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CREASSE

**PRACTICAL HANDBOOK ON “HOW TO
GUIDE COLLECTIVE ENTREPRENEURSHIP:
THE ROLE OF THE SOCIAL FACILITATOR”**

GUIDE TO CONDUCT THEMATIC WORKSHOPS



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MARKETING

Brief Summary

This module introduces participants to the essentials of marketing within the unique context of social enterprises. Unlike traditional businesses, social enterprises must communicate both their commercial offerings and their social mission, making marketing a powerful tool for driving impact and sustainability. The module covers the fundamentals of building a compelling impact story and brand narrative, which are crucial for engaging customers, beneficiaries, and supporters.

Participants will learn to identify and map key stakeholders, segment and target their audiences, and tailor their messaging to resonate with different groups. The module explores the marketing mix—product, price, place, and promotion—with a focus on aligning these elements to the social mission and values of the enterprise. Special attention is given to digital marketing and social media, providing practical guidance on how to leverage online platforms for storytelling, community engagement, and awareness-building.

Through interactive exercises, real-life case studies, and hands-on activities, participants will develop practical marketing skills. They will also draft a basic marketing plan, setting clear objectives, identifying target audiences, selecting appropriate channels, and defining metrics for success.

By the end of the module, participants will understand how effective marketing can help their social enterprise attract supporters, build trust, and create lasting impact in their communities. The module emphasizes authenticity, transparency, and the importance of connecting mission with market needs.



Module Objectives

By the end of this module, participants should be able to:

- Understand the unique challenges and opportunities in marketing for social enterprises.
- Develop a compelling impact story and brand narrative.
- Identify and engage key stakeholders and target audiences.
- Apply digital and traditional marketing strategies.
- Create a basic marketing plan aligned with their social mission.

Checklist

1. Understand the core concepts of social enterprise—mission, social impact, and business sustainability.
2. Be able to clearly articulate the importance of marketing for social enterprises, including how it differs from traditional business marketing.
3. Study and practice drafting an “impact story” that explains the enterprise’s social purpose and mission.
4. Review principles of authentic branding and how to align branding with the enterprise’s mission and values.

5. Familiarize yourself with storytelling techniques that connect emotionally with audiences and make complex missions relatable.
6. Learn how to identify and segment target audiences, including the creation of customer personas.
7. Review stakeholder mapping techniques to identify customers, beneficiaries, funders, and partners.
8. Understand the basics of the marketing mix (product, price, place, promotion) as they apply to social enterprises.
9. Study digital marketing fundamentals: social media, content strategy, platform selection, and engagement tactics.
10. Know how to set SMART (Specific, Measurable, Achievable, Realistic, Time-bound) marketing objectives.
11. Review strategies for selecting appropriate marketing channels based on audience and resources.
12. Learn how to measure and evaluate marketing effectiveness using analytics and feedback.
13. Prepare examples of successful social enterprise marketing campaigns and case studies for discussion.
14. Be ready to guide participants through the process of drafting a simple marketing plan.
15. Understand the importance of consistency in messaging and visual identity across all marketing materials.

Learning Content

Module structure:

TOPIC	DURATION	METHODOLOGY
Introduction to social enterprise marketing	30 min	Presentation, group discussion
Defining your impact story & brand	45 min	Storytelling, workshop
Stakeholder mapping & targeting	45 min	Group exercise, case study
Marketing Mix for Social Enterprises	60 min	Interactive lecture, group work
Digital marketing & social media	60 min	Demo, practical exercises
Partnerships & community engagement	30 min	Brainstorming, role play
Marketing plan development	60 min	Guided template work

Introduction to social enterprise marketing

- Marketing in social enterprises goes beyond selling products or services; it must communicate the social mission and create emotional connections.
- Discuss the duality: balancing commercial goals with social impact.

Defining your impact story & brand narrative

- Impact story: Clearly articulate what your enterprise does, why it matters, and the change you seek to create.
- Brand narrative: Develop an authentic, mission-driven brand that resonates with both customers and supporters.
- Storytelling: Use real stories (beneficiaries, founders, community) to build trust and engagement.

Trainer Tip: Facilitate an exercise where participants draft their own impact story and receive peer feedback.

Stakeholder mapping & targeting

- Identify key stakeholders: customers, beneficiaries, funders, partners, policymakers.
- Map their motivations and decision journeys (why would they support or buy from you?).
- Segment and target audiences based on their values and needs.

Trainer tip: Use a stakeholder mapping template and guide participants through filling it out for their own enterprise.

Marketing mix for social enterprises

- Product: What is being offered? How does it solve a social problem?
- Price: Consider affordability, value perception, and social impact.
- Place (Distribution): How will products/services reach the audience? (online, retail, community events).
- Promotion: How will you communicate your value and mission? (social media, events, partnerships, traditional media).

Trainer tip: Group exercise to develop a mini-marketing mix for a sample social enterprise.

Digital marketing & social media

- Build a user-friendly, mobile-optimized website as your digital hub.
- Leverage social media platforms (Facebook, Instagram, LinkedIn, Twitter) for storytelling, community engagement, and awareness.
- Content marketing: blogs, videos, impact stories, thought leadership.
- Utilize video marketing for higher engagement.
- Consider Google Ads Grants and targeted social media ads for broader reach.
- Collaborate with influencers and ambassadors aligned with your mission.

Trainer tip: Demonstrate setting up a basic social media page and planning a week of posts.



Partnerships & community engagement

- Collaborate with like-minded organizations, influencers, and community leaders to expand reach and credibility.
- Organize or participate in events and workshops to build relationships and trust.

Marketing plan development

- Guide participants in drafting a simple marketing plan, including:
 - Objectives (aligned with mission)
 - Target audiences
 - Key messages
 - Channels and tactics
 - Timeline and responsibilities
 - Metrics for success

Trainer tip: Provide a marketing plan template and facilitate a step-by-step completion session.

Examples

Suggested activities and exercises:

- Impact story workshop: Participants write and share their impact stories.
- Stakeholder mapping: Teams map out stakeholders for a hypothetical or real social enterprise.
- Marketing mix brainstorm: Groups develop a marketing mix for a sample enterprise.

- Digital audit: Participants review and critique existing social enterprise websites or social media pages.
- Role play: Practice pitching the social enterprise to different stakeholder groups.
- Marketing plan drafting: Guided session using a template.

Final Checklist

Post-module mastery checklist for facilitators:

1. Can clearly explain the unique role and importance of marketing in social enterprises, distinguishing it from traditional business marketing.
2. Can guide participants in developing and refining a compelling impact story and authentic brand narrative for a social enterprise.
3. Has mastered stakeholder mapping, including identifying, segmenting, and prioritizing key stakeholders such as customers, funders, partners, and beneficiaries.
4. Can facilitate exercises in audience segmentation, targeting, and positioning (STP) tailored to social enterprise contexts.
5. Understands and can teach the marketing mix (product, price, place, promotion) as it applies to social enterprises, including mission alignment.
6. Is proficient in digital marketing fundamentals—website basics, social media strategy, content creation, and online engagement tools.
7. Can advise on building partnerships and collaborations to amplify marketing reach and credibility.

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8. Can support participants in setting SMART marketing objectives and aligning them with overall social impact goals.
 9. Is able to guide the development of a basic, actionable marketing plan for a social enterprise.
 10. Can demonstrate and facilitate the use of practical marketing tools and templates (e.g., stakeholder maps, marketing plan templates).
 11. Understands how to measure marketing effectiveness using appropriate metrics and feedback mechanisms.
 12. Can provide relevant case studies and real-world examples to illustrate effective social enterprise marketing strategies.

Reflection exercise

After completing the marketing unit, facilitators can use the following open-ended reflection questions to prompt deeper thinking and discussion among participants:

- How did the process of mapping stakeholders and defining your target audiences influence the way you think about promoting your social enterprise's mission and offerings? What new insights did you gain about your potential supporters or customers through this exercise?
- In what ways might your impact story or brand narrative need to adapt when communicating with different audiences (such as funders, beneficiaries, or partners)? What challenges could arise, and how would you address them?

- Reflecting on the marketing plan you developed, what aspects do you feel most confident about, and which areas do you think require further exploration or support? How might you continue to test and improve your marketing strategies as your social enterprise evolves?

Additional Resources and Further Reading

- **Social entrepreneurship training manual (RISE Project):**
https://ec.europa.eu/programmes/erasmus-plus/project-result-content/cd6b8f06-7987-4d7c-a73f-c9cdeb44a67b/I01_-_Social_Entrepreneurship_Training_Manual__EN_.pdf
- **"Marketing Your Social Enterprise" (Social Enterprise London):**
<https://www.socialenterprisebsr.net/wp-content/uploads/2016/05/Marketing-Your-Social-Enterprise-Social-Enterprise-London.pdf>
- **Social Enterprise Marketing Toolkit (FSSES):**
https://www.fses.hk/_ul/1716286984.pdf
- **Causeartist: 7 Marketing Strategies for Social Enterprises:**
<https://www.causeartist.com/marketing-strategies-social-enterprises/>
- **Ailish Irvine Training: 10 Proven Digital Marketing Strategies for Social Enterprises:** <https://www.ailishirvinetraining.com/blog/10-proven-digital-marketing-strategies-for-social-enterprises>

LEADERSHIP, SELF CARE AND TIME MANAGEMENT

Brief Summary

In this module, you will explore powerful techniques that will help you achieve the much-desired balance between your professional and personal life, even when you are facing demanding situations. You will also learn how to listen to your body and respond to its needs, understanding that it is your greatest ally in facing each day with clarity and vitality.

You will discover practical and effective strategies that will allow you to manage your daily responsibilities more efficiently, while also preserving the energy required for self-care. Throughout this process, you will gain a deeper understanding of yourself and how you are currently managing your life. You will explore various techniques and tips to organize your time and priorities more effectively, ensuring that you maintain space for your well-being.

Module Objectives

The specific learning objectives are:

- To promote leadership for entrepreneurs, describing different styles and facilitating decision-making.
- To discover practical and effective strategies that allow us to manage our daily lives more efficiently.
- To foster awareness of self-care as a key skill for achieving work-life balance.

Checklist

The facilitator should be familiar with:

- The concept of leadership, different leadership styles, and how to apply them effectively within a group setting.
- Practical activities and dynamics for developing leadership skills.
- The importance of incorporating a gender perspective in leadership.
- Strategies and group dynamics for effective decision-making.
- Techniques for efficient time management.
- Methods for distinguishing between what is important and what is urgent.
- Approaches to minimize distractions and enhance focus.
- Tools and methods for organizing and managing time.
- Practices for self-care to sustain energy and well-being.
- Reflective techniques to capture and integrate lessons learned.

Learning Content

- What is leadership? Is there only one leadership style? Autocratic. Participative. Servant. Distributed.
- Does leadership have a gender?
- Decision-making and leadership. Decision-making tools.
- Purpose for the day: Prioritizing strategies. Exercise: Choose your priority for the day.
- Focus: Overcome distractions. How to stay focused.
- Conserve energy: Take care of your body to recharge your brain. How to recognize stress.
- Reflect, celebrate, and learn. Evaluate what has gone well and what has not.
- Freely downloadable digital time management Apps. Learn and use the ones that best suit your needs.
- What is time and why is it important to manage it?
- Define your goals: How are you and how do you want to be? Personal and professional goals.
- Know yourself: Identify efficient behaviors. Load sharing, limiting beliefs, imposter syndrome, time wasters,
- Plan, choose, and prioritize. GTD (Getting Things Done) method

Examples

Series

You will love seeing how Dr. Max Goodwin, in the series "New Amsterdam", available on Netflix and Amazon Prime, has a leadership style that emphasizes values like trust and humility.

Reflection

What leadership models do you have as a reference? Is it a woman or a man?

Do you think there are differences?

Why are they a reference for you?

Reflection Exercises

Reflection 1

Now that you are familiar with the four leadership styles we have listed, which style do you identify with most? Which one do you feel most comfortable with?

Reflection 2

Have you ever been questioned about which leadership style feels most natural to you?

Reflection 3

Would you like to try one of the other leadership styles? Which one and why?

Choose your priority for the day

Here is a practical exercise to help you choose a priority for the day:

1. Take a moment to reflect: Find a quiet place where you can be alone with yourself. Close your eyes, breathe deeply, and focus on the present moment.
2. Visualize your to-dos: Imagine all the tasks and responsibilities you have for the day. Visualize them as elements floating in the air in front of you.

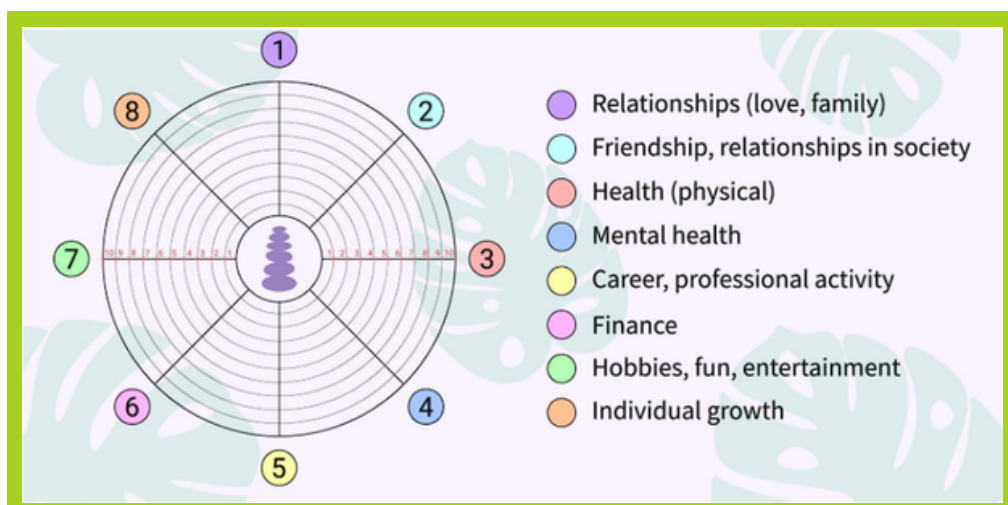
3. Ask yourself:

- ☐ What priority do I want for today?
- ☐ What is most urgent?
- ☐ Which priority will give me the most satisfaction at the end of the day?
- ☐ What will bring me the most joy when I do it?
- ☐ Which one brings me closer to my goals?

The Wheel of Life

It is a self-analysis tool created by Paul J. Meyer, founder of the Success Motivation Institute.

1. Take a piece of paper and draw a wheel like this one (you can change or add any areas that are important to your life).
2. Now grab a blue pen and a red pen (the colors do not matter, just different ones).
3. Use the blue pen and honestly rate your level of satisfaction from 0 to 10 with each of the different areas of your life right now (your current state).



Additional Resources and Further Reading

- **Strategies for entrepreneurs selfcare:**

<https://www.wishup.co/blog/self-care-strategies-for-entrepreneurs/>

- **A self-care checklist for leaders from Harvard Business review:**

<https://hbr.org/2024/09/a-self-care-checklist-for-leaders>

- Here is a video in which educator and writer James M. Lang talks about why we struggle to pay attention and the dangers of multitasking.

Why do we struggle to pay attention? James M. Lang, educator and writer

<https://youtu.be/S4wm2zPuNYU?feature=shared>

- There are techniques that can help you manage your time more effectively. One of these techniques is the **Pomodoro Technique**, a time management method that utilizes short, focused work intervals, known as "pomodoros," interspersed with short breaks. It involves working on a task for 25 minutes, then taking a 5-minute break, and repeating this cycle four times before taking a longer 15-30 minute break.

Pomodoro technique

- In the digital age, there are numerous Apps and tools designed specifically for implementing the Pomodoro Technique or for time management.

Some of the most popular:

- **Toggl Track**. A tracking software that builds custom reports from your team's time data to maximize productivity and revenue.
- **Notion**. A space to resolve questions, automate tasks, and move forward with projects.
- **Forest**. An App designed to help you stay away from your phone and focus on your important tasks.

- Here is a video and podcast that explain how to identify and change your limiting beliefs. **Video: How to Identify and Change Your Limiting Beliefs | + Practical Exercise**

- <https://youtu.be/0YNZK3A8JYQ?feature=shared>

- Another method is **Getting Things Done (GTD)**, is a personal productivity methodology that redefines how you approach your life and work. Normally we go through a five-stage workflow method to deal with our work. We (1) capture things that catch our attention, we (2) clarify what they mean and we (3) organize the results, which we (4) reflect on frequently to choose which thing to (5) engage with next.

To know more:

<https://gettingthingsdone.com/what-is-gtd/>

And here you have some of the many digital tools you can use to make group decisions virtually:

Loomio. Make decisions together without meetings.

Murmur. Murmur allows voice calls between groups of Bluetooth LE capable devices.

LEGAL FRAMEWORK

Brief Summary

This module provides trainers with an essential overview of the legal frameworks governing social enterprises across Hungary, Spain, Italy, Cyprus, and Albania. Understanding the legal context is crucial for aspiring social entrepreneurs, as it shapes how organizations are established, operated, and sustained within each country.

The module begins by outlining the general principles common to social enterprise legislation, such as the requirement for a clear social mission, restrictions or guidelines on profit distribution, and the importance of transparent governance. It then highlights the significant differences between countries.

Trainers are encouraged to familiarize themselves with both the universal elements and the country-specific regulations that affect social enterprise formation and operation. The module includes practical activities—such as comparative analysis, governance drafting, and case study discussions—to help participants grasp how legal frameworks impact their choices and strategies.

Ultimately, this module equips trainers to guide participants in navigating legal requirements, making informed decisions about organizational structure, and ensuring compliance with national laws. Facilitators are reminded to always consult up-to-date local regulations, as legal frameworks can evolve and may differ significantly between countries.

Module Objectives

By the end of this module, participants should be able to:

- Understand the concept of a legal framework and its importance for the development and sustainability of social enterprises.
- Recognise the essential features and criteria that define a social enterprise, such as social purpose, profit distribution limits, and inclusive governance.
- Analyse how legal frameworks influence the operational, financial, and governance aspects of social enterprises, including access to incentives and support schemes.
- Evaluate the advantages and challenges of different legal frameworks, including the impact of having a dedicated legal form versus operating under general legal structures.
- Apply knowledge of legal frameworks to practical scenarios, enabling informed decisions about the most suitable legal structure for a given social enterprise idea in different national contexts.

Checklist

1. Key national legislation: Overview of the background relevant to the specific country.
2. Core criteria defining social enterprises: social mission, profit distribution limits, income-generation thresholds, and governance models.
3. Legal forms vs. legal statuses: country-specific forms.
4. Registration and certification processes: Requirements for national registries.

4. Case studies illustrating successful/failed compliance.
5. Stakeholder inclusion frameworks: Governance models requiring worker/beneficiary participation.
6. Funding and fiscal incentives: Tax breaks, grants, or subsidies linked to specific legal forms/statuses in each country.
7. EU-level resources: European Commission's Social Business Initiative and OECD's Manual on Designing Legal Frameworks.
8. Local contact list: Legal advisors, registries, or NGOs in each country for real-time guidance during training.

Learning Content

Module structure:

TOPIC	METHODOLOGY
Introduction to legal frameworks	Interactive lecture, group discussion
Essential features of social enterprises in [Country]	Presentation, Q&A, guided brainstorming
Legal framework's impact on operations	Case study analysis, small group work
Advantages and challenges of the national framework	Interactive lecture, group work
Practical application	Facilitated discussion, problem-solving, role play
Resources and further guidance	Resource walk-through, open Q&A

Introduction to legal frameworks

- Define what a legal framework is.
- Explain why a legal framework is essential for the development and sustainability of social enterprises.
- Discuss the role of law in shaping opportunities, obligations, and support for social enterprises.

Essential features of social enterprises in [Country]

- Describe the core criteria that define a social enterprise under national law:
- Social purpose or mission.
- Rules on profit distribution and reinvestment.
- Governance requirements (e.g., stakeholder involvement, transparency).
- Highlight any specific legal forms or statuses available for social enterprises.
- Outline the registration and certification process.

Legal framework's impact on operations

- Explain how the national legal framework affects:
 1. Day-to-day operations and management.
 2. Financial requirements, such as minimum income from commercial activities.
 3. Governance and reporting obligations.
- Describe available incentives, support schemes, and tax benefits for social enterprises.

Advantages and challenges of the national legal framework

- Evaluate the main benefits of the current legal environment for social enterprises.
- Identify common challenges or barriers (e.g., complex registration, limited access to funding, regulatory restrictions).
- Discuss the implications of operating under dedicated social enterprise legislation versus general legal structures (if applicable).

Practical application

- Guide participants through practical exercises:
 1. Case studies of successful social enterprises operating under the national framework.
 2. Scenarios for choosing the most appropriate legal form/status for a new social enterprise idea.
 3. Drafting a simple governance or compliance plan based on national requirements.

Resources and further guidance

- Provide a list of key national resources: official registries, legal advisors, support organizations, and up-to-date legislative references.

Examples

Suggested activities and exercises:

Introduction to legal frameworks

- *Quick quiz on key terms and concepts to activate prior knowledge.*
- *Guided brainstorming: Participants share what they think a legal framework is and why it matters.*

Essential features of social enterprises in [Country]

- Fill-in-the-blank worksheet: Participants complete definitions or criteria during the session.
- Turn to your neighbour: Pairs discuss, and list essential features of a social enterprise as defined by national law.

Legal framework's impact on operations

- Case study analysis: Small groups analyse a realistic scenario of a social enterprise navigating national regulations.
- Walking questions: Each participant writes a question about operational challenges on paper; others add insights as papers circulate.

Advantages and challenges of the national framework

- Four corners activity: Groups rotate between flipcharts labelled "Advantage," "Challenge," "Opportunity," and "Threat," adding points to each.
- What I find most difficult: Participants stand by the challenge they find most confusing and discuss as a group.

Practical application

- Role play: Participants act out scenarios (e.g., registering a social enterprise, resolving a compliance issue).
- Best summary: Groups summarize the key steps for compliance and present their findings to the class.

Final Checklist

Post-module mastery checklist for facilitators:

1. Clearly understand the concept and purpose of a legal framework for social enterprises within their country.
2. Be able to articulate the essential legal features and criteria that define a social enterprise nationally (e.g., social mission, profit distribution, governance).
3. Know the specific legal forms or statuses available for social enterprises in their country, including registration and certification processes.
4. Understand how the national legal framework impacts the operational, financial, and governance aspects of social enterprises.
5. Be familiar with available incentives, support schemes, and tax benefits for social enterprises under national law.
6. Identify the main advantages and challenges of the national legal framework for social enterprises.
7. Be able to guide participants in selecting the most appropriate legal structure for their social enterprise idea based on national rules.
8. Confidently facilitate practical exercises and case studies relevant to the national context.
9. Know how to access and direct participants to up-to-date national resources, official registries, and legal support organizations.
10. Demonstrate effective facilitation skills: engaging participants, managing group discussions, and adapting methods to participant needs.

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11. Be prepared to answer common questions about legal compliance and operational challenges for social enterprises in their country.
 12. Have the ability to assess participant learning and provide constructive feedback, ensuring the module's learning objectives are met.

Reflection Exercise

After completing the unit, invite participants to reflect and discuss their learning experience. Use the following open-ended questions to encourage critical thinking and deeper engagement with the content:

- What aspect of the national legal framework for social enterprises do you find most challenging or surprising, and why?
- How do you think the legal requirements discussed in this unit will influence your approach to planning or managing a social enterprise?
- In your opinion, which learning activity (e.g., group discussion, case study, role play) helped you understand the material best, and how could these methods support your work in the future?

Additional Resources and Further Reading

- **OECD Manual: Designing Legal Frameworks for Social Enterprises:**
https://www.oecd.org/content/dam/oecd/en/publications/reports/2022/04/designing-legal-frameworks-for-social-enterprises_a9925d00/172b60b2-en.pdf
- **European Commission Report: Social Enterprises and Their Ecosystems in Europe:** <https://ec.europa.eu/social/BlobServlet?docId=21575&langId=en>
- **Sustainable Model for Social Enterprises and Legal Frameworks (Interreg Central Europe):** <https://programme2014-20.interreg-central.eu/Content.Node/CE-Responsible/D.T4.2.2-Guideline-manual.pdf>
- **Socioeco.org: Designing Legal Frameworks for Social Enterprises:**
https://www.socioeco.org/bdf_fiche-document-8377_en.html

BUSINESS MODEL

Brief Summary

In this module, the social facilitator will learn how to facilitate/deliver a thematic workshop focused on designing or refining Social and Solidarity Economy (SSE) business model using the Business Model Canvas (BMC). The BMC is a strategic management and entrepreneurial tool, that helps entrepreneurs to understand, design, communicate, challenge, innovate, and pivot their business model, by analysing key building blocks, such as value propositions, customer segments, channels, and revenue streams. The purpose of a business model is to help entrepreneurs to understand and clearly articulate how an enterprise works, so that it creates, delivers and captures value. In the case of a social enterprise this would ultimately be about how the enterprise will generate both financial (money) and social value (positive impact on society), and what the relationship is between the two values in the enterprise.

This module emphasizes how facilitators can guide and help social entrepreneurs through structured information, reflection and collaboration to prepare an effective business model canvas, being able to identify the core elements required in the canvas. It is especially relevant for early-stage SSE entrepreneurs who need clarity in aligning their mission with the market. The workshop will incorporate relevant information, real-life examples, hands-on group work, to support co-creation and practical learning.

By the end of this unit, facilitators will be equipped with instructions, methods, and exercises to engage participants in a dynamic and insightful workshop.

Module Objectives

With the completion of this unit the social facilitator will be able to:

- Effectively deliver the topic and facilitate discussions, brainstorming, and hands-on activities throughout the sessions.
- Explain the main concepts, and components of the Business Model Canvas in the social context of SSE.
- Guide entrepreneurs to design, prepare and revise their business model.
- Use tools like canvas templates, case studies and examples to make the process easily understandable, interactive and inclusive.
- Help participants align their social mission with revenue-generating mechanisms.
- Access the knowledge, background information, and materials needed to conduct the training sessions.

Check List

Before delivering this module, the facilitator should:

- ☐ Carefully review the Facilitator's Handbook along with the additional resources provided to ensure a strong grasp of the topic and key concepts.
- ☐ Prepare all necessary training materials in advance, such as presentations (PPT), handouts (PDFs), and templates, ensuring they are clear, engaging, and well-structured.

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- Whenever relevant, adapt the content to reflect your local context, including real-life examples and case studies that resonate with the participants' environment and experiences.
 - Understand the 9 components of the BMC and their interconnections.
 - Be familiar with examples of SSE enterprises and their business models.
 - Print or project the BMC for group use.
 - Prepare markers, sticky notes, flip charts, and colour markers.
 - Set up the training room for group work and wall display.
 - Have sample filled-in BMCs to illustrate.
 - Ensure simple, understandable language and visual materials.
 - Allocate time per section (~15 minutes/block).
 - Understand how to support participants effectively during solo tasks and collaborative exercises
 - Plan for energizers, relevant to the topic, that help maintain engagement and focus throughout the session.
 - Create a method for participants to document their canvas work (photo, template, or online tool).

Learning Content

When preparing the training content, social facilitators should aim to make it engaging and accessible by incorporating visuals, interactive tools, and relevant resources. Use images, infographics, real-life examples, and storytelling techniques to enhance understanding and facilitate deeper learning.

The learning content should include the official Business Model Canvas template, ensuring the format follows the original framework. For the purpose of this training, BMC should be adapted to the context of social entrepreneurship, reflecting both social impact and financial sustainability.

It is also essential to clarify the distinction between a business model and a business plan:

- A **business model** describes the rationale how an organization creates, delivers, and captures value¹.
- A **business plan** is a detailed document outlining the strategy, operations, financial forecasts, and steps to implement the business model.

The materials must also present and explain the **nine key components** of the Business Model Canvas:

1. **Value Proposition:** The unique value (social and/or economic) your enterprise offers.
2. **Customer Segments:** The specific groups you serve (including beneficiaries and/or customers)
3. **Channels:** The ways you deliver your value and communicate with your audience.
4. **Customer Relationships:** The type of relationship you establish with beneficiaries or customers.
5. **Revenue Streams:** How your enterprise earns income to support its activities and mission.
6. **Key Resources:** The assets needed to deliver your value proposition.

¹Osterwalder, A., & Pigneur, Y. (2010). Business model generation: A handbook for visionaries, game changers, and challengers. Wiley. https://vace.uky.edu/sites/vace/files/downloads/9_business_model_generation.pdf



- 7. **Key Activities:** The essential actions your enterprise must take to succeed.
- 8. **Key Partnerships:** The organizations or individuals who help you deliver your value.
- 8. **Cost Structure:** All major costs involved in operating your enterprise.

Make sure these components are clearly presented and explained in your training materials, and the social context is included respectively. Whenever possible, **adapt examples and language to the local context** to ensure relevance and resonance with the target audience.

Time should be provided to the trainees to develop their own business model, starting during the training and maybe finalizing in the home.

Examples

To effectively conduct the Business Model Canvas (BMC) for social entrepreneurship, facilitators should use a combination of practical activities such as group discussions, role-plays, and interactive exercises. Below are examples and instructions to guide facilitators in creating engaging and productive sessions.

Guide to conduct Thematic Workshop on business Model Canvas for Social and Solidarity Economy.

Preparation

- Understand participant backgrounds and tailor content accordingly.
- Set clear objectives for what the workshop will achieve.

- Prepare materials: BMC posters, sticky notes, markers, voting dots, flipcharts, projector. PPT etc.
- Arrange the room to facilitate interaction and visibility of visual aids.
- Create a welcoming atmosphere with name tags and refreshments.

Optional Annexes/ Handouts

- Large printable Blank Business Model Canvas for SSE
- Sticky notes and colour markers
- Timer for timed exercises
- Sample case study handouts
- Online tools, Canva or Miro templates
- Facilitator cheat sheet: tips, questions, and SSE examples for each BMC block

Suggested Session Flow:

1. Welcome & Introduction

- Welcome participants and explain the purpose and agenda.
- Conduct an icebreaker activity or warm-up game to build rapport, it would be better if it be related to the focus of the session ((e.g., “What does ‘value’ mean to you in your community?”)
- Brief overview of BMC and why it matters.

2. Business Model Canvas & SSE Adaptation

- Introduce each BMC block with clear explanations and examples.
 1. Value Proposition (facilitate brainstorming and group discussions for value propositions)

2. Customer Segments (use personas to explore customer segments)
 3. Channels
 4. Customer Relationships (discussion with case studies)
 5. Revenue Streams
 6. Key Activities
 7. Key Resources
 8. Key Partnerships
 9. Cost Structure (discuss with a focus on sustainability and social impact)
- Highlight how the BMC is different for social enterprises – focus on **social value creation, beneficiaries vs. customers**, and **mixed revenue models**.
 - Explain the difference between Business Model Canvas and Business Plan.
 - If possible, use a case study of a known SSE initiative to illustrate each block.

3. Interactive Group Work & Facilitation Techniques

- Divide participants into small groups to work on different BMC sections.

Group Discussion Techniques

- **Speed Canvas:** Small groups brainstorm each block in 5 minutes.
- **Round-Robin Sharing:** Each participant shares their ideas on a specific BMC block (e.g., Customer Segments) in turn, ensuring everyone contributes.

- **Brainstorming Sessions:** Use sticky notes for participants to write ideas individually, then cluster similar ideas on the BMC poster.
- **Dot Voting:** After generating ideas, participants use colored dots to vote on the most promising value propositions or channels, to prioritize ideas.
- **“Mission-to-Model” Alignment:** Compare an SSE’s mission with their business model—what’s missing?
- **Customer First:** Create a persona, then design the rest of the canvas around their needs.
- **Role Plays:** One participant plays a social entrepreneur, others act as investors, clients, or partners. Use this to simulate feedback on each BMC block.
- **Case Study Analysis:** Review examples of successful social businesses and analyze their BMC components.
- **Visual Mapping:** Use large BMC posters, sticky notes, and markers to visually map out business models collaboratively.
- Encourage groups to present their BMC drafts and receive feedback.
- **Canvas Design in Teams**

Sample Topics for Discussion:

- Identifying key social problems, the business aims to solve.
- Exploring customer personas and their needs.
- Discussing sustainable revenue streams for social impact.
- Evaluating risks in relying on a single distribution channel.
- Aligning business goals with Sustainable Development Goals (SDGs)

4.Wrap up and Planning the Next Steps

- Facilitate a session to refine and integrate ideas into a coherent model.
- Develop actionable next steps with assigned responsibilities and timelines.
- Collect feedback on the workshop process for continuous improvement.

5.Follow-Up

- Document and share workshop outcomes.
- Offer ongoing support and check-ins to help implement the business model.
- Encourage learners to treat the BMC as a dynamic framework that grows and changes with their social enterprise journey, that needs to be adapted and revised regularly in response to community feedback and practical challenges.

Final Checklist

Upon completing this module, the social facilitator will be able to:

- ☐ Adapt the BMC presentation method to fit different groups and levels of experience in the SSE.
- ☐ Create a psychologically safe space, where everyone feels comfortable and safe to share ideas and give feedback.
- ☐ Identify when to step in and guide the trainees vs. when to step back and let the group work.
- ☐ Show how the BMC links to impact measurement – help them see the bigger picture.

- 
- ☐ Capture group outcomes effectively.
 - ☐ Use both analog and digital tools (flipcharts, online boards, whatever works best, and suits to the participants).
 - ☐ Manage group dynamics and timing to ensure everyone stays engaged.
 - ☐ Support entrepreneurs in presenting their business models – maybe even facilitate a “pitch-back” session.
 - ☐ Document the learning journey with photos or online tools.
 - ☐ Provide clear action steps so entrepreneurs know what to do next and leave with a plan.
 - ☐ Support participants with follow up along the way, so they can improve further their models.
 - ☐ Provide extra materials and resources for deeper learning.

Reflection Exercise

Here are some reflection questions facilitators can ask participants at the end of the Business Model Canvas (BMC) unit to encourage critical engagement.

1. How did the use of the Business Model Canvas during the session help you clearly understand or think differently about your SSE idea or initiative? If so, how and why?
2. Which part of the Canvas was most challenging for you to fill in, and what support or explanation helped you move forward?

3. How did group feedback or discussion influence your thinking and help you reshape parts of your canvas? What changes would you consider making to your business model after the session?
4. Looking back at the exercises and group work, which moments helped you connect the BMC to real-world social impact and see how your business model could create real impact in your community?

Additional Resources and Further Reading

- **Strategyzer. (n.d.). The Business Model Canvas (BMC). Strategyzer.**

Retrieved from: <https://www.strategyzer.com/library/the-business-model-canvas>

Editable Canva Link:

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utm_content=DAGoQ_QPNAw&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton](https://www.canva.com/design/DAGoQ_QPNAw/gceReN09bwHoUDa6ZUeAnQ/edit?utm_content=DAGoQ_QPNAw&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton)

- **Miro. (n.d.). Business Model Canvas Template in Miro.**

Editable Miro Link: <https://miro.com/templates/business-model-canvas/>

- **Social Innovation Lab. (n.d.). Social Business Model Canvas Template.**

Editable Canva Link:

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AISH0ez4hw/edit?
utm_content=DAGoLjcojXg&utm_campaign=designshare&utm_medium=link2
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- **Partners Albania (n.d). Idea Canvas for Social Enterprises Template**

Editable Canva Link:

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- **Swarthmore College. (n.d.). Social Business Model Canvas – Digital Collaborative Template.**

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[utm_content=DAGoLvc1Ef8&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton](https://www.canva.com/design/DAGoLvc1Ef8/tWaaykSr9olawfwaCuSKSQ/edit?utm_content=DAGoLvc1Ef8&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton)

- **Osterwalder, A., & Pigneur, Y. (2010). Business Model Generation: A handbook for visionaries, game changers, and challengers. Wiley.**

Link: https://vace.uky.edu/sites/vace/files/downloads/9_business_model_generation.pdf

- **Burkett, I. (n.d.). Using the Business Model Canvas for Social Enterprise Design [PDF]. The Centre for Social Impact.**

Link: <https://cscuk.fcdo.gov.uk/wp-content/uploads/2016/07/BMC-for-Social-Enterprise.pdf>

- **Social Enterprise Institute. (2022). Social Business Model Canvas [PDF].**

Link: <https://sehub.ca/wp-content/uploads/2022/11/Social-Business-Model-Canvas.pdf>

- **Stanford Social Innovation Review. (n.d.). Social enterprise. (Articles on Social Entrepreneurship and Social Innovation.**

Link: <https://ssir.org/topics/category/social-enterprise>



ECONOMIC ANALYSIS AND ACCESS TO FUNDING

Brief Summary

In this module, you'll learn the basics of calculating your business finances—investments, costs, revenue, and profits—and learn tools for calculating economic and financial viability and how to make decisions based on these results.

Module Objectives

The specific learning objectives are:

- To understand the basics of economic and financial analysis for an entrepreneurial project.
- To develop skills to assess the economic viability of an entrepreneurial initiative.
- To explore funding sources and grants to present to these organizations.

Checklist

The facilitator should be familiar with:

- Basic economic and financial concepts.
- How to communicate economic concepts in an educational way.
- Tool for calculating economic and financial viability.
- What is the purpose of performing these types of calculations and why they are important.
- Know financing alternatives and which one is most appropriate for each business and individual.
- Financing cases.

Learning Content

1. Basic Financial Education: Understanding the concepts

1. Key aspects to consider: Taxes

- Balance Sheet, Profit and Loss Account, Cash Flow
- Revenue Forecast: Contributions, Sales, Grants
- Expense Forecast: Investments, Fixed and Variable Costs
- Direct and Indirect Taxation. Tax and Accounting Obligations

2. Investment Plan

3. Financing Plan

4. Sales Forecast

5. Fixed and Variable Costs

6. Break-even Point

7. Cash Flow Plan: Collections and Payments

8. Income Statement
9. Depreciation
10. Balance Sheet
11. Economic Analysis and Its Ratios

2. Financing Options:

1. Microcredits
2. Loans and Credit Lines
3. Mutual Guarantee Societies
4. Venture Capital Companies
5. Participative Loans
6. Public Grants

Exercises

Reflections in the classroom

OBJECTIVES

- Why to do provisional accounting? What for?
- Do we have to do a very accurate forecast?
- For how many years shall we do it?

FIABILITY

- Is it a guaranty of feasibility?
- Can we know if the business will run?

IMPORTANCE

- Is it always needed?
- When is it more important?

WHERE SHALL WE START CALCULATING?

- Investments
- Fixed expenses
- Variable expenses
- Sales
- Cost of personnel
- Break-even point

WHO DOES WHAT?

- Who must make the calculations?
- How shall we do it?
- What is our roll?
- What's the sense of this for the entrepreneur?

FILL OUT YOUR INITIAL INVESTMENT PLAN. Think about what you need for each of the budget items:

INVESTMENT PLAN
Incorporation and licensing costs
Start-up costs
Transfer and industrial property
Computer and web applications
Facilities
Machinery

Tools and equipment
Office furniture and equipment
Transportation equipment
Computer equipment
Other fixed assets
Guarantees and deposits
Inventory/supplies
VAT paid
Initial cash

Here you can see an initial Investment Plan of a Logistics Company:

1. Incorporation and Licensing Costs

- Business registration: €750
- Insurance, permits, and licenses: €5,500

2. Infrastructure and Equipment

- Office acquisition and setup: €120,000
- Office equipment (furniture, technology, etc.): €5,000
- Accounting, CRM, and payroll software: €3,000
- Website development and launch: €600
- Other initial expenses (stationery, advertising, etc.): €3,500

3. Initial Operating Costs

- Operating costs for the first 3 months (salaries, supplies, utilities): €120,000

4. Total Initial Investment

- Estimated total: €300,000

Reflection Exercise

Activity 1. Understand key concepts such as income, expenses and break-even points.

1. Divide participants into groups or work individually.

2. Present the following fictional scenario:

'You are going to open a small café in your neighbourhood. You have already rented premises and expect to sell 1,000 coffees per month at 2€ each. Your fixed monthly expenses (social security and salaries, rent, advertising, electricity, insurance, internet) are 1,200€, and your variable expenses (raw materials, kitchenware, etc.) are 0.50€ per coffee sold.'

Ask them to calculate:

- Estimated monthly income.
- Total costs: fixed and variable.
- The break-even point (how many coffees must be sold to cover all expenses?).

Solution:

Estimated monthly income: 1,000 coffees × 2€ = £2,000

Fixed and variable costs:

Fixed costs: 1,200€

Variable costs: $1,000 \text{ coffees} \times 0.50\text{€} = 500\text{€}$

Total costs = $1,200\text{€} + 500\text{€} = 1,700\text{€}$

Break-even point: How many coffees must be sold to cover all expenses?

Calculation:

Revenue per unit: 2€

Variable cost per unit: 0.50€

Margin per unit: $2\text{€} - 0.50\text{€} = 1.50\text{€}$

Break-even point = $\text{Fixed costs} / \text{Unit margin} = 1,200\text{€} / 1.50\text{€} = 800$ coffees

800 coffees must be sold per month to break even.

Activity 2. Choose your form of financing

Explore financing options for starting a business and analyse which one best suits different profiles.

Present the participants with three profiles of entrepreneurs:

Profile A: A young person with no collateral or savings, but with a great innovative idea.

They need 8,000€.

Profile B: An adult with some savings, but no entrepreneurial experience.

They need 15,000€ for a traditional local business.

Profile C: A person with experience and a network of contacts, looking for investment to scale up their business.

They need 50,000€.

Provide them with a list of financing options (microloans, public grants, bank loans, venture capital, etc.).

Ask them to:

- Choose the two most viable options for each profile.
- Explain why they chose them.
- Identify the associated advantages and risks.

Additional Resources and Further Reading

- **EntreComp Europe project**

European entrepreneurship education project.

Offers: Resources based on the European framework EntreComp, which defines key competences for entrepreneurship. It offers practical tools, guides and examples for integrating entrepreneurship in different contexts.

- **European School Education Platform**

European platform for teacher training.

Offers: Free course on entrepreneurial education, mainly aimed at teachers. Also useful for entrepreneurs interested in integrating educational methods or understanding how to promote entrepreneurship through education.

- **Entrepreneurship Education - A Guide for Educators**

Collaborative platform for research and good educational practices.

It offers: Short and accessible guides on key topics in education, such as entrepreneurship. It is aimed at teachers, but can also be useful for entrepreneurs looking to learn from a practical educational approach.

- **Entrepreneurship Educator Resources and Tips**

Academy specialising in entrepreneurship education (Babson College, USA).

Offers: Advice, articles and practical resources on entrepreneurship. It is aimed at educators and high-level entrepreneurs, with a focus on innovation, entrepreneurial thinking and business education.

COMPETENCES LINKED TO COLLECTIVE ENTREPRENEURSHIP

Brief Summary

Entrepreneurship, traditionally viewed through an individualistic lens, **is increasingly recognised for its collective dimensions**. The European Entrepreneurship Competence Framework (EntreComp) provides a comprehensive set of 15 competences across three areas: Ideas and Opportunities, Resources, and Into Action. This part of the handbook focuses on the competences "Working with Others," "Mobilising Others," and "Mobilising Resources". These are not isolated skills but deeply interconnected and vital for the success and sustainability of collective entrepreneurial ventures and Social and Solidarity Economy initiatives.

"Working with Others" forms the essential foundation, ensuring that collective efforts are harmonious, productive, and resilient. Without effective teamwork, communication, and conflict resolution, any attempt to build a shared enterprise will likely falter. Building upon this foundation, **"Mobilising Others"** elevates collective action by inspiring and engaging individuals and communities towards a common vision.

It transforms passive groups into active movements, essential for garnering the widespread support and participation that many SSE initiatives rely upon. Finally, **"Mobilising Resources"** provides the lifeblood for these initiatives.

In the context of collective entrepreneurship and SSE, this often involves **not just securing financial capital but creatively leveraging human capital** (volunteers, skills), social capital (networks, trust), often through innovative and community-led mechanisms like community shares or in-kind contributions. Collective entrepreneurship refers to a process where multiple individuals collaborate to identify, create, and seize opportunities, sharing risks, resources, and rewards. Collective entrepreneurship initiatives often manifest in various organisational forms, including cooperatives, social enterprises, community trusts, and other SSE initiatives. The SSE encompasses a diverse range of organisations and activities that **prioritise social and environmental objectives over profit maximisation**, operating on principles of solidarity, democratic governance, and local embeddedness. Developing the capacities to work effectively in groups, inspire collective action, and pool diverse assets are fundamental to the success and sustainability of such initiatives.

The following workshop is designed to be interactive, participatory, and experiential, encouraging participants to reflect on their own experiences and apply new knowledge to real-world scenarios relevant to collective ventures and SSE.

This workshop is linked specifically to the principles and practices of collective entrepreneurship and the Social and Solidarity Economy (SSE), highlighting their vital role in fostering collaborative ventures for social and economic good.

Learning Content

Workshop instructions

Target Audience: Aspiring and current collective entrepreneurs, members of SSE initiatives, community leaders, and anyone interested in launching or growing collaborative social impact projects.

Overall Objective: To equip participants with practical skills in "Working with Others," "Mobilising Others," and "Mobilising Resources" by collaboratively developing a collective entrepreneurial or SSE initiative, fostering a holistic understanding of their interconnectedness.

Materials: Flip charts, markers, sticky notes, large sheets of paper, pens, a projector, whiteboard, sample project templates/worksheets, a timer.

The Power of 'We'

Briefly introduce the workshop's aim: to experience the synergy of "Working with Others," "Mobilising Others," and "Mobilising Resources" in developing collective entrepreneurial projects, particularly within the Social and Solidarity Economy (SSE).

Emphasise that these are not isolated skills but vital, interdependent drivers for shared impact.

Icebreaker (15 minutes): "My Collective Dream" - Ask participants to briefly share one dream they have for their community or society that they believe can only be achieved through collective effort. This immediately sets a collaborative tone and taps into their desire for social impact.

Collective Idea Generation & Team Formation (30 minutes)

Brainstorming on Social and Community Challenges (15 minutes):

As a large group, brainstorm pressing social, environmental, or economic challenges in communities (e.g., food waste, elder isolation, lack of affordable housing, local economic decline). Write ideas on sticky notes and group similar themes on a flip chart.

Idea Selection & Team Formation (15 minutes)

Participants individually choose a challenge they feel passionate about.

Form 3-4 small, diverse "Project Teams" (1 to 3 people per team) around common interests/challenges.

Team Task: Within their teams, participants begin "Working with Others" to refine one challenge into a potential collective entrepreneurial or SSE *solution idea*. They must establish a clear shared vision for their proposed initiative. *The facilitator will observe and coach on effective team communication and early role definition.*

Crafting the Compelling Vision (20 minutes):

The teams delve deeper into their chosen solution. How would it work? What problem does it solve? Who benefits?

Focus: How to articulate this vision compellingly to inspire others. What's the story?

Team Task: Develop a clear, concise, and inspiring name and a 60-second "mobilisation pitch" for their collective initiative.

Pitch Practice & Feedback (20 minutes):

Each team selects a spokesperson (or co-spokespersons) to deliver their 60-second pitch to another team.

Peer Feedback: The listening team provides constructive feedback on how effective the pitch was in "mobilising others" (e.g., Was the vision clear? Was it inspiring? Did it convey shared value?).

Teams rotate and repeat.

Plenary Debrief: Quick share-out on what made a pitch truly mobilising. Emphasise how clear vision and persuasive communication are crucial for attracting team members, volunteers, and supporters in SSE.

Identifying the resources (20 minutes):

Expanded Definition of Resources: Reiterate that resources go beyond money (e.g., human skills/volunteers, physical spaces, equipment, networks, knowledge, community trust, reputation, time, in-kind support).

Team Task: Each team, for their collective initiative, brainstorms all the resources they would need. Then, for each needed resource, they brainstorm potential non-financial sources first, followed by financial ones. They should identify who they would approach and what value proposition they would offer in return.

Plenary Share-out: Quick reflections on challenges and successes. Emphasise how creative resourcefulness and building strong relationships are paramount in SSE.

Personal Commitment: Ask participants to identify one practical action they will take to apply these integrated competences in their own lives or initiatives.

Reflection Exercise

How did 'Working with Others' directly impact your ability to 'Mobilise Others' for your vision?

How did 'Mobilising Others' (e.g., gaining support) influence your ability to identify and 'Mobilise Resources'?

What did you learn about the unique resource mobilisation strategies and collaborative nature of collective entrepreneurship and SSE initiatives?



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