Methodology of SII Design Academy, 16.01.2020

DOCUMENT CONTROL SHEET

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General information

Remark: All of the information contained in here is tentative and subject to adaptions in the production of the blended learning content. We will implement learnings made in the process and change strategies as needed to develop the best material possible for our target groups.

Suggested name of the program

"Accelerating Investment Readiness (AIR)" – Joining Social Entrepreneurship and Impact Investing

Host platform

Host platform: https://teachable.com/ (used by social(i)makers; open access platform eliademy no longer available

Benefits:

- Relatively low cost for provider
    - Premium: $960/year maximum
    - Standard: $348 (so likely possible to keep the course alive after the end of the project; or for others to maintain the course; first signals of interest from Euclid Network, currently sponsored through the EC's EaSI program)
- Also used by social(i)makers, therefore consistency

Chosen after careful examination of alternatives (edx, Coursera, Futurelearn, iversity, open.hpi, tailor-made organizational platforms), with a number of down-sides, including: high fees for administrator, courses unavailable after end of the course, proprietary (not easy to transfer or maintain contents for future use), or limited user friendliness and design.

Important argument for choice: Use standard open source platform rather than special software created for only one organization or project (or proprietary solution).

Course contents

Module 1. Social impact measurement

Module 2. Finance

Module 3. Management and governance of social enterprises (up for discussion whether to maintain or integrate in other modules)

Module 4. Social enterprise strategies

Module 5. Transfer & Scaling

Module 6. Communication

Concept of the MOOC platform

Every module is conceptualized as part of the MOOC web platform, with social enterprises (SEs) and entrepreneurs being the primary target group, but we introduce different focuses, as they fit, into the modules. In contrast to the other modules, the focus on investors and policy makers shall be most pronounced in module 1 on social impact measurement.

Each module will share a common structure and some elements with others, but we will also have enough variation in how the modules are built to keep the learning trajectory attractive to participants and also to respond to the specific "needs" of the modules as regards formats, storyline and learning tools.

In the context of UHEI's expert workshop held in June 2019, we have already recorded and composed clips on specific aspects of the blended learning. These will be used as both, teasers for the blended learning and as part of the educational material. They also serve as examples for the production of further video material.

In general we want to pursue a "curative approach". This means we want to avoid duplicating content and recreating what is already available. Instead we will seek to "connect the dots", that is point learners at other resources for further information and integrate existing content into our platform. For that we will seek content and permission from the creators of existing contents. This is in line with the open source policy of our own platform. Wherever possible we want to avoid proprietary structures and entry barriers. One way of doing so is to upload videos on a public video channel for everyone to access (such as Youtube or Vimeo) and then embed these videos into our MOOC platform.

We hope the broad sharing of contents will help attract additional learners and at the same time give an incentive for experts (investors, investees, network organizations, scientists) to engage as providers of content to our MOOC (expert statements, case study material, participation as hosts of webinars) and as trainers in our "offline" part of the blended learning.

There is a number of existing MOOCs on social entrepreneurship, social innovation, social finance and related themes that we are screening for existing high quality material that fits our contents. We will seek to curate contents and will focus on moving beyond or linking them. Here is an overview:

- CBS Social Entrepreneurship Course:
  https://www.coursera.org/specializations/social-entrepreneurship-cbs
- Social Entrepreneurship Academy Course:
  https://seakademie.org/angebot/seamooc/#Testimonials
- Roots of Impact Social Finance Academy: https://social-finance-academy.org/
- Social(i)Makers Social Innovation Academy: https://social-innovation-academy.teachable.com/
- Acumen Courses: https://www.plusacumen.org/courses
- University of Basel Entrepreneurship in Nonprofits Course:
  https://ceps.unibas.ch/de/ceps-news/news/online-kurs-entrepreneurship-in-nonprofits/
- University of Pennsylvania Social Impact Strategy:
  https://www.coursera.org/learn/social-impact (related:
  https://www.coursera.org/learn/wharton-social-entrepreneurship;
  https://www.coursera.org/learn/wharton-social-impact)

UHEI has put together an overview of material of high quality and relevance we could request to use. See separate Excel file:

https://docs.google.com/spreadsheets/d/1tc1psqfjhpoicjUsJzfUpL0RgD9zmFwZA3lLC1Wv2k0/edit?usp=sharing

Production process

Scripts

1. Scripts for each module prepared by lead partner (UHEI, Ashoka, FASE) in collaboration with contributing partners
2. Further detail, adaption and harmonization of scripts as material is produced by partners

Materials

3. (Expanding) list of materials to be produced. See separate Excel file, add as needed moderated by Workpackage Leaders (!):
https://docs.google.com/spreadsheets/d/1WCEyiqTN076q94yB_L02uBr_-x3n3sA4UeyhWg82og0/edit#gid=1572594827
   a. Visuals (static or animated)
   b. Videos
4. Individual contracting of video agencies to film expert interviews (done by individual partners, coordinated by lead partner)
5. IF partners want to shoot their own "webinar style" videos, this is also possible (guide to be provided by CCIS)
6. Contracting 1 or several agencies for general setup/design/visual storyline of the course: via CCIS, coordinated by UHEI
7. The above or another agency would also need to do the final editing of videos, including the adding of joint outro and intro (important: maintain consistency and style and composition!)

Coordination

8. Regular calls between all lead partners (and IFKA)
9. Regular calls between lead partners and contributing partners
10. Responsibility for task allocation, quality assurance and uploading to the platform is with the lead partners

Overview and timeline

Partner allocation (based on competencies and preferences)

Modules	1 Impact	2 Social Finance	3 Man & Org	4 Strategy	5 Scaling	6 Communication
Partners	UHEI	FASE	FASE	UHEI	Ashoka	Ashoka
	UEFISCDI	CCIS	IFKA	ZSI	Impact Hub	S2i
	ODIMM		BSC	UKS		SDA

Timeline

Includes links and parallels to WP6 (Competition).

Blended Learning process overview		2019				2020										
Months:		9	10	11	12	1	2	3	4	5	6	7	8	9	10	11
Outline of BL (UHEI)	WP 5															
Detailed script for each module (responsible PPs)	WP 5															
Selection of online platform (UHEI, IFKA)	WP 5															
Production of content, incl. visuals & videos (PPs, CCIS, UHEI)	WP 5															
"Mobilization campaign" (PPs, UHEI, IFKA, other EU projects)	WP 5															
Development of "offline" material (responsible PPs)	WP 5															
BL programme, subsequent 6 weeks release but longer availability	WP 5															
Train-the-trainer event (UHEI, responsible PPs)	WP 5															
"Offline workshops", 2-3 days (all PPs)	WP 5															
Call for SEs' to submit their short business ideas	WP 6															
Evaluation of applications	WP 6															
Shortlist	WP 6															
5 workshops for business plan development?!	WP 6															
International competition in 4 countries	WP 6															
Concluding conference	WP 6															
		9	10	11	12	1	2	3	4	5	6	7	8	9	10	11

Detailed Module Outlines

On the next pages, including the designation of:
- Materials to be curated from other sources
- Categories of material to be produced
  - *Visual*
  - **Video**
  - Exercise
  - All else is assumed to be "slide" materials or text+graphics

1 Social Impact Measurement

Responsible partners (lead listed first):
- UHEI
- UEFISCDI
- ODDIM

Key features:
- Video: Use clips of SEs (& investors) on how they measure impact and what it has helped them achieve
- Explain the different requirements of investors, policy and SEs
- What is impact? & When and when not to measure impact?
- Visual: Show how to compose an impact map
- Use "Impact Management for Everyone" Rubric to outline different pathways to impact measurement
- Go into qualitative and quantitative approaches
- Provide links to databases of indicators

GENERAL REMARKS:
- Second level headings designate submodules
- **Video** material marked in bold
- <u>Exercises</u> underlined
- *Visual material* in italics

1.1 Why measure social impact at all?
- Social impact measurement, definition, objectives (inputs by ODDIM)
- For what kind of decision do we intend to use the results? Why is impact measurement more than a hype which will go away? (policy/advocacy, strategy, resource mobilization) - There are slides available from VT (Vortrag Eurodiaconia Brüssel) – <mark>Perhaps this could also be connected to/part of 1.6.</mark>
- Who is and should be interested in impact measurement?
  - o Possible **video**: https://www.youtube.com/watch?v=jjLPU03H-NY (Gorgi interviewed at Euclid Network's Summit)
  - o Increasing internal skills:
    - Improve strategic planning and make decisions;
    - Maximize the efficiency and effectiveness of the organization's activities;
    - Evaluate and monitor your own activities and projects;
    - Increase accounting capabilities;
    - Increase stakeholder involvement and participation;
    - Motivate your own team with objectively measurable goals Systemize and organize information.
  - o Increasing credibility outside:
    - Strengthening the communication about the social value generated by the organization
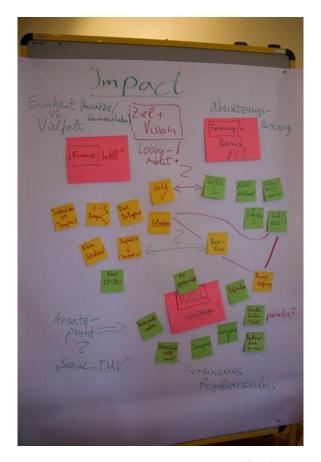
- Effective demonstration of the social return on investments
- Attracting capital and investors
- What are the needs of different stakeholder groups?
  - Highlight different needs of investors and policy
    - **Video:** with 1-2 investors / funders presenting their requirements.
  - Use material from regional stakeholder workshop and other sources, exemplary insights:
    - Investors: Scalable businesses, Financial sustainability, Fulfill their mission
    - Policy: To solve societal challenges: Sustainable development goals- https://www.undp.org/content/undp/en/home/sustainable-development-goals.html
    - Entrepreneurs: are interested in scaling-up https://www.coursera.org/learn/social-impact, video 1.3
  - **Video**: Why is impact such a hot topic? → Impact investing ecosystems and policy (Recorded at expert workshop in HD)

  - REMARK: Other videos from the same event available on (and for)!
    - Frameworks for impact investing and different types of raising funds, for instance Crowdfunding
      - Finance Module
    - What can SEs do to professionalize, including: which platforms are good for learning, what are best practices in managing social enterprises, what should they keep in mind when they enter prize competitions
      - Management & Governance Module
    - Impact oriented management in social enterprises
      - Strategy Module

1.2 What is impact (measurement), and what not?

- Different models of impact
  - Impact staircase Phineo (Impact as change in society)
  - Impact as "attributed outcome" (accounting for deadweight
- Possible **video** on what impact is: Speech of Ms. Roxana Damaschin (NESsT) at the Innovative Enterprise Week Bucharest 2019 conference,
  - https://www.facebook.com/iew2019/videos/532707600596091/ (min 0:00 – 13:00).
  - Presentation (.ppt) available at: https://innoenterprisebucharest2019.eu/documents/3.3_Roxana-Damaschin_21-JUNE-2019_12.00.pdf
- Link to broader reference frames, such as:
  - UNDP definition
- Exercise: Distinguishing impact measurement from
  - Sustainability reporting
  - Social accounting/reporting
  - Quality management
  - …?
    - Provision of reports with prompts for screening and analysis

1.3 Getting to impact—Key concepts of impact measurement

- Brief overview of methods and focus on basic concepts such as:
  - theory of change

- Possible **videos**:
  https://www.youtube.com/watch?v=dpb4AGT684U (By Social Investment Business)
  https://www.youtube.com/watch?v=BJDN0cpxJv4 (By https://hubertproject.org/hubert-material/426/)
  - o impact model
  - o multiple causal chains
    - Use existing organizations to outline the concepts
- *Visual material*: Show a variety of impact maps
  - o Example: https://utz.org/de/?attachment_id=18688 (Utz Rainforest Alliance)
  - o Resources: https://openpracticelibrary.com/practice/impact-mapping/; https://www.impactmapping.org/about.html
- <u>Exercise</u>: Draw your own impact map

1.4 Different kinds of "proof"—Measurement designs

- Different pathways to measurement: "Impact Management for Everyone" (www.im4e.org)
  - o Different goals, require different "depth" of data & complexity of methods
  - o Deeper data and more profound knowledge also reduce impact risk
- Further instruments and approaches: New instruments for measuring social impact have been perfected not only by academic subjects, but also by international organizations (such as the United Nations, ILO, OECD), financial institutions, associations professionals and even individual companies.
  - o [Also maybe outline: SROI, SIA, L3M, incl. details]
- Outline tension between scientific rigor and applicability
- Differences of impact management (internal) and reporting to stakeholders (external)
  - o Stress possibilities for "qualitative assessment" of impact
  - o Potentially link to/delineate from quite well known descriptive concepts such as: Triple Bottom Line accounting (Elkington 2001), the Balanced Scorecard for not-for-profits (Kaplan 2002), the Family of Measures (Sawhill and Williamson 2001), and social reporting (Zadek 1998)

1.5 Measuring your social impact—Step by step

- Checklist: How to move from mission to measures?
  - o Social Investment Toolkit (www.socialinvestmenttoolkit.com)
  - o Guided by: Then et al. "Social Return on Investment Analysis: Measuring the Impact of Social Investment" (https://www.palgrave.com/de/book/9783319714004)
- <u>Exercise</u>: Apply the steps to your own organization
  - o <u>Cf. instructions for SROI workshops (VT)</u>
- Potentially *visual*: Steps to measuring social impact (UNDP, suggested by UEFISCDI; some others provided by ODDIM): https://www.undp.org/content/dam/ukraine/docs/DG/socinnov/7%20Steps%20to%20Effective%20Impact%20Measurement_v3_13.12.16%20(1).pdf
- Provide links to databases of indicators

- o http://www.globalvaluexchange.org/
- o "Related databases":
  - LABREF - LABour market REForm database
  - Tax and benefits indicators database
  - Labour market policies (LMP) database
  - Youth Guarantee Indicator Framework database
  - Long-term unemployed Indicator Framework database

1.6 Why is impact orientation in organizations so difficult?—Boundary conditions

- Exercise: Read https://www.forbes.com/sites/patsydoerr/2019/01/14/four-ways-social-impact-will-affect-businesses-in-2019/#74c142a56e71. Write down your opinion: Will impact be central to organizations in the future? Why or why not?
- Exercise: Why do you think it is likely or unlikely that your organization will measure its social impact? Which obstacles could you face, or are you facing (in case you already do it?
- *Visual material* [potentially as a clip]: Outline the struggles
  - o Effort
  - o Cultural conflicts between performance thinking and social vocation
  - o …
- What can you do to overcome obstacles?
- Expert **videos**: Use clips of practitioners on how they measure impact and what it has helped them achieve
  - o Investors
  - o SEs
  - o Policy?
    - Video proposal: Speech of Oana Craioveanu at Innovative Enterprise Week, Panel H, https://www.facebook.com/iew2019/videos/532707600596091/ , from min 28:00 to 32:38.

1.7 Key lessons learned [every module should have this!]

- Exercise: Note down what your key takeaways are.
- Bullets of learnings that we actually intended to produce

1.8 Potential material for "offline workshops"

- The link between social impact & responsible research and innovation (https://www.rri-tools.eu/documents/10184/16301/RRI+Tools.+A+practical+guide+to+Responsible+Research+and+Innovation.+Key+Lessons+from+RRI+Tools)
  - o Interreg project on the topic of RRI –MARIE: https://www.interregeurope.eu/marie/

2 Finance

Responsible partners (lead listed first):
- FASE
- CCIS

Key contents:
- Optional: Some basics on financial management, financial planning and business projections
- Available financing options/new instruments (e.g., mezzanine finance, social impact bonds, crowd-funding etc.)
    - Benefits and difficulties
- Investors and their requirements: help SEs to see themselves as an "investment case" (clarify for themselves what kind of finance would actually work for them, and an investor)
    - ALSO: understand investor expectations and "strings attached" to an investment
    - Do SEs want an investor at all, and if so which kind?

GENERAL REMARKS:
- Second level headings designate submodules
- **Video** material marked in bold
- Exercises underlined
- *Visual material* in italics

2.1 Orientation
- Define the individual starting position of the SE: The SE will be introduced to the most common organization types in regard to social enterprises. This will enable them to find out where their organization fits in best.
    - Exercise: As a SE: Explain what type of organization you are and how do you plan to develop (e.g. converting into a pure non-profit or building an income stream and become a social enterprise)?
    - *Visual*: Who am I as a SE?
- Understand if and how impact investment can support the SE´s mission
    - **Video**: https://www.youtube.com/watch?v=WBNAsvlnERs about what impact investing is
    - Exercise: As a social entrepreneur: How does your financing model and cost-income profile look like now/ in the future?

2.2 Financing Needs & Options
- Identifying the needs and options for financing: This sub-module will provide insights into how to identify the financing needs of the SE. It will highlight the basic options for financing with respect to two common legal forms of social organizations as well as introduce the concept of a hybrid organization.

- **Video**: https://www.youtube.com/watch?v=C5PcUSmfOZU or similar academic video on how to create a cash flow statement
  - <u>Exercise</u>: Use a basic cash flow statement tool to identify the future financing needs
  - *Visual*: Graphic on cost-income profiles and financing needs

- Understanding the different financing instruments and their main features: this section will outline the main characteristics and 'side effects' of choosing in between different financing instruments.
  - <u>Exercise</u>: Decision tree from Ashoka on how to select the right instrument for SEs
  - *Visual*: Main financing instruments: characteristics and side effects (key differences between debt and equity)

2.3 Investment Readiness

- Find out to which extent the SE is "investment-ready": The sub-module will provide a methodology of how social enterprises can initially assess their investment readiness and identify gaps as well as find support in closing them.
  - **Video**: https://www.youtube.com/watch?time_continue=2&v=WHR8jaQALt4 FASE webinar on how to prepare the business plan for investors
  - <u>Exercise</u>: investment readiness check in to grasp the venture´s progress over the whole social finance module

2.4 Investor Approach

- This sub-module will prepare the SEs for investor due diligence and negotiations: The module will share key insights into suitable processes and attitudes to identify and approach different types of investors.
  - **Video**: https://www.youtube.com/watch?v=zf-xveXjchg FASE webinar on how to approach investors when looking for growth capital
  - <u>Exercise</u>: Create a plan and material to approach investors (e.g. investigate how to best collect a longlist of potential investors and make a rough draft of a compelling pitch deck)

2.5 Key lessons learned

- <u>Exercise</u>: Note down what your key takeaways are.
- Bullets of learnings that we actually intended to produce
- Invite feedback and suggestions from participants

==Available material to be screened:==
- Social Finance Academy "Access to Impact Investment for Social Enterprises" (https://social-finance-academy.org/online-course-access-impact-investment-social-enterprises/)
- Investment readiness assessment TIRESIA (Italy): http://www.tiresia.polimi.it/social-innovation/tiresia-social-impact-outlook-2018-2/

- OECD study on impact investing (https://www.oecd.org/development/social-impact-investment-2019-9789264311299-en.htm)

<mark>Check for possibilities to integrate:</mark>
- Very brief input on business model and references to existing resources
- More important: impact model → how to SEs IN BRIEF produce impact and how to they communicate it to investors (link to but also subsequent step from e.g., impact maps in the social impact measurement module)
- *Visual:* Exemplary representation of the different funding options
- **Video:** Investor portraits, where investors explain their investment approach, area of focus and selection criteria

3 Management and governance of social enterprises

Responsible partners (lead listed first):
- FASE
- IFKA
- BSC

Key contents:
- The governance of social enterprises while looking at operational board-level leadership, enabling service users, managers, trustees and other defined stakeholders
- Focus less on organizational structure (hierarchies/ participation, hybrid organizations) & more on leadership, vision, people management, democratic principles in governing SEs
- HOWEVER also important:
  o Good governance, "boards and expert input"
  o Who decides, who signs agreements, who bears responsibility?
  o How does a due diligence check work?
  o Key benefits/downsides of different legal forms

GENERAL REMARKS:
- Second level headings designate submodules
- **Video** material marked in bold
- <u>Exercises</u> underlined
- *Visual material* in italics

3.1 Setup: The legal form used to incorporate the organization
- Choosing and developing appropriate legal and governance structures
  o **Video**: https://www.youtube.com/watch?v=UNWvSr2xn5U
  o <u>Exercise</u>: Explain why you choose a certain organizational form and what advantages and disadvantages go along with this decision (How will you raise your income? Who do you want to have control or ownership? What message do you want to give to external stakeholders?)
  o *Visual: D*ecision trees on choosing the right legal form can be used (e.g.: Which legal structure is the right for my SE, (2016), Thomson Reuters Foundation, p.14).

3.2 Business model canvas
- <mark>Using the comparison between unicorns and zebras to explain what social entrepreneurship is https://www.entrepreneur.com/article/322407</mark>
- Applying the Business Model Canvas
  o In this Module we will introduce the SE to the Business Model Canvas
  o **Video**: https://www.youtube.com/watch?v=QoAOzMTLP5s for general information on the business model canvas

- o **Video** by Ted Ladd on the social business model canvas in social entrepreneurship. Input from the MOOC of the Copenhagen Business School with professor Kai Hockerts (video access has to be requested).
- o Exercise: Apply the Business Model Canvas tool and create a business model for your social enterprise
- o *Visual:* Filling out the business model canvas template

3.3 The Governance of Social Enterprises

- This is the main section of the module and will try to inform the SEs on governing boards and monitoring systems (may include information on signalling mechanisms like reporting or codes of conduct)
  - o Possible input on:
    - What is governance? Why is it important for social enterprises?
    - How do I choose the right governance structure?
    - How may a social enterprise ideally combine and align different board functions?
    - How can social enterprises effectively manage influence from capital providers?
  - o **Video:** https://www.youtube.com/watch?v=TTUbt3XgasA about the ownership structure of a startup
  - o Exercise: Select a board structure for your enterprise (e.g. how can beneficiaries, share- and stakeholders be involved in governance of social enterprises? Do you prefer a two-tier or one-tier structure?)

3.4 Key lessons learned [every module should have this!]

- Exercise: Note down what your key takeaways are.
- Bullets of learnings that we actually intended to produce
- Invite feedback and suggestions from participants

Available material to be screened:
- SENSES (https://senses.ifka.hu/)
- Social innovation academy (https://social-innovation-academy.teachable.com/courses/enrolled/358335?)
- Relate to, but also delineate from: The better entrepreneurship policy tool (https://www.betterentrepreneurship.eu/)

Check for possibilities to integrate:
- Good governance: Checklists with recommendations and for practical application
- Holacracy and democratic principles: Case studies of "success cases" (for example Premium Cola https://www.premium-cola.de/kollektiv)
- **Video:** Leadership and vision examples of successful SE pioneers
- Entrepreneurship as method: mobilizing resources, brokering and networking with stakeholders (maybe as a separate focus: effectuation and "crazy quilt"; see for example https://www.operation-startup.com/single-post/2018/09/03/The-Effectuation-

[Principle-The-Crazy-Quilt----Why-co-creating-a-business-idea-with-a-group-of-self-selected-collaborators-helps-mitigate-business-failure](#)) etc.

4 Social enterprise strategies

Responsible partners (lead listed first):
- UHEI
- ZSI
- UKS

Key features:
- Think strategy from the "theory of change"
  - Start with social problem/challenge and show how strategy can be built around that, instead of tweaking an existing model to the problem
- Keeping potential mission drift in check
- Impact oriented strategy and management (link to impact and management & organization modules): What does it mean to focus on impact in day-to-day activities?

GENERAL REMARKS:
- Second level headings designate submodules
- **Video** material marked in bold
- Exercises underlined
- *Visual material* in italics

4.1 Strategy and the theory or change
- Deriving strategy from the theory of change
  - What is the difference if strategy follows from the theory of change, rather than the other way around?
  - **Video**: Use clips of SEs that tackle different problems and outline how they formed their strategy (highlight also failures, revision of strategy etc.)
  - Exercise:
    - Which is of the two is your approach?
    - What is your strategy and theory of change?
    - What would change if you accessed strategy formation from the other side?
- **Video** statements (SEs & investors): What are effective tools to develop strong SE strategies? Or if there is a perceived lack, how can it be addressed?
- Provision of links to "tools" (those highlighted in the video statements and beyond)

4.2 Impact oriented management
- **Video**: Impact oriented management in social enterprises (recorded at expert workshop in HD)
- Moving from strategy formulation to strategy implementation
- *Visual*: Key features of impact oriented management Phineo resources on impact oriented management (confidential, could be requested)
- Impact oriented management as a reduction of impact risk ("Impact Management for Everyone"; www.im4e.org); LINK to social impact measurement module

- Exercise: How would you communicate your strategy to an investor?

4.3 Business and impact models

- Potentially *visual* or even **video**: duality of business model and impact model (different ways of how they fit or do not fit together) → how may this change along the growth of the organization.
- Mission drift versus pivoting (targeted and purposeful renewal through mission shifts) → outline in reference to examples
- Exercise: Project your future. Where could your run into conflicts between impact and business model? How could conflicts be resolved?

4.4 Strategy and systems change

- Link of organizational strategy to systems change, resources for example available at:
  - New Philanthropy Capital: https://www.thinknpc.org/resource-hub/systems-change-a-guide-to-what-it-is-and-how-to-do-it/
  - FSG: https://www.fsg.org/publications-and-tools?sort_by=created&field_related_approach_areas_target_id=11511&field_tool_type_value=All
- Consider: strategy of open source sharing of model or proprietary selling of license (connect to module 5.)
- *Visual*: Defining SEs' position within larger systems (different from stakeholder relations of crazy quilt; more oriented at the social problem)

4.5 Key lessons learned [every module should have this!]

- Exercise: Note down what your key takeaways are.
- Bullets of learnings that we actually intended to produce
- Invite feedback and suggestions from participants

5 Transfer & Scaling

Responsible partners (lead listed first):
- ASHOKA

Key contents
- Overview on module contents
    - WHY transfer
    - WHAT to transfer
    - HOW to transfer
    - WITH WHOM to transfer
    - WHERE to transfer
    - Connection between scaling & impact investment

Key formats:
- VIDEOS with introductions
- INTERVIEWS with social entrepreneurs & impact investors
- WEBINARS
- EXERCISES such as scaling readiness checks, or key offer mappings

5.1 COPMONENT: Why is scaling relevant for SEs and how does it connect to impact investment?

CONTENTS

- Overview on module contents
    - **WHY transfer (topic of this component)**
    - WHAT to transfer
    - HOW to transfer
    - WITH WHOM to transfer
    - WHERE to transfer
- What do we mean by scaling? Two fundamental approaches to scaling: Growing your organization (direct impact) and replicating your solution with the help of others (indirect impact)
- Mini case studies from social enterprises who successfully scaled:
    - Irrsinnig Menschlich: licensing model
    - Designathon: partnership model
    - Aflatoun or Teach for All: international networks model
- Common challenges in scaling
    - Selecting core offers for scaling
    - Entering new markets
    - Finding partners
    - Coordinating networks
- What is your main RATIONALE for replicating your model:
    - Which IMPLICATIONS for your impact, business and organizational model do you see?

- Understanding the scaling readiness of your organization based on self-assessment
- Why is scaling relevant with regard to impact investment?

FORMATS

VIDEO:

- Intro to scaling (PowerPoint presentation with comments) (20 min)
- Interview: My scaling journey. Social entrepreneur shares insights on his/her own scaling journey (15 min)
- Interview: My expectations regarding scaling when I invest into a social enterprise. Impact investor shares his perception on the relevance of scaling
- Common challenges in scaling (PowerPoint presentation with comments) (20 min)

EXERCISES:

- Scaling readiness check for teams (POST)
- Filling in first part ("WHY") of SCALING TEMPLATE

WEBINAR:

- Mini case studies (PowerPoint presentation with comments) (30 min)
- Online breakout groups that reflect on case studies (45 min)

5.2 COMPONENT: What to scale?

CONTENT:

- Overview on module contents
  - WHY transfer
  - **WHAT to transfer (topic of this component)**
  - HOW to transfer
  - WITH WHOM to transfer
  - WHERE to transfer
- What is it that you want to transfer:
  - Your whole organization (Your complete approach consisting of the core components of your impact and business model)
  - A program (A clearly defined activity that comprises all components needed to implement it)
  - A specific product or service
  - Principles and approach (Guidelines and values about how to serve a particular social purpose)
- Key offer check: Is your key offer attractive for beneficiaries and potential scaling partners? What are the prerequisites for having an attractive key offer:
  - Demonstrating your impact (according to impact model)
  - Demonstrating a unique value proposition: Your offer has characteristics that make it unique or special in comparison with existing offers
  - Defining the offer: Your offer is clearly defined (and formalized) and can be well communicated

- o Potential for transfer: Your offer is not (too) context specific (may respond to needs in other regions or contexts).

-
- Defining core offers:
    - o Balancing impact and revenue
    - o Mapping out different offers in terms of their impact & revenue potential

FORMATS

VIDEO:

- Intro to defining the core offer (PowerPoint presentation with comments) (20 min)
- Interview: How we developed our core offer. Social entrepreneur shares insights on his/her own scaling journey (15 min)

EXERCISES:

- Mapping offers (POST)
- Filling in second part ("WHAT") of SCALING TEMPLATE

5.3 COMPONENT: How do SEs scale? Which models are available?
CONTENTS:

- Overview on module contents
    - o WHY transfer
    - o WHAT to transfer
    - o **HOW to transfer (topic of this component)**
    - o WITH WHOM to transfer
    - o WHERE to transfer
- Overview and assessment of different scaling models:
    - o Growth
    - o Branching
    - o (Social) Franchising
    - o Licensing
    - o Partnerships
    - o Membership Organizations
    - o Open Sourcing
- Which scaling model fits to your goals, your organization and your core offer?
    - o Path diagrams for choosing the right model
    - o Mapping out core offer on replication spectrum

FORMATS

VIDEO:

- Intro to scaling models (PowerPoint presentation with comments) (30 min)
- Interview: Overview on why social enterprises choose specific scaling methods. Experts shares insights (15 min)

EXERCISES:

- Mapping core offer an scaling model spectrum (POST)
- Filling in third part ("HOW") of SCALING TEMPLATE

5.4 COMPONENT: How do I create a scaling partner profile?

CONTENTS:

- Overview on module contents
  - WHY transfer
  - WHAT to transfer
  - HOW to transfer
  - **WITH WHOM to transfer (topic of this component)**
  - WHERE to transfer
- Overview on module contents
  - Describing the characteristics you look for in a partner (organizational type, organizational stage (from entrepreneurs, to start-up, to established organizations, experience, size, stakeholder networks, etc.)
  - Defining roles & responsibilities for you and your partner
  - How to setup a partnership contract

FORMATS

VIDEO:

- Intro to partner profiles (PowerPoint presentation with comments) (15 min)
- Interview with local partner: My journey of becoming a local partner of a social enterprise and how I established the model in my country (20 min)

EXERCISES:

- Filling in fourth part ("WITH WHOM") of SCALING TEMPLATE

5.5 COMPONENT: How do I decide where I would like to transfer my approach?

CONTENTS:

- Overview on module contents
  - WHY transfer
  - WHAT to transfer
  - HOW to transfer
  - WITH WHOM to transfer (topic of this component)
  - **WHERE to transfer (topic of this component)**
- Model for screening new geographies
  - Defining Indicators for your screening
  - Testing new markets (lean project management)

FORMATS

VIDEO:

- Intro to partner profiles (PowerPoint presentation with comments) (15 min)
- Interview with local partner: My journey of becoming a local partner of a social enterprise and how I established the model in my country (20 min)

EXERCISES:

- Filling in fourth part ("WHERE") of SCALING TEMPLATE

5.6 Key lessons learned [every module should have this!]

- <u>Exercise</u>: Note down what your key takeaways are.
- Bullets of learnings that we actually intended to produce
- Invite feedback and suggestions from participants

Available material to be screened:

- Social Investment Toolkit (www.socialinvestmenttoolkit.com)
- Potential **video** of "scaling cases" (different pathways) from UHEI regional stakeholder workshop (members of SocEnt BW: http://socentbw.org/)
- Potentially some inputs from EVPA on scaling impact (to be requested)

Check for possibilities to integrate:

- *Visual:* Pathways to scale/growth/transfer/diffusion/etc.
- (**Potentially Video**): Case studies on those different pathways
- Framework conditions (see for instance framework model of social innovation https://www.tandfonline.com/doi/figure/10.1080/10580530.2014.923265?scroll=top&needAccess=true) and how they enable and block scaling → need for interaction with environment (link to communication module)

6 Communication

Responsible partners (lead listed first):
- Ashoka
- S2i
- SDA

Responsible partners (lead listed first):
- ASHOKA

Key contents
- Overview on module contents
    - Introduction to Storytelling: Why it matters
    - Storytelling: How to build your story
    - Body & Speech: How to present your story
    - Communication: How to sustain your story

Key formats:
- VIDEOS with introductions
- INTERVIEWS with social entrepreneurs & storytelling professionals
- WEBINARS
- EXERCISES such as scaling readiness checks, or key offer mappings

6.1 Introduction to Storytelling: Why it matters for Social Entrepreneurs

CONTENTS

- Storytelling and Social entrepreneurship
- Examples of stories from leading social entrepreneurs
- How does storytelling work? How do people listen? How do they respond to new information (involving the senses, etc.)
- The Why? / How? / What? Approach by Simon Sinek (Golden Circle)
- Starting with the "Why?"

TO BE ADDED (potential materials moved to the end of this section for screening):

- Unity of communication and stage of the organization (professionalism)
- Communication as a person-centred (HR) issue
- Sketch out communication toolkit & effective ways of communication depending on organizational model and target groups
- Stress that it needs to flow from mission and strategy
- Beyond simple "communication": lobbying and advocacy campaigns, potentially as a joint effort to raise awareness among policy makers and be part of public debates.

FORMATS

VIDEO:

- Intro to storytelling (PowerPoint presentation with comments) (20 min)
- Interview: My personal journey. Social entrepreneur shares insights on his/her own personal journey (15 min)
- Selection of TEDx Clips with Social entrepreneurs

EXERCISES:

- Exploring my personal "WHY" and writing it down

WEBINAR:

- Webinar: Storytelling basics with an experienced Storytelling mentor (We recommend Antonella Broglia from TEDx)

6.2 Storytelling: How to build your story

CONTENT:

- Introduction to "The Hero's journey" as conceived by Joseph Campbell
- Ashoka method of the "Changemaker journey" (This is actually a workshop format)
- What are the main elements of a story? How can you work with locations, moods, descriptions that evoke the senses, personal conflicts and barriers and transformational experiences?

FORMATS

VIDEO:

- How to define the main elements of your story (PowerPoint presentation with comments) (20 min)

EXERCISES:

- Writing down main story elements based on template

WEBINAR:

- Telling your story with peer-to-peer feedback

6.3 Body & Speech: How to present your story

CONTENTS:

- Explore your body:
  - Being present with your body
  - Using body language when presenting

- - Relaxation & preparation techniques
- Explore your voice
  - Voice exercises
- How to prepare for speeches
- Tips and tricks during speeches

FORMATS

VIDEO:

- Intro to body language (Hosted by professional coach)
- Discussing TEDx Talk examples: Professional coach comments on specific body language and speech issues based on TEDx examples
- How I prepare a speech (Insights from professional coach)

EXERCISES:

- Preparing a short speech and writing it down

6.4 Communication: How to sustain your story

CONTENTS:

- Relevance of continuous communication
- Identifying your main target audiences
- Creating personas for your main target audiences
- Choosing your communication channels
- Practice communication in your everyday practice

FORMATS

VIDEO:

- Intro to communication (PowerPoint presentation with comments) (20 min)

EXERCISES:

- Preparing key communication formats based on templates and guiding questions: Press release, social media post, etc.

Key contents:
- Unity of communication and stage of the organization (professionalism)
- Communication as a person-centred (HR) issue
- Sketch out communication toolkit & effective ways of communication depending on organizational model and target groups
- Stress that it needs to flow from mission and strategy

- Beyond simple "communication": lobbying and advocacy campaigns, potentially as a joint effort to raise awareness among policy makers and be part of public debates.

<mark>Check for possibilities to integrate:</mark>
- *Visual:* Communication toolkit → Different mix of channels depending on industry/field of activity, maturity of the organization, type of organization and service
- (Potentially **Video**): Cases of "transformations" in communication strategy (SEs that have undergone a positive communication trajectory)
- (Potentially **Video**): Campaigning and public awareness examples of best practices