



The project is co-funded by the
European Union, Instrument for
Pre-Accession Assistance



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Social Entrepreneurship

Opportunities for young citizens in the Adriatic Region



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This publication has been produced with the financial assistance of the IPA Adriatic Cross-Border Cooperation Programme. The contents of this publication are the sole responsibility of COOSS Marche and can under no circumstances be regarded as reflecting the position of the IPA Adriatic Cross-Border Cooperation Programme Authorities.

Social Entrepreneurship

Opportunities for young citizens in the Adriatic Region

IPA Adriatic Cross Border Cooperation Programme

Priority 1: Economic, Social and Institutional Cooperation

Measure 1.3: Social, Labour & Health Networks

ADRIATIC WELFARE MIX

Developing and Integrating the Welfare System toward a Welfare Mix System Locally

Managed in the Adriatic Area

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1. General Introduction

About IPA programme

The Adriatic Welfare Mix (hereafter AWM) was a project funded by second call for ordinary proposals of the Adriatic IPA Cross Border Cooperation 2007-2013, an instrument for pre-accession assistance of the countries of the Balkan area. It supported the growth of these countries with financial and technical interventions and regulatory reforms. The IPA funds build up the capacities of the countries throughout the accession process, resulting in progressive and positive developments in the region.

About AWM project

AWM project aimed at proposing a sustainable model of welfare, also stimulating and promoting its adoption as a part of the regulatory reforms on going in the IPA territories. The activities focused on the preparation of framework policies, the development of a tailored model of Social Enterprise and the facilitation of the implementation of a modern welfare system and its evolution toward a Welfare mix system. Pilot actions implemented practices and models of social business initiatives, as operational tool for the development of a Welfare Mix approach for the delivery of Social Services in Albania.

The support for the revision of the social security police framework of the Western Balkans as well as the implementation of revised social security policies was one of the key points, the IPA Multi-beneficiary programmes 2007 and 2008 focused on. The Welfare system is one of the main differences between EU & non EU Countries in Adriatic Area. The Welfare Mix model is the main model promoted in the EU countries instead of the Welfare State.



The main principles of Welfare Mix are:

- *Progressive devolution of powers and functions to lower institutional levels;*
- *Recognition and appreciation of the role of the Family as Care Giver;*

- *Introduction of regulatory mechanisms that promote competition among providers, public or private (Profit or Non Profit).*

This model is the most promising in Europe and is quite new in the East Adriatic Territories. Actually the central administration plays the main role in ruling and planning the welfare system and financing it. There have been several other activities that showed the necessity of reforming the system. Actually there are reforms on going in different countries financed from World Bank or EC funds.

AWM project promoted an efficient welfare system as well as a model of social business, harmonizing the supply of professional jobs with the demand for social services. Furthermore project partners addressed their local needs for youth groups in risk, in order to:

- support their transition from the secondary school level into the labour force after the end of the project;
- increase their access to employment opportunities;
- increase their inclusion in civic affairs.

Added effort in key areas, such as delivery of basic employment services to the poorest, market development and education, have been planned by partners as forthcoming actions.

The Work Package 4 (hereinafter WP4), titled "Social Entrepreneurship, as main actor of the Welfare Mix System. Pilot Model in Eastern Adriatic Area", aimed at promoting the creation of jobs for discouraged youth through development and implementation of a model of social business, harmonizing the supply of professional jobs with the demand for social services. The work plan proposed a concrete practice, able to increase the professional capacities of discouraged youth, to encourage their individual initiatives and to increase their access to basic employment services.

Overall objective of the WP4 was to propose a successful venture model in tackling issues of social cohesion and equal opportunities in creative way, investing to transform usually second chance labour force into active participants of the society, rather than passive recipients of social assistance.

In particular, the general objective of Act 4.2 was to develop models of Social Entrepreneurship responding to the requested professional profiles and the sought key competences.

The specific objectives to reach in order to satisfy the main purpose of WP4 were the following:

- to identify the main job profiles requested by local labour market;
- to collect the priority competencies, specific and transversal, needed by a job seeker;
- to develop and implement a training course for the beneficiaries of the action able to provide them the specific skills and suitable knowledge to invest in the labour market;
- to assess and measure the level of sustainability of the proposed model within the specificities of the local areas involved.

The involvement of private actors stimulated and allowed the implementation of the model of Social eEnterprises proposed and the establishment of social enterprises in the Adriatic region allowed to apply such an approach. The Municipality of Tirana, one of the biggest municipalities of the Adriatic area, has been the proponent of the new model of Welfare Mix, managed at local level in joint cooperation between private and public actors.

A joint Observatory on Welfare Policies has been established in Croatia and an on line database published (www.adriaticsocialobservatory.info).

Currently, in the Adriatic area different networks exist, as institutional networks like Forum of Adriatic Ionian Initiatives, Forum of Adriatic Chambers of Commerce, Adriatic Euro region, Ionian Adriatic Initiative; and the Adriatic Macroregion is going to be established in the next years. The Observatory proposes itself as a Technical Partner of the existing structures in the Adriatic area focusing on Welfare and Social Issues. It aims at developing the research and analysis of social phenomena and Welfare Status, enabling data collection systems that allow the monitoring of the users of services and the analysis of specific problems.

The establishment of the Observatory received the strong participation of all project partners. It is meant to be an ongoing technical structure able to gather information, to make studies and researches on the Welfare Status in Adriatic Area and to develop proposals addressed to the Adriatic Public Private Welfare

actors; the Observatory is also conceived to be in contact with the Existing Adriatic Network structures and to propose the establishment of Technical Round Tables.

About the publication

Present document provides and describes the results achieved during the project life, namely in the framework of WP4, with a common and strategic issue: the opportunities of employment and training for disadvantage youth in the project area through the Social Business model, as it was designed and developed within AWM project. It reports within a unique document and within such a strategic issue, the researches, the analysis, the studies, the reports as well as practical and operational activities guides and manuals elaborated in order to implement the AWM Social Business framework in the Adriatic area. It is structured as follows:

- Chapter 2 – It provides a general definition of Social Enterprise;
- Chapter 3 – It offers an overview about the European context;
- Chapter 4 – It enters more in details describing the different types of Social Enterprise;
- Chapter 5 – It presents the Roadmap to create a Social Enterprise;
- Chapter 6 – It suggests a possible training pathway to acquire the needed competences to be an entrepreneur in the Social Economy;
- Chapter 7 – It describes several financial ways to sustain a social business.

The report intends, therefore, to be a practical instrument and guide to young unemployed of the Adriatic basin, allowing them to enterprise a Social Business initiative addressing the Welfare Mix system.

2. *General definition of Social Enterprise*

According to the EU definition, a Social Enterprise (SE) is a private body which combines entrepreneurial activity with a social purpose¹. Its main aim is to have a social impact, rather than maximise profit for owners or shareholders. Businesses providing social services and/or goods and services to vulnerable persons are a typical example of SE. According to the latest figures available, the “Social Economy” employs over 11 million people in the EU, accounting for 6% of total employment. SE has become a small but integral part of the world’s economy. Its influence and impact grows year by year. There are many factors that shape its development: economic conditions, social and environmental challenges, government policies, technology and investments.

In Europe, the concept of SE made its first appearance in 1990, at the very heart of the third sector, following an impetus that was first an Italian one and was closely linked with the cooperative movement. In 1991, the Italian parliament adopted a law creating a specific legal form for ‘social co-operatives’ and the latter went on to experience an extraordinary growth².

The concept of SE, which includes social cooperatives as one model among others, does not compete at all with the concept of Social Economy. It rather helps to identify entrepreneurial dynamics which are at work at the very heart of the third sector, within the various European socio-economic contexts.

Such a perspective has been broadly endorsed by the European Commission when it launched a top-



¹ EC - *A map of social enterprises and their eco-systems in Europe - Country reports*

² Defourny Jacques, Nyssens Marthe, *Conceptions of Social Enterprise and Social Entrepreneurship in Europe and the United States: Convergences and Divergences*, Journal of Social Entrepreneurship, 2010

level Conference in November 2011 to present its "Initiative" to create "a favourable climate for SE, key stakeholders in the social economy and innovation" (European Commission 2011)³.

"A Social Enterprise is a private body which combines entrepreneurial activity with a social purpose"

Member states, even if with some differences, assumed such a definition, but the diffusion of SE within the countries is not homogeneous. Research conducted in various geographical contexts corroborates that SE are a structural trend, which tends to develop spontaneously and

independently from the existence of exogenous enabling conditions; hence the global dimension of this bottom-up reaction on the part of groups of citizens, on the one hand, and also the heterogeneous development trends characterizing SE, which depend on the interplay among various forces at play.

Especially delicate is the relation of SE with public policies. SE can be sustained through adequate supporting and funding schemes, which are introduced on the ground of the responsibilities such institutions decide to take on. When this is the case, policies contribute to addressing weaknesses and enhancing strengths of SE, ensuring thus the replication of SE and the multiplication of their beneficial impacts upon local communities.

By contrast, the spontaneous bottom-up dynamic pushing groups of citizens to self-organize, has also been jeopardized by inadequate policies, which prevented the balanced expansion of SE. Where their potential is not fully harnessed, SE-like initiatives are condemned to remain isolated initiatives. This is still the case of a considerable number of countries, both EU and non EU, including among others Central Eastern and South Eastern European countries. The roles displayed by Se in Central Eastern and South Eastern Europe are still widely underestimated. Various factors can contribute to explaining their insufficient development and the adoption of entrepreneurial behaviours on the part of groups of people, including the lack of supporting environments and

³ Defourny Jacques, Nyssens Marthe, EMES European Research Network, 2012



infrastructures, a restricted access to resources, unsuitable institutional framework and inconsistent legal environment, which result in a lack of legal regulations and unsuitable legal frameworks that fail to consider the social commitment and degree of disadvantage taken on by SE into account.

In addition, the fragile political systems where SE are fit in prevent them from building medium and longer term strategies and the lack of skills of social entrepreneurs adds to the chronic financial instabilities of most SE.⁴

⁴ Bargaza Carlo, Galera Giulia, *The Concept and Practice of Social Enterprise. Lessons from the Italian Experience*, International Review of Social Research, 2012, 85-102

3. Overview of the European context

Despite the efforts of academics, EU institutions, international organisations, national governments and social economy representatives to provide a common analytical framework, a universally accepted definition of the social economy hasn't been identified yet and unanimously accepted. Both academic literature and policy documents acknowledge that, while different types of social economy entities present some common features, they also diverge in important aspects. Furthermore, different enterprises and organisational structures identify themselves according to different concepts. But not all these subjects are comfortable with being called SE.



At the same time, not all enterprises with a legal status, under a particular (national and/or European) regulatory regime, 'fit' for social entrepreneurship or cannot fully recognise themselves as SE or as part of the wider social economy family (i.e. some types of cooperatives).

Social economy is made up of a wide range of operators which taken all together constitute a pole between the public sector and the capital-based sector.

The social, economic and regulatory context for SE is driven by values that substantially and institutionally deviate from the ones governing purely capital-based economic initiatives, and is capable of addressing market issues, in a more efficient way than the public sector.

While it is difficult to describe the social economy by focusing on what social economy organisations share, some distinctive features can be identified on the basis of what sets them apart from other enterprises. In particular, a series of structural elements seem to distinguish the different social economy actors from



other subjects, organisations and bodies operating within the EU single market. The European Commission uses the term '*social enterprise*' to cover the following types of business⁵:

- *Those for who the social or societal objective of the common good is the reason for the commercial activity, often in the form of a high level of social innovation.*
- *Those where profits are mainly reinvested with a view to achieving this social objective.*
- *Those where the method of organisation or ownership system reflects the enterprise's mission, using democratic or participatory principles or focusing on social justice.*

There is no single legal form for SE. Many operate in the form of social cooperatives, some are registered as private companies limited by guarantee, some are mutual, and a lot of them are no-profit-distributing organisations like provident societies, associations, voluntary organisations, charities or foundations. Despite their diversity, SE mainly operate in four fields:

- *Work integration: training and integration of people with disabilities and unemployed people.*
- *Personal social services: health, well-being and medical care, professional training, education, health services, childcare services, services for elderly people, or aid for disadvantaged people.*
- *Local development of disadvantaged areas: SE in remote rural areas, neighbourhood development/rehabilitation schemes in urban areas, development aid and development cooperation with third countries.*
- *Other: including recycling, environmental protection, sports, arts, culture or historical preservation, science, research and innovation, consumer protection and amateur sports.*

⁵ Last update: A recipe book for social finance - A practical guide on designing and implementing initiatives to develop social finance instruments and markets (February 2016)

3.1 Legal framework

In terms of contributing to the development of a “solidarity-based economy”, SE are included within a general purpose of supporting European countries to achieve a number of key EU goals, such as job creation and preservation, social cohesion, social innovation, rural and regional development and environmental protection. The principles of solidarity and its implementation in the EU economy are based on two distinct but complementary pillars: the enforcement of competition and the adoption of social policy measures guaranteeing social justice and bolstering social protection.

On 25 October 2011, the Commission launched its largest initiative for the promotion of social entrepreneurship. The “Social Business Initiative - Creating a favourable climate for SE, key stakeholders in the social economy and innovation” was developed by DG Market, DG Employment and DG Enterprise in the framework of the implementation of the Single Market Act (April 2011). The communication proposes 11 main actions to promote the social economy and social entrepreneurship in the wider sense.

“The Social Business Initiative (SBI), launched in 2011, aims to:

- Introduce a short-term action plan to support the development of social enterprises, key stakeholders in the social economy and social innovation*
- Prompt a debate on the avenues to be explored in the medium/long term.”*

The EC definition comes from the 2011 Social Business Initiative: the European Commission assumes as SE “businesses providing social services and/or goods and services to vulnerable persons (access to housing, health care, assistance for elderly or disabled persons, inclusion of vulnerable groups, child care, access to employment and training, dependency management, etc.); and/or businesses with a method of production of goods or services with a social objective (social

and professional integration via access to employment for people disadvantaged in particular by insufficient qualifications or social or professional problems leading to exclusion and marginalisation) but whose activity may be outside the sector of the provision of social goods or services"⁶. Setting the main criteria that have to be met for an organisation to be considered a SE, the Commission put more emphasis on the innovative feature of SE, which lies in particular in their capacity to bring an entrepreneurial and commercial dimension to the provision of services of general economic interest and to the solution of social issues. In other words, the Commission acknowledges that SE are more than social employment and inclusion entities, as they are oriented towards addressing the needs of the entire community and not only of their owners or members. The Commission also expressed the view that since SE pursue social goals as the main reason of their existence and operate according to the principles of democracy, participation and social justice, they deserve adjusted treatment and legislation.

From a public policy point of view, the Commission's definition represents an important attempt at mapping and increasing the visibility of SE and constitutes a significant step towards the improvement of the existing regulatory framework. A legislative definition of SE (and of social innovations) has been provided by Articles 2(1) and 2(5) of Regulation 1296/2013 on a European Union Programme for Employment and Social Innovation (EaSI).

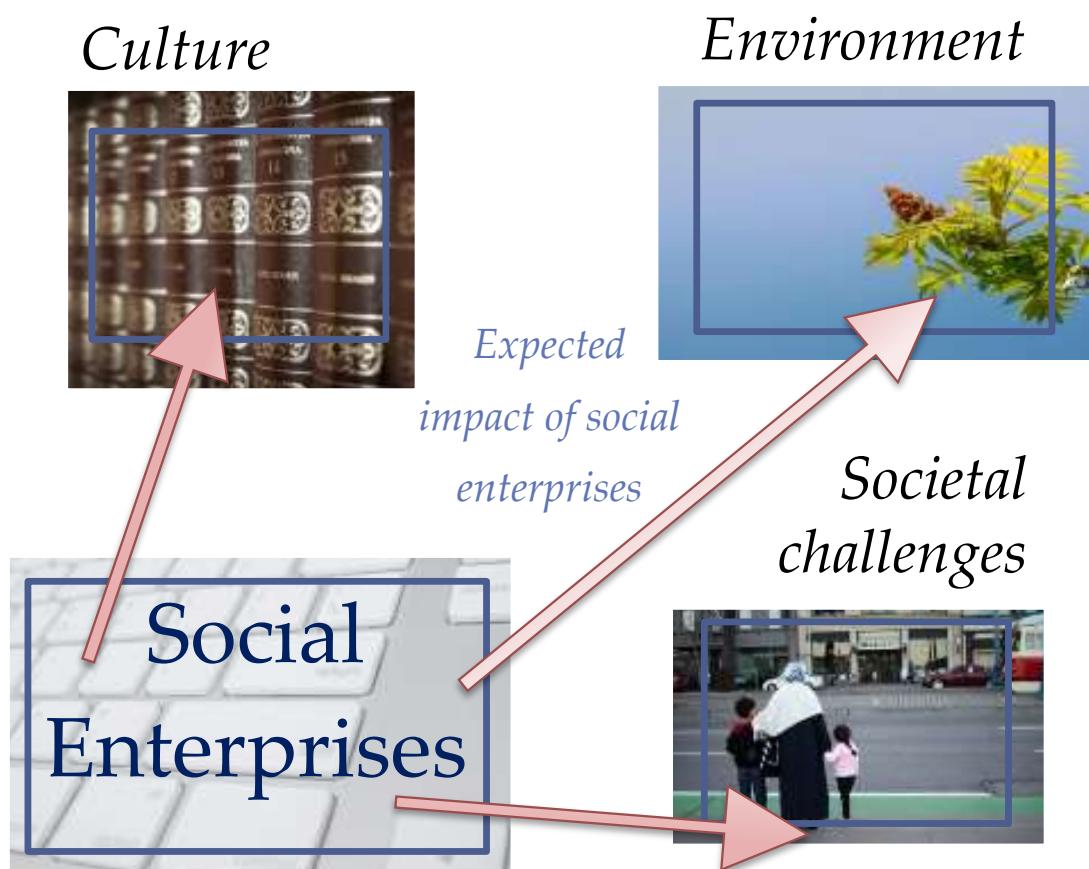
Besides the Commission and the Council, the European Parliament also played an important role in the development of an EU legal framework for the social economy. Since the 1990s, the EP adopted: a written declaration calling on the European Commission to table three proposals for European Statutes for foundations, associations and mutual; two resolutions, respectively on the social economy and on the contribution of co-operatives to overcoming the crisis (February 2013); and the resolutions on the Statutes for a European Mutual Society (March 2013) and for a European Foundation (July 2013).

Furthermore, the European Economic and Social Committee (EESC) has also championed the recognition of co-operatives, mutuals, associations and the social economy in general and has actively contributed to the EU institutional debate, through the adoption of a series of opinions and recommendations.

⁶ Michelini, Laura "Social Innovation and New Business Models. Creating Shared Value in Low-Income Markets" – (2012)

3.2 Social impact

Social entrepreneurs play a unique role in creating world change. They are distinguished from other citizen sector leaders by their long-term focus on creating wide-scale change at systemic level. Such a change is often difficult to measure. Many of the methodologies designed to assess impact in citizen sector organizations today focus on easily-quantifiable figures such as financial ratios or programmatic outputs. Such metrics emphasize financial stability and other “hard” organizational factors that lend themselves to quantitative measurement. But the most important and meaningful product of a social entrepreneur’s work to be considered is a systemic social change over time⁷.



In general, with regard to the objective of the organization, many European laws on SE focus on the so called interest of the community, which is presented as the exclusive (or, at least, primary) purpose of the SE.

⁷ Leviner Noga, . Crutchfield Leslie R, Wells Diana, Understanding the impact of social entrepreneurs, Research on Social Entrepreneurship, 2005

Environmental or ecological impacts. All organisations and people have an impact on the environment. A SE has to ensure that its impact does not have an adverse or negative affect on the environment. It is only by minimising these adverse effects and maximising positive impacts that SE can ensure future sustainability.

Social impacts. A SE would want to ensure that it impacts on people and their livelihoods in a positive way ensuring prosperity and well-being. SE defines prosperity as being more than money and distinct from wealth for its own sake. A society can prosper as the sum of all its parts and the prosperity of a few.

Cultural impacts. Culture is about the way people do things and the way they interact each other. The culture of a community or society is often taken for granted and accepted as the normal way of doing things. But in different groups and communities there are different "cultures". "Culture" is not necessarily good or fair. A SE would want to assess its impact on the beliefs and norms of the wider society in which it operates - its culture. Furthermore, an understanding of the economy is therefore part of 'culture' and has been developed through history and is not static. SE can use external income and has a financial impact on its community. It has to be financially sustainable or it will no longer be able to exist. It has clear and explicit values that underpin all its actions. In its locality it uses social, environmental and cultural resources and creates social, environmental and cultural products or services thus having an impact on people, the environment or ecology and on history, culture and technology within society. It reports on its products/services and impacts using social accounting and audit.

4. Different types of SE



Historically, social economy organisations have been grouped into four major categories: cooperative enterprises, mutual societies, foundations and associations, whose legal form may vary considerably from one country to another. From an overall examination of the European laws on SE, it emerges that these laws substantially agree on defining the SE as⁸:

- a) A private legal entity,
- b) which conducts an entrepreneurial activity of social or common benefit,
- c) for a general or community interest purpose, and not to distribute profits to its members, founders, directors or employees.

4.1. Cooperative enterprises

A cooperative is an autonomous association of persons united voluntarily to meet their common economic, social and cultural needs and aspirations through a jointly owned and democratically controlled enterprise. This definition was also adopted in the International Labour Organization (ILO) Recommendation 193 of 2002.

⁸ Borzaga C., Bodini R., Carini C., Depedri S., Galera G. and Salvatori G., "Europe in Transition: The Role of Social Cooperatives and Social Enterprises", Euricse Working Papers, 69 | 14 (2014)



Cooperatives often are an effective method to overcome economic and social difficulties. Historically, cooperatives have been capable of enhancing the ability of disadvantaged groups of people to protect their own interests, by guaranteeing self-help outside the family in accessing basic goods and services. Unlike shareholder companies, where ownership rights belong to the investors, in a cooperative organisation ownership rights are assigned to other groups of agents (consumers, workers, producers, farmers, etc). In both industrialised and developing countries, cooperatives continue to contribute to socio-economic development, support employment growth, and sustain a balanced distribution of wealth.

4.2. Mutual organisations

A mutual, or mutual aid society, can be defined as an association that offers insurance services to the benefit of its members. Mutual aid societies are based upon reciprocal contracts and require that members receive benefits as a consequence of their participation.

Mutual aid societies were initially launched to ensure workers against work disability, sickness and old age and they were widespread until the end of the 19th century. With the institution of compulsory insurance schemes, in some countries (e.g. France and Germany) mutual aid societies were included in the public insurance schemes, while in other countries (e.g. Italy) they were marginalised. New forms of mutual aid societies are starting to develop in countries where social security systems are at an early stage of development and only cover a small part of the population. Mutuals can be established to cover a wide range of risks, including health (costs of treatment, medicines, and hospitalisation), death (material support for the family of the deceased), funerals, and bad harvests or catches.

4.3. Associations

An association is a group of people who join together for a particular purpose (be it cultural, recreational, social, or economic in nature) and give rise to an organisation aiming to carry on its mission during the time. Associations can be

formal, with rules, by-laws and membership requirements, or can be an informal collection of people without a set structure.

Associations are perhaps the oldest form of social economy organisation: they began to emerge in Europe once small part of the population. In recent years, a revival of mutuals in several European countries is increasingly registered, as a form of insurance against current and future risks complementing the safety net provided by public institutions.

Associations can be either general-interest (the class of beneficiaries differs from the one of promoters) or mutual-interest organisations (solidarity within a class is decisive). These organisations have a wide variety of names based on national context, such as: associations, non-profit organisations, voluntary organisations, non-governmental organisations, and so on.

4.4. Foundations and other organisations

Foundations are legal entities created to accomplish specific goals for the benefit of a specific group of people or of the community at large, through the use of an endowment or systematic fundraising.

These organisations are above all committed to promoting social, religious, educational activities or various general-interest activities according to the founder's will. In some instances foundations can take on some other country-specific organisational form (such as charities in the United Kingdom or even religious organisations). Throughout Europe, foundations typically take on one of two roles: in some instances they engage directly in the provision of goods and services, while in others they provide funding for specific categories of people or activities, including the production of specific services.

A raising number of foundations is registered in more recent periods. that stem from the initiative of wealthy individuals or from corporations and that engage in the support of social projects and organisations. As things are evolving, the latter type of foundations is in the process of transforming themselves – adding to their core business of granting donations that of becoming a strategic philanthropic investor⁹.

⁹ For more details, see "Social economy and social entrepreneurship Social Europe guide | Volume 4"

5. *Roadmap to create a SE*

The creation of a SE may be divided into seven stages:

Stage 1: evaluating entrepreneurial aptitudes;
Stage 2: defining the business idea;
Stage 3: dealing with bureaucratic formalities;
Stage 4: analysing the market and the product/service;
Stage 5: organising the enterprise;
Stage 6: drafting the business plan.

5.1 Stage 1: Evaluating entrepreneurial aptitudes

In this first stage, attention should be focused on the personal abilities of the aspirant “social entrepreneurs”. It is important to assess their profile from the following angles:

- ✓ *psychological (“entrepreneurial personality” as well as “social personality”);*
- ✓ *technical (with reference to their specific “skills” in the chosen field of activity).*

From the psychological point of view, there is such a thing as an “entrepreneurial personality” and a “social personality”. Some people have natural skills as entrepreneurs, for example resistance to stress, acceptance of risk, creative problem-solving ability. Operating in certain “sensitive” domains requires other characteristics such as: sensitivity, altruism, ability to relate with others. The “strengths” and “weaknesses” of entrepreneurial and social personality should be identified at this stage, exploiting the former and improving the latter. It should be remembered, however, that some skills can be acquired, also through suitable training courses.

5.2 Stage 2: Defining the business idea

It is important to select the idea for a SE with care. This means that before deciding to offer goods or services, it is mandatory to:

- ✓ *choose the socially useful goods or services;*

- ✓ *know what the consumer wants. It is of key importance to produce goods/services based on their needs as the primary starting point, rather than offering something - however high quality - and then trying to sell it.*

Thus, the social entrepreneur must take account of the market and the competition, since SE is unlikely to be alone on the market in the sector in question. Frequent competitors will not only be other SE, but also for-profit enterprises operating in the same sector.

5.3 Stage 3: Measuring the business risk

Another thing that an entrepreneur should do, to test the feasibility of the idea, is to measure the associated risk.

A risk-free business is a contradiction in terms, and the risk that something could go wrong is intrinsic to the initiative. But although risk cannot be eliminated, it can be calculated. At this stage an initial perfectibility analysis may be useful, to facilitate an evaluation of the “strengths” and “weaknesses” of the business idea (risk factors), and of the degree of overall risk.

All the objective factors should be accounted for which could affect the success of the business: e.g. its location, the demand for social goods and services in the sector in question, the financial resources available, etc.

If account is not taken of these risk factors, the initiative could fail.

An initial feasibility analysis, however, will enable the social entrepreneur to make any necessary adjustments or corrections required, before process begins.

For example, before setting up a standard enterprise that primarily offers socially useful services, the following questions have to be answered:

The aspiring social entrepreneurs:

- ✓ *have they significant work experience?*
- ✓ *have they experience in this specific sector?*
- ✓ *have they experience running a firm?*
- ✓ *can they cover all the key roles: management, production, distribution/sale of services, or some of these?*

The services offered:

- ✓ *are they traditional and well-known or new and unknown?*

- ✓ are they simple and tangible e.g. accompaniment services for the elderly, and therefore easily assessable by the user, or are they complex, intangible services more difficult to evaluate, e.g. services to promote the cultural heritage?
- ✓ do they involve a high or low level of know-how?
- ✓ are they better or worse in quality or the same quality (the price being equal) as those of the competition? Are the required quality standards average or high?

In the **reference market** and in the chosen sector:

- ✓ are the prices for the services better, worse or the same (quality being equal) as those of the competition?
- ✓ is the current demand for the services steadily increasing or declining? What are the forecasts for the near future? Is the demand spread out in the area that the enterprise is operating in, or otherwise?
- ✓ are there competing non-profit organisations? If so, are they small in number and size, or large in number and size?
- ✓ are there already a sufficient number of potential users, or must service-users be built up completely from scratch? In the first case, are they key users (that can bring significant work on a continuous basis) or infrequent users (requiring modest service levels on an occasional basis)?

As for the **geographical location**:

- ✓ is the planned a geographical zone economically well-developed with decent infrastructure, or a developing area with poor infrastructure?

The necessary **personnel**:

- ✓ are the personnel primarily non-specialised, easy to locate and train, or highly specialised and difficult to locate and train?

Funding the **investment**:

- ✓ can own resources be used or bank loans are required?
- ✓ can own resources plus public subsidies, if any, cover the entire requirement for fixed investments and working capital, or do they only cover a small part of the fixed investments?

5.4 Stage 4: Dealing with bureaucratic formalities

Firstly, aspiring social entrepreneurs must ensure they meet the legal requirements to set up a SE.

Secondly, they must inform themselves about the steps necessary to set one up, bearing in mind that these vary greatly depending on the legal form adopted.

5.5 Stage 5: Analysing the market

Before proceeding, answers to following fundamental questions are needed:

1. *To whom to sell? Which is the market targeted?*

- *orienting towards the market: i.e. understanding the needs of the consumer or user and doing utmost to satisfy them;*
- *identifying the type of consumer addressed, as this could affect the way the entrepreneur presents himself and the type of service to be provided;*
- *analysing the potential market: is it big enough? Is it expanding? Are there many competitors?*

2. *What to sell? Which products and services are introduced to the market?*

Then you can define your enterprise as a way to offer:

- *the "right" product/service;*
- *at the "right" price;*
- *using the "right" distribution;*
- *with the "right" communication;*
- *to the "right" customer/user.*

Your offer is a “total package”, a combination of product/service, price, distribution and communication. These elements must be in harmony with one another.

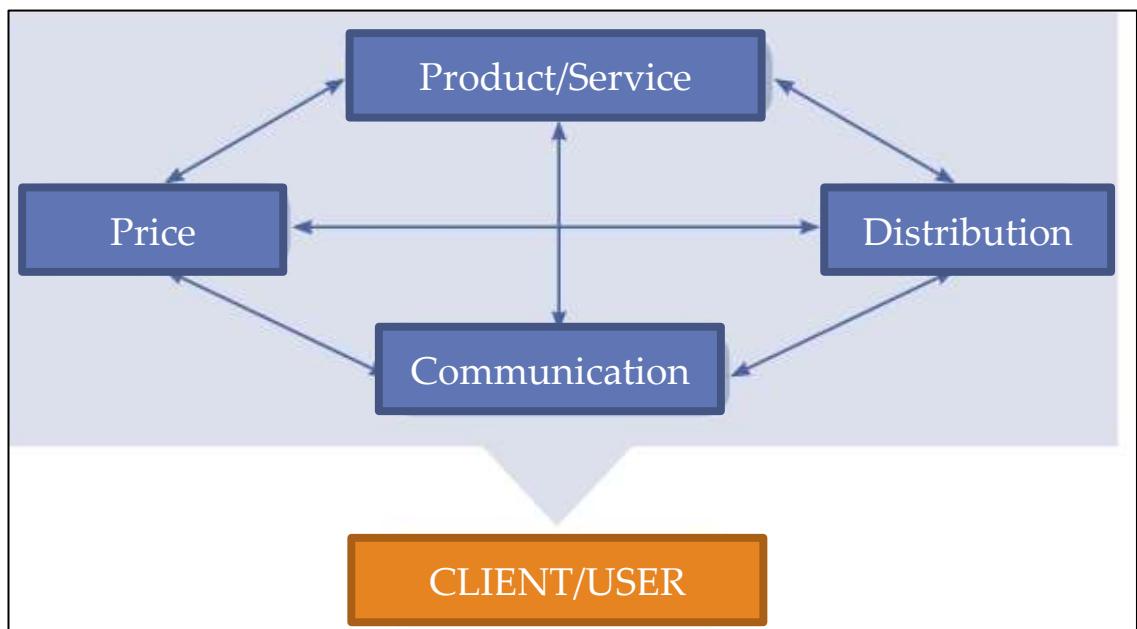


Fig.1: Product /Service, Price, Distribution, Communication → Customer

Example, in the case of a SE offering services, the same market approach as for profit enterprises has to be applied, adapted to the SE characteristics as follows:

- **Service and price:** highly specialised and expensive services (such as medical care to patients suffering from rare diseases) cannot be offered for a low price, nor can simple and inexpensive services (such as accompanying the elderly) be offered for a high price; in both cases, the price must be fair.
- **Service and distribution:** services cannot be offered by post which require immediate response times i.e. which generally require the telephone (e.g. urgent care services for the elderly or seriously ill are normally accessed through special emergency numbers; support services combating loansharking, extortion, maltreatment etc. are frequently available through toll-free numbers).
- **Service and communication:** a service offered to the local community cannot be advertised on a national television network, or social campaigns to prevent obesity cannot be targeted at overweight people.
- **Communication and distribution:** you cannot advertise a service long before it is actually made available.
- **Service and customer:** you cannot offer children services that are targeted at adults.

A SE does not exist in isolation, but will be positioned within an environment that will affect and be affected by it.

It is imperative to try to understand the overall economic and social situation ("macro-environment") and the market situation that interests more closely ("micro-environment").

The macro-environment deals with everything the enterprise cannot directly control:

- the public administration;*
- the political, social, economic, cultural climate etc.*

The micro-environment relates to anything that can be influenced more or less directly by the enterprise:

- clients/users;*
- suppliers;*
- competitors;*
- any intermediaries (e.g. shippers, dealers, agents and representatives, brokers, advertising agencies, etc.).*

This relates in practice to the specific sector of activity, which represents the "field of action" in which the enterprise will operate.

Among the many changes in the macro and the micro-environment, it is needed to try to identify those which represent an opportunity for the social organisation (e.g. a law offering particularly favourable subsidies) or a threat (e.g. reduced demand for the services). The only hope to succeed rely on the full understanding of the existing opportunities and risks.

What is required, therefore, is a market survey based on the competitive system relevant to the SE: essentially, the market chosen to operate in has not only customers/users.

There are other persons or entities involved (competitors, suppliers...) to be taken into account. For example, entering a "difficult" sector such as environmental protection could seriously challenge a new SE, since there would be strong competitors such as big for-profit enterprises specialised in eco-business.

Once the potential customers/users have been chosen, a product or service has to satisfy their needs. Therefore it is recommended to:

- ask what are the needs of the customer/user;
- think about the most suitable product or service for their needs.

Another essential consideration is that the offer is not based only on a “simple” product or service but also on its quality and assistance that is personalised i.e. calibrated to the specific needs of each customer. If the offer relies only on products, it is mandatory to guarantee a post-purchase assistance and even more: namely a “system for the product” or a “360 degree service”.

Example:

In order to understand what are the critical success factors in the particular case, the study of the forces within on the chosen system is required.

- *To give an example from the education and training sector: for an Italian school for non-EU workers, a critical success factor is the availability of a fully bilingual faculty that can communicate with most of the nationalities in Italy and that is properly trained from the teaching and cultural point of view.*
- *To give another example from the field of social assistance: in case of a provision of care service to elderly people living alone and with limited financial resources, a low price may be decisive - or even the use of volunteers for free.*

5.6 Stage 6: Organising the enterprise

Each company consists of four basic elements:

- material resources (premises, furniture, machinery, equipment, raw materials...);
- human resources (personnel);
- financial resources;
- technological resources and know-how.

There are numerous, difficult choices to be made by the enterprise. In particular:

- whether to create a new enterprise or acquire an existing one;
- what size it should be;
- where to locate it;

- what legal form to give it;*
- how to organise the production factors.*

5.6.1 The enterprise: acquire it or create a new one?

This is often the first question that the aspiring “social” entrepreneur asks him or herself. Buying (or renting) a company instead of setting up a new one may, in certain conditions, represent a winning move. There may be advantages and disadvantages to this choice.

The advantages of purchasing. Since the companies in question have already commenced operations and have a presence on the market, and also have available historical data, it is easier to make reliable forecasts about the company's ability to generate adequate income. Then the level of risk and suitability of the investment can be quickly gauged. There is still a start-up period in the case of a purchased enterprise but, compared to beginning from scratch, it is much less demanding in terms of technical complexity, cost and time.

The disadvantages of purchasing. The total cost of such an operation includes not only the purchase price, but also transformation costs. The purchase will be affordable only if the adaptations and improvements required are modest in size. Otherwise, a radical restructuring could prove too costly and indicate against purchasing the company, even if the price initially appears attractive. A very common error in this type of situation is the belief that the original structure can be left unchanged. Adaptation interventions, however modest, are always necessary.

The advantages of setting up an enterprise. The main advantage is the opportunity to create a more modern and “ad hoc” structure, better suited to the objectives of the emerging social entrepreneur.

The disadvantages of setting up an enterprise. The main disadvantage is the lack of experience and the consequent difficulty of making reliable forecasts. It will be clearly necessary to seek out and gain new users.

Whether the enterprise is purchased or otherwise, the right dimensions for the enterprise must be determined. This problem needs to be addressed by the entrepreneur not only at the initial stages, but on a continuing basis, and it will never be finally resolved. The essential criterion in seeking the optimal size

should be maximum flexibility: you need to create a structure that can adapt smoothly to changing external conditions.

In general, however, given the extreme vulnerability of any company in its early stages, it is advisable to proceed with care. It is better to maintain modest dimensions at first, expanding only when the SE is already up and running and has been shown to be suitable for new investment.

It is necessary, therefore, to immediately determine the optimal size of the enterprise. It is essential to resolve this issue from the earliest possible moment, thereby creating the conditions for subsequent adaptation.

- ✓ *The expansion from the initial size, if properly prepared, is physiological in nature.*
- ✓ *A forced scaling down can be an extremely negative event, resulting from poor initial planning.*

5.6.2 Localisation

This is another key problem, which depends on a number of factors:

- ✓ *proximity to the market;*
- ✓ *infrastructure (motorways, railways, aqueducts, power/telephone infrastructures, etc.).*
- ✓ *availability of qualified personnel in the area;*
- ✓ *ability to access subsidies available for specific geographical areas;*
- ✓ *presence of environmental or other restrictions which make a specific location inconvenient or impossible (e.g. a nursing home in an industrial zone). In general, the importance of these factors varies depending on the type of activity carried out: a restoration workshop, for instance, is more suitably located in a city of art;*
- ✓ *the availability of premises in a particular area: location is often chosen based on the availability of premises. But this criterion, however low-cost, can be counter-productive as it may not be the optimal location for the enterprise.*

In any case, whether or not premises already exist, it is often necessary to acquire new premises. This raises the question of whether to buy or rent them. Buying a premises can be beneficial, for example, if you plan to remain for a long time in the same place, thus allowing your capital to appreciate over time, which in turn represents a good guarantee for investors.

It is more advantageous, on the other hand, to rent premises if you plan to change the headquarters or if a capital injection requires to be used in a different way.



5.6.3 Where to go if you do not have premises

An interesting and innovative solution to the problem of localisation is that of “business incubators”, where they exist. These are facilities which are leased to new businesses, especially in economically more deprived areas.

The new businesses accommodated in these incubators are able to avail of a whole series of services (reception, telephone exchange, photocopier, meeting rooms, data processing centres, secretarial service) as well as personalised assistance and advice (administrative, financial, commercial, legal, etc.). This arrangement permits significantly reduced start-up costs.

5.6.4 The legal form

Another important problem when setting up the company is its legal form. An organisation setting up as a SE can be legally structured in different ways. SE *law-making* is a growth industry. In the United States alone, over the last few years, there has been a proliferation of state laws establishing specific legal forms for SE. The situation is not different in Europe, where the process began much earlier than in the United States and today at least fifteen European Union member states have specific laws for SE. This article will describe the current state of the legislation on SE in Europe, inquiring into its fundamental role in the development of the social economy and its particular logics as distinct from those of the for-profit capitalistic economy. It will explore the models of SE regulation that seem more consistent with the economic growth inspired by the paradigms of the social economy. It will finally explain why, in regulating and shaping SE, the model of the SE in the cooperative form is to be preferred to that of the SE in the company form.

5.7 Stage 7: Drawing up a business plan

At this point, it is time for a real “business plan” on paper.

A business plan enables to judge the feasibility of your initiative from its various points of view (technical, commercial, economic, financial); it is a kind of “operational guide” for the initial phases of management; it is a “calling card” of inestimable value in making contacts with potential buyers or lenders.

The business plan has three key parts:

- The first introductory part (brief description of the SE concept and how it will develop, and also a personal and professional description of its promoter/s);
- The second part, technical-operational in nature (factors must be examined - based on market analysis - such as product/service, price, communication and distribution; equipment, premises; the organisation of the manufacturing process and of the commercial and administrative-managerial system, etc.);
- The third part, which is quantitative-monetary in nature (all decisions relating to the various elements of the corporate structure and to the level of operational activity must be translated into quantitative-monetary terms: investment, financing, income and cash flows).

5.7.1 Choose the sector of activity

Goods and services provided by the SE must belong to a specific sector of activity of particular social-ethical value; namely the corporate purpose must involve one or more of the following areas (Italian example given):

- a. *social assistance;*
- b. *health care;*
- c. *health and social care;*
- d. *education and training;*
- e. *protection of the environment and ecosystem;*
- f. *enhancement of cultural heritage;*
- g. *social tourism;*
- h. *university and post-university education;*
- i. *research and provision of cultural services;*
- j. *extra-curricular training, aimed to prevent school dropout and to achieve successful education and training;*
- k. *services instrumental for SE.*

Organisations may also acquire SE status - regardless of the above sectors of activity - if they are carrying out business activities for purposes of work integration of disadvantaged and disabled workers, provided they represent at least 30% of staff employed in any capacity in the enterprise (under Italian law).

5.7.2 How to manage a SE

In non-profit enterprises, the cost-revenue ratio determines the cost-effectiveness of management, and income measures this cost-effectiveness which must be analysed in the medium to long term. Furthermore, the ratio between incoming and outgoing cash and financial flows determines the enterprise's financial structure.

*VISION
PLAN
TEAM
MARKETING
GROWTH
SUCCESS*

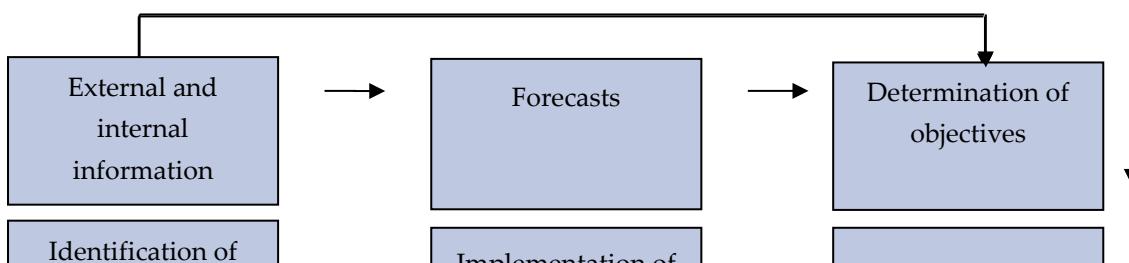
The enterprise's internal organisation can be of different types (hierarchical, functional, etc.), but is generally divided into centres of responsibility (cost or revenue centres) where the efficient use of resources can be controlled. The medium term income is the tool that allows the effectiveness of production to be measured.

The SE requires proper management tools. The objectives of a non-profit organisations are, briefly:

- *cost-effective management;*
- *the role of planning, control and of the related information system;*
- *the use of human resources.*

Cost-effective management means efficiently producing goods and services that can effectively satisfy the needs of those who are in your sights.

Planning and control of management implies rational decision-making and are the best ways of achieving cost-effective results. General planning involves the SE as a whole, while direct planning seeks to coordinate the means to achieve the goals and objectives determined at the planning stage, and involves a less extended period of time. The control phase must be ongoing, to enable any necessary corrections and appropriate adjustments to be promptly made, in order to achieve cost-effective management on an ongoing basis.



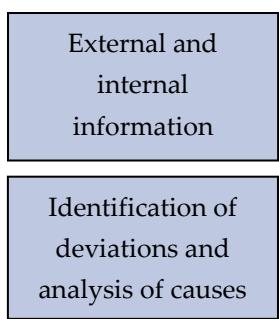


Fig. 2 General and direct planning

6. Key competences for a manager of SE

In order to provide young people with competences and skills featuring the Social Entrepreneur, a set of training modules and related contents were identified within AWM, specifically conceived for the Albanian context but also having in mind also the opportunities for a SE operating internationally in the Adriatic area.

6.1 Understanding and working in the market and in team

Objectives and aims

- to understand the main concepts and the definition of social entrepreneur
- to understand the functioning and mechanism of the labour market
- to develop the capabilities of self-monitoring and self-awareness, skills, motivations and expertise
- to understand the request of the personal service market in terms of knowledge and skills
- to enhance the abilities aimed at the adoption of behaviours and attitudes suitable for the team working procedures

Content

1) Welcome and guidance

- opening of the course and creation the class group, introduction and cooperation climate
- definition of the future career outcomes: skills, positions and tasks
- introduction to the course, explanation of objectives, programme and methodologies of the training as well as the methodologies of credits acknowledgment and testing of skills
- explanation of the organizing structures (included the safety plan f the course venue) and accompanying services supplied to develop the training reconciling it with family and working life
- introduction of teachers, tutors and members of the project staff

2) Skills balance sheet

- self-analysis with respect to character and ethical aspects, personal abilities, knowledge and skills useful in terms of work, compliance with and control of stress and ambitions/working and personal objectives
- definition of individual skills framework with the collaboration of the teacher
- construction of the personal profile of each learner with respect to strength, weakness and capacity
- analysis of a team to join the minimum knowledge of each learner so as to study the content of the previous skills and define motivation and expectation with respect training

3) Introduction to the social sector

- in which fields to search for job opportunities: key factors to choose your working sector; how to develop the learning strategy
- how to introduce oneself in the working field: clothes, look, personal introduction
- to learn methods, instruments and strategies to select the staff
- key elements to manage oneself in the job
- management of time and meeting the deadline

4) Team working

- to work to achieve common and shared goals
- to define strategies based on cooperation and collaborative procedures
- to learn problem solving techniques
- decision making
- to acquire more efficient communication
- to develop stronger leadership

6.2 Functional skills: english and information technology

Objectives and aims

- to be able to communicate in English in the work environment
- to deal with the technical language which is relevant to the sector
- to know and master computer instruments and systems as well as modern digital devices (laptop, tablet, Smartphone, etc.)

- to acquire experience in the web-sites and social services used in everyday life and in work (Skype, LinkedIn, Facebook, Google +, Google Drive, Dropbox, etc.)

Contents

1) Special languages: english language

- initial evaluation of the level of knowledge and master of the English language
- short logical-grammar revision f the English language
- reading, comprehension, terminology
- listening, speaking and writing
- exercises and role-plays about telephone conversations, introductions, presentations, dialogues (also in the work environment) using the appropriate terminology
- writing of e-mails and short texts to work in special sectors
- listening and comprehension of interviews and videos in English with respect to a special working sector

2) Information technology

- initial evaluation of the level of knowledge and master of the information technologies
- basic and advanced concepts on the Office suite (word processing, spreadsheets, to be able to present slides effectively)
- basic concepts, use of the computer and file management: hardware, software, peripherals and their main characteristics, Windows working environment, overview of the applications
- Web surfing and communication: search engines and tools; email, messages and telephone book
- Use of the new technologies in firms (working with the company private network, management of accounts and passwords, presentation of tools, programmes and special accounting, administrative, business, financial, management software
- Antivirus management and planning
- Privacy regulations and information security

6.3 Functional strategies and behaviours

Objectives and aims

- To acquire basic tools to set the activities effectively
- To know and be able to implement rules and methodologies of quality system planning and management
- To know the social sector thoroughly and acquire practical intervention capacity
- To know the legislation of corporate law
- To acquire knowledge, techniques and instruments of Business plan and statistics

Contents

1) Quality system

- quality management system: responsibility of the supervision, management of resources, measurement, analysis and improvement
- plan the quality system (the effect of the system in organizations, planning methodology, definition of processes)
- to perform documents (requirements of documents; the manual of quality; the description of processes; the documents for planning; the procedures; the registrations; the summary on the organization of documents; computer supports)
- top lan the improvement (the requirements of the improvement process; basis; the planning)

2) Enterprise system

- legislation in the subject of enterprise: source of documents
- the sources of law
- labour market
- the social clauses in the UE system
- position, typologies and compliances of the entrepreneur
- the SE in the Albanian system
- the limited companies: typologies, characteristics, compliances
- basic notions of company, EU and international law

- the taxes on the enterprise
- business plan and statistics for the enterprise (definition of the business model and business idea, the different aspects of the business plan for the creation and management of the enterprise: the company team, the organisation of the enterprise, the analysis of the market and competition, the definition of business strategies, the organization of the production factors, the construction of the organizing system, the economic and financial management)

6.4 Collaborating in implementing a management control system that combines economic-financial aspects with indicators of effectiveness and efficiency of product and process

Objectives and aims

- to acquire instruments and methods which are useful in the construction and management of the company accounting
- to know and be able to apply the civil, fiscal rule as well as the accounting principles
- to know and be able to use management software and computer procedures
- to know and apply the systems of cost classification

Contents

1) Directional and analytical accounting

- relationship between directional and general accounting
- relationship between budget, planning and control
- aims of directional accounting: what it is used for and how it is carried out
- general aspects of the system of the management control
- planning of the control system: phases and critical variables
- implementation of the system: roles and procedures
- the elements of cost: defining cost; the classification of costs, the variability of costs, the configuration of cost, operational costs and strategic costs
- the costs of the product in the decision-based process: deciding the price, analysing the breakeven point, deciding the mix, deciding to make or buy
- the economic budget, the financial budget, the budget of investments

- the reporting system: data and structure of the report, the construction and development of reports, the aims, the form and presentation of reports; Report of the General Management and for other Managements; Report of the cost centres; Report of Product; Report of business; Report of project; Report on working capital; variance Report

2) General accounting

- European, National fiscal and civil law
- European, National fiscal and civil law concerning business bookkeeping
- the principles of the examination of the accounting system
- the examination instruments: the account, the chart of accounts, the account books and their functioning in the business logic
- the method of the in the double entry accounting: sale transactions and purchase transactions
- the preparation transactions: end-of-year accounting recognition
- financial statement
- balance sheet: what the balance sheet is, structure, criteria and stages of preparation
- the passage from the accounting records to the balance sheet
- adjustment from the civil law concerning the balance sheet to European Directives in the process of harmonization and transaction to the International accounting principles
- the social report: history, typologies, aims, construction and use for the strategies of development of the SE

6.5 Managing the control system

Objectives and aims

- to understand basic concepts, models and tools relating to business organisation
- to acquire knowledge and develop competences to design management control systems
- to acquire techniques for the measurement and analysis of financial data
- to find your way around the legislative regimes governing the life of the enterprise

- to understand the main aspects of labour law

Content

1) Business organisation

- basic concepts and definition of organisation
- system of roles and organisational dynamics
- from organisation to enterprise
- organisational models of enterprises: history and development
- the principal organisational structures: by function, division, matrix, network
- the variables that affect the organisation of the enterprise (context, social, technical)
- organisational analysis tools: company organisational chart, job-design and job description
- organisational coherence in the enterprise: product and service; reference market, coherent structure; mission and strategy
- motivation and assessment of collaborators/staff

2) Management control

- design of the management control system
- the role of management control in the corporate organisation and its operational structure
- determining and planning corporate objectives and control parameters
- enterprise-level planning of cost centre, of product/service
- ability to identify risk areas: to quantify their effects and predict potential situations arising
- objectives of management control in the short and long term (in the short term: maximising the contribution margin, in the long term: creation of value through cash flow)
- external diagnosis: segmentation and strategic matrices
- internal diagnosis: creation of value and key success factors
- SWOT analysis: strengths, weaknesses, risks and opportunities
- how to analyse investments and projects (investment in the enterprise's economy, criteria for the selection of corporate investments, principles and methods for calculation of expediency, economic-type methods: payback period, financial-type methods: Net Present Value (NPV), Internal Rate of

Return (IRR), type of investment: considerations relating to the calculation of expediency, determination of cash flow, calculating capital costs)

- management control through the reclassification of the balance sheet (reclassification of the statement of assets and liabilities using financial criteria, reclassification of the profit and loss account in cost of sales, reclassification of the profit and loss account at added value, reclassification of the profit and loss account by contribution margin, creation and analysis of financial independence (or stability) ratios, creation and analysis of liquidity indicators, creation and analysis of turnover ratios, creation and analysis of profitability ratios)
- analysis of the financial dynamic: the financial statement; determination and analysis of financial flows
- management control through centres, budgets and reports (control of production centres through standards, control of auxiliary centres through inter-centre exchanges via market accounting rates, standards, control of the other centres by working load, budgetary control and analysis of variances between actually itemised costs and projected costs (budget), use of analysis of variances to help enhance efficiencies in the enterprise)
- using reports as a decision-making tool
- using corporate case studies: application of control and forecasting tools and techniques
- interpretation of business situations
- decision-making and verification of results
- communicating strategy and communicating through strategy, managing, planning, governing
- further information on the differences between and special characteristics of the main types of businesses

3) labour law and corporate legislation

- rights and responsibilities of workers (holidays, leave, illness, etc.)
- regulation and operation of public redundancy arrangements and layoffs in the Albanian system
- unemployment (the social security system for unemployed workers and developed models for comparison; unemployment insurance, special subsidies, special benefits)
- termination of the employment relationship

- trade Unions (representation, representativeness and exercise of trade union rights governed by the company Articles)
- contract elements (what is a contract of employment and types used in the Albanian system)
- incentives and concessions (financial incentives to recruitment; incentives to independent or associated entrepreneurial startups)
- retirement
- social dumping and transnational posting of workers within the services market (Directive 96/71/EC: from the “general interest” to “public order” as a principle regulating the labour market; the constraints imposed by Directive 96/71 on the applicability of collective agreements: the Laval and Rüffert judgements; Directive 96/71 as a special source of private international law; Single Market and labour protection after Lisbon: new principles and old balances; trade union action in the services market)

6.6 Knowing and understanding the real situation of the SE

Objectives and aims

- to know the social entrepreneurship and its social evolution at national and international level, organizing system and structure of SE
- to know the main enterprises of national and European territory
- to know and apply the law ruling SE
- to understand the relationships between the SE and the labour market
- to know the ethics and role of the values in the SE

Contents

1) Doing business

- the phenomenon: history and evolution
- values, ethics and principles of the SE
- new factors: management system, competition, size

2) The SE in Europe: the Italian model

- introduction framework to SE in Europe as well as legal and regulatory framework

- the Italian situation
- Italian law ruling the SE
- the SE in Italy (typologies, main categories, corporate structure)
- the sectors concerning social issues
- classification of the enterprises and strategic guidelines
- relationships between SE and local, public, private bodies; market; banks; non-profit organizations
- fulfilment of requirements for the creation of a SE
- article of Association: characteristics and essential elements
- tax categories

6.7 Managing a SE in its economic-financial aspects and in its administrative-commercial activities

Objectives and aims

- to learn tools for designing interventions and services
- to know and be able to apply the main organisational, management and strategic tools and models
- to learn tools for managing economic and financial aspects
- to learn about access to and management of funds
- to know the key elements of account rendering and apply associated tools
- to know the main techniques and strategies in the commercial field
- to employ the main marketing management tools
- to know and apply the principles and tools of administration

Content

1) Management of a SE

- sources of information and document management in enterprises: objectives, stages and methods
- in-company information and documentation services: role and resources;
- information management and retrieval
- management and organisation of archival documentation
- the basics of business strategy (the definition of business strategy and policy; the evolution of the concept of strategy: business policy. The school of Ansoff or

strategic management, the real strategies of Mintzberg. Empirical strategies based on success factors, from business idea to business formula, case study);

- the definition of the enterprise's strategic business model (the features and roles of the enterprise's business strategy, basic strategic orientation, case study, the time horizon, upscaling, quality development, group or corporate strategy, business or competitive strategy: sources of competitive advantage, types of competitive advantage, cost advantages, advantages of differentiation, determinants of competitive advantage)
- the strategy of value-generating activities
- benchmarking as a means of developing processes, products, services, practices and performance
- management of human resources and definition of roles, duties and responsibilities in a SE
- production processes and the layout of the enterprise
- supply (management, policies, infrastructural policy: outsourcing policies);
- customer satisfaction of customers/users
- strategies and Management Control Systems

2) Economic-financial management of the SE

- financial planning
- techniques supporting investment decisions
- tools for managing company finances
- management of financial risks
- liquidity management
- financing decisions (debt versus equity, the relationship between strategy and financial decisions, the relationship between corporate governance and choices of funding sources)
- the overall financial equilibrium of the enterprise
- objectives of profitability, stability, liquidity and development
- knowing the key factors of the enterprise: size, exposure to financial risks, membership of a national or international group of companies
- sources of funding and subsidies
- fundraising
- dealings with external funders and institutional donors: banks and foundations
- search for contributions at regional, national, EU level

3) Administrative-commercial aspects

- strategic and operational marketing
- definition of marketing and development of its role
- aims and objectives of marketing operations
- analysis of environmental variables, and of market and demand variables
- segmentation and competitive position
- orientation towards the customer
- planning of marketing strategy
- the Long Range Plan
- the marketing mix (product, price, promotion, distribution)
- product management policies and innovation development processes
- pricing policies
- communication and distribution policies
- organisation, planning and control of marketing
- marketing the SE: charter of values and commitments
- stakeholder mapping
- techniques of analysis of social demand/needs
- marketing strategies in social services enterprises
- organisation, planning and control of marketing
- sales psychology and technique (selling and its key phases, persuasive communication, adapting one's communication style to the profile of the other party, techniques for negotiating price and sale conditions)
- e-business: e-commerce and e-procurement
- the relationship between e-commerce and the Internet
- web-based communication: usability and interactivity of websites
- the choice of keywords for placement
- creating an e-mail marketing message
- creating a Newsletter and Mailing list: services, implementation, techniques and costs

6.8 Planning the international dimension of the SE

Objectives and aims

- to learn and apply international and national regulations

- to learn how to set up an export plan
- to know how to internally organise a foreign trade department
- to know how to organise an international marketing strategy
- to know how to conduct business dealings with foreign countries
- to identify and set up sources of finance for export

Content

1) Basic concepts, history and regulatory provisions

- globalisation (origin of the term, short history, effects, commercial flows, capital movements and the labour market)
- internationalisation (opportunities from the economic crisis, concepts and forms of internationalisation strategies)
- models of internationalisation, international marketing and positioning (enterprises in international markets, information supporting the internationalisation process and market analysis; strategies for accessing relevant literature; trends and new players in the global economic arena; the stages of the information process and of marketing research, basic international marketing concepts: similarities and differences between markets, geographical and psychological distance, standardisation and adaptation, global market and local context; the main stages of international marketing; market segmentation: variables, macro- and micro-segmentation, transnational segments, national segmentation, selecting target markets, the choice of entry methods: indirect export, direct export, cooperation agreements, export, direct entry by establishing a production facility, the sale of manufacturing licenses, international positioning)
- criteria for the international positioning and definition of the marketing mix
- standardisation and contextualisation of marketing variables
- international product policy and factors influencing it
- overview of foreign trade (events, organisations and international agreements: IMF, IBRD, GATT, OEEC, CMEC, ECSC, Euratom, EEC, European Investment Bank, the European Single Market, abbreviations and names of the main international economic organisations)
- single enterprise and market (European enterprise, its role in the single market, the benefits to be availed of; constraining factors; European demand, the supply of European-vocation products and services)

- the Single Market of products: free movement of goods, the Community Customs Code, transit of goods, the EC conformity mark, tax harmonisation)
- the protection of consumers and the environment in the Single Market: European laws, information centres, Ecolabel, Ecoaudit

2) Operating in a foreign market

- the subjects of foreign trade (the State and foreign trade; the enterprise and foreign markets; evaluating the enterprise vis-à-vis foreign markets; classification and characteristics of goods and services to be exported)
- foreign markets (globalisation of markets, international demand; type of demand based on the economic system, on the development of the market, on accessibility and on expansion, and based on the goods to be exported)
- entry into and operations in international markets
- international competition at the retail level (internationalisation, leading retailers, the territories, dimensions, the process, the reasons for the internationalisation of retail enterprises, the direction of the process, strategic approaches, strategies, the experience of Auchan and Carrefour)
- Euro marketing strategies
- strategy: from differentiated marketing in several markets to monomarketing in the single market
- the control of international marketing (function, budget control, profitability, costs, marketing: marketing audits)
- Euro marketing policies
- setting up and implementing an internationalisation plan
- export plan: strategic planning in international markets
- how to select markets and identify the company's strong points in the various markets

6.9 Internship

During one's internship inside a SE, participants will be encouraged to learn business management methods, idea generation as well as the subsequent practical and operational activities inside and/or outside the enterprise's head office. The project to be undertaken will be defined by the Head of orientation together with the teaching coordinator and the Company Tutor (the



entrepreneur of the host enterprise), taking into account the particular interests or needs of the individual student.

How the internship operates

The internship will be held during an unbroken period of time at the end of the courses. However, periodic meetings between the coordinators, teachers, tutors and students will be organised. The timetable and the manner of operation of the internship will be agreed with the student to facilitate travel logistics. The company tutor will gradually inform the student about the company's structure and type, and about the tools and schedules and methods that apply to those working in the local business. Tasks will subsequently be assigned to the student, and the Tutor will monitor the student by offering suggestions and constructive criticism. At the end of the internship, the students will return to the classroom for a critical analysis of their work experience. For purposes of continuity of the internship project, it is preferred to hold it during a single unbroken period of time.

Objectives to be achieved

To acquire skills related to the specific sector through "practical experience" where one can experiment and apply to actual work situations the skills and knowledge gained during the training course. To use in the workplace the technologies and techniques studied during the training course, and adapt them to the host company's production realm. To take part in a real operating structure that is frequently different from a simulated one and to acquire, if possible, a complete, global view of working reality within the production system, personally interacting with the various departments of the enterprise. To manage meetings with colleagues and managers in order to propose innovative solutions, thus stimulating a creative and proactive search for ideas and solutions.

7. *Financial resources for SE*

Before seeking financing, it is important to define what ultimately the SE is meant to provide¹⁰. A long-term, slow-growth plan implies a strategy for funding; here is a look at different kinds of possible source and procedure for funding. Starting in seeking out funders that focus on SE and that have expertise in the field of the SE; it is supposed that they will have a better understanding of the market opportunity, and they won't expect the business to compromise its mission in order to grow.

7.1 Funding options

Below are the ins and outs of five funding options.

1. *Debt financing*

Debt financing takes a variety of forms, each with its own underwriting standards: working capital lines of credit, asset-based loans (secured by account receivables, inventory and other assets), equipment loans, mortgages and so on. You will want to seek advice on the best structure. The key questions to ask at the outset are: How will I be able to pay back the loan, and what is the lender likely to do if things go sideways?

2. *Equity investment*

Selling an ownership interest in a business is often the only option for enterprises that have promise but lack the cash flow to service debt or the assets to secure a loan. When adding equity investors, it's especially important to consider what they bring to the table beyond money, since they will be co-owners of the business.

3. *Program-related investment*

Foundations provide program-related investment (PRI) financing to support mission-related enterprises while maintaining their principal and possibly earning some profit. PRI funders tend to have greater risk tolerance than

¹⁰ Don Shaffer, Growth Financing for Social Enterprises: 5 Options and How to Make Them Work for You, Feb 18th, 2015

conventional funders and offer low interest rates, but they have several downsides.

4. Direct public offerings

A direct-public offering (DPO) is an investment opportunity offered to the public directly, without an investment bank and without minimum asset requirements for investors. The offering can be equity shares, debt financing, revenue shares or other types of investment.

5. Integrated capital

Integrated capital is the coordinated use of different forms of capital (equity investments, loans, gifts, loan guarantees and so on), often from different funders, to support a developing enterprise that's working to solve complex social and environmental problems. At RSF Social Finance, we're reorienting our entire operation around this strategy.

7.2 Fund-raising

Fundraising or fund raising (also known as "development") is the process of gathering voluntary contributions of money or other resources, by requesting donations from individuals, businesses, charitable foundations, or governmental agencies (see also crowd funding). Although fundraising typically refers to efforts to gather money for non-profit organizations, it is sometimes used to refer to the identification and solicitation of investors or other sources of capital for for-profit enterprises. Fundraising is a significant way that non-profit organizations may obtain the money for their operations. These operations can involve a very broad array of concerns such as religious or philanthropic groups such as research organizations, public broadcasters, political campaigns and environmental issues.

7.3 Crowdfunding

Crowdfunding is the practice of funding a project or venture by raising monetary contributions from a large number of people, today often performed via internet-mediated registries, but the concept can also be executed through mail-order subscriptions, benefit events, and other methods.[1] Crowdfunding



is a form of alternative finance, which has emerged outside of the traditional financial system. The crowdfunding model is based on three types of actors: the project initiator who proposes the idea and/or project to be funded; individuals or groups who support the idea; and a moderating organization (the “platform”) that brings the parties together to launch the idea.

The Crowdfunding Centre's May 2014 report identified two primary types of crowdfunding:

- Rewards Crowdfunding: entrepreneurs pre-sell a product or service to launch a business concept without incurring debt or sacrificing equity/shares.
- Equity Crowdfunding: the backer receives shares of a company, usually in its early stages, in exchange for the money pledged. Most famous online platform for crowdfunding are: www.indiegogo.com and www.kickstarter.com; but several other platforms devoted to social projects are raising and can be easily find by online search.

7.4 The Micro-Credit potential

Microcredit is a variation on traditional credit service that involves providing small loans to people who would otherwise be unable to secure credit, typically because of poverty. Related barriers may include unemployment or underemployment and a lack of collateral and credit history. Microcredit is sometimes provided to fund a business initiative by the recipient. The entrepreneurs involved are sometimes referred to as “micro-entrepreneurs” because the scope of their projects and the sums required to fund them are very modest. It is one component of microfinance, which also includes other financial services such as savings accounts, insurance and money transfers. Microfinance is the provision of savings accounts, loans, insurance, money transfers and other banking services to customers that lack access to traditional financial services, usually because of poverty.

In short, microcredit has achieved much less than what its proponents said it would achieve, but its negative impacts have not been as drastic as some critics have argued. Microcredit is just one factor influencing the success of a small businesses, whose success is influenced to a much larger extent by how much an economy or a particular market grows. A critical review of 58 papers covering experiences in 18 countries concluded “there is no good evidence for

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the beneficent impact of microfinance on the well-being of poor people" and that "the greatest impacts are reported by studies with the weakest designs".

8. Annexes

8.1 The training for SE

8.1.1 The Training week

AWM project foresaw the creation of SE in Montenegro and Albania. To reach such a goal, the partners from the two countries arranged and launched contests in order to award business ideas. The reward for the winning business idea was the support provided by experts in the start-up phase, and dedicated training sessions, including study visits and e-learning tools.

The participants, according to the general purpose of AWM project, have been selected among disadvantaged categories within local populations, and mainly young and unemployed persons.

COOSS Marche, Italian partner, as long established SE in the form of social cooperative, arranged a training course for the awarded entrepreneurs focusing on SE structure, management, purposes and administrative issues, as well as on study visits to Italian social cooperative.



The training course was organised in Ancona, Italy, from 9th to 13th of May 2016; COOSS hosted 4 entrepreneurs, whose business ideas have been awarded in Montenegro (for organizational reasons, Albanian winners could not join the course, and they only had access to the e-learning materials).

The “agenda” has been meant to fully cover all aspects which could be interesting for an aspiring manager of a SE; the core of the course has been the similarities and the differences between the profit enterprises and the SE, emphasising the relevance fo fundraising and marketing strategies.

The first day focused on the presentation of COOSS Marche, as a model of SE in the care sector, its professional figures and its link with the public authorities at local level.



Training Module 2 - “Funding opportunities for social enterprises”

The second day has been hosted by the Warehouse Factory, a local centre for co-working opportunities with experts of marketing, fund-raising and business.



Training Module 3 - “Professional profiles operating in the care sector”

Third day of training focused on the professional figures curricula of a SE; in the specific those figures requested for a SE in the care sector. Study visits to care centres have been arranged too.



Training Module 4 - “Social Business role models”

Fourth day has been devoted to a case study, with the presentation of OPERA, a SE employing disadvantaged individuals, with a visit to one of its employment centre.



Training Module 5 - "Social entrepreneurship in Europe"

Last day has been focused on the visit to the Marche WOW enterprise, a SME created by young entrepreneurs, awarded by a regional contest and working in the tourism sector.



8.1.2 The e-learning tools

Through the e-learning platform of COOSS (www.fadcooss.it), the training intervention was conceived and provided as a wider, deeper and longer process, considering the training visit in Ancona as the face-to-face moment to review and to see in practice the educational contents made available for the awarded entrepreneurs as remote training.

<ul style="list-style-type: none"> • Students area ▪ Scheda corso ▪ Avvisi ▪ Materiali ▪ Calendario ▪ Blocco note ▪ Repository ▪ Introduzione <ul style="list-style-type: none"> • Collaboration area ▪ Teacher area ▪ Stat area <div style="text-align: center;"> <p>Admire Welfare My The European Project for Promoting Social Entrepreneurship and Social Business Models</p> </div> <p>Benvenuto : Ambraharini Marco Sei in : AWM Remotely Training</p>	<p>Scheda corso</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> AWM Remotely Training </div> <table border="0" style="width: 100%;"> <tr> <td style="width: 15%;">Codice</td> <td>ADM_171_4.4</td> </tr> <tr> <td>Nome corso</td> <td>AWM Remotely Training</td> </tr> <tr> <td>Difficoltà</td> <td>Media</td> </tr> <tr> <td>Descrizione</td> <td>Adriatic Welfare My remotely training activities</td> </tr> <tr> <td>Metodo di iscrizione</td> <td>Selezione</td> </tr> <tr> <td>Lingue</td> <td>Italian</td> </tr> <tr> <td>Docente</td> <td>Ambraharini Marco, Barbara Lanza</td> </tr> <tr> <td>Tutor</td> <td>Giovanni Ferrara</td> </tr> <tr> <td>Studente</td> <td>Benedetta Di Stefano, Giacomo Arizzi, Imanol Maria, Riccardo Izzo</td> </tr> <tr> <td colspan="2" style="text-align: left;">Spazio su disce usato da questo corso</td> </tr> <tr> <td colspan="2" style="text-align: right;">Modifica informazioni del corso</td> </tr> </table>	Codice	ADM_171_4.4	Nome corso	AWM Remotely Training	Difficoltà	Media	Descrizione	Adriatic Welfare My remotely training activities	Metodo di iscrizione	Selezione	Lingue	Italian	Docente	Ambraharini Marco, Barbara Lanza	Tutor	Giovanni Ferrara	Studente	Benedetta Di Stefano, Giacomo Arizzi, Imanol Maria, Riccardo Izzo	Spazio su disce usato da questo corso		Modifica informazioni del corso	
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Spazio su disce usato da questo corso																							
Modifica informazioni del corso																							



The training modules, contents, subjects and materials have been transformed in online training, together with pictures and videos captured during the study visits. Also several literature reviews have been included, together with links and suggestions for the collection of further and more specific resources or information.





8.2 Professional figures of SE dealing with the care activity or employing persons with special needs

The following set of curricula have been elaborated within AWM in order to identify some key competences for workers of SE of the Adriatic Area, in the care and social sector. In particular, this section focuses on: a) training pathways of workers of SE whose work consists on the care of persons with special needs; b) competences to be acquired within a SE in order to deal with and employ persons with special needs.

8.2.1 Social Health Operator - SHO

The SHO is a specific professional figure capable of carrying out activities aimed at meeting the user needs, both in a social and health care environment, and to promote the well-being and autonomy of the user. The SHO finds its origin in the synthesis of different professional profiles of workers in the social and health care fields; s/he carries out activities both in the social sector and in the health services in socio-welfare and social health, in a residential, semi-residential premises and private accommodations or in a hospital setting. S/he acts as a support figure according to peculiar work plans and operational protocols prepared by staff responsible for health and social services, according to the criterion of multi-disciplinary and multi-professional working. The SHO has the ability to intervene on individuals with mental and physical lack of autonomy thanks to a special theoretical, technical and practical training about social care, health care and home care. The SHO carries out her/his work of health and social services run by public institutions, private care providers and individuals. The SHO responds more adequately to the evolution of services according to the holistic understanding of user needs. The activities of SHO can be summarised as follow:

a) direct care and domestic help: assists the person, in particular the dependent or bedridden, in daily activities and personal hygiene; carries out simple tasks to support diagnostic and therapeutic; cooperates in activities aimed at maintaining the residual psychomotor performance, re-eduates, works on reactivation and functional recovery; realises entertainment activities and socialisation of individuals and groups; assists the medical staff and social assistance; helps the user management within its sphere of life; cares of cleaning and environmental hygiene.

- b) recognition of the needs and conditions of the user: collaborates to the implementation of welfare interventions; collaborates to the implementation of systems to monitor the interventions; recognizes and uses language and communication systems with the user and help the family integration, social inclusion and the maintenance and recovery of personal identity.
- c) manage and evaluate her/his own work using information tools commonly used: collaborates on the verification of the quality of the service; concurs, with respect to the operators of the same profile, to the creation of internships and their evaluation; collaborates in defining their training needs and attend refresher courses. The training program for SHO is attended by a person who: (1) at least finished primary school, (2) is at least 18 years old; (3) has medical certificate on psycho-physical ability to perform roles of a family assistant.

Skills acquired with the completion of training:

1. to differentiate, select and use appropriate methods of care;
2. to identify changes in the aging process of healthy and sick persons;
3. to differentiate, select and use appropriate procedures for social rehabilitation;
4. to differentiate, select and use appropriate procedures when seeking employment;
5. to communicate appropriately with users and co-workers;
6. to apply the rules and procedures of work hygiene;
7. to apply safety rules and provide first aid.

Curriculum:

- Basics of social welfare and social work
- Basics of gerontology, anatomy and physiology
- Approaching the world of work
- Care and social rehabilitation
- Work safety and first aid



8.2.2 Family Assistant - FA

The FA is an operator with practical and operational characteristics who takes care of the dependent person, whether elderly, disabled or bearer of disabling diseases. The intervention offered also ranks the level of support to the families as the FA helps to support and promote the autonomy and the psycho-physical function of the needs and context of the user's reference. The FA carries out direct assistance, in particular in the daily routine and takes care of the house cleaning. The FA is able to relate with the network of community services, public and private, in order to provide assistance and ensure opportunities of inclusion and participation to people not able to perform tasks autonomously. Today, the job of the FA is of vital importance within the modern societies, due to the increase of the elderly population which requires continuous treatment and care interventions and families feel the need to rely on a competent professional figure, who should be able to play a delicate role. The FA is a significant professional figure as it affects the lives of individuals. The assistance and care impact on lifestyle and relationships within and outside the family. The tasks are carried out in a complex work environment, made so by the relationships with the assisted family and the relationship between assisted users and their family. In this context, the relational capacity and discretion become indispensable to manage the role, emotions and feelings according to personal and users' family dynamics.

The training program for FA is attended by a person who: (1) at least finished primary school, (2) is at least 18 years old; (3) has medical certificate on psycho-physical ability to perform roles of a family assistant.

Skills acquired with the completion of training:

1. to differentiate, select and use appropriate procedures in the care of people;
2. to differentiate, select and use appropriate procedures to interact with local services and organizations that provide social services;
3. to differentiate, select and use appropriate procedures for household management;
4. to communicate appropriately with users and co-workers;
5. to apply the rules and procedures of a healthy diet;
6. to apply rules and procedures for the establishment and management of a company;
7. to apply the rules and procedures of work hygiene;

8. to apply safety rules and provide first aid.

Curriculum:

- Social services and household management
- Communication and relations with the users
- Care and support
- The basics of a healthy diet
- Introduction to entrepreneurship
- Safety at work
- Practical Lessons

8.2.3 Caregiver for Disabled

Training of individuals who are caregiver to disabled, satisfied a desire to give the services based on individual and personal needs of every and each users (according to state of disability and social arrangement) through an affirmation of adjustable, changeable and admitted work methodology, using ideas to be created , services delivery and supervising the services. Unique structure of this curriculum responds to unique needs of an specific education compared to social-educational forms, as well as health care:

1) New professional profiles within social care. In social care fields, whether it is social, health or educational, needs become more and more complicated and connected in between, changing the basis of planning activities which are meant to be done. For near approaching reasons to the model of the local community as a place familiar to fragile and sensitive individuals, it is very important to develop a method and new and innovative working ways, based on an interdisciplinary approach, demanding new fragmentation of knowledge and skills.

2) Development of the technical skills to run “the network”. For the institutions, services, but primary for the caregivers, working with users of those services, represent a redefinition of social and competent functions and an activation of primary networks, resources mobilisations and communication buildings. Only stable and determined work is capable of making relations between local community and its resources with the participants of public-private network, for quality respond to the disabled individuals needs.

3) Training related to relations and interaction. To assure efficient and quality work, caregivers should work between themselves and cooperate regarding their activities, work within the teams and network systems. To avoid

insufficient efficacy of the interventions, it is necessary to train the experts for specific and technical skills, and an appropriate preparation of aspects which includes cooperation and co working of the social system and the disabled individuals.

The training program for jobs for caregivers for disabled, is attended by a person who: (1) at least has a primary school diploma, (2) is at least 18 years old; (3) has medical certificate for health capacity to perform these functions.

Skills acquired with the completion of training:

1. to be able to differentiate and use appropriate acts regarding disabled individuals;
2. to be able to differentiate sorts and classification of disability;
3. to differentiate, choose and apply appropriate procedures to animate disabled;
4. to differentiate, choose and apply appropriate procedures during the job seeking;
5. to communicate in a proper way with users and co-workers;
6. to apply rules and hygienic space and services;
7. to apply rules of work protection and acts of first aid.

Curriculum:

- Basic terms of caregiving to disabled
- Orientation in working environment
- Care and social rehabilitation for disabled individuals
- Work protection and first aid
- Practical education

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COOSS Marche Onlus

COOSS MARCHE ONLUS is a private company, not for profit, providing health and care services to elderly and disabled persons, since 1979, both at home and in sheltered and protected housing solutions and accommodations. It counts today about 2.500 employees and almost 50 million euro of turnover. COOSS provides care services to a user basin of 8.000 beneficiaries and clients. On 1993 organized the Department of Research & Training in order to design, develop and manage EU-funded project and training courses within the social, health and educational fields of interest. It is composed by a Research Area and a Training Area, both of them with expert and dedicated staff.

Since 1993 the Department has been working on the social needs of population by inquiry, analysis, development and testing of innovative solutions. The work of Research Area is mainly oriented in studying social phenomena and anticipating social trends, through projects funded by European, national and regional funds. Within twenty-five years of experience in European projects, it has promoted and joined thematic, structural and cross-border programmes, it has developed and strengthened important networks and partnerships both at local, as well as at international level.

Since 2002 COOSS has been certified as VET Agency by Marche Region as provider of vocational, higher and continuous vocational and educational training services. The training services designed by the Department concern qualification and professional specialisation paths in education and social-health fields. Those services allow the beneficiaries to acquire educational qualifications as from the List of Qualifications established by Marche Region and exploitable in the labour market. ICT and innovative technologies are part of the contents of training programmes, with the aims of updating, preparing and improving competences and skills of health and care professional figures (carers, operators, educators, etc.) in acting as mediator of ICT towards the end- users and in using ICT innovation to make services more efficient and respondent to users' needs.

COOSS is certified also as Agency for Youth Employment by the Marche Region (DDPF 380/SIM of August 18, 2014) and it is authorized to manage a Youth Employment Desk according to the EU guidelines of "Youth Guarantee" initiatives.

ADRIATIC WELFARE MIX

**Developing and Integrating the Welfare Systems toward a Welfare Mix System
Locally Managed in the Adriatic Area**

The Municipality of Tirana
(Albania, lead beneficiary)

COOSS Marche Onlus
(Italy, partner beneficiary)

Municipal Unit No.9 Tirana
(Albania, partner beneficiary)

National Centre for Social Studies
(Albania, partner beneficiary)

Association for Women with Social Problems
(Albania, partner beneficiary)

Region Abruzzo
(Italy, partner beneficiary)

Municipality of Pesaro
(Italy, partner beneficiary)

Healthy City
(Croatia, partner beneficiary)

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(Montenegro, partner beneficiary)

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