

# **EuroSET**

**EURO**pean **S**ocial **E**nterprise **T**raining

## **ETM – European Training Module**

**Core syllabus**

**May, 2003**



# Competence area 1

## Planning and Researching

*3 modules, 10 categories, 28 topics*

### Module 1.1 Strategic Planning

#### *1.1.1 Institutional Analysis Techniques*

- 1.1.1.1 Strategic Thinking
- 1.1.1.2 Reflective Practice (R.P.)
- 1.1.1.3 Swot Analysis Approach

#### *1.1.2 Facilitating Processes*

- 1.1.2.1 Basic of Group Dynamics
- 1.1.2.2 Encouraging Participation

#### *1.1.3 Strategic Planning*

- 1.1.3.1 Basic of visioning
- 1.1.3.2 The Interpersonal Communication
- 1.1.3.3 Missions, Objective and Actions
- 1.1.3.4 The WBS approach

#### *1.1.4 Scenarios Scanning*

- 1.1.4.1 Environmental Scan Approach
- 1.1.4.2 Relevant Information & its use

### Module 1.2 Research

#### *1.2.1 Basic of Social Research*

- 1.2.1.1 History and Methods of Social research
- 1.2.1.2 Applied Research tools

#### *1.2.2 Data management*

- 1.2.2.1 Data Collection
- 1.2.2.2 Data Interpretation
- 1.2.2.3 IT Research tools and storage systems

### Module 1.3 Scenarios

#### *1.3.1 Welfare Policies*

- 1.3.1.1 Origins and Development of Welfare State Policies
- 1.3.1.2 Beyond the Welfare State

#### *1.3.2 EU Institutions and Policies*

- 1.3.2.1 European History
- 1.3.2.2 European humanistic vision
- 1.3.2.3 European Philosophy of Law
- 1.3.2.4 European Institutions
- 1.3.2.5 European Social Policies

#### *1.3.3 EU Third System Policies and Scenarios*

- 1.3.3.1 European features of Third System organisations
- 1.3.3.2 European Third System Policies and Projects
- 1.3.3.3 European third System legal aspects

#### *1.3.4 Social and Associative Economy*

- 1.3.4.1 Global socio-economic scenarios
- 1.3.4.2 Associative economy

## **Module 1.1**

### **Strategic Planning**

#### **1.1.1 Institutional Analysis Techniques**

##### 1.1.1.1 Strategic Thinking

*Concept of strategy*

*Prospective thinking*

*"Sailing complexity"*

##### 1.1.1.2 Reflective Practice (R.P.)

*Models of personal reflection*

*Application of personal and organisational reflection techniques to the strategic planning*

##### 1.1.1.3 Swot Analysis Approach

*Swot Analysis Method*

*Involving stakeholders and clients*

*The typical process of Swot*

#### **1.1.2 Facilitating Processes**

##### 1.1.2.1 Basic of Group Dynamics

*Groups and group dynamic*

*Groups' roles and assets*

*The social psychology of groups*

##### 1.1.2.2 Encouraging Participation

*Process of facilitation*

*Concept and use of feedback*

*Conflict resolution & Interpersonal skills*

*Importance of client-group*

#### **1.1.3 Strategic Planning**

##### 1.1.3.1 Basic of visioning

*Theories of motivation*

*How to build up a "motivational milieu"*

*Visioning (strategy, application ..)*

*Visioning tools*

##### 1.1.3.2 The interpersonal Communication

*Basic of human communication*

*Group oriented communication*

*Planning inside organisation communication*

##### 1.1.3.3 Missions, Objective and Actions

*Goal setting*

*Targeting process*

*The concept of organisational mission*

##### 1.1.3.4 The WBS approach

*WBS step by step*

#### **1.1.4 Scenarios Scanning**

##### 1.1.4.1 Environmental Scan Approach

*Methods for collection of information*  
*Role of scenario scanning in the strategic planning process*

1.1.4.2 Relevant Information & its use  
*Knowledge of competition*  
*Monitoring Policies*  
*Resources availability and development*  
*Target development*

## **Module 1.2**

### **Researching**

#### **1.2.1 Basic of Social Research**

1.2.1.1 Social Research: history and methodology  
*Empirical Research methods*  
*What are the goals of my research?*  
*What hypothesis can I make about my research?*  
*What tools should I use?*  
*What theories should I refer to?*

1.2.1.2 Applied Research Tools  
*The logic of survey, interviews, focus groups*  
*Interviews*  
*Focus groups*

#### **1.2.2 Data Management**

1.2.2.1 Data Collection  
*How to build a DB with your qualitative or quantitative data*

1.2.2.2 Data Interpretation  
*Quantitative and qualitative data approaches*

1.2.2.3 IT Research tools and storage systems  
*Introduction to main software tools for data interpretation*  
*Qualitative data: Nud.Ist Vivo*  
*Quantitative data: Statistical Package for Social Sciences*

## **Module 1.3**

### **Scenarios**

#### **1.3.1 Welfare Policies (WP)**

1.3.1.1 Origins and Development of W. P.

*The raise of Welfare State*

*Outline of worldwide welfare regulations features*

1.3.1.2 Beyond the Welfare State

*Changing Paradigms*

*Future regulatory systems*

*Lights and Shadows of Welfare change*

#### **1.3.2 EU Institutions and Policies**

1.3.2.1 European History

*Basics of European History*

*European Institutions and Bodies*

1.3.2.2 European humanistic vision

*The European way to social inclusion*

*Confronting worldwide humanistic visions*

1.3.2.3 European Philosophy of Law

*Basics of European philosophy of Law*

#### **1.3.3 EU Third System Policies and Scenarios**

1.3.3.1 European Features of TS organisations

*Overview of TS development and trends at EU level*

*Features, similarities and differences of TS organisations at EU level*

*Is it possible a EU-TS?*

1.3.3.2 European TS Policies and Projects

*EU TS political action: a review*

*Role of TS throughout EU programmes*

*TS-dedicated EU programmes*

1.3.3.3 EU Third System legal aspects

*History of EU legal approach to TS organisations*

*Role of EU as to national legislations*

*Overview of future trends considering enlargement and European Constitution*

#### **1.3.4 Social and Associative Economy**

1.3.4.1 Socio-economic scenarios

*Just capitalism?*

*European socio-economic features*

1.3.4.2 Associative economy

*Associative economy principles*

*European dimension and trends of Social Economy*

## Competence area 2

### Networking and Influencing

*4 modules, 9 categories, 23 topics*

#### Module 2.1 Publicity and Funding

##### *2.1.1 P.R. Strategies and Skills*

- 2.1.1.1 Communication and Promotion Strategies
- 2.1.1.2 Logistic Skills
- 2.1.1.3 Presentation Skills

##### *2.1.2 Fundraising*

- 2.1.2.1 Social Sponsorship
- 2.1.2.2 Obtaining money
- 2.1.2.3 EU Funds and Projects

##### *2.1.3 Advertising and Campaigning*

- 2.1.3.1 Media features and its functioning
- 2.1.3.2 Targeting for communication
- 2.1.3.3 Media-related communication skills
- 2.1.3.4 Advertising Techniques

#### Module 2.2 Lobbying

##### *2.2.1 Consensus Building*

- 2.2.1.1 Stakeholders Theory
- 2.2.1.2 Conflicts Resolution and Mediation

##### *2.2.2 Best Practices of lobbying*

- 2.2.2.1 Understanding Political Actors
- 2.2.2.2 The value of compromise

#### Module 2.3 Community Empowerment

##### *2.3.1 Social empowerment*

- 2.3.1.1 The "Community Empowerment" approach
- 2.3.1.2 Network analysis and social network approach

##### *2.3.2 TS Political Action*

- 2.3.2.1 TS Political Sociology
- 2.3.2.2 "The bottom Up " approach
- 2.3.2.3 TS Political debate

#### Module 2.4 Networking

##### *2.4.1 Network Sharing*

- 2.4.1.1 Policy network and new public policy

- 2.4.1.2 The crisis of traditional social and economic regulation
- 2.4.1.3 Emerging models of governance

#### **2.4.2 Network management**

- 2.4.2.1 The management of public policy
- 2.4.2.2 Strategies for network management
- 2.4.2.3 Competences for network management

## **Module 2.1 Publicity and Funding**

### **2.1.1 P.R. Strategies and Skills**

#### 2.1.1.1 Communication and Promotion Strategies

*Building Communication plans*

*Information Strategies*

*Web diffusion*

*Image definition and communication*

#### 2.1.1.2 Logistic Skills

*Organisation of events*

*Pre- during- and post-management of events*

*Database use*

#### 2.1.1.3 Presentation Skills

*Arguing and debating*

*Writing effective documents*

*Posture management*

*Presentation tools*

### **2.1.2 Fundraising**

#### 2.1.2.1 Social Sponsorship

*Basics of social sponsorship*

*Successful experiences*

*Sponsorship and Corporate Social Responsibility*

#### 2.1.2.2 Obtaining money

*Traditional and creative approaches*

*Fund Raising*

#### 2.1.2.3 EU Funds and Projects

*Main EU Programmes*

*Project approaches to EU Funds*

### **2.1.3 Advertising and Campaigning**

#### 2.1.3.1 Media features and its functioning

*Main communication media*

*Media languages*

#### 2.1.3.2 Targeting for communication

*Strategies for target identification*

2.1.3.3 Media-related communication skills

*Effective Writing & Speaking*  
*Arguing and debating*

2.1.3.4 Advertising Techniques

*Social Communication Approaches*  
*Campaigning*

## **Module 2.2**

### **Lobbying**

#### **2.2.1 Consensus Building**

##### 2.2.1.1 Stakeholders Theory

*From self-reference approaches to the Stakeholders culture*  
*Successful experiences*

##### 2.2.1.2 Conflicts Resolution and Mediation

*Nature of conflicts*  
*Avoiding disputes*  
*Mediation*

#### **2.2.2 Best Practices of lobbying**

##### 2.2.2.1 Understanding Political Actors

*Basics of Political psychology*  
*Successful experiences in political lobbying*

##### 2.2.2.2 The value of compromise

*The Art of compromise*  
*Basics of Games Theory and its applications*

## **Module 2.3**

### **Community Empowerment**

#### **2.3.1 Social empowerment**

##### 2.3.1.1 The "Community Empowerment" approach

*Basics of community approaches*  
*Self organization and social accountability*

##### 2.3.1.2 Network analysis and social network approach

*Network approach and network analysis*  
*Horizontal networks for social enterprises*

#### **2.3.2 TS Political Action**

##### 2.3.2.1 TS Political Sociology

*New forms of citizenship*  
*De-centralization and social planning*  
*Inter-institutional collaboration*



2.3.2.2 "The bottom-up " approach  
*Institutional subsidiarity*  
*Promoting citizens' self-organization*

2.3.2.3 TS Political debate  
*Finding the "third way" between Liberalism and State organized society*  
*Public goals and non-profit private subjects*

## **Module 2.4**

### **Networking**

#### **2.4.1 Networking Sharing**

2.4.1.1 Policy network and new public policy  
*Sociological studies of network*  
*Public policy approach*  
*Kinds of policy network*  
*New public policy*

2.4.1.2 The crisis of traditional social and economic regulation  
*Subsystems of regulation*  
*New interdependencies*  
*The growth of "strategic regulation"*

2.4.1.3 Emerging models of governance  
*Multilevel governance*  
*Centrality of subsidiarity*  
*Three models of governance*

#### **2.4.2 Network management**

2.4.2.1 The management of public policy  
*The dimensions of policy management*  
*Actors and relations*  
*Purpose and tools*

2.4.2.2 Strategies for network management  
*Strategies at game level*  
*Strategies at networking level*

2.4.2.3 Competences for network management  
*Functions of a network manager*  
*Competences for game level*  
*Competences for networking level*

## Competence area 3

### Providing Services

*3 modules, 6 categories, 13 topics*

#### **Module 3.1 Needs Assessment**

##### *3.1.1 Needs Assessment methods*

- 3.1.1.1 Client orientated assessment
- 3.1.1.2 N.A. Approaches and Tools
- 3.1.1.3 Intercultural + gender sensitivity in N.A.

##### *3.1.2 Data Analysis*

- 3.1.2.1 Statistics and Quantitative Methods
- 3.1.2.2 Qualitative methods

#### **Module 3.2 Service Planning**

##### *3.2.1 Counselling, Treating, Educating, Caring*

- 3.2.1.1 Basics of care services
- 3.2.1.2 Basic of applied methodologies of care services

##### *3.2.2 Project planning*

- 3.2.2.1 Programming services
- 3.2.2.2 Feasibility study approach

#### **Module 3.3 Services Monitoring and Evaluation**

##### *3.3.1 Monitoring Services*

- 3.3.1.1 Monitoring and Reviewing job
- 3.3.1.2 The "Reporting process"

##### *3.3.2 Evaluation methods*

- 3.3.2.1 Evaluation theory and Techniques
- 3.3.2.2 Evaluation as a communication tools

## **Module 3.1**

### Needs Assessment

#### **3.1.1 Needs Assessment methods**

##### 3.1.1.1 Client orientated assessment

*Client-centred approaches*

*Basics of individual and group interview*

##### 3.1.1.2 N.A. Approaches and Tools

*Biographical methods*

*Resources & competences balances*

##### 3.1.1.3 Intercultural + gender sensitivity in N.A.

*Cultural constrains in Needs Assessment*

*Developing cultural sensitivity*

#### **3.1.2 Data Analysis**

##### 3.1.2.1 Statistics and Quantitative Methods

*Statistical methods for data analysis*

##### 3.1.2.2 Qualitative methods

*Qualitative approaches to data analysis*

## **Module 3.2**

### Service Planning

#### **3.2.1 Counselling, Treating, Educating, Caring**

##### 3.2.1.1 Basic of care services

*Care services systems: principles and criteria*

*Objectives and functions of care services*

*Theory of counselling, treating, educating and caring*

##### 3.2.1.2 Basic of applied methodologies of care services

*Communication: interview technique*

*Provision of care services*

*Coordination, supervision and register*

#### **3.2.2 Project planning**

##### 3.2.2.1 Programming services

*Objectives, methods, timing, resources, expected results, impact*

*Client-oriented project planning*

*Involving clients as co-planner*

##### 3.2.2.2 Feasibility study approaches

*Context analysis*

*Demand and supply analysis*

*Product, service and location identify*

## **Module 3.3**

### Services Monitoring and Evaluation

#### **3.3.1 Monitoring Services**

##### 3.3.1.1 Monitoring and Reviewing job

*Feedback and validation*

*Approaches to monitoring*

##### 3.3.1.2 The "Reporting process"

*How to write effective reports*

*How to present effective reports*

#### **3.3.2 Evaluation methods**

##### 3.3.2.1 Evaluation theory and Techniques

*Evaluation concepts*

*Process evaluation and results evaluation*

*Economic evaluation*

##### 3.3.2.2 Evaluation as a communication tools

*Quality Management Systems*

*Evaluation as technique of quality management*

## Competence area 4

### Organising and Managing

*4 modules, 15 categories, 28 topics*

#### **Module 4.1 Human Resources Management**

##### *4.1.1 Human Resources Policies*

- 4.1.1.1 H.R. Approaches
- 4.1.1.2 Selection and recruitment

##### *4.1.2 Human Resources Settings*

- 4.1.2.1 Leadership and membership
- 4.1.2.2 Consultation
- 4.1.2.3 Group Dynamics
- 4.1.2.4 Team building and working group

##### *4.1.3 Human Resources Development*

- 4.1.3.1 Training for the Future
- 4.1.3.2 Mentoring and Coaching
- 4.1.3.3 Burn Out prevention

#### **Module 4.2 Financial and Legal Management**

##### *4.2.1 Planning and Control*

- 4.2.1.1 Basic of economics and finance
- 4.2.1.2 Management Control Systems
- 4.2.1.3 IT Tools for planning and control

##### *4.2.2 Employment Law*

- 4.2.2.1 National Scenarios
- 4.2.2.2 EU employment regulations

##### *4.2.3 Budgeting and accountancy*

- 4.2.3.1 Budgeting process
- 4.2.3.2 Balancing Process
- 4.2.3.3 The "Social Balance"
- 4.2.3.4 IT Tools for budgeting and accountancy

##### *4.2.4 Taxation*

- 4.2.4.1 Tax regimes for TS organisation
- 4.2.4.2 Tax regimes and legal Constitution

#### **Module 4.3 Organisational Structures**

##### *4.3.1 Resources Management*

- 4.3.1.1 Effectiveness and Efficiency
- 4.3.1.2 Resources Maintenance

##### *4.3.2 Structures and Dynamics*

- 4.3.2.1 Company Law and its impact
- 4.3.2.2 Designing effective organisations

## **Module 4.4 Organisational Strategies and Methods**

### ***4.4.1 Profit for non profit***

- 4.4.1.1 Basic of Business economics
- 4.4.1.2 Risk Management
- 4.4.1.3 Marketing
- 4.4.1.4 Outsourcing

### ***4.4.2 Change Management***

- 4.4.2.1 How to introduce changes?
- 4.4.2.2 Internal communication strategies for change

## **Module 4.1**

### Human Resources Management

#### **4.1.1 Human Resources Policies**

4.1.1.1 H.R. Approaches  
*Motivation Theories*  
*Basics of organisational Sciences*

4.1.1.2 Selection and recruitment  
*Selection Interview*  
*Volunteers and staff recruitment*  
*Recruitment policies inside TS*

#### **4.1.2 Human Resources Settings**

4.1.2.1 Leadership and membership  
*Basics of leadership*  
*Leadership development inside TS organisations*

4.1.2.2 Consultation  
*Theory and practice of consultative models*  
*Consultation methods and consensus building*

4.1.2.3 Group Dynamics  
*Basics of group theories*  
*Working groups*

#### **4.1.3 Human Resources Development**

4.1.3.1 Training for the Future  
*Competencies needs for TS development*  
*Human Resources development policies inside TS*  
*Peer learning*

4.1.3.2 Mentoring and Coaching  
*Applied strategies for one-to-one training*  
*Management and development of horal traditions*

4.1.3.3 Burn Out prevention  
*Burn out theories*  
*Stress Management*  
*Mobbing inside TS organisations*

## **Module 4.2**

### Financial and Legal Management

#### **4.2.1 Planning and Control**

4.2.1.1 Basics of economics and finance  
*Fundaments of micro & macro economics*  
*Applied economic analysis*

4.2.1.2 Management Control Systems  
*Basics of management control theories*

4.2.1.3 IT Tools for planning and control  
*Software applications for management control*  
*IT applications for TS development*

**4.2.2 Employment Law**

4.2.2.1 National Scenarios  
*Employment national laws*

4.2.2.2 EU employment regulations  
*European employment plan*  
*Future strategies*

**4.2.3 Budgeting and accountancy**

4.2.3.1 Budgeting process  
*Basics of accountancy*  
*Language of business*

4.2.3.2 Balancing Process  
*Measuring, reporting and using financial information*  
*Analysis and interpretation of financial reports*

4.2.3.3 The "Social Balance"  
*Social balance and stakeholders theory*  
*Mission balance*  
*Institutional settings and information responsibilities*  
*Corporate Social Responsibility*

4.2.3.4 IT Tools for budgeting and accountancy  
*Software applications for budgeting and accountancy*

**4.2.4 Taxation**

4.2.4.1 Tax regimes for TS organisation  
*National Tax regimes for TS organisations*  
*European role and perspective*

4.2.4.2 Tax regimes and legal Constitution  
*Benchmarking opportunities and problems of tax regimes*

## **Module 4.3**

### **Organisational Structures**

**4.3.1 Resources Management**

4.3.1.1 Effectiveness and Efficiency  
*Applying effectiveness and efficiency inside TS organisations*  
*Measurement theories and applications in TS organisations*

4.3.1.2 Resources Maintenance



*Resources management & logistic*

**4.3.2 Structures and Dynamics**

4.3.2.1 Company Law and its impact

*Benchmarking models*

*Company Laws opportunities and treats*

4.3.2.2 Designing effective organisations

*The organisation engineering process*

**Module 4.4**

**Organisational Strategies and Methods**

**4.4.1 Profit for non profit**

4.4.1.1 Basics of Business economics

*Global Political Economy*

*Concurrence and competitive advantage*

4.4.1.2 Risk Management

*Risk Takers theory*

*Decision making*

4.4.1.3 Marketing

*Fundaments of marketing*

*The Social marketing*

*Innovative approaches to marketing*

4.4.1.4 Outsourcing

*Core and support processes*

*The outsourcing policies*

**4.4.2 Change Management**

4.4.2.1 How to introduce changes?

*The organisational culture*

*Strategies & Change Agents*

*The cultural change approach*

4.4.2.2 Internal communication strategies for change

*Organisational communication principles*

*Meaning and potential of Rituals & Symbols*

## Competence area 5

### Integration and Development

*2 modules, 5 categories, 11 topics*

#### **Module 5.1 Integration Management**

##### *5.1.1 Systemic approaches to organisations*

5.1.1.1 System Theory and organisation

5.1.1.2 Managing integration

##### *5.1.2 Cultural and Gender specificity*

5.1.2.1 Intercultural processes inside organisations

5.1.2.2 Gender-related organisational issues

#### **Module 5.2 Institutional development and innovation**

##### *5.2.1 Institutional analysis and evaluation*

5.2.1.1 Inst. Analysis model

5.2.1.2 Strategies and Tools

5.2.1.3 Reporting and dissemination of Evaluation results

##### *5.2.2 Quality management*

5.2.2.1 Third System organisations and Quality policies

5.2.2.2 Quality Management

##### *5.2.3 Innovation*

5.2.3.1 Creativity and Lateral Thinking

5.2.3.2 Innovation and Change Management

## **Module 5.1**

### **Integration Management**

#### **5.1.1 Systemic approaches to organisations**

##### 5.1.1.1 System Theory and organisations

*A systemic approach to organisations*

*System thinking & Mental models*

##### 5.1.1.2 Managing integration

*Differentiation and interdependency*

*From scientific organisation to overlapping management*

#### **5.1.2 Cultural and Gender specificity**

##### 5.1.2.1 Intercultural processes inside organisations

*The experience of transnational corporations*

*Learning from differences*

##### 5.1.2.2 Gender-related organisational issues

*How far TS organisations diverge from the traditional ones?*

*TS policies and experiences*

## **Module 5.2**

### **Institutional development and innovation**

#### **5.2.2 Quality Policies and management**

##### 5.2.2.1 T.S. organisations and Quality policies

*Quality policies and approaches*

*The ISO approach*

*The Social Quality approach*

##### 5.2.2.2 Quality Management

*TS organisations facing Quality policies*

*Quality management inside TS organisations*

#### **5.2.3 Innovation**

##### 5.2.3.1 Creativity and Lateral Thinking

*The creative brain*

*TS as a laboratory*

*Creativity and social mission*

##### 5.2.3.2 Innovation and Change Management

*Nature of change*

*Toward a Fourth Sector?*