



HUMAN-CENTERED TRAINING DESIGN FOR TRAINERS



Erasmus+

ABOUT

SELC Human-Centered Training Design was developed as an open educational resource within the framework of the Social Entrepreneurship in Local Communities project that supports entrepreneurs with innovative ideas who want to develop businesses with social impact in their communities. The project is co-funded by the European Commission through Erasmus+ Programme and the Romanian National Agency – ANPCDEFP.

AUTHORS

The training teams of SELC partners:

Fundația Danis (Romania)

Diesis (Belgium)

SYNTHESIS Center for Research and Education (Cyprus)



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Introduction to the SELC curriculum for trainers

SELC Human-Centered Training Design was developed as an open educational resource for trainers/facilitators of nonprofit organizations or other types of organizations interested in developing, supporting, or promoting the creation of incubators for social businesses and social entrepreneurs, or social business incubation models. The curriculum is created within the [Social Entrepreneurship in Local Communities \(SELC\) project](#). It is designed to support the trainers/facilitators in learning new knowledge and skills to work with adults who want to become entrepreneurs and start businesses with strong social impact.

The Social Entrepreneurship in Local Communities project aims to increase motivation and improve the guidance of adults with entrepreneurial initiatives for starting social businesses and enhancing social cohesion in local communities. The project began in 2019 and brought together six organizations from Cyprus, Italy, Belgium, and Romania to develop innovative learning resources and supporting tools for social entrepreneurs and other organizations from Europe interested in starting incubation programs for social businesses.

In 2019-2021, the SELC partners worked to achieve the following goals:

- Develop an integrated innovative social incubation business model for entrepreneurs in order to start businesses with strong social impact in local communities.
- Provide guidance and training for entrepreneurs and staff involved in entrepreneurship programs, who will improve their skills by learning all steps and tools of the social business incubation models matching the community realities.
- Create an innovative, alternative funding instrument for social entrepreneurs and businesses through a crowdfunding platform for social enterprises.
- Increase the visibility of social entrepreneurship in the partner countries as an innovative solution for community well-being.

The SELC project is led by [Fundatia Civitas pentru Societatea Civilă](#) (Romania) and implemented in partnership with [Centrul pentru Legislație Nonprofit](#) (Romania), [Fundatia Danis](#) (Romania), [MateraHub](#) (Italy), [Diesis](#) (Belgium) and [SYNTHESIS](#) (Cyprus). The project

is co-funded by the European Commission through Erasmus+ Programme and the [Romanian National Agency – ANPCDEFP](#). Read more about the project here: <http://wegrowideas.eu/>.

How to use the SELC Human-Centered Training Design

The **SELC Human-Centered Training Design** was developed to support you, the facilitator of an NGO or other supporting organization for social entrepreneurs, to train your staff - future or current trainers/facilitators - in working with adults interested in opening social businesses.

The curriculum includes relevant theory and workshop plans on topics that will help your organization's trainers/facilitators to:

- Develop relevant knowledge and skills about social entrepreneurship and social business incubation models developed within the SELC project;
- Gain knowledge and experience in starting a social business incubator program by learning the necessary steps of creating such a program and explore successful examples of such incubators from Europe;
- Acquire information and hands-on experience in using the human-centered design approach in supporting adults from their communities to explore, define, create, prototype, and implement social business initiatives.

The curriculum is structured on three key chapters, respectively:

1. Social entrepreneurship and social business incubation models in Cyprus, Italy, and Romania

The chapter helps the facilitators transfer the key knowledge from SELC social business incubation models in Cyprus, Italy, and Romania to future or current trainers and other staff from organizations interested in developing, supporting, or promoting the development of social business incubators.

2. SELC Integrated Model of Social Business Incubation

The chapter supports the facilitators to train people/organizations on how to design social business incubator programs while using the research-based knowledge and case studies gathered within the SELC project.

3. Using human-centered design method in facilitating training courses for social entrepreneurs

The chapter provides essential information on human-centered design and how this supports social innovation. Then, it helps facilitators to train the organization's trainers or other staff on how to use human-centered design tools to support social entrepreneurs to explore, define, ideate, and prototype their social initiatives.

Each of these chapters includes workshop plans to develop specific knowledge and skills as described above. Then, every workshop plan provides the following information that supports you, the facilitator, in preparing and organizing the learning experiences:

Learning objectives

These objectives tell you what the trainees are supposed to know and what they should be able to do after they participate in the workshop. You could use these objectives to promote the workshop to your participants, tell them what the workshop is about, and introduce the workshop's expectations at the beginning of the training.

Materials needed

This information helps you to prepare the right and enough materials for the workshop. It is like a checklist you will use before starting the workshop. Prepare these materials in time; we recommend doing it at the latest the day before the workshop. Also, we added some additional resources you might consider if you want to deliver the workshop online.

Estimated time

This section helps you plan the workshop in terms of time, inform participants about the length of the training, and reserve the training room for a suitable duration.

Workshop steps

These steps tell you exactly what to do during the workshop: how to start it, how to instruct participants on specific work, how to split the group into teams, how to follow up and reflect on activities.

The **SELC Human-Centered Training Design** was developed to be used by experienced facilitators. However, you need little previous experience in social entrepreneurship or human-centered design method. If you have more experience in these fields, it will help, for sure, in providing outstanding learning activities! Check [the other SELC resources](#) we have developed for organizations interested in developing, supporting, or promoting the creation of incubators for social businesses and social entrepreneurs, and don't hesitate to contact the project team for any inquiries, sharings, or suggestions.

Chapter 1. Social entrepreneurship and business incubation models in Cyprus, Italy & Romania

The aim of the first chapter, Social entrepreneurship, and business incubation models in Cyprus, Italy, and Romania, is to support the facilitators to train current and future trainers/organizations' staff/employees by transmitting knowledge on the topic of social enterprises and social entrepreneurship, and social business incubation models, focusing on the models that were developed within the SELC project. This goal will be achieved through the following workshop:

- **Understanding Social Business Incubation Models**

This workshop will lay the basis for social entrepreneurship and social business in partner countries.

To get a more thorough understanding of the chapter, we recommend reading the materials produced in the framework of the SELC project, materials that include national reports, case studies, and policy recommendations (SELC Cyprus Model of Social Incubation for Entrepreneurs, SELC Italy Model of Social Incubation for Entrepreneurs, respectively SELC Romania Model of Social Incubation for Entrepreneurs).

Workshop 1: Understanding Social Business Incubation Models

Not all partner countries and participants have the same level of understanding with social entrepreneurship/business, as in some countries social businesses and social incubators are well developed, while in others they may be under-developed or non-existent. Therefore, this workshop aims to offer a learning experience on social entrepreneurship/business and the Social Business Incubation Models.

Recommended readings for trainers:

- SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs;

- SELC Cyprus Model of Social Incubation for Entrepreneurs, SELC Italy Model of Social Incubation for Entrepreneurs, respectively SELC Romania Model of Social Incubation for Entrepreneurs;
- Social enterprises, EU definition: https://ec.europa.eu/growth/sectors/social-economy/enterprises_en;
- The EC's Social Business Initiative (brochure): <https://ec.europa.eu/docsroom/documents/14583/attachments/3/translations/en/renditions/pdf>;
- Final report: The Impact of the European Commission's Social Business Initiative (SBI) and its follow-up actions: <https://op.europa.eu/en/publication-detail/-/publication/8731e1ac-6697-11eb-aeb5-01aa75ed71a1/language-en>.

Learning objectives:

- To understand the concept of social businesses/enterprises.
- To understand and learn about social business incubation models that the SELC project developed.

Materials needed:

Physical meeting: flipchart, paper, marker, pens or pencils, access to the Internet (computers, tablets, own mobile devices).

Online meeting: online meeting platform with breakout rooms, such as Zoom or Microsoft Teams.

Estimated time: 2-2.5 hours

Workshop steps:

1. Introduce the participants to the learning objectives of the workshop.
2. Show 4-5 known company and organization logos to the participants (Example: Starbucks, Shell, Apple, H&M, ZARA) and ask if they can name the organizations and describe what they do. You may use Template 1 – Business Logos, from Annexes. The participants should be able to recognize them. To start the discussion, ask the participants:
 - *What type of companies are these?*
 - *What type of businesses do they do?*
 - *How do they make money?*

The logos represent businesses that are involved in the trade of goods, services or both, to customers. The aim is to have a profit.

3. Show 4-5 known social enterprises/businesses logos to the participants (For example, Ashoka, MetoWe, Grameen Bank) and ask if they can name the organizations and describe what they do. You may use Template 2 – Social Business Logos, from Annexes. The participants may or may not be able to recognize them. To start the discussion, ask the participants:

- *What type of companies are these?*
- *What type of businesses do they do?*
- *How do they make money?*

The logos represent social enterprise/businesses. The EU Operational Definition of Social Enterprise/business is: “A social enterprise is an operator in the social economy whose main objective is to have a social impact rather than make a profit for their owners or shareholders. It operates by providing goods and services for the market in an entrepreneurial and innovative fashion and uses its profits primarily to achieve social objectives. It is managed in an open and responsible manner and, in particular, involves employees, consumers, and stakeholders affected by its commercial activities.”

4. After the discussion, explain to the participants the concept of social business/entrepreneurship.
5. Ask the participants if they know what social business incubation is.
6. Ask them to form teams of 2-3 persons each, and research and write on a piece of paper one specific example of a Social Business Incubator in their country (Italy, Romania, Cyprus) and one specific example of an international/European Social Business Incubator. For both cases, they write a case study about the Social Business Incubator’s activities and characteristics. They can use the internet freely.
7. Ask the participants to present their findings in the plenary.
8. Ask the participants again to form the same teams of 2-3 persons each, and conduct research using the IO2 report. Then, write on a piece of paper the following information about their countries:
 - *What is the definition of social enterprises/businesses?*
 - *What is the public policy and/or legal framework?*
 - *What are the funds offered to social businesses?*
 - *Are there crowdfunding opportunities for social businesses?*

- *Are there any social incubation methods in your country? If yes, please describe them briefly.*
- *What are the types of social businesses that can be incubated?*
- *What is the geographical coverage of the incubators?*
- *What are the challenges in the incubation programmes?*

Ask them not to exceed one-two A4 pages in total.

9. Ask the participants to present their findings in the plenary.

10. After the presentations, ask the participants:

- *Based on the research you have carried out and the presentations in the plenary, can you group the social business incubators based on the targeted impact they intend to have?*

Guide the participants towards shaping the following groups:

- *Impact accelerators.*
- *Social venture co-working spaces.*
- *Social venture academies.*
- *Impact angel networks.*
- *Social innovation prizes.*

11. Debrief the participants with the results of the workshop, definitions, and ask them:

- Do they understand the concept of social businesses/enterprises?
- Do they understand the concept of social business incubators?
- Can they give a simple definition of social business incubators in their own words?

12. Finally, explain to the participants the social business incubation models and their importance. Debrief the workshop by emphasizing the learning outcomes of the activities.

Chapter 2. The SELC Integrated Model of Social Business Incubation

The general objective of this chapter, the SELC Integrated Model of Social Business Incubation, is to support NGOs, associations and other stakeholders and their staff and employees to learn the essential steps in developing a social business incubator and a model of social business incubation.

To reach this goal, the chapter presents five examples of workshops that facilitators/trainers could use in their work with individuals interested in organizing social business incubators. The first two workshops are dedicated to understanding which are the existing types of incubators, including common elements and differences, as well as learning about the different incubation stages: pre-incubation, incubation and post-incubation.

The other three workshops are dedicated to the phases of the creation of a social business model incubator. Indeed, the three workshops will focus on:

- Feasibility study for an incubator and stakeholder analysis (with a specific focus on social business);
- Identification of the right target market for an incubator dedicated to social businesses;
- Design the right services of an incubator.

To fully understand this chapter and be prepared for delivering the five workshops, we recommend the reading of the SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs (chapters 4, 5, and 6).

Workshop 1: Types of incubators and common elements and differences between incubators

Some participants may or may not know the different types of incubators that exist to support social businesses. This workshop aims to offer a learning experience on the types of incubators and common elements and differences between incubators.

Recommended readings for trainers:

- SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs

Learning Objectives:

- To know and understand the types of incubators that exist.
- To know and understand the similarities and differences between existing incubators.

Materials needed:

Physical meeting: flipchart or board, marker, paper, pens or pencils, dot stickers.

Online meeting: online meeting platform with breakout rooms, such as Zoom or Microsoft Teams, and online interactive whiteboard, such as Padlet or Miro, etc.

Estimated time: 1.5-2 hours

Workshop steps:

1. Introduce the participants to the learning objectives of the workshop.
2. Ask the participants:
 - *On a scale from 1 to 10, how knowledgeable are you about the existent types of incubators?*

1

5

10

New to this concept.

I run/work in my own
incubator.

-
- ✓ Have them write their score on a piece of paper.

3. Break the participants into teams of 2-3 persons each. Each team must answer the following questions, which will be written on the flipchart:
 - *Can you describe any social innovation ideas that you may have for the rest of the group?*
 - *What do you need to have your idea started?*

Participants will share their own ideas of social innovation, which will make the discussion more interesting. The second question aims to make the participants think about what they need in terms of facilities, objects, etc., to get their business going.

- ✓ Have the participants write their suggestions on a piece of paper.

4. Ask the participants to present their findings in the plenary.

The participants will most probably propose the following: working space, internet connection, funding, guidance, etc.

Draw on the flip chart two columns: In the first column, ask the participants to write the suggestions they presented. The second will be left blank for now.

5. When all of them finish their presentations, give each participant three dot stickers and ask them to vote on the three most necessary suggestions to get a social innovation idea going, by placing the dot stickers in the second column, next to their choice (not in the case of online training).
6. Present the most popular choices in the plenary.
7. Explain to the participants and write on the board or flipchart that there are different types of incubators, as follows:
 - **Physical hubs and co-working spaces** (open space with shared physical facilities and often a social element such as a coffee shop to encourage networking)
 - **Virtual incubators** (online shared working space with access to advice and broker links);
 - **Innovation parks and city clusters** (geographical co-location with shared facilities);
 - **University incubators** (incubating spin-outs from universities, with co-working space, shared facilities, and access to advice and broker links supported by the universities' own resources and networks);
 - **Corporate incubators** (incubators set up or sponsored by corporations with coworking space and shared facilities to generate spin-outs);
 - **Venture incubators** (incubators set up or sponsored by venture capital investors with co-working space, shared facilities, and access to finance to generate a pipeline of investible propositions);
 - **Mentoring and business development programmes** (often competitive and cohort-based programmes of mentoring, coaching, and business planning);
 - **Accelerator programmes** (competitive and structured programme of activities and stages to support a cohort of startups)
8. Now, in plenary, ask the participants:
 - *What do you think are the similarities and differences of these types of incubators?*

- ✓ Write the suggestions made by the participants on the board or flipchart.

Similarities (common elements):

- Main function: to facilitate business start-ups.
- Mode of operation: sharing of physical and/or virtual working space to reduce startup costs and promote interaction and networking among business start-ups; in many cases, also coaching and mentoring services.

Differences:

- The nature of the entity that is responsible for them (universities, local public authorities, private companies, business associations, etc.);
- The economic sector(s) where the business start-ups fit in (biotechnology, creative industries, social enterprises, etc.).

9. Ask the participants:

- *On a scale from 1 to 10, how knowledgeable are you now, after the workshop, about the existent types of incubators?*

1

5

10

Totally new to this
concept.

I run/work in my own
incubator.

-
- ✓ Have them write their score on a piece of paper.

10. Ask the participants if their score is the same as before or if it has changed in any way.

11. Debrief the participants with the results of the workshop.

Workshop 2: Stages of incubation

Some participants may or may not know how incubators operate and what they can offer to social businesses. This workshop aims to offer a learning experience on the stages of incubation, how the different stages of incubation take place, and what services can be offered in each phase.

Recommended readings for trainers:

- SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs;
- Templates 3, 4, and 5 from the Annexes.

Learning Objectives:

- To know and understand the stages of incubation.
- To get a hands-on experience on how the different stages of incubation take place.

Materials needed:

Physical meeting: flipchart or board, markers, paper, pens or pencils, a watch.

Online meeting: online meeting platform with breakout rooms, such as Zoom and Microsoft Teams, online interactive whiteboard, such as Padlet or Miro, a watch.

Estimated time: 2-3 hours

Workshop steps:

1. Introduce the participants to the learning objectives of the workshop.
2. Ask each of the participants to form groups of 2-3 persons in each group (Participants' Teams) and write down a social business idea on a piece of paper.
3. Create three signs that will be used for three incubation stations, in three parts of the room (You may use Template 3 – Incubation signs, from the Annexes). In the case of an online meeting, use the breakout rooms as stations.
 - Pre-incubation station;
 - Incubation station;
 - Post-incubation station.
4. Ask 3-6 of the participants (according to the total number of participants) to sit in one of the three incubation stations (1-2 persons in each station). In the case of an online meeting, 1-2 persons should stay in each breakout room.
5. Each representative in each station will play the role of an **Incubator**.

PRE-INCUBATION STATION

6. The Participants' Teams will present their ideas to the Incubators.
7. The Incubator (the person(s) in each station) will follow the step-by-step process to assess the idea. The Incubator will go through the step-by-step process together with the participants/teams (refer to Template 4 – Incubation stages, from the Annexes). The Incubator should assess the degree of innovation and also the social impact of the business idea. If the idea is innovative and with a relevant social impact, then

further support should be provided. If it doesn't, the incubator will revert the idea to other business support organizations not exclusively devoted to social innovation or will advise the entrepreneur to address other types of incubators (business incubators that do not address the social part of the impact of the business).

8. If the Incubator decides that the idea is innovative and has a social impact, then the Participants' Team can move to the next Incubation Station (Incubation Stage).

INCUBATION STATION

In the incubation station, the Incubator will have the role of preparing the teams that have an innovative idea with social impact to address the challenges that may arise during their journey of incubation.

9. The Participants' Teams present their pitch to the Incubators (Incubation station/stage).
10. The Incubator (the person(s) in each station) will follow the step-by-step process (refer to the Template 4 – Incubation stages, from the Annexes) to support the idea by undertaking activities needed for a business plan and carry out services delivered by Incubator (according to the business).

In this station/stage, the teams, together with the Incubator, will decide on the activities needed to carry out their potential business plan and the services needed to be delivered by the Incubator (for example, training courses, fundraising, co-working spaces, etc.).

11. Ask the participants to write down on a flipchart or a piece of paper the needed activities for incubation and the timeframe needed.

POST-INCUBATION STATION

Post-incubation relates to the activities to be carried out when the company has reached the maturity phase. It is the time when the company will leave the incubator. Various services might still be needed by the social business, for example, to increment its sales or improve its production processes, such as internationalization services or innovation introduction through scouting and detection activities.

12. The Participants' Teams present their pitch to the Incubators (Post-Incubation station/stage) and what has been done up to this point.

13. Together, the Participants' Team and the Incubators decide what services are still needed in the post-incubation phase, according to the nature of the social business (refer to the Template 4 – Incubation stages, from the Annexes).
 14. Ask the participants to write down on a flipchart or a piece of paper the needed services for post-incubation and the timeframe required.
 15. Bring the participants back to the plenary.
 16. Distribute to the participants the tables (Template 5 - Incubation stages - tables, from the Annexes) of the incubation stages.
 17. Ask the participants to reflect on the workshop. Debrief the participants with the results of the workshop.
-

Workshop 3: Feasibility study for an incubator & stakeholder analysis

This workshop will allow trainers to teach trainees how to develop a feasibility study for an incubator and a stakeholder analysis. Moreover, there will be a specific focus on social business - what is relevant for an incubator when it wants to attract social entrepreneurs and social businesses.

Recommended readings for the trainers:

In order to be able to develop this workshop, trainers should have read and assimilated the content of the SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs, in particular, Chapter 6 - Guide and toolkit for social business incubation for entrepreneurs, with reference to points 6.1 Objectives of the integrated guide and toolkit of social business incubation for entrepreneurs, 6.2.1 Creating the feasibility study, and 6.2.3 How to assess when an incubator is not the appropriate solution. Indeed, trainers need to have knowledge on:

- What is a stakeholder working group;
- Which are the components of a feasibility study;
- How to assess if a social incubator is the right solution.

Learning objectives:

- Understand the importance of putting together the right team to plan an incubator, who should be involved in such a team, and what their initial tasks should be.
- Know what is involved in a feasibility study, how long it takes to complete, who should complete it, and how it looks like.
- Be able to interpret the results of the feasibility study to arrive at a 'Go' or 'No-Go' decision on whether or not to proceed with the establishment of an incubator.

Materials needed:

Physical meeting: flipchart paper, markers, sticky notes.

Online meeting: an online meeting platform with breakout rooms, such as Zoom or Microsoft Teams. Plus, we also suggest the creation of a Miro or Padlet board divided into the following sections:

- One dedicated to the stakeholder working group (identification of the stakeholders, the tasks, and how to identify the key incubator concept and trends);
- One dedicated to the feasibility study;
- One on how to assess when an incubator is not the appropriate solution (with columns for "Go" and "No-Go").

Estimated time: approx. 2.5 hours

Workshop steps:

1. Introduction (10-15 min.): Presentation of the trainer and why they have the expertise to carry this workshop. Ask the participants to present themselves and share with the others why they are interested in the topic of the workshop. Introduce to the participants the learning objectives.
2. Stakeholder working groups (45 min.)
 - Explain to the participants what a stakeholder working group is.
 - Let the participants identify who is part of the stakeholder working group.
 - Invite the participants to identify the tasks of the stakeholder working group.
 - Help the participants understand which tools will allow the SWG to identify the key incubators concepts and trends.

3. Feasibility study (45 min.)

- Ask the participants, divided into small groups, which are the aim and the topics of the feasibility study. Let each group present the main findings. Then give the participants the exact definition of a feasibility study and its components, and explain to them which is the average length and the need (or not) to have a consultant to carry it out.
- Let them understand which are the five main items that a feasibility study needs to have.
- Present to the participants an example of an index and content of a feasibility study.
- Tell the participants that an ad hoc workshop will be dedicated to the identification of the right market for a social business incubator.

4. Is an incubator the appropriate solution? (45 min.)

- Present to the participants the four key success factors (a solid market; a sound financial base; strong community support; and true champions), which provide a useful basis for 'Go' / 'No- Go' decision making. Invite the participants to discuss among them which questions are important to be asked in each category.
- Finally, explain that if a 'Go' response cannot be clearly and unanimously provided by the stakeholder working group in each of these fundamental areas, then only two possible conclusions can emerge: a) further research is needed, or b) the incubation is not a good solution. This can be explained with two examples: one of a successful feasibility study and the decision to 'Go' with the creation of the incubator and the other with an unsuccessful case. The trainer debriefs the learning outcomes of the workshop.

Workshop 4: Identification of the right target market for an incubator dedicated to social businesses

This workshop should guide the participant through the identification of the right target market for an incubator dedicated to social businesses. This should also allow sharing with the trainers a tool to evaluate the social businesses that could join the incubator (with a

specific focus on social business - what is relevant for an incubator when it wants to attract social entrepreneurs and social businesses).

Recommended readings for the trainers:

In order to be able to develop this workshop, trainers should have read and assimilated the content of the SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs, in particular, Chapter 6 - Guide and toolkit for social business incubation for entrepreneurs, with reference to points 6.2.2. Understanding the Market Need (including Stakeholder Analysis) and to 6.3.3. The Social Incubator Marketing Plan. Thus, trainers need to have knowledge on:

- How to understand the Market Need;
- What is and how to carry a needs analysis;
- What a social incubator marketing plan is, and how to develop it.

Learning objectives:

Learn about what market research should be undertaken to create an incubator dedicated to social businesses.

Materials needed:

Physical meeting: flipchart paper, markers or pens, sticky notes.

Online meeting: an online meeting platform with breakout rooms, such as Zoom or Microsoft Teams; we also suggest the creation of a Miro or Padlet board and of an online poll (e.g., Mentimeter).

Estimated time: 3 hours

Workshop steps:

1. Introduction (10-15 min.): Presentation of the trainer and why it has the expertise to carry this workshop. Ask the participants to present themselves and share with the others why they are interested in the topic of the workshop. Introduce to the participants the learning objectives.

2. Introduction to market research (30 min.)

- Explain to participants what market research is (Market research is a process of finding and analyzing information for the purpose of completing a feasibility study or business plan) and why analysis of local market conditions and prospective deal flow is arguably the most important element of the feasibility study.
- Prepare an online pool for the participants, asking them which are the entities of the target market. Look at the results together, how many correct and mistaken answers were there and why?
- Explain to participants the importance of understanding which segments or niches of the market are being targeted.

3. Market research (30 min.)

- Present to the participants the five key tasks of the market research: 1) identify the information that is needed, 2) profile potential sources for that information, 3) outline an approach to finding that information, 4) gather the information, and finally, 5) organize the information in a format that will provide useful conclusions on the potential market.
- Explain that market information can be categorized as secondary and primary market data, and explain the difference between the two but also their complementarity.
- Ask the participants which could be the sources of secondary market data.

4. Needs analysis (45 min.)

- Then, explain that primary market data is generated through a comprehensive needs analysis or demand survey, which aims to further quantify the size of the potential market, its characteristics, and needs, now and in the future.
- Explain which are the issues that the needs analysis addresses. Present it with a table:
Lack of knowledge and understanding, New industries and new market for business incubation, Insufficient demand, Research expertise required.
- Then, present the three main elements of the needs analysis (survey, consultations, focus groups). Let the participants reflect on each tool: What is the difference among them? Which are the target groups? On an interactive board or flipchart, three sections can be prepared, one for each tool, and post-its with their characteristics should be placed under each tool by participants. The results should be then checked together.

5. The Social Incubator Marketing Plan (1 hour)

- After the analysis of the needs, we can ask participants to build their marketing plan. The trainer should start by asking which are the objectives of the marketing plan: a) identify the target of the business; b) illustrate the needs and details on how to attract target groups and c) how the incubator will reach its target market.
- The next step is for trainees to understand how to establish marketing goals and strategies. The trainer will explain what the marketing mix formula is, and via one good practice among the 20 collected, it will showcase how the incubator developed its marketing strategy (e.g., Impact Hub or Coopcity).
- Divided into three groups (if online, via the breakout rooms option), each group should set up a small marketing plan (identifying the target audience, define the product/service offered, choose the dissemination channels and develop main message/slogan) of three of the incubators identified with the 20 best practices in the SELC project. (for instance, you could use Coopcity, Make a Cube, and HUB ESS).
- Finally, the trainer will then explain the steps on how to set up prices and debrief the workshop's learning outcomes.

Workshop 5: Design the right services of an incubator

This workshop should guide the participant wishing to increase their understanding and know-how of the business incubator process. After a brief introduction, the workshop consists of 3 steps ranging from basic introductory topics designed for planning a social incubator, to specialized topics such as social business incubation services. Therefore, this workshop aims to offer practical examples and case studies of successful incubators in Europe, showing the services that social business incubation models can provide.

Recommended readings for the trainers:

In order to be able to develop this workshop, trainers should have read and assimilated the content of the SELC Integrated Guide and Toolkit of Social Business Incubation for Entrepreneurs, Chapter 6 - Guide and toolkit for social business incubation for entrepreneurs, with reference to points of the subchapter 6.3 Planning a social incubator, in particular 6.3.1. Vision & Mission Statements and Strategies for an Incubator, 6.3.2 Designing the Business

Plan for the social business incubator, 6.3.4 Funding the incubation activities, and 6.3.5 Human resource requirements. Therefore, the trainers need to have knowledge on:

- The vision and mission of a social business incubator;
- What is a business plan and how to design one for a social business incubator;
- How to fund incubation activities;
- The characteristics of the manager of a social incubator, and of the staff.

The trainers should also have read and assimilated the 20 case studies at the European level on best entrepreneurial development stories developed by Diesis Network and CLNR, within the SELC project framework (check: <http://wegrowideas.eu/>). These studies and the interviews related to these provide many examples of existing social incubators and hubs in Europe, as well as stories of social business created thanks to the incubation process.

Learning objectives:

- Learn how to plan a social incubator (from the vision and mission to the strategic and business plan).
- Learn the specific duties of the Social Business Incubator manager.
- Explore what services a Social Business Incubator should have.

Materials needed:

Physical meeting: flipchart paper, markers or pens, sticky notes.

Online meeting: an online meeting platform with breakout rooms, such as Zoom or Microsoft Teams; an interactive online board (e.g., Miro, Padlet); Google sheets, Google Jamboard.

Estimated time: approx. 3.5 hours

Workshop steps:

1. Introduction (15 min.): Ask the participants to present themselves and share with the others why they are interested in the topic of the workshop. Introduce to the participants the learning objectives, the program of the workshop and the utilized tools, especially if the workshop will be done online. Also, please check and use the .ppt presentation from the Annexes - *Design the right services of an incubator*.

2. Planning a social Incubator (1 hour and 30 min.)

Part 1: Mission and vision

- Give an overview to the participants concerning the main elements of the strategic framework to develop a social incubator: what are the vision and the mission statements?
- Explain to participants that a typical mission statement contains three components: 1) The overall purpose of your incubator, 2) What your incubator does, and 3) What are the values your business holds and aims to convey to clients and other stakeholders.
- Ask the participants to work in groups (each group should be composed of three persons) and to think about a possible mission and vision of their social incubator. To stimulate the participants, you can share with them some inspirational questions (see .ppt, slides 03 and 04).
 - If the workshop will be done in presence you can use a flipchart and post-its to collect the inputs from the participants;
 - If the workshop will be online, you will use the breakout room and online board.

Part 2: Business plan and strategic plan

- The second part of the first hour will be focused on the business and the strategy plan. First, the difference between the two should be clarified, then should be pointed out the key points of each of them.
- Then, you will present the business model and its main components. From the beginning, the needs that the business plan addresses should be clear. In order to this, you can show a concrete example of a business model or a short video (e.g., <https://www.youtube.com/watch?v=n6ecdYd8T6o>; <https://www.youtube.com/watch?v=AMUJ48MDtG8>).
- After this, you will give to all the participants a contents index about the business plan and explain to them the main sections included (executive summary, vision and mission, SWOT analysis, strategic objectives, business model, marketing plan, management and operations, financial management and planning, a strategic development plan).
- Ask the participants to work in the same group and starting from the mission and vision developed before, to write down the strategic objectives of the business plan and other main points (see the .ppt, slide 05).

Part 3: Funding the incubation activities

- Let the participants identify the possible funding sources and provide some existing examples at the national level. A dedicated part of the online board/flipchart can be dedicated to brainstorming on this topic.
3. The manager of a social incubator (30 min.)
- After a break, introduce to the participants the figure of the social incubator. Ask the participants in a brainstorming session to write down (on post-its, if it's a face-to-face meeting or on Miro board online) what they think are the main duties of the manager of the social incubators.
 - Discuss the results and present the main tasks of the manager such as
 - programming and operational responsibilities;
 - human resources management: the importance of setting up the right staff.
 - Discuss the requirements of the social business incubator manager and which are the areas where the candidate should provide a good level of service (administration, management of physical environment, quality business development marketing and PR, strategic planning, reporting, monitoring, and evaluation tasks).
4. The right services of your social incubator (1 hour)
- In the first part of this step, present to the participants three case studies of the social incubator from the 20 case studies collected within the SELC project. Focus your presentation highlighting the services and financial tools provided as well as their incubation method. Share with the participants the ppt presentation of the three case studies analyses.
 - Give a moment to the participants for the questions and answers.
 - Ask the participants to work in the same group and starting from the case studies presented to develop for their social incubator at least the description of:
 - One service proposed;
 - One financial tool;
 - The possible incubation model.
 - Conclusion: At the end of the workshop one representative of each group will present their Social Business Incubator and its characteristics developed during the workshop.

Additional resources to check before organizing your workshops:

- Y- SEH kit for start-up and management of social enterprises:
<http://www.diesis.coop/the-y-seh-kit-for-start-up-and-management-of-social-enterprises/>
- Youth Social Entrepreneur Competences Profile: <http://www.diesis.coop/youth-social-entrepreneur-competences-profile/>
- Y-SEH platform: <https://yseh.eu/>
- EU3 leader project: <http://www.diesis.coop/project/eu3leader-2016-2019/>
- Training courses available on the Promyse platform: <https://e-learning.promyse.eu/courses/>

Chapter 3. Human-centered design for social innovation

What you should know about human-centered design to support social entrepreneurs and promote social innovation

WHY use human-centered design for social innovation?

Social entrepreneurs tackle major social, cultural, and environmental problems in our communities through innovative solutions. They are motivated to help others, address pressing needs, and thus solve problems. We believe that as a facilitator or trainer, your role is to support the social entrepreneurs in their endeavor of generating social innovation and solving community and societal problems. One way of doing this is to introduce them to processes, methods, techniques, and tools they can use in connecting better with their communities, the people they want to support, and relevant stakeholders, and in generating their innovative solutions.

HOW human-centered design can help social entrepreneurs to generate innovation?

Our proposal to support social innovation and social entrepreneurs in the community is the intensive use of the design thinking process. Thus, through this chapter, we want to equip facilitators and trainers with the necessary knowledge and tools to introduce design thinking to people willing to generate social innovation in their communities.

Design thinking is a problem-solving process used mainly to generate innovative services and products. It is an extremely human-oriented method that helps people unblock themselves from the self-imposed constraints they work within, challenge their assumptions, redefine problems, and identify alternative strategies that might not be instantly obvious. It focuses on solving problems, but what makes this process more remarkable is the focus on the “users”, on those for whom one wants to re-design experiences as users, audiences, customers, clients, beneficiaries, etc. For this reason, the design thinking process is also known as human-centered design.

How does human-centered design support social innovation? There are three reasons why the process is considered essential in generating innovative solutions to societal challenges. First, human-centered design is a problem-solving process, thus it can be easily employed by social entrepreneurs in analyzing the problem and the needs of the people they want to help, generate ideas, prototype alternative solutions, test the best ones and implement them for solving social problems. Second, the power of the process for bringing social innovation also relies on the deep connection with the users during the process - “by working closely with the clients and consumers, design thinking allows high-impact solutions to *bubble up from below rather than being imposed from the top*” (Brown & Wyatt, 2010, p. 32). Finally, when such a process focuses so much on the users (clients, customers, beneficiaries), it forces the social entrepreneurs to reach all the local resources, stakeholders and make them “uncover local solutions” (Brown & Wyatt, 2010, p. 32) coming from local expertise.

WHAT is human-centered design?

Before moving into concrete activities, methods, techniques, and tools you could use with the social entrepreneurs supporting them in generating innovative solutions to social challenges, here is a short introduction to design thinking and to how this process is understood and structured for social innovation.

The design thinking process includes five steps: empathize, define, ideate, prototype, test. Let's see them one by one and understand how a social entrepreneur may use them:

1. The main objective of the *empathize step* is to discover the needs of the users - entrepreneurs' clients/customers/beneficiaries. To really empathize, it is not enough to ask people: *What is your need? What do you want to hear? What will make you act or care?* Sometimes they do not know, or they cannot express it in the best way.

There is no more efficient way for social entrepreneurs to learn about the importance of listening to others - their clients and relevant stakeholders, collect information, and decipher the meaning behind what people are saying, doing, thinking, or feeling. There are specific methods used for empathy:

- Search for insights into the people's stories about their experience that you want to understand better;
- Observe people, go where they live, work or play; observe what they do or do not do, what they say or do not say;
- Finally, understand people at the following three levels: functional (try out what the people regularly experience), cognitive (understand what makes sense to the people), and emotional (understand what people feel).

For "listening" to users, social entrepreneurs may use observation, video ethnography, interviews, group discussions, visual thinking (example: asking people to draw what the experience means to them), role-playing (ask people to perform a short play on what the experience means to them), storytelling (ask people to tell stories about their experience - the most successful stories, the worst stories), etc.

2. Once all the data is collected, and the users are really understood, social entrepreneurs must *define* the users' needs. This means to unpack and synthesize the empathy findings into compelling needs and insights and scope a specific and meaningful challenge for their project. Their goal is to come up with an actionable problem statement, a challenge that will bring specific focus to the idea generation process. In other words, the entrepreneurs will need to select the direction from which they will address a particular problem they identified while adding to this perspective any valuable insight acquired through the empathize step, and which will help them ideate for their social business/social project.
3. In the *ideate* step, the aim is to generate radical design alternatives to the users' experience. The social entrepreneurs will need to generate a large number of ideas for solving the social problem they want to solve, and these ideas should be as diverse as possible. The ideation process happens through complex or simple brainstorming or visual thinking techniques.
4. To *prototype* means to "think with hands," and any prototype should be cheap, fast, and rough. A prototype can be anything that takes a physical form. It might be a wall of post-it notes with ideas about the social business, a role-playing activity, a place, an object, an interface, acting out, a user journey, etc. When prototyping, the social

entrepreneurs need to go back to their users and get their feedback, observe and understand how they use the prototype, and explore, test, and get inspiration.

5. The final step - *test* - is social entrepreneurs' chance to get feedback on the best solutions, ideas they found to the users' needs related to their social business. And they will use this feedback to refine the solution and continue learning about their users. The testing should be done with a "low-resolution" component of the social project/social business that the users can pilot/try out. Then, social entrepreneurs go back to the process and create the final service, product, space, etc. they want to deliver.

Taking this process in the social innovation realm, Tim Brown and Jocelyn Wyatt (2010) talks about three spaces of design thinking for social innovation:

- 1) Inspiration

This is the space in which social entrepreneurs gain a deep understanding of the problem or the opportunity that motivates them to search for innovative solutions and help others. This space includes the design brief - setting up the framework from which the entrepreneurs begin their project, some objectives, and constraints they might have. Then, in this space, the entrepreneurs learn about the needs of the clients and discover valuable insights about the clients and their environment.

- 2) Ideation

This is the space in which social entrepreneurs start the creating process. First, they synthesize the information gathered from the field research that leads to insights and deeper understanding. Then, they generate alternative visions on how change can happen and how the social problem can be solved. In this space, the defining and ideation steps are combined. Supported by "T-shaped persons" (multidisciplinary experts, open-minded to discipline beyond their own), social entrepreneurs engage in brainstorming sessions, sort and group ideas, define the point of view they want to take in tackling the problem, test competing ideas against one another, and finally select ideas for which they would like to develop prototypes and plan these.

3) Implementation

The implementation space combines the prototyping and testing steps. It is the space in which the social entrepreneurs take their ideas from the project stage into people's lives. They prototype, pilot, and test their ideas to discover unforeseen problems and unintended consequences of their solution, get feedback from users, learn how to build their communication strategy around their solution, and constantly improve their product or service before deciding on its final deliverable.

Like any other problem-solving process, the human-centered design for social innovation has some challenges as well that you should make social entrepreneurs aware about:

- Unpacking the social problem might be a very complex and long process. Some of the roots of the problems can be highly embedded in cultural norms, people's habits, beliefs, values, or determined by the structure of the system in which the clients live. Also, social entrepreneurs need to serve and pay attention to many stakeholders and how these impact the problem and the proposed solution;
- The pressure to find appropriate, sustainable, and scalable solutions, in addition to the fear of failure that everyone has, might be high on some social entrepreneurs and could lead to demotivation, compromise, and giving up.
- Getting beyond the assumptions, beliefs, prejudices, preconceptions that they themselves or other experts, stakeholders might have is one of the first challenges that social entrepreneurs might face in this process.
- Sorting out how the social entrepreneurs deliver the solution to clients and understanding how the solution might impact other stakeholders and the whole community/system need a lot of effort, piloting, coordination, consultations, etc. And sometimes, the social entrepreneurs need to make the decision to give up an idea because the risks are too high, and start the process again.

Recommended readings for the trainers:

- Tim Brown & Jocelyn Wyatt, Design Thinking for Social Innovation, 2010, available at https://ssir.org/articles/entry/design_thinking_for_social_innovation;
- IDEO.org, The Field Guide to Human-Centered Design, 2015, available at <https://www.designkit.org/>.

- Hasso Plattner Institute of Design at Stanford, An Introduction to Design Thinking - Process Guide (not dated), available at <https://dschool-old.stanford.edu/sandbox/groups/designresources/wiki/36873/attachments/74b3d/ModeGuideBOOTCAMP2010L.pdf>.
- Tim Brown, Change by Design: How Design Thinking Transforms Organizations and Inspires Innovation, 2009, available at <https://www.amazon.com/Change-Design-Transforms-Organizations-Innovation/dp/0061766089>.

Workshop 1: How to introduce the human-centered design process to your trainees

Some trainees, being social entrepreneurs or other trainers/facilitators, might need to experiment more and learn through a hands-on experience what the human-centered design process is before applying it in their work. Here is a workshop plan for introducing human-centered design by helping the trainees to go fast through the process, directly experience it, reflect on it and ask more questions to fully understand the method and how this can support social innovation.

Learning objectives:

- To understand the design thinking/human-centered process.
- To be able to implement a first design thinking process for a simple design challenge.

Materials needed:

Physical meeting: flipchart paper, markers, sticky notes, other office supplies for prototyping.

Online meeting: an online audio and video collaboration platform, which also allows you to split participants into pairs, such as breakout rooms (e.g., Zoom, Microsoft Teams). At the same time, ask participants to print out the playbook mentioned below and have around some office supplies for prototyping.

Estimated time: 1.5-2 hours

Workshop steps:

1. Introduce to the participants the learning objectives of the workshop, and tell them that they will experience what design thinking/human-centered design is through a hands-on learning experience. Tell them that throughout the workshop they will redesign the lunch experience of people from their team (or you may choose another simple challenge - morning coffee, giving a birthday gift, online shopping, etc.).
2. Present the participants the five steps of design thinking (use the theory introduction of this chapter and additional resources).
3. When preparing your workshop, build a similar workbook like the one developed by the Institute of Design at Stanford or print out [their playbook](#) (it can be used freely under CC license). Split the workshop participants into pairs, and give them the workbook to start the process of redesigning their lunch experience.
4. Take them first into the empathize step: in pairs, they interview each other, they ask questions, build empathy with their colleagues and learn as much as possible about the current lunch experience of the other one. They write down all the information they gathered throughout the interviews on a flipchart paper or on the workbook you printed out for them. To guide them, you may use [the instructions](#) developed by the Institute of Design at Stanford for their playbook.
5. Once they finish, ask each team to work on the definition of the problem they want to solve, and on the point of view they will take in redesigning the lunch experience. The PoV might take the form of: USER+NEEDs (the users' needs)+ BECAUSE (valuable insight about users).
6. Guide them in the next step - ideation. Each of them starts generating 3-5 alternative ideas on how to redesign the lunch experience. Then, they choose one idea they would like to prototype.
7. Each of them builds something tangible of their solutions by using cheap office supplies or other things they might find in the workshop room. Once the prototype is built, they get feedback from their user, in their initial pairs.
8. Based on the feedback, they improve the prototype and test it again with the user, in their pair.
9. Debrief with the participants their experience, the results of their work, the process, the steps and answer their questions about the method.

10. Finally, explain to the participants the three spaces of design thinking for social innovation and show them how this process is relevant for social entrepreneurs. Ask them to reflect and add more benefits or challenges to the process of generating social innovation.

How to use human-centered design methods and tools in working with social entrepreneurs

Social entrepreneurs can use human-centered design in developing their business idea or specific aspects of their initiative, such as:

- a) Products, services, or certain parts/aspects of the products/services;
- b) Customer support services;
- c) Communication or marketing strategies;
- d) Crowdfunding campaigns;
- e) Physical or online shops;
- f) Working spaces for their employees;
- g) Human resources policies and practices;
- h) Social impact activities, etc.

In this section of the training toolkit, we introduce some methods and tools that social entrepreneurs can use in the three spaces of designing their social businesses or specific aspects of these initiatives - Inspiration, Ideation, and Implementation. After a short introduction of each method, we offer an example of how you can teach social entrepreneurs to use the method or the tool while developing relevant entrepreneurship competencies and sparking social innovation.

INSPIRATION

Reminder: The Inspiration space is the one in which the social entrepreneurs gain a deep understanding of the problem or the opportunity that motivates them to search for innovative solutions. The entrepreneurs learn about the needs of the clients and discover valuable insights about the clients and their environment.

There are tens of methods and tools that social entrepreneurs can use to get in touch with their users/clients, gain an understanding of the users' needs and get inspiration to come up with innovative solutions for diverse social problems. To mention only a few of these methods and tools: interviews with users, interviews with extreme users or lead users, question maps, journey maps, expert interviews, group interviews or focus groups, unfocus groups, jobs to be done tool, observations, guided tours, immersion experiences in the life of the users, drawing and other visual thinking methods, photo journals, video ethnography, etc. You may find many of these methods and tools in the list of the free resources we provide at the end of this chapter.

For this training toolkit, we chose to present two methods you may use with social entrepreneurs.

- Interviewing the extreme users is one of the methods that allow social entrepreneurs to explore “the edges, the places where “extreme” people live differently, think differently, and consume differently” (Brown & Wyatt, 2010, p. 32) and get meaningful inspiration for their social innovations.
- The User Journey Map helps the social entrepreneurs to explore in-depth a topic, a problem, a service, a process as the user/client lives it in chronological order, from the beginning to the end of the experience.

Through the facilitation methods we propose here, the social entrepreneurs also improve certain aspects of the following entrepreneurship competences, as defined in the [EntreComp](#) (EU, 2016):

- Ideas & opportunities: spotting opportunities, creativity, vision, valuing ideas.
- Resources: mobilizing others.
- Into action: taking the initiative, planning & management, working with others, learning through experience.

Extreme Users Interview

Usually, when analyzing the social problem they want to solve, the social entrepreneurs access previous research studies or run themselves market research. Like with any other “classical” research, these studies look most of the time to the “median” users or, using quantitative data, generalize and present the “average” experience - what most of the people

live. Thus, the social entrepreneurs are left “blind” to what happens to the edges, how social problems are experienced by the extreme users. This lack of information might thrive on solutions that fit only the “average” client, and, for instance, never serve those that are in extreme need. Talking to extreme users/clients can expose social entrepreneurs to use cases, hacks, design opportunities that they had never imagined (Ideo.org, 2015).

As Lewrick et al (2020) show, this method can serve social entrepreneurs in the following ways:

- Extreme or lead users have a strong need already, no matter if the product/the service exists. This means that they might already have some ideas about the solution or they might have created some “basic” solution for their problem.
- The needs discovered in extreme users usually might be latent in the general population. Thus, social entrepreneurs might identify early trends in users’ behaviors or needs.
- Exploring the needs of extreme users help social entrepreneurs to articulate social problems better. They gain an in-depth understanding and collect qualitative data, stories that can inspire innovative solutions.
- Interviewing extreme users allows and encourages a more inclusive design in the ideation and implementation phases.

Recommended readings for the trainers:

- Ideo.org. (2015). Design Kit. Extremes and Mainstreams. Retrieved from <https://www.designkit.org/methods/extremes-and-mainstreams>
- Lewrick, M., Link, P., Leifer, L. (2020). The Design Thinking Toolbox: A Guide to Mastering the Most Popular and Valuable Innovation Methods.

Workshop 2: Example of how to use the Extreme Users Interview in a workshop

Learning objectives:

- Be able to identify users/clients' needs and behavior by interviewing the “extremes” of a social problem.
- Learn how to use the Extreme Users Interview to generate innovative solutions to specific social problems.

Materials needed:

Physical meeting: flipchart paper sheets, A5 or A4 sheets of paper, sticky notes, pens, markers, computers, recorders

Online meeting: an online audio and video collaboration platform, which also allows you to split participants into teams, such as breakout rooms (e.g., Zoom, Microsoft Teams). At the same time, ask participants to have around A4/A5 sheets of paper, pens/markers. Also, for steps 4-6, you may use a [Miro](#) board that could simulate the four corners of a room. For notes and summaries, you could use Google Docs.

Estimated time: approx. 4 hours (the time needed to run the interviews and make the summaries of these is not included)

Workshop steps:

1. Introduce the participants to the aim of the session: to learn more about their users/clients that will benefit from their social innovation and who directly experience the social problem they want to solve. Ask participants to use a social problem they would like to focus on during the workshop or propose a social problem they might all be familiar with.
2. Give each participant several A5 or A4 sheets of paper and markers/pencils in different colors. Ask them to draw various portraits of their users/clients that they decided to support with their social business. While drawing, encourage them to think about the users' context, their needs, their interests, their history, their connection with the social problem they want to solve, how they are affected by this social problem,

how they can be reached, etc. Ask them to draw both the “less affected”, and the “most affected” people by the social problem they want to address.

3. Split the participants into two teams, and each team discusses the portraits they drew and establish together the final “profile” of their extreme users they would like to interview. Each team needs to identify and select two-three people that would correspond with the profile they decided upon as being the “extreme users”.
4. The participants prepare the interview guidelines. So, split the group into four teams and prepare four different “places” in the training room with flipchart paper sheets with one of the following questions:
 - a. *What questions would you ask to discover the users’ needs, what they will like to benefit from your social business?*
 - b. *What questions would you ask to discover the users’ interests, motivation, what or who will make them adopt the social innovation you propose?*
 - c. *What questions would you ask to find out about the things/obstacles that will make them not adopt your innovative solution?*
 - d. *What questions would you ask to learn new insights about the users, insights/information that will make the solution you propose impossible to refuse?*
5. Each team then “travels” from one place to another, and adds questions they would ask their users/potential clients. Remind the group of the power of open-ended questions and ask them to phrase their questions as open-ended questions.
6. All the questions are presented by the teams, and the final questions are selected to develop the interview guidelines, with a maximum of 8-10 questions.
7. The participants go back to the initial two teams, contact the persons they chose in Step 3, and run the interviews. This can be online or phone interviews, or face-to-face interviews. However, the participants need to step out of the workshop time and really connect with their users. It would be great if they can record the interviews. Summary of the interviews are prepared and shared with the whole group via online shared documents, but also keynotes of each interview are written down on flipchart paper sheets.
8. Split the group into 2-3 teams and ask them to review the interview summaries and the keynotes, and develop lists with the needs and insights of their users. Each list is then presented to the whole group, and a final sort out is run before going into the ideation space.

The User Journey Map

The Journey Map is a tool that social entrepreneurs use later in the inspiration space, just before getting into the ideation space. This map helps the entrepreneurs to identify key moments in the experience they want to re-design for their users/clients and understand better how they can respond to users' needs. The journey maps are used mainly in situations in which the entrepreneurs want to understand in detail what their users/customers experience when they interact with the solution they want to propose/or other similar solutions that already exist but are not that successful. The Journey Map can be also used in the Implementation phase, once that the social entrepreneurs develop their solution and they want to prototype and test the "touchpoints" the users have with their social business, or services, or products.

The Journey Map serves the social entrepreneurs in the following ways:

- It draws the detailed map of the full users' experience in interacting with a possible solution or similar solutions that already exist on the market to address the specific social problem;
- The social entrepreneurs are able to spot problematic areas, gaps, obstacles and/or identify extra needs of the users/clients;
- They achieve a complete understanding of all the users'/client's touchpoints in the experience they want to re-design/design;
- The entrepreneurs are able to keep the design process user-oriented and experience-oriented while starting the ideation process for new products, services.

Recommended readings for the trainers:

- Ideo.org. (2015). Design Kit. Journey. Retrieved from <https://www.designkit.org/methods/journey-map>.
- Lewrick, M., Link, P., Leifer, L. (2020). The Design Thinking Toolbox: A Guide to Mastering the Most Popular and Valuable Innovation Methods.

Workshop 3: Example of how to use the Journey Map in a workshop

Learning objectives:

- Be able to identify users/clients' touchpoints with the experience the social entrepreneurs want to re-design or design.
- Learn how to use the Journey Map to gain a deeper understanding of users' needs, insights, and also on gaps, obstacles, or other factors that might influence the adoption of an innovative solution to address a specific problem.

Materials needed:

Physical meeting: flipchart paper sheets, sticky notes, pens, markers

Online meeting: an online audio and video collaboration platform, which also allows you to split participants into teams, such as breakout rooms (e.g., Zoom, Microsoft Teams). You may also use [Miro](#) boards - each team could have its own board for developing and then analyzing the Journey Map.

Estimated time: approx. 2 hours

Workshop steps:

1. Discuss with the social entrepreneurs the aim of the session: to identify the key moments of the users/clients as they experience a certain solution that aims to solve a specific social problem. Invite participants to choose a program, project, social business idea they are familiar with, which they will use to learn and understand how the Journey Map can be used in developing their own social businesses.
2. Split the participants into two teams. On a flipchart paper, each team will analyze and write down the selected business/project by thinking about the core moments of users' engagement. They should describe the moments with a 1-2 word headline and arrange them in chronological order.
3. Each team presents the initial maps, they discuss it with the whole group, and with help of the feedback received they review the map, adding, removing, grouping, or reordering the key moments.

4. Then, each team analyzes the moments from the Journey Map by thinking about how the users interact with the business/the project in these “touchpoints”. Explore how these touchpoints address their specific needs, how they might miss some needs, how they might ease the interaction or create additional obstacles, how the interactions might make users/clients feel, what gaps, confusions they could generate, etc.
 5. The teams present their discoveries and reflections. The group makes a new list of needs and insights about their users. Explain to the social entrepreneurs that this list and all the reflections generated by this method help them in the ideation process when they design their innovative solution. It gives them a solid understanding of how to design their solution step by step, thinking, and planning in every detail the way in which the users interact with their business, product, or service.
-

IDEATION

Reminder: In the *Ideation* space the social entrepreneurs start the creating process. First, they synthesize the information gathered from the field research that leads to insights and deeper understanding. Then, they generate alternative visions on how change can happen and how the social problem can be solved.

This space includes methods, techniques, and tools that the social entrepreneurs can use to define their point of view in addressing the social problem and generating innovative solutions, brainstorm for ideas, and select and prepare the ideas for prototyping and testing. Thus, here they can use various sorting out and building matrix methods to clarify, cluster, and analyze certain needs and insights about the users, brainstorming techniques, co-creation sessions, business models, frameworks, storyboards, role-playing, etc.

From all these, we selected two tools through which social entrepreneurs could clarify their business model for their solution, and visualize and prototype specific communication or interaction aspects of their social business.

- The Business Model Canvas helps entrepreneurs to express the business model of their social innovation on one page and then easily collect feedback from users/potential clients.
- The Story Map and the Storyboard assist the social entrepreneurs in ideating for communication campaigns or interaction aspects of the experience they want to redesign/design for their users.

Through the facilitation methods we propose here, the social entrepreneurs also improve certain aspects of the following entrepreneurship competences, as defined in the [EntreComp](#) (EU, 2016):

- Ideas & opportunities: creativity, vision, valuing ideas, ethical & sustainable thinking.
- Resources: self-awareness & self-efficiency, motivation & perseverance, mobilizing resources, financial & economic literacy, mobilizing others.
- Into action: taking the initiative, planning & management, coping with ambiguity, uncertainty & risk, working with others, learning through experience.

The Business Model Canvas

The Business Model Canvas is a visualization tool, developed by Alex Osterwalder and [Strategyzer](#). The canvas supports entrepreneurs to express their business idea in a canvas structured in nine blocks - essential aspects of any business model. Once the canvas is developed, the social entrepreneurs can present it to potential clients, stakeholders, investors, and other relevant actors whose feedback is essential in defining the final business model of their social innovation.

The Business Model Canvas					Designed for:	Designed by:	Date:	Version:
Key Partners	Key Activities	Value Propositions	Customer Relationships	Customer Segments				
	Key Resources		Channels					
Cost Structure		Revenue Streams						

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 DESIGNED BY: Strategyzer AG
 The makers of Business Model Generation and Strategyzer

Strategyzer
 strategyzer.com

The Business Model Canvas can be downloaded for free at
<https://www.strategyzer.com/canvas/business-model-canvas>

How to use the Business Model Canvas?

1. First, entrepreneurs should think about the clients they want to serve (Customer Segments). They need to identify the all groups/customer segments their business could reach through the products they want to provide, but also through the key resources and partnerships they might need and the key activities they want to develop.
2. They should start filling out the canvas with the first group (segment) of clients: think about what they can provide to these clients (services, products, relations, etc.), what the Value Propositions are.
3. They then move into deciding on how they can provide the value, through what Channels; how their products/services will get to their clients.
4. The chosen channels and the value propositions influence the entrepreneurs' decision about what kind of relationship (Customer Relationships) they want to establish with their clients (direct, indirect, online, face-to-face, etc.).
5. Then, the entrepreneurs decide about the price they want to set for their products/services, and about the mechanism that they will use for buying and payments (Revenue Streams).

6. They should think about the Resources they need in order to create, deliver, and capture value for their clients and for their business (Key Resources). These could be financial resources, human resources, infrastructure for production and selling their products, etc.
7. The next decision is about the main activities needed in order to create and deliver the value (products, services, relations, etc.) they promised to their segment of customers (Key Activities).
8. In order to get to the key resources, and perform the key activities, the social entrepreneurs definitely will need some Partners (suppliers, public authorities, business partners, etc.). These partners could represent the next customer segments the business model might need to include.
9. Finally, the entrepreneurs define the business costs and identify the specific costs they have for delivering the value to the specific customer segment they selected.
10. When they fill out the canvas for one customer segment, they should continue the planning with the following segment of customers, starting from the value they want to provide to this new group. They might observe how a key partner becomes a client, and how some customers help in delivering value for another segment of clients.

Since the launch of the Business Model Canvas, many adaptations of the canvas to the social businesses' characteristics and goals emerged in the learning space designed for social entrepreneurs.

- First, Alex Osterwalder, the author of the classic Business Model Canvas, developed an adapted canvas for organizations that have as a primary goal a mission and not profit. Mission Model Canvas is available here <https://www.strategyzer.com/blog/posts/2016/2/24/the-mission-model-canvas-an-adapted-business-model-canvas-for-mission-driven-organizations>.

Shortly, in this new canvas, five blocks get new "assignments" supporting organizations with a mission to deploy the value they create in a sustainable manner:

1. Revenue Streams changes to Mission Achievement (Impact Factors)
2. Customer Segments changes to Beneficiaries
3. Cost Structure changes to Mission Cost/Budget
4. Channel changes to Deployment
5. Customer Relationships changes to Buy-in/Support

- Young Foundation has also developed a Social Business Model Canvas inspired by the Business Model Canvas. Read more about it here <https://www.youngfoundation.org/social-innovation-investment/introducing-the-social-business-model-canvas-2/>, and download it here <http://innovasjuncamp.wpengine.com/wp-content/uploads/Social-Business-Model-Canvas.pdf>.

This canvas starts from the Social Value Proposition and develops into three areas: Market, Implementation, and Finance, with the corresponding blocks:

1. Market: Customer segments, Macroeconomic environment, Competitors;
 2. Implementation: Delivery, Partners, Sales & marketing;
 3. Finance: Revenue, Cost of delivery, Surplus.
- The Social Entrepreneurship Hub at Stanford has taken the model developed by the Young Foundation and the classic Business Model Canvas and generated a new canvas for social entrepreneurs. Download the canvas here https://sehub.stanford.edu/sites/default/files/Social%20Business%20Model%20Canvas_1.pdf.

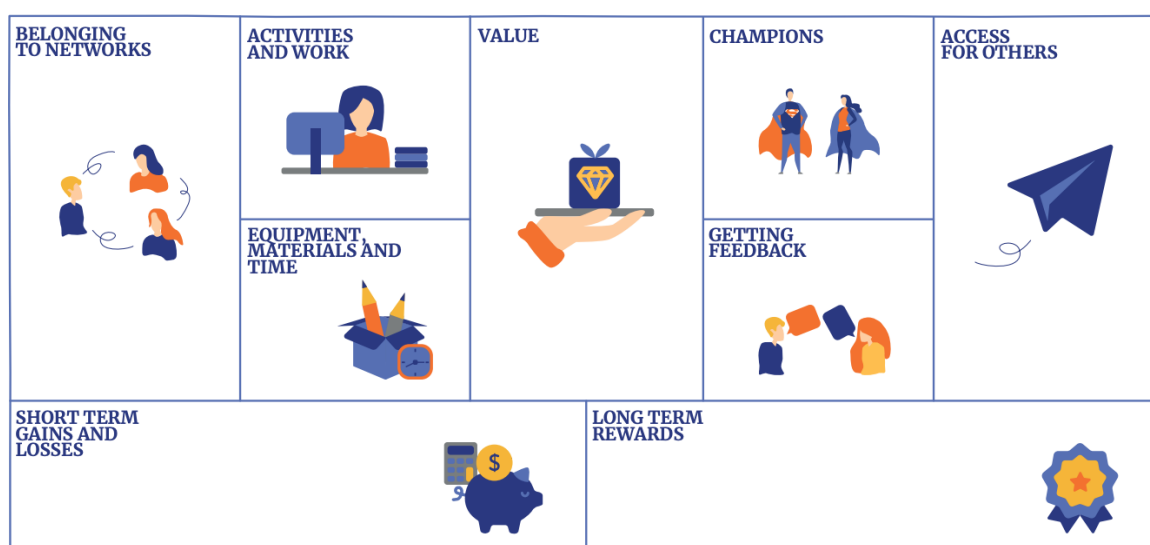
Similarly, the canvas starts from the Social Value Proposition and follows the Market phase and the Implementation phase with the following blocks:

1. Market: Customer segments, Macroeconomic environment, Competitors;
2. Implementation: Activities & Resources, Partners, Sales & marketing;

At the bottom of the canvas, the social entrepreneurs will also have to design the Revenue streams and the Cost structure of their social business.

- Some academic authors, such as Sergio Sparviero (2019) and Ingrid Burkett (2014), reframed the Business Model Canvas, adding questions and issues that social entrepreneurs should think about when filling out the classic nine blocks, or adding blocks related to impact, such as Governance, Mission Values, Objectives, Impact and Output measures, etc.:
 - Sparviero, S. (2019). The Case for a Socially Oriented Business Model Canvas: The Social Enterprise Model Canvas. *Journal of Social Entrepreneurship*. 10:2, pp. 232-251. Retrieved from <https://www.tandfonline.com/doi/full/10.1080/19420676.2018.1541011>.
 - Burkett, I. (2014). Using the Business Model Canvas for Social Enterprise Design. Retrieved from <https://cscuk.fcdo.gov.uk/wp-content/uploads/2016/07/BMC-for-Social-Enterprise.pdf>.

Finally, the Italian partner of the Social Entrepreneurship in Local Communities project, Matera Hub, inspired by the same Business Model Canvas, has developed **the Creative Project Canvas**, a strategic management and entrepreneurial tool to visualize a project idea and make it become a successful living project. This Canvas can be used both by creative entrepreneurs and social entrepreneurs to kick-start, initiate and develop a project, or review and assess the state of the art of a creative, cultural or social project after the first months of testing it.



The Creative Project Canvas can be downloaded for free here:

<https://www.creativeprojectcanvas.com/>

The Creative Project Canvas includes nine blocks: 1. Value; 2. Belonging to networks (to reach key people and key resources); 3. Activities and work; 4. Equipment, material, and time; 5. Champions (supporters, mentors, advisors, etc.); 6. Access for others (audience, clients, users, etc.); 7. Getting feedback; 8. Short-term gains and losses; 9. Long-term rewards.

Explore the canvas and learn how to use it here: <https://www.creativeprojectcanvas.com/>.

Recommended readings for the trainers:

- Strategyzer. (n.d). The Business Model Canvas. Retrieved from <https://www.strategyzer.com/canvas/business-model-canvas>
- Ideo.org. (2015). Design Kit. Journey. Retrieved from <https://www.designkit.org/methods/business-model-canvas>

Workshop 4: Example of how to use the Business Model Canvas/Social Business Model Canvas in a workshop

Learning objectives:

- Be able to create the business model of the social innovation/social business.
- Learn how to use the Business Model Canvas/Social Business Model Canvas to build the logic of the social business, identify clients and relevant stakeholders, and create a financially sustainable enterprise/project.

Materials needed:

Physical meeting: flipchart paper sheets, sticky notes, markers

Online meeting: an online audio and video collaboration platform, allowing you to split participants into teams, such as breakout rooms (e.g., Zoom, Microsoft Teams). You may also use [Miro](#) boards - each team could have its board for developing their Business Model Canvas.

Estimated time: approx. 2 hours

Workshop steps:

1. Discuss with the participants the aim of the session: build and visualize the business model of their innovative solution to a specific social problem, which can be then prototyped with users/potential clients.
2. Split the participants into 3-4 teams. For each team, prepare in advance some information about a social problem relevant to your community. On a flipchart paper, each team has to develop the plan of a social business addressing the social problem they received from you. The team presents their business ideas and the plan they made on one flipchart paper.
3. Present and explain to them the Business Model Canvas or any of the canvas specially designed for social businesses by using a social enterprise example of your choice.

4. Ask the participants to go back into their teams and replan the social business idea by using the Business Model Canvas/Social Business Model Canvas. Each team presents the canvas and reflects on the benefits of using the canvas.
 5. Finally, explain to the participants how the Business Model Canvas/Social Business Canvas can help them to prototype, in a cheap and fast way, their social business idea. Emphasize the need to collect feedback on the model from potential clients, investors, stakeholders, or to organize co-creation sessions with these groups to refine and tune up their business model.
-

The Story Map and the Storyboard

The Story Map and the Storyboard are straightforward tools to develop and structure the communication, crowdfunding campaigns, or other interaction moments from the business model the social entrepreneurs want to design. They can use the map and the storyboard in the ideation process, helping them to cover all the parts and aspects needed by a good story - a main character/characters with a good challenge, a tension moment, and a resolution for the challenge of the characters.

To fill out the Story Map, for a communication or a crowdfunding campaign, means to think and plan out at least the following aspects:

- The main character or characters of the story (in some communication/crowdfunding campaigns, especially when the entrepreneurs want to move people into action, their audience might be the story heroes);
- The context, the settings, the tone of the story, and other characters relevant for the story and plot;
- The challenge the heroes will take (this challenge always includes a moral aspect, a value social entrepreneurs want to share with the story);
- The story's resolution - how the challenge, the problem, or the conflict can be solved. What is the solution the social entrepreneurs show or propose to their audience of the campaign?

In the second section of the map, the entrepreneurs will outline the details of the story, making sure they build the plot for the three acts of the story: the beginning (introduce the hero and the challenge), the middle (build the tension), the end (solve the conflict, provide the solution).

Once the Story Map is all planned out, the entrepreneurs can visualize their story, moment by moment, by using the Storyboard. Also, the entrepreneurs can use the Storyboard to ideate and prototype certain moments, for instance, the “touchpoints” the users/clients have with the business/the service or the product.

The two tools, used together or separately, help entrepreneurs to learn more about their business ideas, and refine some details of the communication/interaction moments with the users. Also, they can be then used for collecting feedback or organizing co-creation sessions with users or potential clients.

The Story Map

The main character / the hero	Setting / places / tone & other characters
Problem / challenge	Solution / resolution

The Beginning setting, characters, introduce the central conflict/problem (explain the problem you want to solve)	The Middle tension increases, it ends with the tensest moment of the story, the biggest challenge of the hero (the major crisis)	The End the main conflict is solved, and success is celebrated

The Storyboard



Recommended readings for the trainers:

- Ideo.org. (2015). Design Kit. Journey. Retrieved from <https://www.designkit.org/methods/storyboard>.
- Mozilla. (n.d) Open Innovation Toolkit. Storyboarding. Retrieved from https://toolkit.mozilla.org/method/storyboarding/?utm_source=movingworlds.

Workshop 5: Example of how to use the Story Map and Storyboard in a workshop

Learning objectives:

- Be able to ideate further certain aspects of the business idea, such as a communication campaign, a crowdfunding campaign, a sales message, an advertising idea, or the “touchpoints” the users have with the business/service/product;
- Learn how to use the Story Map and Storyboard to understand the business idea better and prototype it with different audiences.

Materials needed:

Physical meeting: flipchart paper sheets, A4 paper sheets, markers

Online meeting: an online audio and video collaboration platform, allowing you to split participants into teams, such as breakout rooms (e.g., Zoom, Microsoft Teams). Also, ask participants to have around some A4 paper sheets and markers. You may use [Miro](#) boards, so that each team could have its board for developing their Story Maps and Storyboards.

Estimated time: approx. 2 hours

Workshop steps:

1. Introduce the social entrepreneurs to the aim of the workshop: learn how to use storytelling (the Story Map and the Storyboard) to further understand their business model and prototype it with users, investors or other relevant stakeholders. Also, make a short presentation about storytelling and how it is used in human-centered design, and about the two tools - the Story Map and the Storyboard.
2. Then, using for instance the Business Model Canvas developed in the previous session, ask the participants to go back into their teams and brainstorm on how they could tell the story of their business to different audiences, such as the clients or potential investors. Advise the teams to build their stories around the value propositions they provide to each specific audience.
3. Each team presents their story maps: the story created to tell the clients about their business; and the story created to tell their investors about their business.
4. With the feedback received from the group, the participants go back into their teams, improve the stories, and develop the storyboards for each of the audience.
5. Finally, the storyboards are presented to the big group, and feedback and reflections are collected.
6. Wrap up the session by explaining to the participants how they can use the two tools as cheap and fast prototypes for the communication or interaction aspects of their businesses. Also, insist on the fact that they should always involve users (clients, investors, or other stakeholders) in prototyping, and only afterward to go in the implementation space of the process.

IMPLEMENTATION

Reminder: The *Implementation* space is the one in which the social entrepreneurs take their ideas from the project stage into people's lives. They prototype, pilot, and test their ideas to discover unforeseen problems and unintended consequences of their solution, get feedback from users, learn how to build their communication strategy around their solution, and constantly improve their product or service before deciding on its final deliverable.

There are several methods that social entrepreneurs can use in the implementation space for prototyping and testing their innovative solutions to social problems. Below we present two of them:

- The Theory of Change - developed to support social entrepreneurs and change-makers in the process of generating social innovation;
- The Story Canvas - specially designed for digital storytelling campaigns, such as crowdfunding campaigns or other communication campaigns that social entrepreneurs might need in promoting their innovative solutions.

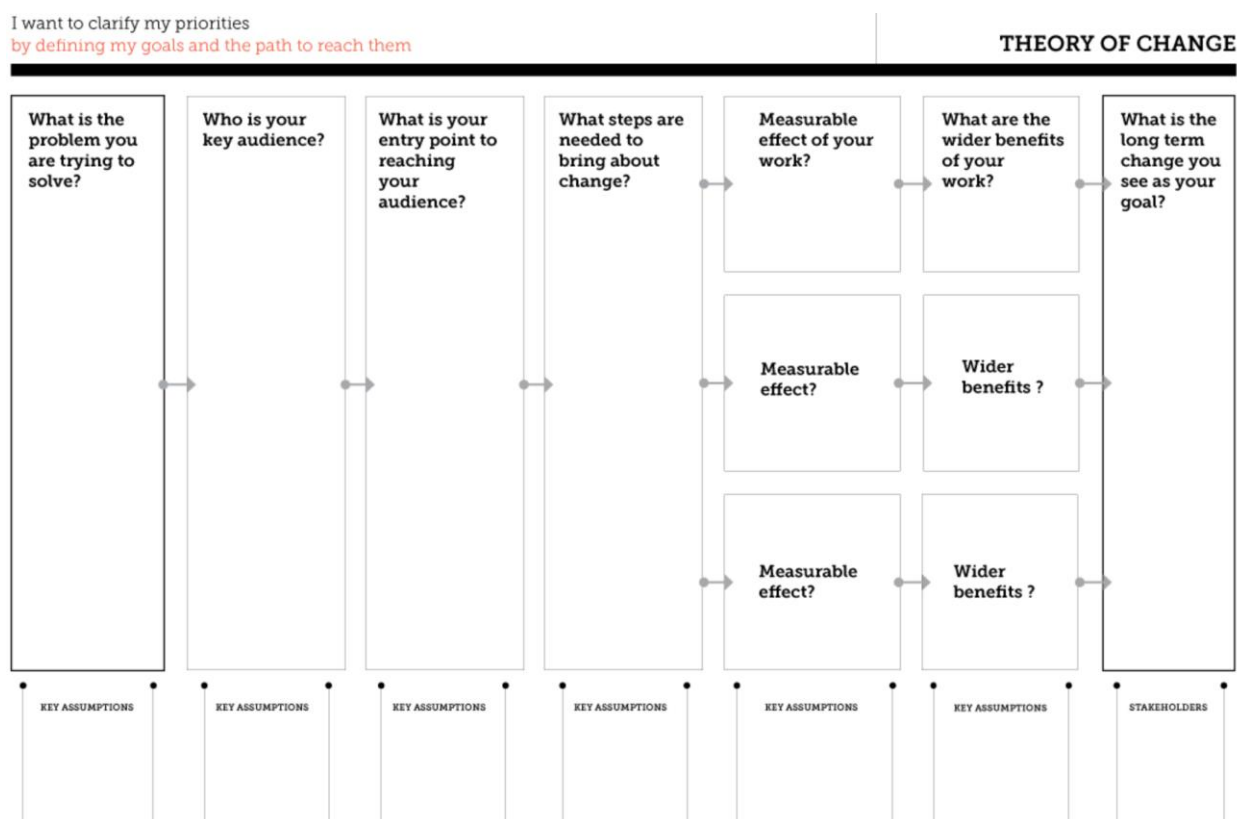
Through the facilitation methods we propose here, the social entrepreneurs also improve certain aspects of the following entrepreneurship competences, as defined in the [EntreComp](#) (EU, 2016):

- Ideas & opportunities: creativity, vision, valuing ideas, ethical & sustainable thinking.
- Resources: motivation & perseverance, mobilizing others.
- Into action: taking the initiative, planning & management, coping with ambiguity, uncertainty & risk, working with others, learning through experience.

The Theory of Change Canvas

The Theory of Change is a method that was developed in the '90s. Since then, it was intensively used by nonprofit organizations and other government agencies to generate social innovation. Shortly, through this method, the social entrepreneurs can envision and draw their roadmap from the problem they identified in their community to the change they want to see that is adopted.

1. First, social entrepreneurs have to define the problem they want to solve.
2. Then, they focus on the change they would like to accomplish and the key stakeholders they have to reach.
3. They start to map backward the process of achieving this long-term goal, by identifying the key audience they want to reach, the entry points for reaching this audience, the practical steps they need to take, and the first measurable results they want to achieve.
4. They also need to think of concrete benefits for their audience, once their initiative is in place and working.
5. Finally, for each of the sections of the canvas, they will need to reflect on the key assumptions that support the actions they want to take, which will also help them to see the potential risks they might face.



The canvas and the instructions on how to use it are available for free download here:

<https://diytoolkit.org/media/Theory-of-Change-Size-A4.pdf>

Recommended readings for the trainers:

- Nesta. (2014). Development Impact & You. Practical tools to trigger and support social innovation. The Theory of Change. Retrieved from <https://diytoolkit.org/tools/theory-of-change/>.

- Anderson, A. The Aspen Institute Roundtable on Community Change. (2006). The Community Builder's Approach to Theory of Change. A Practical Guide to Theory Development. Retrieved from https://developmenteducation.ie/media/documents/The_Community_Builders_Approach_to_Theory_of_Change.pdf.

Workshop 6: Example of how to use the Theory of Change Canvas in a workshop

Learning objectives:

- Be able to identify the social impact they want to generate and the ways of reaching that impact.
- Learn how to use the Theory of Change Canvas to take the solutions they brainstormed in the ideation phase to the implementation phase.
- Understand how to engage and work with different stakeholders.

Materials needed:

Physical meeting: flipchart paper sheets, sticky notes, pens, markers

Online meeting: an online audio and video collaboration platform, allowing you to split participants into teams, such as breakout rooms(e.g., Zoom, Microsoft Teams). You may also use [Miro](#) boards - each team could have its board for developing their Theory of Change canvas.

Estimated time: approx. 3 hours

Workshop steps:

1. Introduce the social entrepreneurs to the aim of the session: to map out one of the solutions they generated in the ideation phase into a clear, comprehensive, and impactful implementation plan by using the Theory of Change Canvas.
2. The participants go back to their solutions generated in the ideation phase, and, by voting or consensus, they choose one solution they would like to work on during the workshop to practice the Theory of Change Canvas.

3. Guide them in a brainstorming session on the impact they want to have with the solution they proposed. Write down all the ideas they come with about the change they want to see in their community regarding the problem they studied and solutions they found. Sort out ideas and ask them to decide together on the final impact they want to make through their social business/social initiative.
 4. Show and explain to them the Theory of Change Canvas by using a concrete project. Encourage them to ask questions to clarify the model and how they could use it for their initiative.
 5. Add on the canvas the problem they want to solve and the change they want to accomplish as agreed in step 3. And then split the group into two teams to brainstorm on the other sections of the canvas: the audience, the entry points, the steps they need to take, the outputs & outcomes they want to achieve, and the key assumptions they have for each of these areas.
 6. Each team presents their canvas and discusses with the other team all the sections of the canvas. The group decides on the final approach they want to take in addressing the social problem by filling out the final Theory of Change Canvas.
 7. The participants reach some users (members of the audience or relevant stakeholders mentioned in the canvas) and present them their theory of change. Based on their reactions and feedback, the social entrepreneurs review their plans.
-

The Story Canvas

Another tool that social entrepreneurs may use, especially in planning their crowdfunding campaigns in the implementation phase, is The Story Canvas, developed by Digital Storytellers. Get prepared to support the social entrepreneurs to plan their campaigns and read more about the canvas here: <https://www.digitalstorytellers.com.au/the-story-canvas/>.

Any social marketing, advocacy or crowdfunding campaign the social entrepreneurs want to plan will serve at least one of the following goals:

- To educate a specific audience about the issue;
- To motivate a specific audience to care about the issue;
- To mobilize a specific audience to act upon the issue in a particular direction.

We summarized for you and the social entrepreneurs the main steps (and the order of the steps) and questions they need to use in order to fill out the Story Canvas for their crowdfunding campaigns, based on the communication goals they have - to educate, motivate, mobilize or/and move people into action.

PURPOSE: Why does this story need to be told? Why should people care about your campaign?				
3. Audience <i>Primary</i> – takes action <i>Secondary</i> – hears your story • Profile • React (emotions) • Impact	5. Key messages Three things you want your audience to remember about the problem & solution, and why now?	9. Story Concept Structure Type of story (explainer, vision, personal story, etc.)	4. People & Places Who & Where <i>People</i> – relevant for you and the audience; how you reach them <i>Places</i> – relevant for people, for the story, for the “challenge” people had to take	8. Campaign How will you get your story out there? Develop it <i>before</i> the story. • Delivery channels (online/offline) • Promotion channels • Supporters • Partners/partnerships • Most important moments of the campaign
	6. Call to action What do you want your audience to do? Ex.: share the message to others, challenge themselves, sign a petition, protest, etc.		7. Style & Tone Look & Feel Connected to the emotions/reaction you want to get Colors, music, language, time of day, font, the story’s pace, etc.	
1. Outcomes raising awareness, shifts in perceptions, policy change, etc.		2. Indicators (SMART)		

Workshop 7: Example of how to use the Story Canvas in a workshop

Learning objectives:

- Learn the essential aspects and steps of any communication and storytelling campaign.
- Be able to create and plan a crowdfunding campaign for a social business that can be tested with specific audiences.

Materials needed:

Physical meeting: flipchart paper sheets, sticky notes, pens, markers

Online meeting: an online audio and video collaboration platform, allowing you to split participants into teams, such as breakout rooms (e.g., Zoom, Microsoft Teams). You may also use [Miro](#) boards - each team could have its board for developing their Story Canvas.

Estimated time: approx. 3 hours

Workshop steps:

1. Introduce the social entrepreneurs to the aim of the session: to learn how to plan their crowdfunding campaign for their social business idea by using the Story Canvas developed by the Digital Storytellers. Also, make them a short introduction on the Story Canvas, on its section by using a concrete campaign as an example.
2. The participants go back to the results of the previous session in which they used the Theory of Change Canvas or maybe another tool to plan out their solution/the social business model they want to develop. Split them into two teams, and ask them to start discussing and filling out the Story Canvas for their crowdfunding campaign.
3. Each team presents their canvas and discusses with the other team all the sections of the canvas. The group decides on the final communication plan and the story they want to tell with the crowdfunding campaign.
4. The participants engage with some potential audience of their crowdfunding campaign and present them the Story Canvas, with a focus on the story the campaign would tell. Based on the audience's feedback and reactions, the participants review their story and the campaign's plan.

Discover more methods and tools!

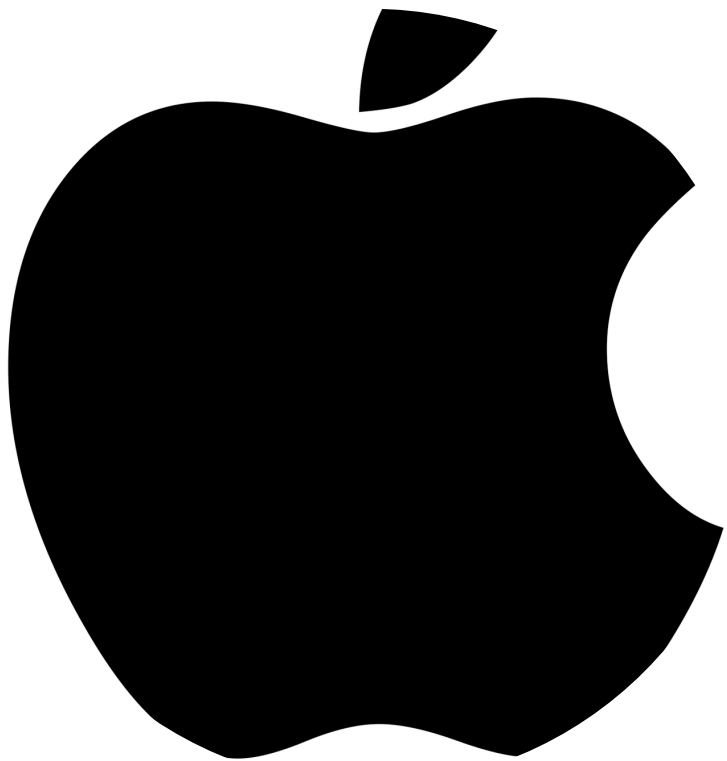
Here are some free resources you can use to identify other methods, techniques and tools for Inspiration, Ideation and Implementation, which you can use in your facilitation work with social entrepreneurs:

- Ideo.org. (2015). Design Kit, available at <https://www.designkit.org/methods>.
- D.School at Stanford. (2018). Design Thinking Bootleg, available at <https://dschool.stanford.edu/resources/design-thinking-bootleg>.
- Frog Design. (2019). The Collective Action Toolkit, available at https://www.frogdesign.com/designmind/collective-action-toolkit-empowering-communities?utm_source=movingworlds.
- Mozilla. (n.d) Open Innovation Toolkit. Retrieved from <https://toolkit.mozilla.org/methods/>.

Annexes

Template 1 Workshop 1: Understanding Social Business Incubation Models









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PRE-INCUBATION STATION

INCUBATION STATION

POST- INCUBATION STATION

PRE-INCUBATION STATION (PRE-INCUBATION STAGE)

Step-by-step process 1:

1. First assessment :
 - a. Idea formulation
 - b. Idea assessment
 - c. Market validation of idea
2. Training on :
 - a. management
 - b. marketing/sales
 - c. business administration
3. Orientation
 - a. Counsiliation with defining the business idea
 - b. Counsiliation with defining the business model
4. Innovation assessment
 - a. Internal committee evaluation
 - b. External committee evaluation
5. Competition of the Business Plans / Business Models
 - a. Competition / peach for the BP or the business model

INCUBATION STATION (INCUBATION STAGE)

The step-by-step process 2:

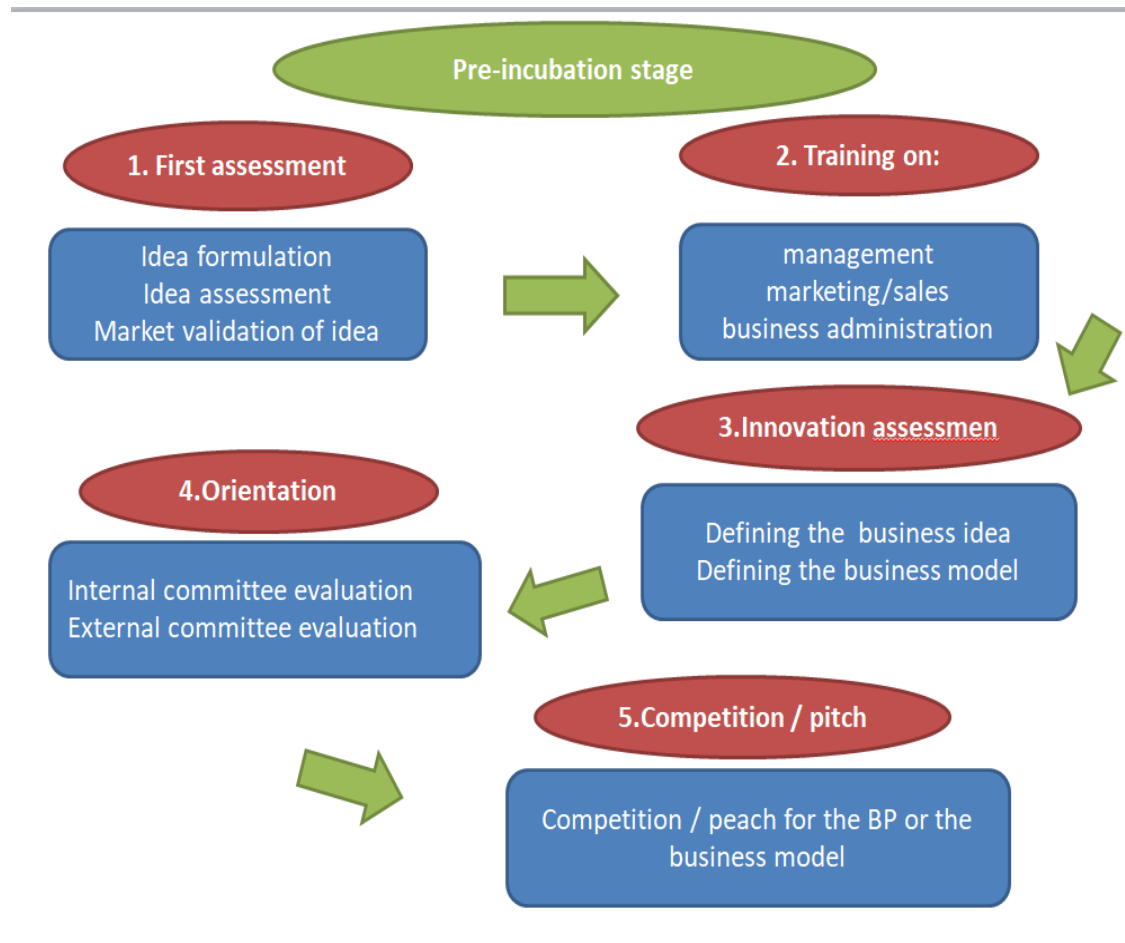
- 1) Start-up creation
 - a) Selection and admission in the incubator
 - b) Access to finance
 - c) Legal and administrative support
 - d) Physical facilities
 - e) Education and access to knowledge
- 2) Early stage
 - a) Physical facilities
 - b) Fund raising
 - c) Mentoring and coaching
 - d) Networking
 - e) Technology transfer
 - f) Assistance with basic business and marketing
 - g) HR training
 - h) Commercialization
 - i) Advanced business planning
- 3) Expansion
 - a) Definition of the exiting strategy

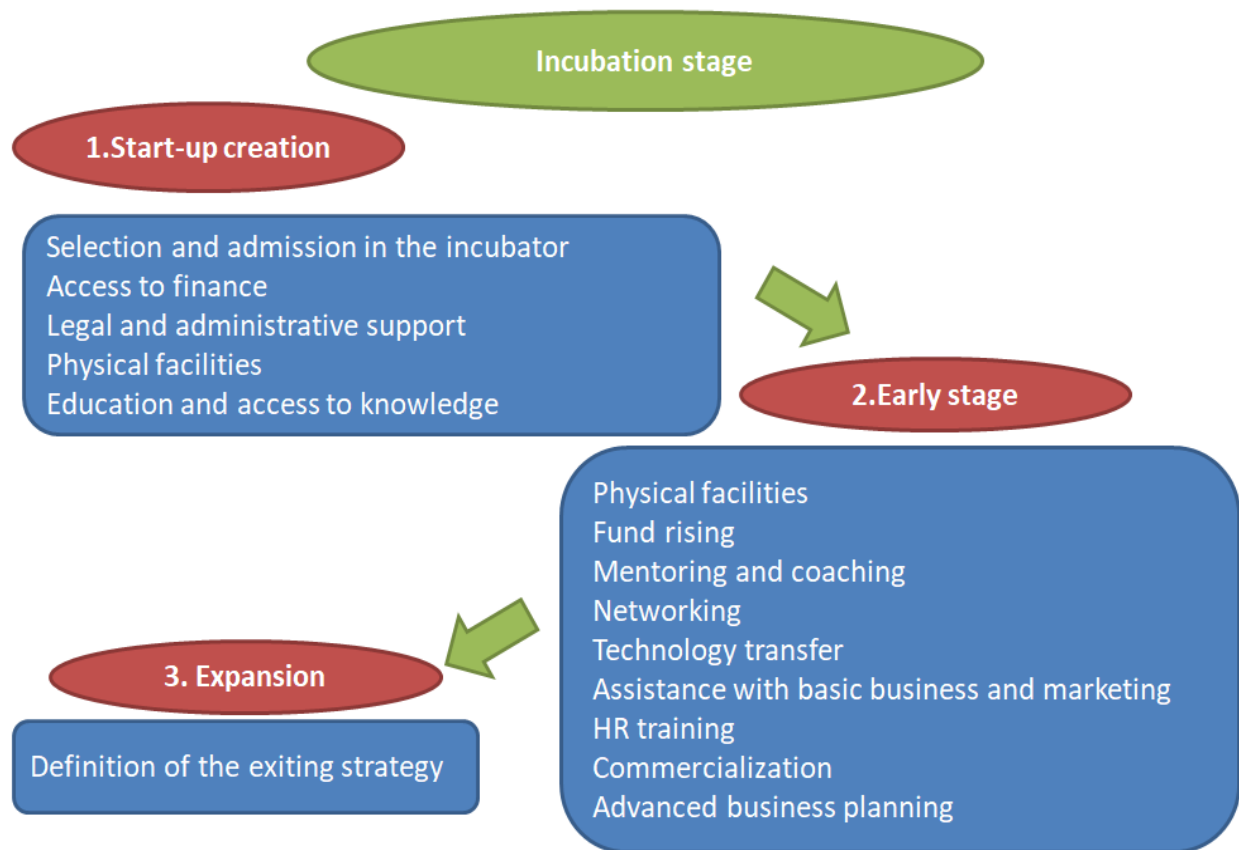
POST-INCUBATION STATION (POST-INCUBATION STAGE)

Services in the post-incubation stage 3:

- 1) Social innovation diagnostic
 - a) Social innovation weakness
 - b) Social innovation strengths
- 2) Specialized development training
 - a) IP rights
 - b) Technology transfer
 - c) Social impact enhancement
- 3) Specific consultation in:
 - a) Marketing
 - b) Internationalization
 - c) Social innovative process
- 4) Entering specific projects
 - a) Clustering
 - b) Takeover
 - c) Technology transfer

Template 5 Workshop 2: Stages of incubation





Post-incubation stage

1. Social innovation diagnostic

Social innovation weakness
Social innovation strengths

2. Specialized development training:

IP rights
Technology transfer
Social impact enhancement

4. Entering specific projects

Clustering
Takeover
Technology transfer

3. Specific consultation in:

Marketing
Internationalization
Social innovative process





SOCIAL entrepreneurship in local communities

Design the right services of an incubator

The spirit of this sessions is to give you the chance to share your vision. Don't worry about aiming for perfection! Here are a few guiding principles to make the most of our time together:



This is a safe space: a place for an open mind and no judgment.



The sessions will be recorded, yet what's shared will be used for this research only and will be anonymized.



This is all about creativity! Focus on letting everyone's ideas flow freely.

The essence of a vision statement:

It should be a powerful motivational tool which brings all stakeholders together to work towards a common inspirational goal.

To kick start discussions about a vision statement, the following questions could be considered:

- What are the primary motivations for setting up the social incubator?
- How would each stakeholder define success for the social incubator?
- From a client perspective, how would you like clients to experience and benefit from the incubator services?
- how would you envision the incubator in 10 years' time?

A typical mission statement contains three components:

1. What are you trying to achieve right now? Why are you in business?
2. What your incubator does – What are the core products and services it provides?
3. What is important to your business? What are the values your business holds and aims to convey to clients and other stakeholders; for example accountability, objectivity, creativity, and ingenuity?

The Business Opportunity

What problem are you solving? What challenges and pain points will you resolve for users?

Company Description

What does your company do? What challenge(s) does your company solve?

Team

Who is involved in this endeavor? Who is on your team and why are you the right person/ people to build this business?

Industry Analysis

Who are your competitors? What are some key factors related to being successful in your industry?

Target Market

Who are you targeting? Who makes up your target audience? Who are your target segments, buyer personas, and ideal customers?

Implementation Timeline

Briefly, how will you roll out the business? Which phases will be involved?

Marketing Plan

Which channels and platforms will you use to reach and convert your target audience? Where will you meet your audience?

Financial Summary

What is your cost structure and what are your revenue streams? Describe your fixed variable costs and how will you make money? Consider your sales goals for the near future and long-term.

Funding Required

What amount of funding will you require from investors? Where will that funding go?



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