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SOCIAL
SOLIDARITY
ECONOMY
IN EUROPE:

affirming
a new paradigm
through IVET
curricula innovation

# Training module 2.
# Democratic Management
# in the Social Solidarity Economy

This document is part of a package of 3 training modules aimed at promoting the Social Solidarity Economy at the level of Initial Vocational and Educational Training (IVET). It is an intellectual output resulting from the project "Social and Solidarity Economy in Europe: affirming a new paradigm through IVET curricula innovation" (September 2016 – August 2018), co-funded by the Erasmus+ programme.

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# CONTENTS

# 0. INTRODUCTION

This document is the second part of a package of training modules aimed at promoting the Social Solidarity Economy at the level of Initial Vocational and Educational Training. This package is composed by the following training modules:

- Module 1. Social Solidarity Economy Values and Principles
- Module 2. Democratic Management in the Social Solidarity Economy
- Module 3. Ethical and Solidarity Finance and Resources

**Who are these training modules for?**
These training modules are a tool for trainers working in initial vocational and educational training (IVET). IVET covers several pathways through the education system, usually before entering working life, and can start at age 14 and be stretched out potentially to age 25 (age limits differ from country to country in the European landscape).
It can equally serve as reference for other professionals operating at different levels of the training and education system.
The modules are also useful for people and organisations working in the Social Solidarity Economy and who have an interest in developing actions in the field of education and training.

**Who developed these modules?**
These modules are intellectual outputs resulting from collaborative work among 8 organisations from different European countries, who gathered under the project "Social and Solidarity Economy in Europe: affirming a new paradigm through IVET curricula innovation" (September 2016 – August 2018), co-funded by the Erasmus+ programme of the European Union.

**Why have we developed these modules?**
We believe that it is crucial to invest in the education and training of future generations so that young people can grow up as citizens who develop their professional activity with a more critical view on the current economic system. For this we need a more innovative IVET curricula, which promotes discussion around alternative socio-economic models and paradigms – such as the Social Solidarity Economy (SSE).
SSE – as a social movement and as a professional context – aims at personal development and emancipation as well as social justice. In this perspective, these modules will support trainers working with young people in developing their professional activity with an enlarged perspective including these SSE aims, possibly inside SSE organisations.
The SSE is still an emerging theme and still largely unknown by the society at large, and it is thus absent from curricula at the level of IVET in most European countries. These modules aim to be a first step in organizing a relevant and meaningful training structure both at national and European levels.

**What is the Social Solidarity Economy?**

The Social Solidarity Economy is an economy aimed at a different form of development from the mainstream profit-oriented one. It includes organisations whose purpose is more focused on social and environmental value rather than the search for financial gain and growth. Social Solidarity Economy is a way to satisfy human needs through economic activities – such as production and exchange of services – that reinforce values of social justice, ecological sustainability, cooperation, mutuality, community and democracy. It is expressed by a constellation of networked grassroots groups, civic organisations, consumer and producer-based platforms, cooperative and social enterprises, and collaborative public institutions. [1]

The Social Solidarity Economy is already happening through thousands of citizens' initiatives, solidarity practices and collaborative networks all over Europe and in various parts of the world. It increasingly asserts itself as a vibrant and promising socio-economic model.

**How to use the modules?**

These modules are to be included as modular parts in existing IVET courses, namely in the fields of economics, management, financial and social area. They can be used with flexibility, depending on the profile of trainees and on the degree of autonomy that trainers have in each country to reformulate or add parts to the curricula of existing training courses.

The 3 training modules should be ideally implemented together in a sequential way, allowing for a deeper and more comprehensive understanding of how the SSE functions. This module 2 should always be preceded by module 1 (which sets the general framework of the SSE so that specific contents on democratic management can be more accurately understood).

Below you can find:

- The general structure of the Module 2. Democratic Management in the Social Solidarity Economy, including its duration, general purpose, specific learning outcomes, key words, and contents
- A list of existing resources which can be used as inspiration and inputs for trainers who will develop the full contents and learning activities adapted to their training context
- Tips for trainers to promote innovative pedagogical approaches
- A glossary including relevant keywords from all 3 modules
- Case studies from different European countries presenting real-life examples around the values and principles of the SSE
- Additional examples useful for trainers.

All these materials can be a reference to those wishing to implement training and education activities focusing on the Social and Solidarity Economy. Beyond IVET, they can also be used as starting points or inspiration for the development of other education and training activities in other levels of the education and training system.

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[1] Adapted from RIPESS (2015). Global Vision for a Social Solidarity Economy: Convergences and Differences in Concepts, Definitions and Frameworks.
Available at: http://www.ripess.org/wp-content/uploads/2015/02/RIPESS_Global-Vision_EN.pdf

## 1. TRAINING MODULE 2

| TITLE | Democratic Management in the Social Solidarity Economy |
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| DURATION | 30 hours (suggested duration; each trainer can adapt the duration according to specific needs) |
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| GENERAL PURPOSE | The purpose of the training module entitled "Democratic management in the SSE" is to provide to all potential learners and relevant stakeholders with all the necessary information regarding the aspects of Democratic management in the Social Solidarity Economy (SSE). Specifically, at the end of this module, learners will be able to understand how Democratic management can be organized and be tailored to a collective goal, what are the benefits of this type of management and how it can help the development of organizations operating within the SSE. It mobilizes a plurality of economic principles and tools which can be manifested and used in most areas of economic activity (agriculture, industry, services, etc.) in order to run a SSEO successfully. It goes far beyond only decision-making but includes all aspects of governance and organizational structures. |
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| SPECIFIC LEARNING OUTCOMES | <ul><li>to be aware of the historical background of Democratic Management in SSE</li><li>to understand the principles of Democratic Management</li><li>to recognize the importance of Democratic Management in SSE organisations</li><li>to understand the main features of collective ownership and of self-management</li><li>to identify the challenges of SSE organizations</li><li>to understand the institutional operation and decision-making process of an SSE organization</li><li>to identify social needs in order to develop a SSE organization</li><li>to understand how SSE organiszations are set up in order to be economically successful</li><li>to understand how to build and use Social Capital</li><li>to understand how social / participative management benefits internal and external stakeholders</li><li>to understand how Social Marketing can help to gain income and trust</li><li>to understand why social accounting and auditing is important for the sustainability of a SSE organization</li></ul> |
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| KEY WORDS | – Social Solidarity Economy organizations (SSEOs) |
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| | − Worker Self-management<br>− Democratic Management<br>− Social Capital<br>− Social Enterprise Planning<br>− Social participative management<br>− Social marketing<br>− Social accounting and auditing |

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| CONTENTS | 1. Outlining a perspective on the management of social solidarity economy organisations<br>   1.1. Introduction to the concept of Social Solidarity Economy Organizations<br>   1.2. Historical background of Democratic Management in SSEOs<br>   1.3. The Philosophy of Democratic Management - Why democratic management is important for SSEOs<br>   1.4. Challenges for SSEOs<br><br>2. Introducing the establishment and democratic management of a SSEO<br>   2.1. How to set up a SSEO (social enterprise planning)<br>   2.2. How social / participative management can be implemented in the SSEO<br>   2.3. Social Capital - How bonding and bridging social capital can be used in SSEOs<br>   2.4. How Social Marketing can help to gain income and trust<br>   2.5. How social accounting and audit can provide the framework to assess performance and impact<br><br>3. Case Studies (transversal element) |

## 2. PEDAGOGICAL APPROACH – TIPS FOR TRAINERS

Along with the previous training module structure, the pedagogical approach is decisive for the quality of the training. Here are some practical tips which are useful for trainers wishing to implement SSE training courses/sessions.

Tip 1. Ensure a tailored approach | The training in SSE must always be accurately adapted to the profile of trainees, both in terms of contents and methodology. The training structure presented here should be seen as a starting point, from which a clearly adapted training programme must be developed. A tailored training programme should respond to:
- the specific objectives defined for a particular training course/session
- the cultural/political/social characteristics of SSE in each country/region
- IVET institutional framework and organisations in each country/region

- adaptations to other educational levels beyond IVET (non-formal learning, training for adults, etc.)

Only a tailored approach will ensure maximum benefit is extracted from the training structure presented here.

Tip 2. Focus on active training methodologies | Active methodologies imply an engaged participation from both trainees and trainer. These are some examples:
- team work/exercises
- group discussions/brainstorming/problem solving
- analysis of practical examples/stories/case studies
- presentations from guests/visitors
- outdoor field visits.

Active methodologies are crucial to promote:
- a strong interaction/participation within the group
- effective links between theory/practice and concepts/real life examples
- trainees' understanding of contents
- trainees' motivation.

When implementing the training try to avoid having insufficient time for discussion, reading long documents, listening to long explanations and any other form of lack of interactivity between trainees/trainers.

Active methodologies need a smart and adapted implementation in order to be successful (i.e. achieve a good level of participation and comprehension of contents from trainees). Trainers should prepare in advance.  Trainers' capacity to make relevant use of trainees' inputs and perspectives, to promote synthesis and to create a productive link between trainees' inputs and the training contents is very crucial. It helps to clarify specific terminology and improve trainees understanding of the contents.

Tip 3. Debate practical examples | To present and debate concrete examples of SSE organisations and case studies is a valuable way to promote a more practical way of learning. This includes exploring local/regional/national/European examples, which serve as inspiring stories improving trainees understanding and their motivation/interest. For this trainers should prepare in advance:
- Select examples and case studies directly linked with the module contents
- Do not try to fit examples that aren't clearly related with the module contents, as this creates confusion
- Investigate SSE movements in your area and get to know people and organisations working in the field
- Give priority to local/national examples that trainees can relate to more easily. Invite guests and promote visits whenever possible
- Present as well international/European examples and case studies which are relevant in the context of the training. This is a way to show that the SSE is a growing and diverse movement in Europe and many parts of the world

- If the SSE is not so well developed in your area (and you miss local/national examples), make sure you build meaningful bridges between international/European examples and the trainees' local and cultural context
- Always ensure a clear correspondence between the practical examples/case studies, the inputs that arise from trainees and the training contents you wish to approach
- Use the practical examples and case studies as a means to clarify concepts and terminology.

Tip 4. Debate practical examples [2] | The training will benefit from a trainees centred approach, which means that the program flow should be planned keeping in mind the participants' real experience in the contents addressed. Learning from experience will be a fundamental pillar in the way the training will be facilitated. For this, trainers can design their training programme having in mind the following principles:
- the course/session should be centred on the trainees and their needs
- the trainees should take responsibility for their own learning under each of the modules
- the learning should be connected with individual actions and projects
- there should be a connection and balance between theory and practice.

## 3. (RE)SOURCES FOR INSPIRATION

Here we share a list of resources which can be useful for trainers to know more about the topics covered in this module.

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| **Local Social Economy Learning Package: A European Curriculum for Social Enterprise Practitioners and Supporters, Berlin (TechNet) 2009** https://static1.squarespace.com/static/5652bb12e4b03de1acada41c/t/5821ca468419c252721b5d43/1478609545848/CEST+Manual.pdf | In Module 4: Developing a Social Enterprise Culture you will find good practice examples and tools for managing a SSE organization (p. 49 ff) |
| **Social Solidarity Economy: Our common road towards decent work** http://www.ilo.org/empent/units/cooperatives/WCMS_166301/lang--en/index.htm?ssSourceSiteId=employment | Section 2.2.2 and 2.2.3 of the chapter 2 – Governance and Management of SSE Organisations |
| Documentary **"Can we do it ourselves"** http://topdocumentaryfilms.com/can-we-do-it-ourselves/ | One-hour documentary questioning if we should be pushing for a democratic cooperative way of doing business, showing case studies of businesses who are surviving as democracies within a capitalist system. Grounded in the Swedish context but suited for international audiences, the film explores |

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[2] Adapted from the Local Social Economy Learning Package (TechNet CEST Transfer project, 2009)

| | the what, why, and how of worker-owned cooperatives through interviews with experts, visits to coops, and brief expository interludes. |
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| **Democratic Enterprise: Ethical business for the 21st century** <br><br> Web-link | Chapter 3 – presents a vision of the application of democratic governance in co-operative enterprises; based principles of good governance supporting and enabling management. <br> With exercises for concept reflections. |
| **BOOK - The Routledge Companion to Alternative Organization** <br> Edited by Martin Parker, George Cheney, Valérie Fournier, Chris Land <br><br> 2014 – Routledge | *No free access but the basic* <br> "[…] the reality is that capitalism has always been contested and that people have created many other ways of providing for themselves. This book explores economic and organizational possibilities which extend far beyond the narrow imagination of economists and management theorists. Chapters on co-operatives, community currencies, the transition movement, scrounging, co-housing and much more paints a rich picture of the ways in which another word is not only possible, but already taking shape. The aim of this companion is to move beyond complaining about the present and into exploring this diversity of organisational possibilities. Our starting point is a critical analysis of contemporary global capitalism is merely the opening for thinking about organizing as a form of politics by other means, and one that can be driven by the values of solidarity, freedom and responsibility. This comprehensive companion with an international cast of contributors gives voice to forms of organizing which remain unrepresented or marginalised in organizational studies and conventional politics, yet which offer more promising grounds for social and environmental justice. It is a valuable resource for students, activists and researchers interested in alternative approaches to economy and society in a |

| | variety of disciplinary and interdisciplinary fields. |
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| **BOOK - Civil Society, the Third Sector and Social Enterprise Governance and Democracy**<br><br>Edited by Jean-Louis Laville, Denis Young, Philippe Eynaud, Routledge, USA, March 2015<br><br>http://www.socioeco.org/bdf_fiche-publication-1205_en.html | No free access on line – ONE OF THE BASICS for general understanding<br><br>"Civil society organizations are playing a key role in addressing global societal and ecological issues, often setting the agenda for public discourse. Therefore, at a time when they are becoming more varied and interwoven than ever, critical analysis of the governance of these organizations and networks, and their role in a democratic society, is particularly important. This book addresses these challenges by revisiting concepts of citizenship, public participation, the democratic exchange of ideas, markets, co-construction and co-production of public services, and alternative political ideologies. The first part of the book focuses on internal governance and the economic dimensions of civil society organizations and analyses the growing role of management models. The second part addresses the institutional dimensions and focuses on public spaces and the capacity of civil society organizations to resist, collaborate and negotiate with the state." |
| **GUIDE - DEMOCRATIC GOVERNANCE**<br>**The Design of Governance**<br>**Systems for Worker Cooperatives**<br><br>The ICA Group<br>http://ica-group.org/wp-content/uploads/2015/04/Democratic-Governance-The-Design-of-Governance-Systems-for-Worker-Cooperatives.pdf | "Worker cooperatives are built on a framework of democracy, but this does workers very little good unless the means to exercise their rights and enjoy the protections this framework provides are in place – this is what an effective governance system does. This report is meant to offer guidelines for the design of governance systems that help a co-op avoid the twin traps so many democratic firms fall into: either so much structure and bureaucratic procedure that members cannot actually use the power they formally have, or so little structure that there is no available means to make a difference. We seek, instead, structures that empower people. A properly |

| | functioning governance system clearly articulates the roles of the members, the Board of Directors (including a "grievance council"), and the management. If the governance system is to function well, the responsibilities of these groups must be clear, and the groups must have real decision-making power. While each co-op and its culture are unique, generally the roles of each of these groups fall into this general form" |
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| **BOOK - La gestion des associations**<br><br>Livre de Corinne Vercher-Chaptal, Julien Bernet, Olivier Maurel (économiste).) et Philippe Eynaud | Not in free access and French book – but one of the basics<br>Some articles could maybe be translated to be added to the resources, as they help understanding governance options. |
| **GUIDE - Association & Coopération Jouez collectif !**<br>("play it collective!")<br><br>France Active – Guide<br>http://www.franceactive.org/upload/uploads/File/ressources_documentaires/152727_Guide_Cooperer-web.pdf | → this resource gives very useful insight on organizing cooperation and governance. Some parts could be translated and added to the resources, and specially the mapping of cooperation & governance options. |
| **ARTICLE - Solidarity at Work: The Case of Mondragon**<br><br>Think pieces for the UNRISD conference "Potential and Limits of Social and Solidarity Economy". 6-8 May 2013<br><br>http://www.unrisd.org/unrisd/website/newsview.nsf/%28httpNews%29/DA6E37662364DDC8C1257BAC004E7032?OpenDocument | This article aims to reflect on the shared moral feelings and motivations on which to base and orientate cooperative action. In this paper, when considering the question about the reproduction of cooperative culture it is important to address the field of values. One of these values is the principle of solidarity. We highlight the fact that values are not merely normative, rational principles but have an experienced and embodied dimension. We briefly analyse the experience of the long-standing Mondragon Cooperative Movement as a relevant case study to illustrate how the value of solidarity plays out. |
| Paper - **Social and Solidarity Economy and the Challenge of Sustainable Development**<br><br>Link | The Position Paper responds to concerns that the process of crafting a post-2015 development agenda and set of Sustainable |

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| | Development Goals (SDGs) has so far paid insufficient attention to the role of Social and Solidarity Economy (SSE).<br><br>SSE refers to the production of goods and services by a broad range of organizations and enterprises that have explicit social and often environmental objectives, and are guided by principles and practices of cooperation, solidarity, ethics and democratic self-management. |
| Vieta, M. (2015). **SSRN and Euricse Working Papers, 78/15**. Trento, Italy: European Research Institute on Cooperative and Social Enterprises. [Link] | The Italian road to creating worker cooperatives from workers' buyouts: The emergence of Italy's worker-recuperated enterprises and the Legge Marcora framework. |
| Sen A., **"Development as freedom"**, Oxford University Press, 1999. | |

## 4.  FUTURE ACTIONS: ADVOCATING FOR SSE IN EDUCATION AND TRAINING

The development of this module is one step to affirm the SSE in IVET curricula. It is also a starting point for a process that needs to mobilize the whole spectrum of relevant stakeholders in the SSE and the IVET ecosystem, in order to develop practical strategies to advocate for the inclusion of this field of study into general training programmes structures. The following step in the project "Social and Solidarity Economy in Europe: affirming a new paradigm through IVET curricula innovation" will be to develop:

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− Concrete tools to set in motion and improve advocacy activities
− Joint strategies for SSE and IVET organisations to advocate for curricula innovation
− Common strategies at the level of national and European networks for continuous institutional cooperation with different kinds of stakeholders in order to advocate for IVET curricula innovation.

**We appreciate your feedback!** ▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬▬

If you have any suggestion to improve this document or if you would like to share your experience in implementing this module, please contact info@apdes.pt.

## ANNEXES

## A. GLOSSARY

**Democratic management:** a specific style of management which is based on the idea of self-determination, inclusiveness, equal participation, deliberation autonomy, reflexivity, cooperation, self-management and collective ownership. We often find this situation in workers who have some relationship with unionism, thus have a clear political project and see self-management as a revolutionary approach.

**Social economy**: in the French/Latin speaking areas, social refers to the type of ownership by individual persons and not by shareholders, functioning on the principle of "one person, one vote". In the English speaking areas social economy is also known as the "third sector: "social" relates to the purpose or the sector of activity, such as day-care, health, care of the elderly, etc. As such, the third sector is positioned between the private for-profit (businesses) and public (state-led public investments and redistribution processes) sectors. In both definition, cooperatives, mutuals, association and non-profits as well as charities and foundations are included.  While Social economy is based on shared principles of cooperation, workers' democratic engagement and environmental sustainability, it is usually part of the Market economy and does not challenge it in a transformative way.

**Social enterprise/entrepreneurship:** a social enterprise/entrepreneurship is related to "the creation of a social value that is produced in collaboration with people and organisations from the civil society who are engaged in social innovations that usually imply an economic activity". They are for-profit or non-profit organisations acting on a market and providers of welfare services, seeking social impact of their actions and activities, applying commercial strategies that include social value.

**Social solidarity economy organisation (SSEO):** SSE Organisations act according to the following criteria:

1) Economic activity

2) Social/societal objective (including social, cultural, ecological objectives)

3) Citizens' initiative and participative structure

4) For social profit (not for private gain)

**Social solidarity economy (SSE):** While especially in francophone countries the term "Economie Sociale et Solidaire" is equated to the social economy (and sometimes to social business), mainly in its institutional recognition, RIPESS uses Social Solidarity Economy to join the two approaches as a political, social and institutional movement including different economic approaches from organisations seeking social value and repairing Market economy damages, to initiatives seeking a more radical socio-economic change. It includes non-profit organisations, for-benefit enterprises and informal economic initiatives, by their explicit economic, social and environmental objectives as well as various forms of collaborative, associative and solidarity relations.

**Solidarity economy:** Solidarity economy gathers transformative citizen-led initiatives understanding economy as a space of social relationships based on solidarity, human and Earth rights, self-determination, mutuality and cooperation. Solidarity initiatives are seeking to democratise economy and participate strengthening social, economic, and environmental justice. SE is not a sector of the economy, but a transversal approach that includes initiatives in all sectors, sharing a broad set of values contrasting with the dominant Market economy, such as

cooperation vs competition, mutual support and solidarity vs individualism, horizontal organisation and democratic decision making. vs hierarchy and centralized structures  It is an attempt towards solidarity-based practices of production, exchange and consumption that generate livelihoods while implementing democratic principles and fundamental rights for common well-being.

**Social auditing:** the social accounting and audit framework involves three steps for a SSEO.  The first step is about an organisation clarifying its mission, objectives and related activities, and the values and principles that under-pin all its actions, as well as identifying its key stakeholders. The second step involves recognising the quantitative and qualitative indicators that enable the enterprise to report effectively on its performance and impact against its stated mission, objectives and values through data collection and consulting appropriately with its key stakeholders.  The third step is about bringing all the collected information together into social accounts that are then verified by an independent panel that, once satisfied, issues a social audit statement.

**Social capital:** Social capital is an important resource and can be used in setting up and developing SSEOs. Social Capital is all of these concrete elements and it evolves through relationships between people and organisations:

·        Trust: having relations of trust with people and organisations so that you feel confident and comfortable working with them;

·        Reciprocity and mutuality: having the sort of relations with people and organisations which mean that you do something for them without expecting immediate payback; that you help each other out; that you are prepared to work together on schemes of common advantage;

·        Social networks: being in touch with a wide range of people and organisations so that you get to know them; to learn to trust them and work together; to give and get information;

·        Shared norms of behaviour: realising that you share ideas with others of how things should be done; that you can build a common vision; that you broadly agree on what is acceptable and what is not;

·        Sense of commitment and belonging: realising that sharing a commitment to an area or to a group can uncover a shared understanding of issues and lead to a common sense of purpose.

**Social enterprise planning:**   setting up SSEOs is different from establishing traditional enterprises. With SSEO enterprises and with organisations operating in the Local Social Economy, it is a social process in itself which may take time. Social enterprises often start by identifying a need or needs within a locality. The needs of a population can be explored using some form of 'Needs and Resource Analysis'. A social enterprise should write a Social Enterprise Plan which should cover a long number of aspects. It includes topics like conventional business plans but also special ones like social management, social marketing, and social auditing.

**Social marketing:** Alcalay and Bell (2000) use a variety of definitions of social marketing to describe their commonalities and arrive at a consensus definition. First, social marketing is a label that is generally applied to programs that are deemed by authority figures to be beneficial to individuals and society in general. Second, there is no financial profit from implementing a social marketing campaign. Third, the ultimate goal is behaviour change, not just education and awareness. Fourth, those using social marketing attempt to incorporate the unique knowledge, attitudes, and beliefs of the stakeholders into their campaigns. Fifth, they attempt to not only influence the relevant individuals, but also social structures that may be preventing individuals from achieving the focal goals. And finally, there is a reliance on commercial marketing concepts,

such as consumer-driven strategy to offering product, price, positioning, promotion, and placement.

**Worker self-management:** "worker self-management (WSM) is the idea that those who produce should control their workplaces. It is based upon the premise that hierarchical forms of MANAGEMENT and organization are unnecessary, undesirable, and can be replaced by DEMOCRATIC forms of decision making." Extract from The Dictionary of Alternatives, Utopianism and Organization, Martin Parker, Valérie Fournier, and Patrick Reedy, Zed Books, USA, 2007.

## B. CASE STUDIES

Here we gather examples of how the SSE works, illustrating with concrete examples of initiatives/organisations who are implementing democratic forms of management, both inside the organisation and in its relation to the wider community. These case studies can be used as a training material.

| Democratic Management in the SSE – an example from France |
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| **Galapiat Cirque** |
| GALAPIAT Cirque project was born in a small creative collective demanding an egalitarian approach. After the success of a first show, the necessary deployment of individual artistic ambitions is reflected in a strong and rapid growth of the association which hosts multiple projects. It then seeks to combine professionalism, hiring of employees and respect for the initial project. For this, it is led to develop a reflection on specific methods of governance and to innovate organizationally. Baseline of the collective: "alone we go faster, together we go further" |
| ✓ "From the beginning, beyond the spectacles, we had a pedagogical project of transmission with schools, circus classes. Our introductory workshops allowed us to forge links with others, to exchange. We did not want to do anything but representation. "<br><br>✓ Dozens of socio-cultural projects will thus emerge. The circus criss-crosses Brittany (west rural region of France), putting the circus tent Pétaouchnok at the disposal of the territories, the inhabitants, while proposing to them innovative artistic forms, mixing circus and music. These participatory projects lasting a few weeks are designed with the help of local partners. "We want to help build a society where life is good. We propose dreams, we want that after our passage, people share these dreams: when they continue to do things together, it's genius! "<br><br>✓ Established in 2008 in Langueux, the festival "As long as there are seagulls", thanks to its programming and its atmosphere, has conquered a large public: 4 000 spectators on average (see here below). It is also one of the highlights of the associative life: the festival is organized by a hundred volunteers, met during the tours, in Langueux, Brittany or elsewhere. "Everyone is familiar with the project and is keen to operate in a co-operative manner. " |
| The strength of Galapiat's initial project, and the self-managed imagination that was in the minds of its founders, was transmitted to the collective, instilling greater vigilance with regard to the organizational question. Although the formal structure (of the general assembly type, the board of directors, the bureau) has been maintained, it has never been considered sufficient by the associations to prevent a possible drift from the project. As a result, the innovation that the collective has shown has culminated in the creation of La Gazette (internal newspaper), of cells (unit production for each project or topic members want to work on), and seminars (everybody gathers for 2 days at least once a year). These new instances do not replace the traditional instances but complement and enrich them. Cells are a means to regain the coherence of the egalitarian troop within an organized collective. The seminaries are the higher level of collective form, gathering all the troops in one. All this mechanism will finally maintain a strong reflexive dimension around the action. Behind the question of size, which is often the subject of contradictory judgments such as "Small is beautiful" or "the bigger, the better", there is an important and never closed reflection on the question of the values and the means to serve them. |
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| For more information:<br>    − Galapiat Cirque, 20 rue des Frères Huby, 22 360 Langueux<br>    − contact@galapiat-cirque.fr - +33 6 10 58 02 34<br>    − http://galapiat-cirque.fr / FB: https://fr-fr.facebook.com/pages/galapiat-cirque/148147945272821<br>    − video:<br>        o About the festival: https://www.youtube.com/watch?v=rOtvOYMrYHQ<br>        o on social innovation https://www.youtube.com/watch?v=fOmXZxJ0hlU |

| Democratic Management in the SSE – an example from Romania |
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| **Mutualities – actors of solidarity in communist and post-communist period** |
| CARP Timișoara-Mutuality for retiree's people, Timișoara is an actor of social economy, which develop financial and social services for their members. The initiative is mainly addressed to pensioners who are temporarily confronted with financial difficulties (the need to realize a medical surgery, family accidents, accumulation of heating debts during the winter, etc.) |
| ✓ CARP Timișoara is an association (NGOs) which functions as a mutuality, providing micro-credits to retirees and employees persons.<br>✓ The organization has been operating since 1952, with a current number of 18,000 members. 3000 people from the total number of members are employees which have difficulties to access conventional bank services. Mutualities are present in all part of the country (they are 1650 structures, in December 2015), offering to their members' similar services.<br>✓ The organization offers loans and non-reimbursable grants, operating on the principle of solidarity and reciprocity.<br>✓ The organization has partnerships for providing medical services at advantageous prices for their members, organizing excursions and other social-cultural programs.<br>✓ The organization's social mission is accomplished through the financial contribution of each member. The minimum amount of the financial contribution is less than one euro, but the social impact can be very high.<br>✓ The association is autonomous, without financial support from public institutions. The decision-making body is the General Assembly |
|  |
| For more information:<br><br>**Name and address of organisation**<br>Casa de ajutor reciproc a pensionarilor, Timișoara<br>Street Bogdăneștilor, number 4, Timișoara, Romania<br><br>**Webpage/FB of the initiative:** |

| Democratic Management in the SSE – an example from Germany |
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| **Regenbogenfabrik: Democratic management in a social enterprise** |
| Regenbogenfabrik is a neighbourhood enterprise in the borough of Kreuzberg in Berlin. It provides socio-cultural services and products: e.g. a cinema, a timber and a bicycle repair workshop, a pottery, a canteen, a hostel with 40 beds, and a café with an own bakery. From the beginning of its existence, democratic management was a priority in this social enterprise. |
| ✓ What happens?<br><br>The democratic management includes a monthly plenary session of all businesses and projects of Regenbogenfabrik. The working group Business Management is an executive organ which enhances communication within the organization, reports on staff and finance, prepares strategic proposals for the plena, and supports the different projects and businesses.<br><br>✓ Who is involved?<br><br>Through the plenary sessions and the working groups, all employees, and volunteers of the enterprise are involved in the process.<br><br>✓ Where does it take place?<br><br>At the site of the enterprise, in Berlin<br><br>✓ When does it take place?<br><br>Plenary sessions are taking place each month, working groups meet often weekly.<br><br>✓ Why does it happen?<br><br>This way of enhancing democracy in the organization often takes time but also ensures more sustainability of decisions. |
|  |
| For more information:<br>    Regenbogenfabrik Block 109 e.V., Lausitzer Straße 22, 10999 Berlin, phone: +49 30 695795 0<br>https://www.youtube.com/watch?v=TCIx6qZJbwc |

| Democratic Management in the SSE – an example from Italy |
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| **OZ - Officine Zero. Spazio di rigenerazione urbana e del lavoro** |
| OZ – Officine Zero is an experience of recovery and transformation of an industrial area in the heart of Roma. It is a project aimed at creating dignified labour, as well as to promote a culture of critical consumption. |
| The Officine Zero project was born in 2013, when the RSI Officine for night train wagons maintenance failed, leaving more than 100 workers without jobs.<br><br>Workers decided to occupy the factory with the help of some social experiences from the neighbourhood and to reactivate production from the bottom: artisanal workshops of carpentry, upholstery, electronics and welding.  Former RSI workers combined various types of precarious workers (designers, artisans, journalists, etc.) with the aim of re-imagining the way they work and their workplaces.<br><br>Officine Zero became a Coworking site and a Multifactory, where mostly recycled materials are used and workers experience circular economy's practices. Today there are 45 people working there.<br><br>Officine Zero wants to experience a new way of working, in which the self-employed worker (web designer, craftsman, designer, journalist…) is no longer alone, but is inserted into a context of relationships that makes it possible to have a steady increase in both ones own skills and in collaborative work.<br><br>Officine Zero's management system is based on an assembly of the workers and the decision-making method is that of consensus. The assembly decides the fair compensation of the worker, refuses voluntary work and competition between workers. The slogan is: "you work in and/or with Officine Zero, and not for Officine Zero". |
|  |
| For more information: |

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| ✎ Via Umberto Partini, 20, Roma (Italy) |
| ✎ http://www.ozofficinezero.org/ |
| ✎ https://twitter.com/OfficineZ |
| ✎ https://www.facebook.com/OzOfficineZero/ |
| ✎ https://www.youtube.com/watch?v=WiU6pCKj2MQ |
|     (Video in Italian language with subtitles in English) |

| Democratic Management in the SSE – an example from Portugal |
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| **A3S** - an association contributing to sustainable, fair, equitable and participatory development alternatives |
| A3S is a non-profit association, created in 2006, with the mission of promoting collective social entrepreneurship and the sustainability and recognition of the social and solidarity economy. A3S acts as a social enterprise creating added social value and opportunities to intervene and innovate. Its main activities include research & development, training, organizational consultancy and evaluation. |
| A3S' intervention relies on democratic principles, such as: <br>   **Participatory democracy** and shared responsibility of individuals. A3S is made up of 12 individual members, 9 of whom are members of the steering bodies. Structural decision-making processes aren't limited to board members but also include workers and sometimes volunteers. They are made based on consensus and collectively shared decisions. Members and workers participate actively in the suggestion of new activities and decision processes on the life of the association. Email is the most commonly used communication tool for faster decision making. Meetings and assemblies are used for more structural decisions. A challenge of this model is that the decision-making process is more time-consuming. <br>   **Transparency** as a key ingredient to keep members and stakeholders informed and involved with A3S mission and activities. Transparency is ensured in several ways: <br> - provision of social, environmental and economic accounts; <br> - promotion of active participation in different moments, involving members, workers and volunteers; <br> - general meetings with all members once a month and general assembly held twice a year; <br> - report of activities and decisions are made through the sharing of information between all; <br> - internal bulletins are mechanisms for sharing information among members and newsletter for sharing information with the general public; <br> - work and leisure special weekends are used for shared reflection, participation and conviviality, open to all those who are close to the organisation. <br>   **Loyalty and trust in relations** with the various people and organisations. Although the steering body has the role of representing the organisation, A3S' structure is horizontal and representation is made by any member or worker who shares its vision and values. There is an affective recognition of all people of the ethical and professional values that guide the intervention of A3S. Loyalty and respect also applies to the relationship with partners and clients, with whom the association seeks to maintain lasting and trusting relationships. <br> This management model is possible because of the small number of members and workers, allowing greater space for participation and for the involvement of all in the mission and values of the A3S. |

For more information:
**A3S**
CIaP- Centro Incentivar a partilha
Rua de Cruz de Pau, 153
4450-103 Matosinhos
**Email** geral@a-3s.org
**Webpage** http://a-3s.org/en/
**Facebook** https://www.facebook.com/associacao3s/

| Democratic Management in the SSE – an example from Greece |
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| **Women's agrotourism cooperative of Portaria** |
| The women's agritourism cooperative of Portaria in Pilio called «The Portaria», has its base in Magnesia and operates throughout the hole Prefecture of Magnesia. It was founded in March 1997 by women of the community who wanted to make good use of old recipes in order to save the gastronomic tradition of the place. At the same time, they suggested to all women in the village, ways of using their free time while contributing to their family income. |
| Nowadays, the cooperative has 35 members. In a daily basis, women work in both labs of the cooperative. One of the labs and a product showroom was created through the LEADER Program. The older showroom in the centre of Portatia still exists.<br><br>At first, the cooperative produced traditional spoon sweets and marmalades of all the fruits of the region while today it manufactures a wide range of products. Women of the Cooperative today are manufacturing a large number of sweets, drinks, pasta and other products from pure local ingredients free of preservatives and paints.<br><br>The key for their success is the democratic way that they manage their cooperative. Every member of the cooperative participates in the decision-making process equally. They trust each other and they all share the responsibilities of their actions. In this way, they all equally try for the best outcome.<br><br>Nowadays the cooperation is actively involved in various tasks, activities in seminars both in Greece and abroad:<br>    ✓ Participation in workshops in the Region of Thessaly<br>    ✓ Attend multiple seminars to improve their managerial skills<br>    ✓ Cooperation with the development company in Pilio and participation of cooperative members in visits in France through the<br>    ✓ "Transnational Local Program Co-operation of Leader in Pilio and North Sporades Islands" program.<br>    ✓ Participation in the National Food & Beverage Exhibition "AGROTICA", In the Basketball Stadium of Athens |

| ✓  Participation in exhibitions all over Greece and abroad. |
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For more information:
- Telephone: +30 2428099952 , +30 2428099400 , +30 2428099928
- e-mail: mail@portaria-pelion.gr
- Website: http://portaria-pelion.gr/

| Democratic management – an example from CZ |
|---|
| **Etnetera a.s.** |
| In 1997, two friends wanted to earn some extra money when studying at technical university. They founded a company and they soon learned, with a surprise, they can also employ their friends who shared their knowledge and sense of humour. After 18 years of successful operation, Etnetera is a leading company in the web portal and application development area. Their goal is to be the market leader on the Czech market in this segment. |
| Currently, the Etnetera team consists of 140 people and they work in a liberal and open environment without neckties and process manuals. They get inspired by the principles of a free company where profits are shared transparently, teams set their own rules and the management doesn't have any superior benefits. They like to do sports together and they support each other. They belong to one team. It's no coincidence they came in one of the first three places in the "Best Employers Czech Republic" award for four consecutive years. The results of this study are based on opinions of companies' own employers and their motivations.<br><br>For development, they use open source solutions. They set aside ISO because they don't need it. They don't manage projects according to the waterfall model, they believe in agile approach. They build dedicated teams that are close partners for clients and they spend part of their working time directly with them.<br><br>They also share their joy — they create and manage web pages for NGOs (e.g. Transparency International, Czech Abylimpic Association, Femancipation, and many other). Where brains are not enough, they put their hands to the plow: they help to repair a castle or clean up flood damage. They cooperate for a long time with Leontýnka Foundation and One-On-One ("Jeden na jednoho") Society which help the visually impaired integrate in the society. Their also support other charitable projects financially. |

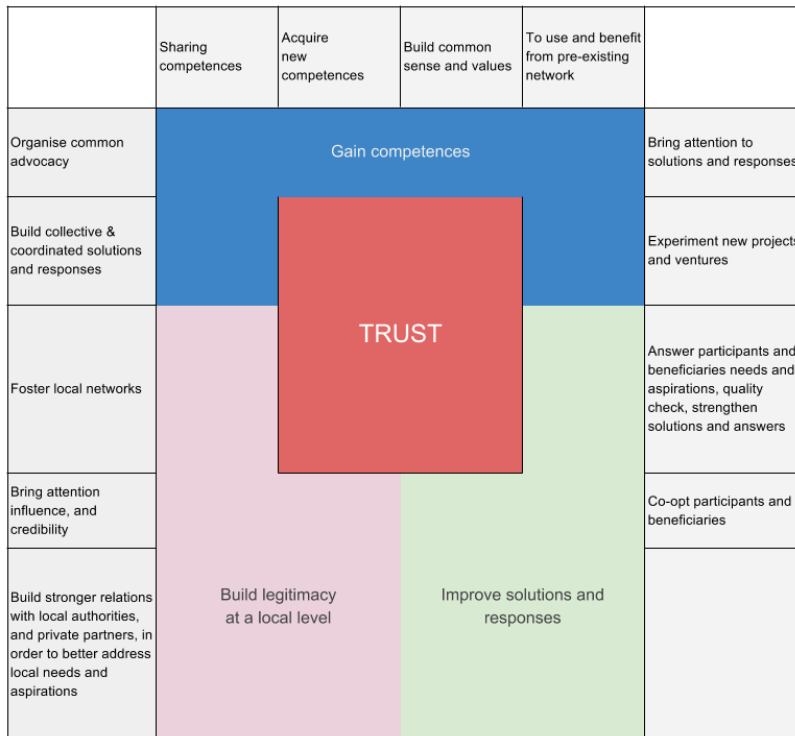| For more information: |
| :--- |
| **Webpage** https://www.etnetera.cz/<br>**Facebook** https://cs-cz.facebook.com/etnetera/<br>**E-mail** info@etnetera.cz |

## C. EXAMPLES FOR TRAINERS

These examples may serve as inspiration. It is not mandatory that trainers follow these in a strict way. Trainers shall adapt contents and the methodologies according to their experiences and national/regional/local contexts.

### Cooperation mapping

Suggestion of a reference tool to build content (translated from "Association & Coopération Jouez collectif !", Frane Active Guide)



### Videos

– These video interviews from a GRUNDTVIG project present in a very practical manner the motivation and daily management approach of German social entrepreneurs in different businesses (English language subtitles).
  1. Sevgi Bayram: GRAEFEWIRTSCHAFT e.V. / WELTKÜCHE UG: http://www.youtube.com/watch?v=HnzBPTyjIFs
  2. Anne Lorenz: LEBENSNAH e.V Soziales Unternehmen Sprachkurse http://www.youtube.com/watch?v=Dyr2uXQxy5s

3. Anette Schill: REGENBOGENFABRIK e.V. Soziales Unternehmen Sozio-kulturelle Aktivitäten http://www.youtube.com/watch?v=TCIx6qZJbwc
4. Lutz Bojahr: STERN-RADIO BERLIN GmbH Soziales Unternehmen Integration durch Arbeit http://www.youtube.com/watch?v=xmrVzIoqyuQ
5. Bernd Thuerk: STEREMAT GmbH: Soziales Unternehmen Beschäftigungsmaßnahmen http://www.youtube.com/watch?v=QVKXrqpm_os
6. Klaus Lemnitz: GEWERBEHOF SAARBRUECKER STRASSE eG Soziales Unternehmen Gewerbeflächenmanagement http://www.youtube.com/watch?v=NvUcgQCztKc
7. Rainer Milletat BAUS E&A Soziales Unternehmen Beratung http://www.youtube.com/watch?v=S7wNiXhC1vA
8. Norbert Thoemen: MUT eG Soziales Unternehmen Facility Management http://www.youtube.com/watch?v=2qDIS8w6sgY
9. Thomas Holbe LAFP e.V.: Soziales Unternehmen Integration durch Arbeit http://www.youtube.com/watch?v=GXU3aJqnkR8
10. Dieter Baumhoff: ZUKUNFT BAUEN e.V. Soziales Unternehmen Bau http://www.youtube.com/watch?v=VBpByt_A5Po

— Interview: Understanding the Mondragon Worker Cooperative Corporation
https://www.youtube.com/watch?v=8bcNfbGxAdY

— Defying the Crisis - The Spanish Collective Mondragón
https://www.youtube.com/watch?v=zaJ1hfVPUe8

— Sofia Papachristou and Kostas Papanastasatos traveled 30 days in 40 different European locations in Germany, Austria, France, Italy, Belgium and Greece to make interviews and present, social entrepreneurship examples through different forms of cooperative business. The documentary is a tool for informing and promoting social / cooperative enterprises through banking sector, healthcare industry, renewable energies, rural tourism, reuse, etc. The documentary highlights potential for sustainable growth and employment and focus on a different economic model, a model that can contribute to a way out of the crisis we are experiencing today. https://www.youtube.com/watch?v=Nu4WKWv5RIg

**Exercises for Trainees**

1. Topic: Addressing SSE

Step 1. ~10 min
Divide the group in three small work teams mixing the people randomly. Put the names of the participants in a bag and mix them to after choose randomly the members of each team.

Step 2. ~10 min
Each team has to discuss between them the different meaning that they think for Social Solidarity Economy and build one that conflate the ideas to present a team meaning and to write it down in the paper given as a banner.

Step 3. ~10 min
The teams choose a member to present in maximum three minutes the meaning that they built. They can use sheets to take notes about the ideas.

Step 4. "Summing up" ~15 min

Having the three banners with the meanings, all the participants and the moderator or tutor do a small debate to conclude about the meaning of SSE. The tutor can complement the meaning with plus information.

This meaning can be can be decorated to be keep and show all permanently in the classroom.

2. Topic: The concept of SSE organizations

Step 1. Brainstorming ~10 min
The group will express the needs that they can recognize in their society. The moderator or tutor will note the needs in a way to be visible to the group.

Step 2. ~10 min
Divide the group in three small work teams mixing the people randomly. Put the names of the participants in a bag and mix them to after choose randomly the members of each team.

Step 3. ~10 min
Each team will discuss between them the different needs of the society. They will exchange opinions on the variables needs that the society is facing. They will have to choose one need or a combination of them if possible that would be the basis to create their own SSEO.

Step 4. ~40 min
The team will draw the idea of their SSEO. They can describe their organization through different points: the initiative, the necessity, the vision, where it will be located and why, its actions, how they will manage this organization, how many persons could be involved, etc.

Step 5. ~20 min
Each team presents their SSEO to the group. The group will discuss over them, exchange opinions, pointing out strengths, weaknesses, potentials, perspectives, similarities between them, etc. If needed, some changes could be introduced for these plans.

3. Topi:  draw up a social enterprise plan

Teams of ca 3 trainees each working group agree upon one organization (ideally an existing or planned SSEO) for which they develop a social enterprise plan:

Cover Page

Acknowledgements

Executive Summary

Background: background to the social enterprise; history of the social enterprise; activities and achievements of the social enterprise to date

Demonstrating the Need for the Organisation: background to the area (if appropriate); context and policy (if appropriate); need for the social enterprise; examples of similar social enterprises and/or partners

Description of the Organisation: structure; key skills; approach; premises; legal status; geographical area of focus

Mission, Values, Objectives, Activities

Stakeholders Analysis

Social Accounting and Audit: Introduction to social accounting and audit; reasons why the social enterprise will implement social accounting and audit; key stakeholders consultation summary; social book-keeping system; summary of the data to be collected; social accounting plan – provisional timetable

Expected Environmental Impact

Forecast Financial Impacts

Marketing Plan: social accounting linked to marketing; marketing and promotion

Finance: projected income and expenditure; projected cash flow; projected balance sheet

Work Plan and Targets

Summary Remarks and Conclusions

4. <u>Group discussion</u>

Discuss practical problems and solutions of social management in a SSEO in the plenary

Tensions that have to be managed within social enterprises

| Tensions that have to be managed within social enterprises | | |
|---|---|---|
| Providing the staff with excellent conditions and pay | Vs. | Providing services to clients and customers which are affordable |
| Deciding to keep staff and being committed to the workforce | Vs. | Making staff redundant in the event of a decrease in the work |
| Having a mechanism to be accountable to key stakeholders | Vs. | Being able to be effective in making decisions quickly and making them clear |
| Spending time managing the social enterprise | Vs. | Spending time on local projects and programmes that benefits the locality |
| Re-investing any surplus in the social enterprise to expand and develop | Vs. | Using the surplus to support other, wider work in the locality eg. donations, etc. |
| Expansion of the social enterprise to become bigger and changing the original mission | Vs. | Remaining small and concentrate on providing services within the locality |
| Spending time raising funds and accounting to funders and on social accounting | Vs. | Spending time on delivering the core work of the social enterprise |
| Recruiting people with a community development background | Vs. | Recruiting people with a business background |
| Managing the enterprise as a business | Vs. | Running the enterprise as a means to achieve social objectives |
| Stressing the underpinning and shared values of the social enterprise | Vs. | Concentrating on achieving the activities to an adequate degree |

**Study Visit**

At least 1 study visit is recommended during the training

## Copyright statement

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