

WP T2

**Testing Social Enterprise Support Models**

ACTIVITY A.T2.1

**Pilot Actions Testing Social Enterprise Start-up Incubation**

**Pilot Activity Concept**

Created by Rzeszow Regional Development Agency and Regional Centre of Social Assistance in Rzeszow (PL)

July 2018

Structure of the Pilot Activity Concept

1. BACKGROUND (justification of the pilot action and assumption for the pilot action)

*(Please explain why it is crucial to address the problem identified and what has already been done to solve the problem.) (max. 1 page, bullet points)*

Problem: Support path maladjusted to the needs of people / institutions interested in establishing / running Social Economy Entity (SEE) including Social Enterprises.

The support system for Entities of Social Economy is very extensive in whole Poland (including Podkarpackie Voivodeship). The system is based on legislation valid throughout the country as well as on national and regional programs, i.e. the National Program for the Development of Social Economy, and the Podkarpackie Program for the Development of Social Economy. The Social Economy Support Center (OWES) is the basic institution supporting Social Economy Entities in Poland. These institutions provide consultancy services for existing Social Economy Entities and train people interested in starting a social enterprise or the economisation of a non-governmental organization. OWES cooperate with the regional social economy development coordinator, i.e. the Regional Center of Social Policy. They jointly agree on the plan and principles of cooperation and implementation of joint initiatives. In the Podkarpackie Voivodeship the accreditation of the Minister of Family, Labor and Social Policy was received by 3 Social Economy Support Centers on March 18, 2016.

The support system for creation of a social enterprise run by Social Economy Support Centers is based on cyclical projects co-financed with the European Union funds. For example, the Rzeszow Social Economy Support Center ROWES (that operates under the Rzeszow Regional Development Agency and that we cooperate with as part of the SENTINEL project) implements projects entitled "ROWES - comprehensive support for the social economy sector in the sub-region I" and "ROWES - comprehensive support for the social economy sector in the sub-region II". The duration of both projects is the period from 01/01/2017 to 31/12/2019. Due to the nature of support provided in the project, there is no possibility of making changes while its implementation. Every individual or entity that wants to get financial support to start a business in the form of a Social Economy Entity (i.a. Social Enterprise) must go through the entire path provided by the project framework. The support is universal, i.e. the same was given to everyone regardless of their experience, development status, qualifications etc. As a result, the entire support process is extended and the work and financial outlays grow. People who are willing to operate within the Social Economy sector are discouraged, what affects the instability of the actions taken.

The path consists of the following stages / elements:

* information campaign - consists of reaching as many potential participants as possible, including field activities - direct contact with people living in the region, with particular emphasis on the least developed areas.
* animation - is aimed at supporting people and institutions intending to start up in the form of social economy entities and social enterprises, or to encourage groups and environments to take up activities aimed at developing of the social economy;
* incubation - is carried out by key advisers, whose activities focus on supporting the non-governmental organizations recommended by animators and initiative groups (natural persons or representatives of legal entities) intending to set up a social enterprise or social economy entity.
* business services – the support in identifying current needs, assistance in diagnosing of the client's needs and expected effects, assistance in preparation of an action plan tailored to the specific needs of clients, implementing an action plan (training, consulting, financial support, etc.), involving the organization and coordination of support, monitoring the implementation of the action plan, evaluating the results of the planned activities.
* trainings - general trainings in the field of social economy preparing for setting up and running a social enterprise.
* study visit - is to serve, above all, the exchange of experiences as well as the analysis of the applied solutions and the possibility of transferring them to the ground of their own social enterprise.

- specialist consultancy - marketing, personal, financial, tax and accounting

- School of Leaders - the participants gain skills related to running Social Economy Entities and managing their potential. The School of Leaders is a free training for leaders, members, employees and volunteers of social economy entities

- Subsidies - Receipt of funding for establishing a social enterprise and creating jobs in SEE

- Audit of a social enterprise

- Training for social enterprises employees.

- Incubators in Mielec and Tarnobrzeg - might be used by people, the environment, communities, non-governmental organizations that create Initiative Groups intending to set up Social Economy Entities or a Social Enterprise. The support also includes the use of the technical and infrastructure facilities of these Incubators

The purpose of the pilot action is to adjust the existing support path for the individual / entity to their real needs. Not all persons / entities need the entire support system offered by OWES. Support should be more tailored to the individual situation of each person / entity. Only entities / persons without any experience or qualifications should use the entire support system.

Conducting of a pilot action in this form will contribute to the development of a better support model, what will be offered by OWES as part of projects in the period from 01.01.2020.

1. **TITLE OF THE PILOT ACTION** (& acronym if applicable)

Social Entrepreneurship Simulator –SES (first draft of the name)

1. **SUMMARY OF THE PILOT ACTION**

*(please specify how you intend to implement the pilot action and which are main activities and measures) (max. 1/2 page, bullet points)*

The pilot action will be in a form of simulation of the support path with particular emphasis on the pre-selection stage and adaptation of the support elements to the needs of the beneficiaries. The Pilot Action (PA) will be carried out in close cooperation with the Rzeszow Social Economy Support Center. This institution deals with providing support for entities from the social economy sector on a daily basis and has extensive experience in that subject. ROWES employees are experts in this fields, so they will actively participate in every part of the Pilot Action. The campaign will be carried out by the employees and with the use of infrastructure of RRDA, ROPS, ROWES. Some part of the trainings and meetings will be organized in the form of a two-day workshop organized in the Social Economy Entity facility providing the opportunity to use the conference rooms, catering and accommodation. Other trainings will be carried out at the headquarters of RRDA, ROWES and ROPS.

1. **AIMS AND OBJECTIVES OF THE PILOT ACTION**

*(please define aims and objectives of the pilot action you intend to implement) (max. 1/2 page, bullet points)*

Basing on the analysis of the situation in the region covering both the sphere of support and networking of social enterprises, a Pilot Action was planned to improve the existing support system implemented by Social Economy Support Centers. This improvement will allow to remove barriers that affect the formation process as well as the sustainability of social enterprises in the Podkarpackie Voivodship.

The pilot action will be in a form of simulation of the pre-selection stage and creation of a social enterprise. The simulation will cover several stages. The most important part will be the diagnosis of the participants' needs, development of new tools and support models as well as development of the School for Leaders.

The results of the Pilot Action will be helpful for the creation of future projects implemented by OWES and other institutions aimed at supporting the emerging social enterprises as well as for the development of existing ones.

1. **TARGET GROUPS**

*(please define direct and indirect target groups, present their main needs which will be addressed, and explain how you will motivate, select and engage target groups to join pilot action) (max. 1 page, bullet points)*

The target group of the pilot action are people or entities interested in setting up of a social economy entity or a social enterprise. Institutions and persons must be eligible to set up an enterprise in accordance to the law requirements, i.e. they must be endangered with a social exclusion. In order to recruit the above mentioned groups, the well-functioning structure of ROWES field offices will be used. The ROWES employees will participate in information and promotion meetings. They will encourage people/entities to take part in the simulation of creating a social economy entity or a social enterprise. These actions will be taken to reach target groups directly, especially in less developed regions. Information on the pilot action will also be put in ROPS and RRDA websites as well as by employees of these institutions, in the press, in the Internet, on social networking websites, etc.

Thanks to the participation in the pilot action, people / entities will be able to gain knowledge and experience in the subject of creation of a social economy entity or a social enterprise. Participants may also be persons / entities that because of various reasons did not qualify for currently operating projects providing support in establishing SEE. Participation in the SES will allow the initiative group (a group of people creating a social enterprise) to gain additional points in the case of applying for support in subsequent editions of projects aimed at supporting the creation of a social enterprise.

Persons / entities that want to participate in the SES will have to complete the application form available on ROPS / RRDA websites. The form will provide all information about the candidate - employment history, experience, qualifications, reason for participation, business idea, etc. The selection will be made on the basis of analysis of application forms and in-depth interviews - interviews with candidates.

The next target group of SES are mentors / experts. Simultaneously with the recruitment of participants, recruitment and creating a database of mentors / experts / practitioners will take place. Those will be people with practical experience in the area of ​​social economy, i.e. social entrepreneurs, entrepreneurs from the open labor market, ROPS employees, RRDA, ROWES, etc. and other representatives of institutions supporting social enterprises. These people will benefit from the direct results of the pilot action, i.e. from the new developed path of support for the emerging social enterprises. Experts will participate in specialist training during the TWG 3 in Italy. These persons will participate in each stage of the pilot action as practitioners / experts / trainers / jurors. They will be members of the Experts' Committee - they will verify the application forms and will then participate in the selection of candidates and the selection of participants. The experts will take part in the diagnosis of the participants' needs and directing the participants to appropriate trainings / workshops. They will also conduct workshops and trainings.

1. **MOST IMPORTANT MILESTONES OF THE IMPLEMENTATION OF THE PILOT**
2. Information :

Promotion and informing people from the region of the Podkarpackie Voivodeship, with particular emphasis on less developed areas. Information and promotion activities will be taken in cooperation with the OWES and basing on their field offices structure. Territorial meetings will be organized (among others in Local Government Units, rural housewives' circles, PES, enterprises, etc.) to inform about the possibility of participation in the simulation of creation of a social enterprise adapted to the individual needs of the participant and the situation in its region. Industry meetings will be organized in order to broaden the network of contacts and to help with reaching beneficiaries and partners. Cooperation with local media.

2. Recruitment:

a) Publishing information about starting of recruitment for pilot actions (press, internet, social media, RRDA website, ROPS) and the possibility of submitting applications. Applications will be accepted with using of the previously prepared application form. The AF will contain, among others information about the person / entity, employment history, experience, qualifications, reason for participation, business idea, etc.

The key criteria for participation in the pilot action will be the following criteria:

- guidelines from the act on social cooperatives,  
- status on the labor market,  
- additional points for people from less developed areas,  
At the same time, recruitment of participants will involve the recruitment and creation of a database of mentors / experts / practitioners who are members of the Experts' Committee and those conducting workshops.

b) Applications verification will be carried out by a project team consisting of ROWES, RRDA and ROPS employees. Verification will take place through analysis of application forms and in-depth interviews with candidates.  
Pre-profiling / grouping of candidates will take place basing on the individual needs and possibilities of the candidates.

3. Preparation / organization and workshops for participants: choice of place, time, mentors / experts, program, tools, study visits, etc.)

4. Conducting first workshops - School for Leaders:

- Checking business potential by the Expert Committee

- A well-thought-out concept of the business model,

- trainings (introduction about Social Economy and Social Enterprises),

- group work ,

- workshops with the use of new tools, e.g. a board game on PS Guidance "Spoldzielcy"

- preparation by participants of an initial business plan with the mentors support

- consultation with experts,

- study visits in a social enterprise and / or an open labor market

5. Preparation / organization of the second workshop for participants: selection of place, time, mentors / experts, program, study visits, etc.)

6. Organization of the second workshop:

- additional training profiled as needed,

- workshops,

- individual consultations with experts / practitioners of Social Economy,

- group work to verify initial business plans,

- The Committee of Experts finally verifies and evaluates business plans,

- The Experts Committee adjusts the support paths based on the diagnosis of the participants' needs.

Participants of the Pilot Action after its completion will constitute the Group Creating the Environment (the Initiative Group), that will be dedicated to receiving funding as part of the OWES activities in the region. It is planned to create 4 Initiative Groups.

1. **ACTIVITIES, IMPLEMENTATION PLAN AND EXPECTED RESULTS OF THE PILOT ACTION** (schedule)

*Please schedule accurately the implementation of your pilot by filling in the following table. Please try to define as many actions as it is realistic. Increase the number of rows, if needed.*

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Months**  **Activities** | **10** | **11** | **12** | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **Responsible &**  **Participating actor** | **Location** | **Expected outputs/ results** |
| Starting and conducting information campaign in the field and on websites. | x | x |  |  |  |  |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS, ROWES | ROWES field offices, websites | Informing and reaching as many people / entities interested in participating in SPS as possible. |
| Recruitment and selection of experts / mentors who will be members of the Experts' Committee and will conduct workshops and training. | x | x |  |  |  |  |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS, ROWES | RRDA and ROWES field offices | Collecting a database of over a dozen experts / mentors to participate in the Pilot Action (PA). 6 experts chosen and created a reserve list. |
| Participation of 6 experts / mentors and AP promoters in training in Italy under TWG3. |  | x |  |  |  |  |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS, mentors | Trieste, Italy | Training of ROPS and RRDA project team members and mentors in the implementation of the Pilot Action. |
| Recruitment: announcement, waiting, collecting candidates' application forms, form analysis, interviews. |  |  | x | x |  |  |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS | Rzeszow, | Recruitment of about 20 people to simulate the creation of 4 SE in the community plus reserve list. |
| Conducting the main part of the pilot action in the form of two two-day workshops and additional training, consulting meetings, etc. The main part should not last longer than a month. |  |  |  |  | x | x |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS, ROWES, mentors | Rzeszów and, for example Błażowa or Rymanów Zdrój. | Conducting workshops, training, meetings with advisers. |
| Drawing up a progress report of the Pilot Action |  |  |  |  | x |  |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS | Rzeszow | Progress report. |
| Participation of organizers and mentors in a study visit in Brno, Czech Republic. |  |  |  |  |  | x |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS | Brno, Czech Republic | Gaining experience from a pilot action in the Czech Republic. Exchange of experiences. |
| Organization of a study visit for the Czech - USI in the Podkarpackie voivodeship. |  |  |  |  | x |  |  |  |  |  |  |  | Responsible:  RRDA, ROPS  Participating:  RRDA, ROPS | Rzeszow, | Presenting the specifics, actions and results of the Polish Pilot Action to the Czech partner - USI. Experiences exchange. |
| Completion of the pilot action and preparation of the summary report. |  |  |  |  |  |  | x | x | x | x | x | x | Responsible:  RRDA,  Participating:  RRDA, ROPS | Rzeszow | Summary report of pilot actions. The report concerns the results of the actions obtained thanks to the action of information and future conclusions |

1. **BUDGET FOR IMPLEMENTATION OF PILOT ACTION** (please plan the budget of your pilot action based on the application form**)**

*Since the majority of the costs of your pilot will be covered by Sentinel project, it is essential from planning point of view to use the project’s budget structure during the financial planning of your pilot. On the other hand, it is useful for you to plan your pilot as detailed as it is possible. It will definitely help the implementation. In line with this, after the completion of the implementation plan, please estimate the required budget of your pilot in EUR, based on the application form, using the table below. Increase the number of rows, if needed. You could also use excel table and copy it in to this document if you wish to.*

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Activities** | **Staff cost** | **Overhead** | **Travel & accommodation** | **External expertise** | **Total** |
| Pilot Activity Concept preparation -ROPS  Pilot Activity Concept preparation - RRDA | 3675,00  4410,00 | 551,25  661,50 | -  - | -  - | 4226,25  5071,50 |
| Training on pilot implementation – ROPS  Training on pilot implementation – RRDA | 1176,00  1176,00 | 176,40  176,40 | -  - | 1800,00  1800,00 | 3152,40  3152,40 |
| Mid-term status report – ROPS  Mid-term status report - RRDA | 2940,00  4410,00 | 441,00  661,50 | -  - | -  - | 3381,00  5071,50 |
| Study visits (Czech Rep) – ROPS  Study visits (Czech Rep+Poland) - RRDA | 2205,00  2940,00 | 330,75  441,00 | 2000,00  2000,00 | -  2000,00 | 4535,75  7381,00 |
| Pilot evaluation report – ROPS  Pilot evaluation report - RRDA | 2940,00  5880,00 | 441,00  882,00 | -  - | -  6190,00 | 3381,00  12952,00 |
| Pilot Activity Synthesis Report – ROPS  Pilot Activity Synthesis Report - RRDA | 588,00  588,00 | 88,20  88,20 | -  - | -  - | 679,20  679,20 |

1. **PILOT LOGICAL FRAMEWORK / LOGFRAME**

A Logframe as a tool for improving the planning, implementation, management, monitoring and evaluation of projects. It is a way of structuring the main elements in a project and highlighting the logical linkages between them. In Logical Framework Matrix (or Logframe) the pilot is defined in terms of hierarchy of objectives (inputs, activities, results, specific objectives and overall objectives plus a set of defined assumptions and a framework for monitoring and evaluating achievements (indicators and sources of verification).

It is about setting your goals first and then getting into the glassroots – what you actually need to do. You have to look at all the boxes in the table as a sequence using and “if and then” logic to test the lograme. A simple test is to ask if your logframe satisfies the following**: [1] IF**these activities are undertaken **AND**the assumptions hold true, **THEN**the intended outputs will be created**. [2] IF**these outputs are delivered **AND**the assumptions hold true, **THEN**the purpose will be achieved.**[3] IF**the purpose is achieved **AND**the assumptions hold true, **THEN**the intervention will have contributed to the goal.

*An example of »if and then« logic:*

***If*** *we establish a community committee (activity)****and****people are enthusiastic (assumption)****then****we’ll have the capacity to build and manage a playground (output).****If****we have a playground (output)****and****it’s easy to maintain (assumption)****then****children will have fun (purpose).****If****children are having fun (purpose)****and****families continue to grow in the village (assumption)****then*** *we’ll reach the goal of a happy community.*

Ideally, the Logframe is prepared on **one page**, which requires short and specific descriptions in bullet points.

Useful reading before starting to write a logframe:

<https://www.theguardian.com/global-development-professionals-network/2015/aug/17/how-to-write-a-logframe-a-beginners-guide>

<https://www.unodc.org/documents/human-trafficking/Toolkit-files/08-58296_tool_10-3.pdf>

<https://www.betterevaluation.org/en/evaluation-options/logframe>

<https://www.byggdastofnun.is/static/files/IPA/SN_4_How_to_fill_out.pdf>

|  |  |  |  |
| --- | --- | --- | --- |
| **Action description** | **Indicators** | **Means of verification** | **Risks / Assumptions[[1]](#footnote-1)** |
| **Overall objective (Aim/Goal)** *[[2]](#footnote-2)*  *The pilot’s contribution to SENTINEL project objectives (impact).*  Testing methods and tools eliminating barriers in creation of social enterprises by simulating the creation of 4 SE. | *How the overall objective is to be measured including quantity, quality, time. Impact indicators.[[3]](#footnote-3)*  The number of barriers shown in the creation of PES and the strength of their negative impact on the formation of PES. | *How the information for the indicators will be collected, when and by whom.*  Information collected by the organizers during the preparation of the Pilot Action. The primary source are ROWES employees. | *n/a* |
| **Specific objective (Purpose/Outcome)[[4]](#footnote-4)**  *This is the single central objective of the pilot in terms of sustainable benefits to be delivered to the pilot’s beneficiaries.*  Conducting a simulation of the initial stage of formation of 4 social enterprises using experimental methods and support tools in the form of a diagnosis of needs and appropriate training. | *How the specific objective is to be measured including quantity, quality, time. Outcome indicators[[5]](#footnote-5).*  The number of people / groups who passed the individual stages of the simulation and was qualified to obtain a financial grant to start operations. The number of methods and trainings that took place and that positively influenced the achievement of the goal. | *How the information for the indicators will be collected, when and by whom.*  Information collected by the organizers and mentors during the simulation and during the final group verification by experts. | *If the specific objective is achieved, what assumptions must hold true to achieve the overall objective.*  "If a simulation of the initial stage of formation of 4 PES is carried out and it proves to be effective, we will eliminate the existing barriers."  *What external factors are necessary if the purpose is to contribute to the achievement of the goal?*  Availability and involvement of mentors who are able to objectively assess the usefulness of methods and tools. Presence of people interested in creating social enterprises. Willingness to cooperate on the part of public institutions. Positive reception of PA by the social economy environment. |
| **Results (Outputs)**  *Tangible products or services delivered by the pilot.*  Creation of tools and methods of support for forming PES, which will be included in the Toolbox manual. | *How the results are to be measured including quantity, quality, time. Output indicators.[[6]](#footnote-6)*  Number of methods and tools tested and positively evaluated by the organizers. | *How the information for the indicators will be collected, when and by whom.*  Information collected by the organizers and mentors during the simulation and during the final group verification by experts | *If results are achieved, what assumptions must hold true to achieve the specific objective.*  "If methods and support tools for creating PESs are created and they are well planned, we will be able to simulate the formation of 4 PES."  *What are the factors not in the control of the project which are liable to restrict the outputs achieving the purpose?*  Resignation of participants during the PA, lack of availability of mentors during the PA implementation period |
| **Activities**  *Tasks that have to be undertaken to deliver the desired results.*  Preparation of a detailed PA schedule (PA Concept). Conducting an information campaign. Recruit mentors. Recruitment and selection of PA participants. Preparation of the infrastructure for conducting the AP (hotel, workshop room, preparation of materials). | *n/a* | *n/a* | *If activities are completed, what assumptions must hold true to deliver the results.*  If we prepare the PA schedule and it will be a logically correct (it will be well prepared), we will create tools and support methods. If we conduct an information campaign and get interest of people / entities, we will create tools and support methods. If we recruit mentors and they will be experienced experts, we will create tools and support methods. If we select participants and everyone will participate in the PA, we will create tools and support methods. If we prepare infrastructure and it will meet the requirements, we will efficiently conduct a pilot action.  *What factors will restrict the activities from creating the outputs?*  Incorrect PA schedule (PA Concept), bad information (no results), no interested mentors to participate in the PA, no willing participants to PA, difficulties in reaching target groups, poorly prepared infrastructure (no materials, no space for workshops) unattractive PA offer. |

1. **CONTACT DETAILS FOR THE PERSON RESPONSIBLE FOR THE PILOT**

|  |  |
| --- | --- |
| Name/Surname: | **Danuta Kandefer**  **Bartosz Świder** |
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1. Factors external to the pilot which are likely to influence the work of the pilot management has little control, and which need to exist to permit progress to the next level. [↑](#footnote-ref-1)
2. The ultimate result to which your pilot is contributing – the impact of the pilot. [↑](#footnote-ref-2)
3. Impact indicators usually take longer to be realised and would require long term evaluation. Please try to choose few which measure changes that you expect to occur during the lifetime of the pilot. [↑](#footnote-ref-3)
4. The change that accurs if the pilot outputs are achieved – the effect of the pilot. [↑](#footnote-ref-4)
5. Outcome indicators measure intermediate changes as a result of the pilot activities, for example changes in knowledge and attitudes, increased acces to and utilisation of services, increased quality of services…. [↑](#footnote-ref-5)
6. Output indicaors measure the immediate results of pilot activities and tell as if activities are happening as planned, for example number of SEs particiapting, number of mentors trained, number of measures introduced… [↑](#footnote-ref-6)