LLP Lifelong learning Programme
Leonardo da Vinci Programme – Transfer of Innovation

“PRO-ACT PROfessional development of the ACTors involved in the social economy sector”

FINAL CONFERENCE

BORDEAUX
30th of September 2014

This final conference is organised with the support from the Department of Gironde.
ITALY - Maria Jose Armendariz Zalba, MCG - MANAGER CONSULTING GROUP SOC. COOP.

PORTUGAL
- Claudia Pedra, BAIRROS
- Mourad Ghanem, BAIRROS
- Maria Carmona, CRESHER NA MAIOR

CZECH REPUBLIC
- Jiri Kucera, SEDUKON
- Lukas Dastlik, ELIO

UNITED KINGDOM
- Graham Bould, OAKE ASSOCIATES
- Bill Fryer, OAKE ASSOCIATES

FRANCE – Stéphanie Maupilé, IFAID AQUITAINE
The Social Economy sector in Europe
Presentation in each PROACT partner country
ITALY

Maria Jose Armendariz Zalba,
MCG - MANAGER CONSULTING GROUP SOC. COOP.
POLITICAL AND LEGAL CONTEXT

- Third sector is mainly born and developed in Italy during **1980's**
- There are **235.000 organizations** working in Third Sector in Italy
- **488.000 workers**
- **4.000.000 volunteers**
- Its incomes are equal to **67 billions of EUR** (= GNP 4,3%)
- Italian Third Sector owns functions oriented to production (linked to social utility for users) and to provide social services
DIFFERENT STATUTES

- Associations of social promotion Law n. 383/2000
- Volunteership organization Law n. 266/1991
- Non governmental organization Law n. 49/1987
- Society of mutual help Law n. 3818/1886
- Church bodies Law n. 222/1985
TYPES OF COOPERATIVES - ITALY

- cooperatives of production and work,
- cooperatives of consumer,
- agricultural cooperatives,
- credit cooperatives,
- cooperatives of home construction,
- cooperatives of transport,
- editorial cooperatives,
- social cooperatives.
MAIN DIFFICULTIES/NEEDS OF THE SECTOR

- Needs and difficulties have changed over the years
- Organizations involved in producing social services able to establish relationships based on trust with both consumers and workers
- Main objective is to provide service quality but without opportunistic characteristic of profit organizations
- Third Sector has to cover both economic and social role, last one traditionally assigned to the welfare (State)
- Wealth is also measured by non-economic indicators (capacity to build relationships, to generate trust...)
- Perspectives of development for non-profit organizations have also to consider financial context, in order to provide sustainability within continuity and strategy of its actions.
- Modalities to access to credit and loans for third sector organizations are based on profit criteria
CURRENT HELPS TO REINFORCE THE CAPACITY AND SUPPORT THE SECTOR

- Training
- Improvement of internal organization processes
- Offer of new products and services
- Processes of internal assessment by specific methods and tools, very often subcontracted to external professionals and/or organizations
- Organization of social events (i.e. Festival of Fundraising, organized by Philanthropy (University of Forlì))
PORTUGAL

- Claudia Pedra, BAIRROS
- Mourad Ghanem, BAIRROS
- Maria Carmona, CRESCE NA MAIOR
POLITICAL AND LEGAL CONTEXT

Some quantitative data

- Charities with hundreds of years connected to the Catholic Church
- NGO boom after the end of the dictatorship – beginning of the 1980s
- Dramatic increase of the Social Economy organizations in the last 10 years – from 25,000 to 50,000
- 1 million volunteers
- Employs 5% of the active population
- Its income is 4.5% of the GNP

Organizations work on

- Implementation of social services in complement of State intervention – in health care, education and family support
- Creation of social value: research, training, culture, sports, entrepreneurship
- Lobby and advocacy: environmental protection, human rights activism, local and international development
TYPE OF ORGANIZATIONS

BY TYPE
- Associations
- Foundations
- Local development institutions
- Charities
- Museums
- Development NGOs
- Mutualites
- Cooperatives

STATUTES
- NGO
- IPSS (private institution of Social Solidarity)
- Public Utility
MAIN DIFFICULTIES/NEEDS OF THE SECTOR

Quality of social response:

- **Reactive** and non proactive – do not work on the root causes
- Influence especially in the area of **provision of social services**
- **Lack of concern with legitimacy**
- **Lack of social innovation** and reduced national **impact**
- **Difficulty in mobilising social actors** and working in partnership and in **networks**

Organizational:

- Contradiction between principles/ values and management
- **Week internal structures**
- Centralised and non participative organizational models
- Amateur leadership
- **Lack of strategic planning**
- Lack of good managerial practices and systematic evaluation
- **Week internal communication systems and absence of external communication**
- Lack of transparency and accountability
- Lack of training and absence of personal development systems for staff
- **Lack of long term sustainability**
CURRENT HELPS TO REINFORCE THE CAPACITY AND SUPPORT THE SECTOR

- Funding for institutional strengthening by several foundations (ad hoc)
- Several national award/grant delivery systems
- Social consultancy
- Social investment
- Social events
- Training
CZECH REPUBLIC

- Jiri Kucera, SEDUKON
- Lukas Dastlik, ELIO
After communist era in 1990 was adopted a law about association of citizens and also a law about foundations and endowment funds. After five years a law about public service companies.

In 2014 after two years from adoption enter in to force a new Civil Code. Legal forms of NGO’s are now clearly defined by this law. We have 4 types of organizations in social economy sector.
THE DIFFERENT STATUTES

1. Association (SPOLEK)
2. Foundation (FUNDACE)
3. Civil service company (ÚSTAV)
4. Social cooperatives (SOCIÁLNÍ DRUŽSTVO)
NEEDS OF THE SECTOR

- less private money in social sector (70% of financial resources comes from public budgets)
- small knowledge of leadership and management in social economy organizations
- especially in regions- absence of impact measurement
CAPACITY BUILDING

- new initiatives - sign of reliable organization - evaluation of processes in NGO
- long-term educational programs
- new instruments for donors - on-line fundraising, etc.
- other capacity building instruments
- supports for start-up social enterprise
UNITED KINGDOM

- Graham Bould, OAKE ASSOCIATES
That it is empowering, economically sustainable, and capable of providing a real alternative to the `mainstream' public and private sector economies. They argue that the empirical evidence offers only ambiguous support for these claims and that the full potential of the UK social economy is not being realised.

The Social Economy can be defined as that part of the economy which is **neither private nor public**, but consists of constituted organizations, with voluntary members and boards of directors or management committees, undertaking activities for local benefit. Organizations may or may not allocate profit in the form of dividend. The social economy includes four interrelated sectors

- cooperatives
- mutuals
- voluntary associations, and
- charitable foundations and trusts
In the UK Social enterprises now have three-times the start-up rate of traditional businesses and account for 15% of SMEs. The number of cooperatives has increased by more than 25% since 2009, and collectively boasted a turnover of £37bn in 2013.
The last decade has seen massive progress in the social sector in the UK. Social Enterprises and co-operatives are outperforming just-for-profit businesses; alternative banks have better returns on assets, lower volatility and higher growth; and a growing proportion of start-ups are socially-driven. The UK social investment market is growing fast and attracting global attention.

(Social Economy Alliance 2014)
However in Wolverhampton the chosen city for the PROACT pilot has seen large reductions in public resources for third sector organizations who are struggling to maintain and grow their services in traditional ways, many ‘grass root’ groups are in need of professional help and development which has been the focus of the transfer of innovation as part of this pilot programme. Come to our afternoon workshop to find out more.
FRANCE

Stéphanie Maupilé, IFAID AQUITAINE
L'ESS EN FRANCE : QUELQUES POINTS DE REPÈRE

FONDATIONS
1887 : institut pasteur
1969 : fondation de France
1987 : loi sur le mécénat

MUTUELLES
1820 : fort développement
1848 : 2 000 stés –
1,6 millions de personnes

COOPERATIVES
1848 : fort développement
1947 : cadre unique

ASSOCIATIONS
1-07-1901 : loi de création
XXe : forte croissance
1971 : constitution

Gouvernance démocratique
Lucrativité limitée
Utilité sociale

LESS EN FRANCE : QUELQUES POINTS DE REPÈRE

AUJOURD'HUI, l'ESS c'est :
- 2,34 millions de salariés – 1, 8 millions ETP
- 56 Milliards d'€ de rémunérations brutes versées

1981 : L'expression ESS apparaît en droit français
2000 : Création du 1er secrétariat d'état
2012 : 1er Ministère ESS
2014 : 1ère loi ESS

2014 : ouverture aux sociétés commerciales
- Gouvernance démocratique
- Utilité sociale
- Bénéfices majoritairement investis dans le projet

LES BESOINS DES STRUCTURES DE L’ESS EN FRANCE

Ils sont très différents d’une catégorie de structures à l’autre.

Par exemple, pour les mutuelles, il s’agit de faire face à la croissance des assurances. Alors que pour les fondations, l’enjeu est plutôt de s’adapter à la démultiplication des possibilités de donner offertes aux publics, ...

Ces besoins sont également différents d’un secteur d’activité à l’autre et en fonction de l’étape de développement de la structure elle-même.
**LES BESOINS DES STRUCTURES DE L’ESS EN FRANCE**

**Existence d’enjeux transversaux** qui impactent chaque structure d’une façon ou d’une autre :

- Diminution et resserrement de la subvention - Augmentation de la commande publique
- Dualisation des acteurs
- Solvabilisation des modèles par l’usager au détriment de la logique de solidarité
- Inégalités territoriales
LES BESOINS DES STRUCTURES DE L’ESS EN FRANCE

**SECTEURS**

**SPORT**
- Trésorerie
- Mutualisation

**PETIT ENFANCE**
- Dynamique associative
- Organisation interne

**SPECTACLE VIVANT**
- Outils de gestion
- Modèle économique

**INSERTION**
- Développement d’activités
- Gestion des ressources humaines

LES BESOINS DES STRUCTURES DE L’ESS EN FRANCE

**EMERGENCE**
- Projet à définir
- Utilité à faire connaître
- Fonction support à penser
- FR à constituer
- Partenaires à trouver

**CONSOLIDATION**
- Gouvernance à stabiliser
- Outils de gestion à sécuriser
- Équipe à coordonner
- Partenaires à fidéliser

**CRISE**
- Gérer l'urgence
- Réduire la voilure
- Projet à re-penser ou à abandonner

**DEVELOPPEMENT**
- Changer d'échelle :
  - RH
  - Économique – Financier
  - Institutionnel

LES OUTILS AU SERVICE DE L’ESS EN FRANCE

- Réseaux
- Organismes de formation
- Groupement employeurs
- Collectivités
- Finance solidaire
- CAE
- OPCA
- DLA
- Groupement achat
- ...
Impact of the PROACT project

Feedback from the partners
ITALY

Maria Jose Armendariz Zalba,
MCG - MANAGER CONSULTING GROUP SOC. COOP.
IMPACT OF « PROACT » PROJECT

A) INTERNAL IMPACT:

- Opportunity to know a methodology and to adapt it according to characteristics of Italian national context

- Opportunity to compare PROACT methodology with current methodologies used in MCG
B) EXTERNAL IMPACT:

- Opportunity to transfer PROACT methodology, adapted to characteristics of Italian national context, within different non profit Italian organizations.

- Opportunity to exchange, to discuss and to compare PROACT methodology with trainees working in non profit Italian organizations.

- Training in Italy has given the opportunity to exchange opinions, perspectives and to know better some professional fields of non profit.

- Exchange and contact with trainees: during and after training undertaken by MCG.

- One of organizations attending training in Italy intends to transfer DLA within its staff (the version adapted implemented in Italy). Consequently, a training course is being organized with material and contents worked out in PROACT.
PORTUGAL

- Claudia Pedra, BAIRROS
- Mourad Ghanem, BAIRROS
- Maria Carmona, CRESKER NA MAIOR
NEIGHBORHOOD OF IMPLEMENTATION
Mouraria - Intendente
Goal 1: To train 10 organisations

Goal 2: To have a practical follow-up with the organizations (Consulting and mentoring)

Goal 3: To build a product and a Consortium ProACT Portugal between the 5 partner organizations involved
THE PROGRAM

» Training Modules (100h):

- 1) Organizational assessment and capacity building,
- 2) Strategic planning,
- 3) Financial management,
- 4) Accounting implementation methodologies,
- 5) Recruiting and supporter services for members, and fundraising
- 6) Strategic and digital communication,
- 7) Customer Relationship Management for 3rd sector,
- 8) Managing legal and tax issues in a 3rd sector organisation

» Coaching (Consulting + Mentoring) (>30 days):


IMPACT OF THE ProACT PORTUGAL

YEAR 1
- Pilote
- First impacts

YEAR 2
- 2nd edition at a different scale
- More impacts

YEAR 3
- Service
- Sustainability
### SOME OF THE IMPACTS

<table>
<thead>
<tr>
<th>IMPACT 1</th>
<th>Raise of the awareness on the importance of capacity assessment and capacity building</th>
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</thead>
<tbody>
<tr>
<td>IMPACT 2</td>
<td>Increase of competence in several areas (exemple: financial management, legal and tax issues for 3rd sector organisations, strategic comunication...)</td>
</tr>
<tr>
<td>IMPACT 3</td>
<td>Some structural impacts expected on 3 organisations</td>
</tr>
<tr>
<td>IMPACT 4</td>
<td>The embryo of a portuguese ProACT consortium that provides ProACT as a service for the 3rd sector organizations in Portugal Neighborhoods</td>
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OBRIGADO!

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CZECH REPUBLIC

- Jiri Kucera, SEDUKON
- Lukas Dastlik, ELIO
PROACT IN CZECH REPUBLIC
PILOT TRAINING / CONSULTING

- 2 day theoretical training
- 1 day case study, assessment
- 0.5 day consultancy with each organization
- 5 reports and 5 action plan
IMPACT OF THE PROACT PROJECT

- 5 organizations from different field of social economy got a push and tools to work on their capacity
- 5 development / action plans for each organizations
- We found possible evaluator of processes in other organizations
- We think about involving local action groups to use methodology to increase capacity of regional NGO’s
UNITED KINGDOM

Bill Fryer, OAKE ASSOCIATES
MOTIVATION - WHY OAKE ASSOCIATES BECAME A PARTNER IN PROACT

- We respected the work of Ifaid as an organisation
- We were attracted to the development and testing of a new approach to Capacity Building not available in the UK
- We work with many community organisations who are experiencing financial and operational difficulties and require a fresh approach
- We believed that such a programme would be attractive to both community organisations and also UK funders and was therefore sustainable
IMPACT – WHAT WE CONSIDER HAS BEEN THE IMPACT OF DELIVERING PROACT IN THE UK

- The positive response of individuals from community organisations to participate in the pilot programme evidenced by recruitment and evaluation.
- Successfully securing resources from both local and national UK funders to support the programme.
- Proven testing via the pilot programme of a new product and approach which meets the needs of our organisation’s and adds real value in our work to support them.
- A tool combining training, assessment and monitoring that is transferable to the Quality Assurance measurement of organisations valuable to evidence competence.
- Further interest from other organisations to undertake Proact and indications from UK funders that the programme meets their requirements.
- Increased confidence in our staff through the wider EU experience gained together with new skills and materials to progress their work.
FRANCE

Stéphanie Maupilé, IFAID AQUITAINÉ
MOTIVATIONS D’IFAID POUR LE PROJET

Formation professionnelle

90% de nos stagiaires dans l'ESS

Appui aux initiatives de développement

Animation du DLA GIRONDE depuis 2003

1 500 structures diagnostiquées
10 000 emplois concernés
Des besoins repérés
Un transfert vers nos stagiaires

DANS UN CONTEXTE

Diminution des fonds publics
Privatisation des modèles économiques
Exigence de professionnalisation
Dualisation du secteur associatif

Améliorer nos contenus de formation
Enrichir la pratique des formateurs
Chercher des « solutions » ailleurs
Partager notre expérience

RÉSULTATS ET IMPACTS

Une meilleure connaissance des pratiques d’appui en Europe
Des mobilités pour l'équipe
Une formation de formateurs
Une formation enrichie pour nos stagiaires
Des rencontres entre des acteurs locaux ESS et partenaires européens

Renforcement de la dynamique interne
Consolidation de la transversalité de nos métiers
Renforcement des liens avec nos partenaires locaux
Nouvelles formations en perspective
Nouveau projet européen : SPOTS