiki platform, which consists of a collection of material supporting the online master. The first two days are dedicated to teachers, trainers and professors, while the third day is dedicated to social economy practitioners, stakeholders and umbrella organizations. The last day of Learning Mobility will host the final ignition meeting, which will consist of a consortium meeting to finalize the planning of the pilots.

More specifically, the 4-day learning mobility is organized and hosted by UNIBO in month 25. It supports informed implementation of the pilot phase and will provide direct training to SE entrepreneurs, SE training staff and university teachers before the initiation of the actual pilot testing activities. Specifically, this workshop aims to train the main SE Living Lab participants (educators, SE entrepreneurs and SE training staff) in the main elements of the project such as the service-learning methodology, the educational materials and learning approach of the online Joint Master on "Social Economy and Community Development Strategies" and the SE 4Ces Wiki platform.

The whole training will be facilitated by 5 trainers/project partners (2 from UNIBO leading WP5, 1 from STIMMULI leading task 4.1, 1 from AUTH leading task 4.2 and 1 from UAB leading WP6). In general, the working team responsible for elaborating the material and the module of the master on each topic is also responsible for the training on the same topic.

This learning mobility activity is significant for **testing** the SE4Ces educational approach as it supports informed implementation of the pilot phase and provides direct training to SE entrepreneurs, SE training staff and university teachers before the initiation of the actual pilot testing activities (M26). Specifically, this workshop aims to train the main pilots' participants (educators, SE entrepreneurs and SE training staff) in the main aspects of the project and on the implementation of the educational materials and learning approach.

Furthermore, the online Joint Master on "Social Economy and Community Development Strategies" and the SE 4Ces Wiki platform will be discussed. Participants to the Learning Mobility will give feedback and inputs for the master programme; they will be proposed with an extensive explanation of each module, including the content, the material, the resources and references, the methodological approach and the innovative educational material deriving from the Living Labs.

1.5 Training for teachers and trainers

	Leader	Name of the Module
Topic 1	UNIBO	Running a SE enterprise
Topic 2	AUTH	Soft Skills in SE
Topic 3	UAB	Support Structures
Topic 4	UoEssex	Value Creation and Assessment

Overview of the 4 modules creating the SE4CEs EU Project

The paragraph below has the objective to describe the training for teachers and trainers during the mobility. During the first day of training was given a definition of Living Labs (LL). UNIBO, helped by the consulting organization for the third sector Social Seed, introduced the techniques and methodologies adopted during the LL. A representative explained the **National Observatory of local social services** that involves students in analyzing the social services in the national territory, at the municipal level. It is an important organization in collaboration with public entities like the Constitutional advisory body, the Parliament, Regions and Government.

Second training held by Dr. Angelos Varvarious (University of Barcelona, UAB) on the Topic 3 of the project (support structures). An interactive game called sUPport STructuREs sociAl econoMy "**UPSTREAM**" designed by Eleni Karafylli, it is an experiential educational material to assist students to understand the multiple levels and layers of Social Economy (SE) as well as the multiple factors that either foster or hinder its development in a given geography. The game is based on the concept that each system needs a set of conditions to support

their development. We can observe this system in support structures that are produced in various scales, ranging from small neighborhoods to international institutions.

It is utterly important to break down this concept into three pillars.

- First pillar refers to all actors and institutions that support the social economy top down.
- The second pillar contains supportive structures created bottom-up, by the SE organizations.
- The third pillar includes specific conditions related to cultural or historical development of the place that can support or hinder the development of the Social Economy. The game consists of four phases: Phase 1 - Introducing support structures, Phase 2 - Making connections, Phase 3 - Role play, Phase 4 - Looking ahead.

In conclusion, the main object of the game is to provide a comprehensive outline about the broad constellation of factors that determine the environment in which social economy organizations arise, prosper or perish. The students should be able to identify all the possible connections between structures and policies that involve the three scales to further try to explore dynamics and **reshape the future scenario**.

Second part of the day was held by Dr. Eirini Tzekou (Aristotle University of Thessaloniki, AUTH), on the subject of the Topic 2 "Soft Skills in SE". The workshop aimed to focus on getting feedback on important gaps in terms of content and educational methodology of the module and in terms of implementation of pilots. Last but not least, it was important to motivate teachers to adopt the educational methodology proposed.

All the trainers were divided in groups of 5 or 6 people to whom was assigned a SE initiative, a plan, an educational programme on democratic governance. The workshop ended with a discussion and feedback of the process.

Second day was led by UNIBO about Topic 1: Running a Social Economy organization. Given the summary of the state of the art in Italy, the focus was to design and implement Living Labs and co-creation workshops.

The program is divided into 5 different subjects.

1- **Business Planning**: the whole module consists of preparing a business plan for a new business venture, launching a new product and/or market, or a new line of business.

2- **Management in Social Economy Organizations**: through role-play on decision making and gamification on organizational aspects students will be able to adopt new strategies and perspectives for SE organizations.

3- **Management Accounting in social economy organizations**: through active teaching methods and qualified testimonials from the world of Social Enterprise and Cooperation the students will be able to understand the main organizations' key success factors and how they influence the decision-making and thus the management control system.

4- **Finance for Social Economy Organisations**: a subject which aims to analyse the financial market and recognize the critics and peculiarity of financial activity, give a wide view about innovative ways of financing the SE.

5- **Fundraising**: the core is to give students tools, strategies, sources and management of fundraising, to ensure the economic sustainability of nonprofit organizations.

It was given the space to *MIG.EN.CUBE*[1] a project that fosters migrant entrepreneurship and focuses on enhancing the knowledge and competences of diverse incubation professionals who deal with current or aspiring migrant entrepreneurs.

Finally, an outline was given by Barbara Petracci about a mentoring program, a Service-Learning to strengthen the alumni network.

Topic 4 was introduced in the second part of the day by George Kokkinidis of Essex University (UoEssex) together with practical exercises. The objective of this part of the module is to challenge students with multidimensional and political nature of value and to think beyond financial, political and creative value.

1.6 Training on topic 1 for practitioners and organizations

In this paragraph we are going to explain the tool used in the Training on topic 1 for practitioners and organizations and the reasons behind it.

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[1] MIG.EN.CUBE is a KA2 project co-funded by the Erasmus+ Programme

Social impact readiness refers to an organization's ability to measure, manage and communicate the social impact of its activities. It involves having systems and processes in place to collect data on social impact, analyse the data to understand the outcomes and communicate the impact to stakeholders.

To achieve social impact readiness, organizations need to develop a clear understanding of their social mission and the intended outcomes of their activities. This involves defining specific social impact indicators and metrics that align with the organization's goals and values.

Social Impact Investment (SII) has emerged as one of the most effective potential strategies for solving the key societal challenges of our time[2]. SII is the use of funds to generate both social and financial returns, offering a way to help social organizations access suitable financing and improve their ability to deliver impact. The SII ecosystem is complex and consists of various elements: the supply side (i.e., investors), the demand side (i.e. investees – organizations addressing social needs), financial and capacity-building intermediaries that link and provide support to the supply and demand side actors of the SII ecosystem, and an enabling environment (i.e. all of the legal, regulatory and economic conditions that are necessary for SII). The SII market in the EU has demonstrated rapid growth over the last decade but despite significant progress, the EU SII market has not yet achieved its full potential. The maturity level of the SII market in most EU Member States remains low – in four fifths of the EU it is considered to be at its 'incipient' or 'infant' stages.

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[2] Social Impact Investment, Best Practices and Recommendations for the Next Generation

1.7 AICCON Proposal

AICCON, as part of network of people and institutions (EMES Network)[3] which aims to promote the culture of SE enterprise, has designed a tool capable of elicit reflections to refine some aspects of the business plan, with respect to the economic sustainability and impact orientation of the planning.

The checklist proposes a **self-reflective path** of identifying skills, both those already existing in the organization, to be consolidated, and those not yet present, to be acquired. The results will enable the design of customized capacity building paths geared toward developing strategic capabilities proportionate to the development stage of the enterprise.

Goals were: validation of the tool; look at the flip sides into education. Validation of the module and pilot project through testing and feedback is crucial to ensure their effectiveness and relevance. Additionally, examining the potential challenges and drawbacks of the project, as well as exploring alternative perspectives, can help to improve and refine the project and ensure that it meets the needs and goals of all stakeholders involved.

Description of the activity

The tool is a checklist that is useful for self-assessment, informing decision-making, and setting new objectives for an organization. At the start of the activity, the groups evaluate the different sections of the investment and impact readiness, analyzing the relevance of each section, identifying what is missing, and determining what the most important part is. However, participants find it challenging to evaluate the relevance of the different sections, as they find most of them to be very important. As a result, they are taking a lot of time for each section of the tool. Additionally, some participants find certain aspects of the tool to be redundant.

Stakeholders Feedback

According to participants the tool should reflect the impact investment but also evaluates the overall state of the organization. It assesses the state-of-the-art of the organization, if

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[3] EMES is a research network of established university research centers and individual researchers whose goal has been so far to gradually build up an international corpus of theoretical and empirical knowledge, pluralistic in disciplines and methodologies, around our "SE" concepts: social enterprise, social entrepreneurship, social economy, solidarity economy and social innovation.

the assessment is positive, it can attract investors. It is recommended to use this tool at the end of the semester.

Ranking the sections is challenging as all the sections are equally important and can fit anywhere. In one group, strategic competencies were the subject of the most discussion. Two missing aspects include the high turnover rate resulting from the type of contract that SE organizations offer, which affects investment readiness. Additionally, although traditionally, human resource management is crucial, now it is viewed as part of a democratic governance system, including other aspects. Moreover, instead of asking how to use financial instruments, it is better to inquire about the **level of knowledge** the individual has about them.

Regarding the impact readiness section, crowdfunding is missing from the evaluation tool. It's unclear who evaluates the tool, whether it's one person or a group and what their role is. Lack of funds and competencies within organizations to dedicate to impact and impact financing could be externalized. A networking component is also missing. Additionally, it's worth considering whether to include a section on soft skills. As for the evaluation process, it's worth exploring the possibility of using a scale from 1 to 10 to assess impact readiness.

It's important to consider whether the impact readiness tool allows for the **improvement of an organization** and serves educational purposes. Some may argue that the tool is too theoretical for students, and it may be worth exploring how to apply the tool from students to organizations. It's also important to determine how to use this tool in collaboration with topic 4. It's worth noting that the tool is not only applicable to social businesses. To make it more relatable for students, it's worth considering whether it could work with real-life examples from students. However, it's important to ensure that students are prepared, so it doesn't become an interrogation. On the other hand, the tool offers the opportunity for **connection between students and organizations**, which could be beneficial for both parties.

Areas of interests	What we investigate
Characteristics of impact investment	Funds/financial instrument used
Strategic competencies	Innovation in the organization
Impact financing	Do you know financial needs?
Impact management skills/capabilities	Intentionality and strategic planning of interventions
Management and organizational complexity	Governance and organization
Technology and intangibles	Plan for digitization

Table of the scheme of the tool administered during the training for practitioners and organizations

2. Results and decisions on the pilot phase per country

Ignition meetings are fundamental moments in order to build relationships between Higher Education Institutions (here and after HEIs), Social Economy (here and after SE) organizations and students. Each partner will describe ways of engagement and their perspectives. These meetings also aim to design all practical aspects of local pilot projects.

The document contains information about the approach adopted during each ignition meeting and the results achieved.

In this phase we had an introductory SE Living Labs ignition meeting (4-days learning mobility in Bologna) in order to establish a common framework in which each partner will **organize local training**, seminars supporting all the partners in producing a comprehensive pilot implementation.

The function of ignition meetings is to **gather relevant stakeholders** and discuss the initial phases of a project or initiative. These meetings are designed to align stakeholders' goals and objectives and create **a shared understanding of the project's purpose and scope**. Ignition meetings typically involve presenting the project's background, goals, and timeline, as well as identifying the key stakeholders and their roles in the project. The meetings also provide an opportunity for stakeholders to ask questions, provide feedback, and identify any potential obstacles or concerns that need to be addressed. In summary, the function of ignition meetings is to set the project in motion by creating a shared vision and understanding among stakeholders, and identifying the initial steps to be taken towards achieving the goals of the project.

2.1 Ignition meeting - Autonomous University of Barcelona

Organization: Autonomous University of Barcelona Country: Spain
Date: 28 March 2023

Total duration: 1,5 hours

Type: Online Meeting

Number of people reached: 30

Number of the people participating: 12

All the people who participated in the preparatory workshops that led to the creation of the game UPSTREAM were invited. This included both students, SE entrepreneur and educators. Below a list of the people who attended and/or showed interest in the material.

Roles and function of the participants:

- Andrea Calsamiglia - SE member and educator, (Estarter -IGOP/UAB, Switchmed-SCPRAC/ UN, New Economies- Master Political Ecology-ICTA/UAB)
- Saioa Arando Lasaga - Educator, University of Mondragon
- Andrew Moore - Student, Master Political Ecology-ICTA/UAB.
- Raquel Rios - PhD student in Economics, UAB
- Giorgios Kallis, Professor, Master Political Ecology-ICTA/UAB and R&D.
- Giacomo D'Alisa, Senior Researcher, Master Political Ecology-ICTA/UAB and R&D.
- Angelos Varvarousis, Senior Research Fellow ICTA/UAB, Co-Director of the Master's "Degrowth: Ecology, Economics, Policy"
- Panos Petridis, Post-doctoral Researcher ICTA/UAB
- Steph McDonaugh, Coordinator, Online Masters on Degrowth: Ecology, Economics, Policy, Universitad Autonoma de Barcelona
- Enekoitz Etxezarreta, Universidad del País Vasco.
- Rosa Garcia Hernandez, Universitad Autonoma de Barcelona
- Jordi Ibanez, Finanzas Éticas.

The following participants could not attend the meeting but were interested in the material and, and we will follow up the communication for future activities.

- Millan Diaz-Foncea, Universidad de Zaragoza
- Moshin Sidi, Student Master Political Ecology-ICTA/UAB and R&D.

- Nerea Abad Itoiz, PhD student UNED Business School
- Marta Solorzano Garcia, UNED Business School.
- Adoración Mozas Moral, CIRIEC-España y la RED ENUIES, Universidad de Jaén.
- Brenda Nistor, Student Master Political Ecology-ICTA/UAB and R&D.
- La Pinya associacion

Objective of the meeting:

The objective of the meeting was two-fold. First it was to **acknowledge** the involvement and contributions of all the participants in the previous stages of the co-creation process, and concretely informing them about the output of their collective efforts.

Secondly, the opportunity was taken to **gather valuable feedback** from the design and implementation of the UPSTREAM experiential board game which aims to assist students understand the multiple levels of Social Economy (SE), as well as the multiple factors that foster or hinder its development in real life situations.

Phases of the meeting:

After a short introductory round and a friendly check-in, the game was outlined during the first half of the meeting, showing the 4 different boards and giving brief explanations of the instructions, including insights from its first pilot implementation at the Online master's course on "Degrowth: ecology, economics and politics" at the Autonomous University of Barcelona.

The second part of the meeting was dedicated to comments, feedback, clarification questions and insights into the game and its possible applications.

The meeting concluded with a summary of the topics covered and an open invitation to stay in touch, as some participating educators in particular showed interest in using the game in their respective contexts.

Focus on Topic 3 "Support Structures in Social Economy" - Autonomous University of Barcelona

It covers the so-called support structures for social economy. These refer to all the local and wider conditions necessary for the emergence and reinforcement of the social economy. The course introduces an analytical framework used to categorize and assess the main SE support structures, that includes 3 pillars:

- top down supporting mechanisms,
- support structures from the bottom-up,
- local conditions.

This module will be a combination between a series of 10 2-hour lectures, and an innovative experiential board game (**UPSTREAM**) that will run parallel throughout the course. The idea is that the board game will start right after an initial introduction to the module, and will run in parallel with the development of the theoretical lectures, concluding in a final synthesis session.

Apart from the lecture part, the main innovative methodology includes a **hybrid experiential board game**, that aims to guide the students through the learning process. The board game is designed as a hybrid product that can be played either online or in class and elsewhere. It consists of four different boards and a series of cards and it involves four distinct phases. It is designed to unfold over an entire semester but it can be simplified and stripped down to fit also more intensive courses. In short, the four phases are:

Phase 1: Introducing support structures. Aim: Introduction to the analytical framework used to categorize and assess the main Social Economy support structures, using a real case example.

Phase 2: Making connections. Aim: Highlight the connections and the contradictory dynamics between different structures

Phase 3: Role play. Aim: Evaluate the results from different stakeholder's perspectives, in order to understand and unveil missing elements and potential problems.

Phase 4: Looking ahead. Aim: Exploring the dynamics of reshaping the future

There have been generally overwhelmingly positive reviews about the module and the game in particular. Useful comments have been received for future modifications that will be taken into consideration during the phase of Piloting. Some examples include:

- Add some blank cards, to give flexibility in specifying own questions
- Add some different roles in the discussion phase (3) to achieve a better stakeholder representation, and avoid stereotyping
- Produce a manual of instructions to facilitate both students and educators
- Support the modularity of the game, so it can be used in different contexts, and different timeframes.

Finally, the role of the facilitator was discussed, and the diverse possible directions the game may take, depending on the level of the class, as well as whether it is performed in class or online.

Based on the above comments it is expected to further refine the design, and come up with a more user-friendly game that better represents the above-mentioned topics, as well as contribute to a livelier and more creative experience, and thus assist longer term learning on behalf of SE students.

The University of Barcelona is currently identifying multiple opportunities with the other partners to pilot the game and incorporate it into their curriculum, thus further improving the connectivity and organic linking between the different modules.

Focus on UPSTREAM game

UPSTREAM is designed as an experiential educational material to assist students to understand the multiple levels and layers of Social Economy (SE) as well as the multiple factors that either foster or hinder its development in a given geography, and is explained below in detail.

Structure and game-flow

The board game is designed as a hybrid product that can be played either online or in class and elsewhere. It consists of three different boards and a series of cards and it involves three distinct phases. It is designed to unfold over an entire semester but it can

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be simplified and stripped down to fit also more intensive courses.

Phase A

In the first phase, the students are divided into groups of 4-8 people and are invited to choose an area of research, which can be of various scales but, ideally, larger than a single neighborhood and smaller than an entire region. Then they are provided with a pdf file of the first board that can either be printed or modified online since it has interactive features and is editable. This first board consists of three areas that are demarcated on it with different colors and symbols. The three areas represent the three subcategories of support structures as defined above (Top-down Supporting Mechanisms, Support Structures from the bottom-up, and Local Conditions). The students are also provided with a series of cards (printable or editable online) with guiding questions to assist them in the "treasure hunting" of the different elements that make up the three above-mentioned fields in their research area.

This initial stage **aims to help the students to understand** how support structures unfold in distinct fields (policy, grassroots, historically) in a certain geography. Once they answer all the questions on the cards and create the list with the support structures in each field they are taking another set of cards that now consists of a series of roles. These roles involve the figures of the mayor, the worker in a cooperative, the social movement activist, the urban planner, the politician, the university professor and more. By taking these cards and assigning roles to the members of the team the students have to move to the center of the first board where there is a demarcated area for public consultation and begin a discussion on the strong points and shortcomings of the existing support structure as it has been previously defined. It is important in this phase to start seeing connections between structures and policies that were previously

seen as isolated from each other.

Phase B

In the second phase of the game, the students are provided with a second board (printable or editable online) as well as some connecting tools (lines, arrows, bars and barriers, etc.). The board in the middle has an empty slot in which the students should put a printed (or screenshot) map of their actual area of research. Then, they put on the map all the elements they found in phase A of their exploration and subsequently they take the above-mentioned connecting tools with which they seek to understand which elements of this supporting structure work synergistically and which are antagonistic. In this way, students

can understand the supporting structure for SE not simply as a sum of distinct entities but as a living organism that involves different and often contradictory dynamics.

Phase C

In the last phase of the board game, the students are provided with a third board that is snail shaped and represents the pathway towards the future, in which Social Economy and its supporting structures will be substantially stronger and widespread. The students are invited to use the richness of the dialogues between the different actors as it happened during the last part of phase A as well as igniting a visionary process and describe the steps that should be followed in the next 20 years in order to complete the board of phase B with more elements and more connections. The steps are represented with different names and icons on the snail-shaped board. The scope of this phase is to move beyond the description and understanding of the present and explore the transgressive dynamics of reshaping the future.

When will the pilots happen?

A first one has already started **since February 2023** in a series of weekly courses at the Autonomous University of Barcelona. Moreover, **in Spring 2023** it will be piloted, in part or as a whole, on different occasions at the Aristotle University of Thessaloniki and two courses at the Hellenic Open University.

The following list summarizes the courses and tutors that are either already piloting it, or have agreed to do so in the following months:

- Angelos Varvarousis, Professor and Senior Research Fellow ICTA/UAB, Programme: Online Masters on Degrowth: Ecology, Economics, Policy. Course: Living without growth

- Giorgos Gritzas: Assistant Professor at School of Spatial Planning and Development, Faculty of Engineering, Aristotle University of Thessaloniki, Course on Geography, Social & Solidarity Economy and Spatial Development

- Theodosia Anthopoulou and Sofia Nikolaidou: Professors Hellenic Open University. Programme: Social and Solidarity Economy. Course: Alternative Spatial Development, Social Innovation, and Social Solidarity Economy

- Sofia Adam Sofia and Ifigeneia Douvitsa: Professors Hellenic Open University. Programme: Social and Solidarity Economy. Course: Public Policy and Institutional Frameworks for Social and Solidarity Economy

2.2 Ignition meeting – University of Bologna

Organization: University of Bologna
Country: Italy

Date:
03/10/2022
Total duration:
6 hours
Format of the meeting:
In attendance

Number of people reached:
No more people were reached.

Number of the people participating:
The initial ignition meeting was attended by teachers who agreed on piloting the innovative educational material in their classrooms. UNIBO project managers and coordinators lead the meeting, explained the project and the current phase to the teachers who will host the pilots. Piloting was discussed, answering the following questions: what do we want to pilot? When? How? With who?

Participants (names and roles):
Federica Bandini, UNIBO, coordinator and professor (professor and facilitator)
Elena Barison, UNIBO, project manager (facilitator)
Silvia Mazzoccoli, UNIBO, project manager trainee (facilitator and student)
Alceste Santuari, UNIBO, professor
Daniela Bolzani, UNIBO, professor

Roles and function of the participants:

All the participants were actively involved in the meeting. Both teachers and facilitators lively discussed to define the contents of lessons, format, period, guests etc.

- **Teachers** listened to the proposal and adapted it to their programme. In particular, they approved all the contents proposed, but the main issue that worried teachers was related to the evaluation of that experience. Someone suggested that it should be evaluated to encourage student participation, and others disagreed.
- **UNIBO facilitators** explained the project and the educational proposal. They also mediated the discussion among teachers.
- **Student' perspective** was included, suggesting ideas and helping teachers to tailor the experience to students' needs.

Teachers were invited because they showed interest in the operational phase of the project. UNIBO facilitators suggested testing the innovative educational material in collaboration with these teachers since they seemed the most excited about new teaching ideas.

In addition, UNIBO facilitators asked for advice to students that are attending the second year of the Master in Social Economy. Therefore, this group could give an interesting point of view about their experience.

Objective of the meeting:

The definition of the timeline, the educational materials, and the content of the innovative lessons that UNIBO trainers will pilot.

Phases of the meeting:

- Welcome and brief introduction about SE4Ces and the project.
- UNIBO trainers proposed the ideas that emerged during the Living Labs (podcast, role-playing, etc...).
- Teachers tailored the general idea to their courses. Professor Santuari accepted the first suggestion of trainers (role-playing), while the idea of the podcast was accepted by professor Bandini.
- Trainers and the teacher defined dates, guests, educational materials, and logistic aspects.

> To conclude the meeting, teachers saved personal meetings with trainers to organize and define the late pieces of information about the piloting lesson.

Focus on topic 1 "running a social economy organization or a social enterprise" – University of Bologna

The module of topic 1 will focus on running a social enterprise. Talking about this theme means to consider several types of organizations. So, the aim of this module will be to introduce students to all the differences and the analogies of these organizations. Teachers will focus the analyses on the differences among governance, human resources, marketing, social impact assessment and financial management. How will it be done?

The objective of the module 'running a social economy organization or a social enterprise', whose character is mainly applied, is to provide the tools for the preparation of a business plan suitable for the development of a new entrepreneurial activity, a new branch of enterprise or a new business idea. The development of the Business Plan is a **group activity**.

Phase 1: Students will be presented with a real community need to answer by creating a SE organization.

Phase 2: Students will be offered training on theoretical aspects of management, finance, marketing and entrepreneurship.

Phase 3: Students will also be provided with practical experiences and laboratories on such topics, adopting innovative methodology co-created within SE4Ces project.

Phase 4: in the meantime, students will keep developing their business plan to develop an answer to the need identified and will take the rest of the course to finalize it.

There is a connection between the module and the pilots that will be done in classroom. In fact, the innovative methodology to include in the module will be tested in the pilots:

- Module **Management in social economy organizations**

The objective of teaching is, after identifying the business characteristics of social economy organizations and social enterprises, to delve into the topic of strategic management and

strategic orientation (mission, vision and values). Students will analyze the competitive formula and competitive environments in which the social enterprise operates, and identify new strategic perspectives for development.

At the end of the course, students **will be able to**:
- recognize the characters and problems of the different typologies of SE organizations;
- recognize the typical management modes of social enterprise in different competitive environments;
- evaluate the options for expansion/reduction of the enterprise's range of activities and the different strategies of relationship with the territory;
- hypothesize cooperative strategies in the global era.

The methodology adopted includes:
- Active teaching methods such as case discussions and exercises will be developed alongside classroom lectures.
- Qualified testimonies from the world of Social Enterprises and Cooperation
- Discussion of a case: Analysis and organizational redesign of a nonprofit company
- Role-playing on decision making
- Gamification on organizational aspects

For this module UNIBO proposed to involve student in creating a podcast on corporate welfare. The purpose is to get them experiment on the topic by interviewing both workers and managers of SE organizations.

- Module **Management Accounting in social economy organizations**

This section discusses the implementation of management control systems in social economy organizations and social enterprises.

Students will know about:
- Which are the main organizations' key success factors, why they vary among different types of organizations, and how they influence decision-making processes and, thus,

management control systems;
- Ways that organizations can account for their costs and how the cost accounting effort can help SE organizations' decision-making processes;
- How to measure performance in SE organizations.

The methodology adopted includes:
- Active teaching methods such as case discussions and exercises will be developed alongside classroom lectures.
- Qualified testimonies from the world of Social Enterprises and Cooperation
- Role-playing on decision making
- Gamification on organizational aspects

- Module **Finance for social economy organizations**

The objective of the course is to analyze the financial market in all its aspects: banking, financial and public management. At the end of the course the student is able to:
- know the dangers and peculiarities involved in financial activity;
- know the innovative ways of financing the social economy;
- have an overview of the reflections that have matured on the subject of the public financial management;
- analyze the future challenges that contemporary society poses in the area of financial relations in the broadest sense.

The methodology adopted includes:
- Active teaching methods such as case discussions and exercises, which will be developed alongside classroom lectures.
- Qualified testimonies from the world of Social Enterprises and Cooperation
- Role-playing on decision making
- Gamification on organizational aspects

For this module UNIBO proposed a **role-playing** among students and professionals of SE organizations. In this occasion, students will experience a multi-stakeholder decision-making process. Specifically, UNIBO trainers will propose to the classroom a notice of

interest in co-design for social services with local authorities where different organizations will participate. Students will simulate the role of these organizations within the co-planning meeting. The aim is to associate several roles with the students so that they can experience the dinamics of this kind of discussion.

- Module **Fundraising**

The objective of the teaching is to transmit to the student the basics and main tools of fundraising for nonprofit organizations.

Upon completion of the course, students will be able to:
- know and apply the strategies, sources, tools, methodologies and management of fundraising;
- analyze and use the different techniques to ensure the economic, organizational and strategic sustainability of nonprofit organizations

The methodology adopted includes:
- Active teaching methods such as case discussions and exercises will be developed alongside classroom lectures.
- Qualified testimonies from the world of Social Enterprises and Cooperation
- Role-playing on decision making
- Gamification on organizational aspects

When will the pilots happen?

The pilots will be carried out from **February 2023 to June 2023**. Students from the Business Science Department of the University of Bologna, professors and stakeholders will participate in the pilot activities.

As previously mentioned, the implementation of the pilot activities for the following modules is foreseen:

- Business plan laboratory;
- Private-Public-Partnership's laboratory;

- Strategy course.

Each pilot activity has a duration of 2 or 3 lessons for innovative methodology.

2.3 Ignition meeting - Aristotle University of Thessaloniki

Organization: AUTH   Country: Greece
Date: 20 /1/2023   Total duration: 2.5 h   *Format of the meeting:*   In attendance

Number of people reached: 41   Number of the people participating: 16   Roles and function of the participants: 1 SAC member, 6 SE professors, 1 SE enterprises, 1   local authority, 1 student, 8 partners from AUTH team)*:*   The participants were engaged in the LLs and the co-creation workshops. They were actively interested in getting more involved in the coming tasks of the project. They are rightly placed to provide useful advice on how the material can be piloted – some of them expressed interest in piloting the material in their own organization's

programmes.

Objective of the meeting:

· Present the material that was developed based also on the ideas developed in the LL and co-creation workshops in Greece as well as in the other countries

· Identify ideas on how the material can be tested in the coming months

Phases of the meeting:

Presentation of all topics (1,2,3,4) and discussion after each of them as well as overall before the end of the meeting.

· **Discussion on Topic 2**

The sequence of the tasks from 1 to 9 could reflect capacity building as it usually happens through practice in SE organizations or increasing difficulty levels e.g. conflict resolution after decision-making? or from tasks dealing with individual features to collective ones? (S. Aggelaki)

Feedback from one team to the other should be enabled before the self-assessment at the end of Project b (S. Aggelaki).

Maybe it would make more sense to have a good idea brainstorm rather than a bad idea brainstorm as an exercise to boost creativity (S.Koutsou).

· **Discussion on Topic 3**

The game is played by groups (no winner, looser). Comparing the online and offline versions, given the tools developed for each case, the game flow will be similar. When online, the selection of the geographical area might not be as justified / known for everyone, but at same time including as diverse perspectives as possible (which is enabled more in

online environments) can be beneficial.

·   **Discussion on Topic 1**

The practical could address a real SE enterprise
  although the semester with the aim to identify problems and design solutions.
  The practical of Topic 1 relates to the actual practical at the end of the
  course?

The module as well as the previous ones, builds capacity on the SE topics but also in relation to implementing these in real life settings.

Topic 4 was not discussed due to time limitations

Focus on Topic 2: "Skills" - Aristotle University of Thessaloniki

Motivations and incentives are not enough to create SE organizations. One of the most important ingredients to create any type of venture is skills and competences. Skills can include **either hard skills**, namely those which can be obtained through formal education/training, such as business management, accounting, marketing etc. or **soft skills**, namely those which can be acquired through non formal and informal education and which are linked to personality traits, abilities and mentality, such as team building, active listening, conflict resolution, etc. Besides the hard and soft skills' part, there are reportedly **cultural skills**, that is those which are linked to the environment and the prevailing perceptions within and outside the partnership. Examples of the latter type of skills can be the skills of transparency, cooperativism, of out of the box thinking, of "we" versus "I", of democratic governance and of recognition of the value of social capital.

Both hard and soft skills are much needed in the context of a social organization scheme, even more so than in the case of a standard business, and in the framework of the efficient collaboration and performance of the team running or working in a SE entity. This is because a SE entity is not motivated by profit maximization, but by a set of social, environmental and economic goals. Serving all these goals simultaneously, makes running a SE organization a quite complex process, which demands a wide range of both hard and soft skills. However,

in an attempt to compare the category of skills, is one of them more important than the other?

In this module, focus is being given to the **soft skills** part as these cannot be easily taught in theory, but mainly in practice. What's more, feedback shared by those engaged in SE, demonstrates lack or inadequacy of basic soft skills, which hinders the smooth cooperation among the team and, consequently, the successful outcome of their scheme and common goal.

The aim of the module is to make students aware of the importance of skills, particularly soft skills, for running a SE initiative and familiarize them with the classification between hard, soft and cultural skills. The module also aims to help them **develop a range of soft skills**, such as creative thinking, communication skills, diversity awareness, team spirit, conflict management skills, organizational and democratic governance skills, as well as networking skills. More specifically, by the end of the module, students will be able to:

1) Distinguish between types of skills and provide relevant examples
2) To tell whether someone lacking skills can actually develop them during their lifespan. Is someone born with specific soft skills or is this something that can be changed throughout a certain process?
3) Identify and describe ways through which someone can obtain and develop skills.
4) Understand the rationale behind the focus given to soft skills.
5) Gain understanding of the EU's current and future approach to Skills.
6) Use educational tools for a better understanding of the importance of skills and their upskilling process.
7) Make use of different skills and tools to deal with a conflict in their SE initiative
8) Think creatively on how to plan their activities and overcome problems in their initiative
9) Organize an assembly and reach a collective decision
10) Plan and create networks

Syllabus

- Theme 1: Introduction to skills (2 weeks)

Description: This session examines the distinction between hard and soft skills, while also introducing cultural skills. The importance of soft skills is emphasized, particularly for SE initiatives, in their different forms and types. It also aims to raise a discussion among students around skills and how skills are acquired through formal, non-formal and informal education, while simultaneously introducing them to the project each team will work throughout the lectures, by assigning to each group (around 5 people) a different SE initiative.

- Theme 2: Boosting creativity and visionary thinking

Description: This session will focus on creativity, out of the box thinking and visionary thinking. These are fundamental skills for promoting an initiatives' economic as well as social goals. Furthermore, they can foster social innovation which is closely related to the social economy. We will explore and discuss the importance of these skills and we will try to develop creative and visionary thinking through team games.

- Theme 3: Personal / Communication skills

Description: This session will focus on the development of active listening, empathy, non-violent communication and flexibility. These are fundamental skills for democratic governance as well as conflict management in all types and forms of SE initiatives. Through the use of videos and a simulation game students will have the opportunity to familiarize with these skills and practice them.

- Theme 4: Engaging with diversity and team building

Description: This session will focus on diversity awareness. Through discussion and practice, we will try to reflect on how privileges or the lack of them might influence our stances and views and in turn affect collective decision-making. We will also try to develop openness to critique in order to promote a fruitful dialogue as a prerequisite of collective decision-making, on which we will focus later on the course. During its second part, we will examine tools and methods to foster team building, which can also promote smooth collective decision-making. So, in this session we will focus on how we can operate as a team, not by trying to "hide" or eliminate our differences but by acknowledging them.

- Theme 5: Conflict management

Description: This session will address the topic of dealing with a conflict in a group, which is one of the biggest problems SE organizations face, according to their members. We will examine tools and methods to deal with a conflict and make use of earlier developed skills, such as empathy and active listening, in order to facilitate conflict management. Furthermore, we will focus on the development of facilitation skills.

- Theme 6: Democratic decision-making (2 weeks)

Description: Building on the previous sessions, this session will focus on the challenges, tools and methods related to democratic decision-making in different forms of SE initiatives. Democratic decision-making is in the core of any SE initiative and can be a quite challenging process. After engaging with what democratic decision-making is and how it can be performed, we will make use of all the skills developed and all the tools and methods learned to practice democratic decision-making and reflect on the possible shortcomings in this process.

- Theme 7: Organizational skills

Description: This session will introduce students to the logic of organizational apps (e.g. trello, loomio, doodle) as well as to organizational methods (e.g. rotation in roles and duties) that assist democratic decision-making and governance in SE initiatives.

- Theme 8: Networking (2 weeks)

Description: Networking is vital to a SE initiatives' viability as well as to its innovativeness. Particularly for cooperatives, the "cooperation among cooperatives" constitutes the 6th cooperative principle. This session will examine why networking matters and will focus on tools, methods and skills (e.g., public speaking, advocacy) that promote networking.

- Theme 9: Values' and skills' interaction

Description: This session will revisit the material already taught from the values' point of view. We will examine how personal values (e.g., responsibility, honesty, integrity)

can promote soft skills' building and, in turn, how soft skills can promote implementing and maintaining the core values of a SE initiative. We will also refer to the problems arising in serving SEs' values when some soft skills are missing (e.g. hierarchies).

Methodology discussed:

Project A, students break up in groups of 5-6 and each selects and links to a specific type of SE organization that they work with all through the semester. Each one of the 9 themes of the topic involves games and exercises. Some of them relate to scenarios suitable for the given SE organization and some of them are the same for all students.

Project B (final assignment): Students break up in groups of 5-6 and each group is given a specific type of SE organization with detailed information regarding its size, type, legal form, characteristics etc. At the end of the module each group will have to plan and present an educational programme on democratic governance according to the specific needs of the assigned SE organization.

Another topic discussed:

Topic 3: SE support structures

- Presentation of the module including content and practical part (game) and assessment method based on module description. The game will be running **throughout the semester**. The completion of the game will be the final assignment of the students. The game is called Upstream, and can be a print-on-demand played in the classroom or online. It has 3 parts corresponding to the 3 pillars of the module. Students define a geographical study area and get cards that include questions, which should be answered by the students. The second phase examines the links among the individual elements (gaps, clashes, reinforcements). Then there is role-playing and organisation of a consultation backed by an observer. The third phase (visionary) takes them 30 years ahead and asks them what needs to be done in view of a more active SE in the future.

Topic 1: Running a SE

- Presentation of the module including content, practical assignments and assessment method based on module description – the practical includes gradual building of a business plan; assessment is done by committee of professors and invited SE experts/professionals – the module also includes invited speeches/podcasts, etc.

Topic 4: Value creation

- Presentation of the module including content, practical part and assessment method based on module description

When will the pilots happen?

During the months of **March, April and May**. Pilots will be implemented from Topic 0 – Theory and SE types, Topic 2 – Skills and Topic 3 – supporting structures.

The pilot activities will be led by the professors at the relevant courses in the Hellenic Open University and possibly at the Integrated Masters on Spatial Planning and Development of the Aristotle University of Thessaloniki and will be carried out with students enrolled in these programmes.

Object of evaluation:

- On the spot assessment of the experience by the students
- Degree to which the new educational methodologies and the material tested affected the performance of the students in the official assignments of the programme – through specific questions addressed to them after the completion of their official assignments

What are the steps needed to organize the pilots?

- Daily communications with the professors with the aim to explain trainings
- Adjustment of the existing programmes of AUTH and HOU to the degree possible
- Execution of the pilot
- After each piloting session feedback meetings are organized to inform the next piloting session

2.4 Ignition meeting - University of Essex

Organization: University of Essex
Country: UK

Date: 4 January 2023
Total duration: 2 hours
Format of the meeting: Online

Number of people reached: 32
Number of the people participating: 8
Participants (names and roles):
Peter North (academics)
Nic Beuret (academics)
Nicos Moushoutas (academic)
Gerald Milanzi (student)
Elena Pagani (student)
Phelim Sharvin (Community Finance Ireland)
Emily Darko (Social Enterprise UK)
Ted Fowler (practitioner)

Most of the participants had attended the co-creation workshops and had expressed an interest in following up the development of material. Unfortunately, the possible dates proved inconvenient for many potential participants.

Objective of the meeting: to validate the material with a panel of students, practitioners and teachers, most of whom had participated in the co-creation workshops. And to check with them if they felt the material was appropriate for their experience / context, or needed or could be adjusted.

Phases of the meeting:

1. Presentation of the module material: objectives, content, structure and activities. (All the material had been sent to participants ahead of the meeting)

2. General discussion with all participants to get their views about the suitability of the material for topic 4 in their own context

3. Summary of main points

Focus on topic 4: creation and assessing value - University of Essex

The aim of the module is to familiarize students with the multidimensional and political nature of value creation, and to challenge the economic-centric logic dominant in mainstream economics and business. The module also aims to encourage students to think creatively about how to create value and to run a business with a social and ethical compass. More specifically, by the end of the module, students will be able to:

- **Demonstrate** understanding of the different dimensions of value and the different logics at play for attributing value.

- **Demonstrate** understanding of the political nature of value creation and the potential conflicts between different values and stakeholder groups.

- Critically **evaluate** the principles of organizational design (e.g., ownership, organisation of work, decision-making) and the ways it can be made to serve social value creation.

- **Identify** the various facets of a social economy organization's ecosystem and support network.

- **Describe** and compare the different methods of value or impact assessment.

- Critically **evaluate** how value creation in the social economy can address contemporary environmental and social challenges, and in particular how it can be articulated around the concepts of degrowth and the commons.

- **Demonstrate** effective use of the Value Creation Framework to define a value proposition and planning the critical activities required to deliver it, including mapping of support network, estimation of cost and identification of key financial streams.

- Critically **evaluate** the process of collaboration in groups, and identify potential problems and ways of addressing them.

Syllabus

- Theme 1: Economic Value

Description: This session examines and challenges the conventional economic understanding of value and its articulation around growth, productivity and profits, or shareholder value. It raises questions about the relationships between value, values and what we consider valuable. Using case studies, we'll also illustrate what and who get silenced or harmed in an economic-centric view of value.

- Theme 2: The multiple dimensions of value

Description: This session will draw upon different valuation frameworks to ask, 'what do we want to value?'. This question helps broaden up 'value' to different dimensions and leads us to consider the multiple ways in which we can attribute worth or value to things, activities or relations. We'll use various examples (e.g., related to the environment, social or economic 'goods') to explore the different bases on which we can value things.

- Theme 3: Value Conflict

Description: This session will focus on acknowledging the different dimensions of value suggests that there can be conflicts between them; for example, pursuing environmental value such as the promotion of organic agriculture could be at the expense of social value such as inclusivity. Another long-standing debate concerns whether social economy organizations can remain true to their social missions and be economically viable. We'll explore how these various value conflicts emerge and are negotiated.

- Theme 4: Organizing for value creation: the relationship between means and ends

Description: This session will try to address a range of questions: How does a social enterprise organize itself to create value? Are the values it aims to promote also reflected in the value creation process? To address these questions, we'll consider the relationships between means and ends, and with the notion of prefiguration, we'll explore whether the ways in which a social enterprise organizes

itself (the means) are in line with its mission and values (ends). In particular, we'll look at how social economy values of democracy and inclusivity can be embedded in organizational governance structure and decision-making processes.

- Theme 5: Value for whom?

Description: Social Economy organizations aim to benefit a broader or even different constituency than 'shareholders. In this session we'll use stakeholder analysis to explore who are the main beneficiaries of an organisation, but also who else is impacted, positively or negatively, intentionally or unintentionally, by its activities. This will lead us to consider the notion of externalities, but also to go back to the idea of value conflict, and its manifestation between various stakeholder groups.

- Theme 6: The Valuation process - Pricing and valuing

Description: In this session we'll move from the questions of what is value and whom it is for, to the question of how to assess or capture it. This will take us to the area of valuation studies which consider not only the ways in which we ascribe value (e.g., the norms and criteria we use), but also the effects that this valuation process has on the things we are valuing. In particular we'll examine the relationships between pricing and valuing, and use examples to explore how putting a market price on something (e.g., the environment, our health) can affect our understanding of and relationship with the objects of valuation.

- Theme 7: Valuation Methods

Description: In this session, the focus will shift to a more concrete level of analysis, and we will review the different methods and frameworks available to assess value, from quantitative to more qualitative ones. We'll introduce the notion of impact and impact assessment which have attracted growing interest among Social Economy practitioners and scholars. And we'll explore and compare different assessment models such as the Economy for Common Good framework, social auditing or Social Return on Investment.

- Theme 8: Measuring Value - Social Return on Investment

Description: This session will focus on one of the most commonly used tools for measuring value and go through its various steps with illustrative case studies. This will lead us to revisit the questions explored earlier in the module in a more concrete way: what value does the organisation want to create, how does it aim to create it, and who are the stakeholders.

- Theme 9: Sustainable Value

Description: In this and the next session, we'll go back to a broader level of analysis and explore how the question of value in the social economy can address contemporary environmental and social challenges. Here we'll discuss how the current ecological crisis (the climate emergency, the threat of extinction of multiple species) challenges the way we create and assess value. We'll explore how alternative models of economic development, and in particular the idea of degrowth, can deliver sustainable value.

- Theme 10: Reclaiming Commons Value

Description: In this final session we ask: what it would mean to create value in common and for the commons? The ideas of the common and commoning are useful to interrogate what we value, how we produce value, and for whom. For example, we may start to consider taken for granted resources such as clean air, or public space, as valuable commons resources, but also as things that are co-produced through use. The commons also offer a very inclusive vision of ownership, governance and use, and as such provide a promising model for challenging the rampaging inequalities in the production and distribution of value in the 'conventional economy'.

Methodology discussed

The module will be taught through a combination of **lectures and seminars**. Lectures will include the use of case studies and videos to illustrate the various issues discussed. The seminars will be articulated around an interactive activity that will run through the course of the module. More specifically, the module will involve:

- The weekly delivery of 10 x 2-hour lectures.

- 5 x 2-hour seminars taking place every two weeks.

The series of seminars will be based on action **learning groups of around 8 students** (with 2 to 4 action learning groups per seminar class) working on a value creation project using the Value Creation Framework designed for this purpose. The aim of the activity is to make students reflect on the complex and political nature of value creation and of the various stages involved. At the end of these seminars, groups will need to have produced a 15-minute video presentation of their value proposition for an organisation of their choice (one they design, or an existing one). This presentation will be aimed at a potential funding body. As they work on the various stages of value creation, students will also be asked to reflect on the process of collaborating in groups (e.g., how are decisions made? Is everyone participating equally? Do leaders emerge?).

Seminar Activities

Seminar	Description
1	This seminar has two key tasks: - Thinking about collaboration versus competition: each group is asked to define and contrast collaboration and competition (by providing a brief description of each as well as some examples). All groups are then given a simple task or game, some are asked

	to do it collaboratively, others competitively; this is followed by a comparative discussion. ● Introduction to the Value Creation activity: You will be introduced to the Value Creation Framework and its various stages. Action Learning Groups to start discussing what sort of 'value' they want their organisation to produce.
2	In this seminar, you will work on the first step of the Value Creation Framework and define the 'value' you want to produce and identify: What needs do you want to address, for whom, what sort of products / services would help address these needs.
3	This seminar has two key activities: ● Work on the second stage of the Value Creation Framework and think about how the structure of their organisation can be designed to facilitate the delivery of value. In particular, you will be asked to think about decision-making processes, and the nature of the relationships between different parts of the organizations (e.g., horizontal versus vertical). ● Reflect on the way decisions are taken in your own groups (e.g., have some leaders emerged? On what bases is it established? Are some voices silenced?)
4	In this seminar, you will work through the last 2 stages of the framework, namely map the supportive ecosystem (e.g., financial service providers, public bodies, social movements, training and educational providers), and plan the implementation process (list all critical activities for achieving the set value proposition, what resources -financial or otherwise- are needed to achieve the set objectives).
5	Prior to this final seminar, all groups' video presentations will have been shared and viewed online. The seminar will be dedicated to discussing the different groups' value propositions, as well as their experience of the collaborative process throughout the project. The work in these seminars would be linked to the assessment based on Group Work (25%)

When will the pilots happen?

University of Essex: Spring Term, **January – May 2023**

ASH University of Berlin: June 2023

University of Essex: Module on 'Understanding Value and Values'. This is a core module across the following UG programmes:

- BSc Business Management
- BSc Management and Marketing
- BSc Accounting
- BSc Accounting and Management
- BSc Finance and Management

ASH University of Berlin: Module on 'Economic Justice, Empowerment and Resilience' as part of MA Social Work as a Human Rights Profession (SWHR)

The pilots' activities will be led by:

University of Essex

Lecture Leads: Dr George Kokkinidis, Dr Simon Carmel, Prof. Peter Bloom

Seminar Leads: Dr Simon Carmel, Dr Hamid Foroughi, Nicolae Radulesco, Theofanis Lyrintzis

University of Berlin

Lecture Lead: Dr Valerie Fournier

Execution of the pilots

University of Essex: 7 of the Themes/Lectures and the Value Creation Framework. All seminar activities are structured around the Value Creation Framework and will also constitute the first element of the assessment in the form of a Group Presentation

University of Berlin: 6 of the lectures / interactive activities

3. Ignition meetings' reports: positive and negative aspects encountered

3.1 Ignition meetings AUTH

The reason why these participants were invited is that they had already shown interest in the LLs and the co-creation workshops. They were actively interested in getting more involved in the coming tasks of the project. Furthermore, they are well-suited to provide valuable feedback on how the material can be piloted, as some of them have expressed interest in using it in their own organization's programs. The ignition meetings aimed to plan the activities based on several areas of the Master. In detail, the discussions focused on Topic 2 (Skills) including **content, practical exercises and assessment methods**. Topic 3 instead concerns the Social Economy Support Structures designed to provide students with an understanding of the three pillars of social entrepreneurship: **Social Impact, Sustainability, and Social Innovation**. Topic 1: Running a SE in order to provide students with an understanding of how to establish and operate a successful social enterprise. Topic 4 supports Value Creation to provide students with an understanding of **how to create value in a social enterprise**. The module includes content on value creation through innovation, collaboration, and market-based approaches. Further details will be included in part 3 and in particular 3.5 of this deliverable.

The objective of the meeting is to present the material developed for the SE Support Structures, Running a SE, and Value Creation modules. The material was developed based on the ideas developed in the LL and co-creation workshops in Greece, as well as in other countries. Additionally, the meeting aims to identify ideas on how the material can be tested in the coming months, to ensure that it meets the needs of students and effectively prepares them for a career in social entrepreneurship.

People appreciated this meeting (after their involvement in the co-creation phase). They found the material and practical exercises interesting and inspiring. They stated their commitment to the continuation of the project and already came up with several cases where the material could be tested.

Do(s) and Don't(s):

The pilot phase should include a comprehensive part of a module if not possible to test a whole module so that feedback is as comprehensive as possible.

It is understood that the whole programme cannot be piloted. Yet, decisions should allow testing as much material as possible considering also that the pilot phase is 6 months.

3.2 Ignition meetings UAB

The discussion focused on Topic 3, which is about Support Structures in Social Economy. The main methodology discussed was **the UPSTREAM experiential board game**, which was created as the main output for this module. The aim was to evaluate if the game fairly represents the discussions that took place during the co-creation workshops.

The meeting was generally positive, with an open and friendly atmosphere, and participants expressing interest in the product and the co-creation process. However, scheduling conflicts resulted in some participants being unable to attend, causing delays in the project. Nevertheless, there are plans for additional meetings and dissemination processes to ensure that those who missed the meeting can still contribute to the evaluation and co-creation of the final product. Overall, while there were some negative aspects related to scheduling conflicts and delays, the meeting was positive and productive, with participants expressing interest and enthusiasm for the project.

3.3 Ignition meetings FEBEA

The meeting had the primary goal of updating the SE organisations about the project progress in terms of the teaching modules.
Furthermore, the meeting had the objective of informing SE organisations about the Learning Mobility in Bologna and assess the possibility of attending either in person or online.

All four topics were discussed, the Wiki was presented and the contribution that Social Economy organisations can make was debated.

The social economy organisations demonstrated a strong interest in the project's advancement and the forthcoming Bologna event, and they appreciated the opportunity to offer their feedback and participate in the creation of the modules. However, the organisations expressed some dissatisfaction with the level of coverage given to ethical finance in the material

3.4 Ignition meetings UoESSEX

During the ignition meeting the discussion focused on Topic 4, the methodology for the module was presented. This included the objectives, structure, and content of the module, as well as innovative activities that would be used in lectures. Two of these activities were presented, namely **a role-play on democratic decision-making and a stakeholder mapping exercise**. The Value Creation Framework activity was also discussed as a central component of the module.

All participants highlighted that they were impressed with the materials produced and academics commented on their excitement to teach these materials if they had the chance. They all found a nice balance between theory and practice, were pleased with our use of inclusive language in the materials produced (e.g., in the description of stakeholders) and found our Value Creation Framework tool very useful for seminar activities and for guiding practitioners to think through their value propositions.

Overall, they also made several suggestions that we could incorporate to further strengthen our module:

- To make sure there is some incentive for stakeholders to participate in the programme and that stakeholders are aware of the benefits of the programme and attracted to it.

- To ensure cross-referencing between modules and tracing of skills across the programmes (e.g., a map of skills and places in the programmes where they can be developed)
- To promote inclusivity and diversity by making sure that the material used, the cases and examples discussed are representative of a diversity of backgrounds, cultures and experiences. This could be reflected in the development of a repository of material (reading, cases, videos…) that include a diversity of perspectives, cultures…

3.5 Ignition meetings UNIBO

The ignition meeting involved teachers in the SE4Ces EU project who were enthusiastic and willing to take the time to organize and train participants. However, it was noted that it is important not to spend too much time explaining the entire project to participants, as they can become overwhelmed. Instead, a simple explanation such as "our department is participating in the SE4Ces EU project to improve our educational approach and pilot innovative methodologies within our courses" can be used.

The methodology proposed involves three different approaches to engage students in learning about corporate welfare and social entrepreneurship (SE) organizations.

The first approach involves **creating a podcast on corporate welfare** where students will interview workers and managers of SE organizations. The aim of this approach is to help students experiment with the topic and gain practical knowledge by interacting with experts in the field. However, this idea is still in the planning phase, and further work is required to develop it into a successful learning tool.

The second approach proposes a **role-playing activity** among students and professionals from SE organizations. In this activity, UNIBO trainers will propose a notice of interest in co-design for social services with local authorities, and students will simulate the roles of different organizations within the co-planning meeting. The objective is to enable students to experience the dynamics of multi-stakeholder decision-making processes in a practical way.

Lastly, the third approach involves developing a **gamification strategy for a strategic decision-making process**. The idea is to create a game-like environment that allows students to engage in a strategic decision-making process for SE organizations. This approach aims to provide students with a fun and interactive way to learn about the complexities of strategic decision-making in the context of social entrepreneurship.

Overall, the proposed methodology combines different approaches to provide students with a comprehensive learning experience in the field of corporate welfare and SE organizations. The combination of practical activities such as role-playing and podcast creation, along with a gamification strategy, aims to engage students and facilitate their learning process.

4. Expected outputs from the pilots

In this paragraph will be explained what are the overall expected outputs from the pilots of the 4 Topic of SE4Ces project: Running a SE organisation, Skills, Support Structures, Creating and Assessing Values. These outputs will help to determine the effectiveness of the project's approach to social economy education and the impact of the new teaching materials on student learning outcomes. Practical results will be obtained from testing the innovative methodologies and teaching tools developed within the project.

The pilots will be conducted in each university involved in the project. The expected outputs from these pilots may include **feedback from students and teachers** on the effectiveness of the innovative methodologies in enhancing their knowledge and understanding of social economy, as well as suggestions for improvements or modifications to the materials.

Other expected outputs from the pilots may include evidence of increased interest and engagement among students in social economy, as well as **increased awareness among educators and other stakeholders** about the importance of social economy education. These outputs will be used to refine and improve the materials developed within the project, with the ultimate goal of enhancing the quality of social economy education across Europe.

The Social Economy presents significant questions regarding the type of value that we want to generate, and it challenges the way that value is understood in traditional economics and standard companies. In the Social Economy, value goes beyond financial gain and includes

economic, social, and environmental objectives. Social economy organizations are motivated by a social mission that includes principles like **solidarity, prioritizing people over capital, democratic governance, and environmental sustainability**. Thus, their aim is to contribute to the well-being of people and the planet in various ways. This implies that the 'value' they create differs significantly from conventional businesses and is intended to benefit various stakeholders beyond just shareholders. Additionally, because this 'value' is different from the traditional understanding, it is challenging to capture it using standard accounting methods like profit and loss accounts. It requires different evaluation techniques that serve various purposes. As a result, the issue of 'value' in the Social Economy raises questions about what constitutes value, for whom it is generated, how it can be evaluated, and why it is evaluated. This module will use both theoretical and practical materials to examine these questions.

Moreover, the purpose of creating a Value Creation Framework is to allow its users to reflect on the value creation process in the Social Economy organisation they work for, one they are familiar with, or one they would like to start. It draws upon and seeks to integrate other very useful tools and frameworks, in particular the **Common Good Matrix, the Social Business Model Canvas and the Doughnut Economic**. The proposed model guides users through four stages of value creation: define value proposition, design the organizational infrastructure that would facilitate the delivery of value, map the supportive ecosystem, and plan the implementation process. This framework can be used by practitioners, students and educators as a foundation for key follow up processes, for example, for doing a social return on investment analysis or for developing a workable strategy/action plan.

It is important to underline that support structures are locally defined and are produced in various scales, from local neighborhoods all the way to the international level. They also vary in type, ranging from tangible assets like specific infrastructure, financial support instruments, or physical geographic advantages, to more intangible conditions, such as favorable institutional frameworks or local traditions. In addition, support structures are weaved through both gradual long-lasting historical processes and exceptional breakthrough events triggered by social movements or natural disasters. Through the use of theoretical inputs and the practical application using an innovative educational board game, in parallel, the current module will present the plurality of support structures necessary for the emergence and reinforcement of social economy.

5. Evaluation

Evaluation is an important aspect in order to provide precise feedback about the implementation of the chosen pilots. The purpose of this section is to describe the information about the parameters of the evaluation methodology. Despite it having been provided in the deliverable D.7.1 "Evaluation Methodology" we want to connect the objects of the evaluation with the chosen pilots.

It has to be pointed out that during the learning mobility (before each university starts the official piloting), it was shared with all participants the evaluation tools to examine their satisfaction and understanding with the presented training material and methods:

1) an evaluation poll and

2) a Postcard to the future self-activity.

Respondents to **the evaluation poll** were the invited and participating educators and SE practitioners attending the Learning mobility event, while the postcard to the future activity was also distributed to consortium members too.

The evaluation methodology focuses on developing a framework used to evaluate SE organizations members/representatives and teachers' professional development in Service Learning (SL) methodologies and collaborative learning and teaching practices.

The end goal is to synchronize the activities of the SE LLs with the evaluation actions, so as to devise an evaluation timeline according to which specific evaluation tools will be designed.

The implementation of the SE Living Labs framework involves multiple objectives, techniques, and actors, and therefore the evaluation plan takes into account several parameters to ensure its successful implementation. The plan adopts a comprehensive evaluation approach that assesses the impact of the project from multiple perspectives, using various tools and methods. This approach is designed to provide a thorough assessment of the project's effectiveness and to identify areas for improvement, taking into account the perspectives of all stakeholders involved in the implementation of the framework. The evaluation will be conducted by analyzing the Attendance and Innovative

teaching methods through Key Performance Indicators. Surveys or questionnaires and qualitative assessment will be administered in order to analyse engagement, satisfaction, attitudes, community development, co-creation methodologies, innovative teaching methods, skills and value creation, professional development.

In the table below a visualization of the parameters that will be useful during the evaluation.

Evaluation Parameters
Attendance
Engagement
Satisfaction
Attitudes
Community-development
Co-creation methodologies
Innovative teaching methods
Skills & Value creation
Professional development

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