



# REPORT ON CAPACITY BUILDING SEMINARS RESULTS ACHIEVEMENTS D.T3.2.10

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D.T3.2.10

VERSION 3 - 03/2022

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## Abbreviations

AP - application form  
BSOs- Business Support organizations  
CB - Capacity Building  
LAGs - Local Action Groups  
PPs - Partners of DelFin's Consortium  
SEs - Social Enterprises  
TWGM - Transnational working group meeting  
WPL - Leader of the Work Package - PP7



## 1. Introduction - Capacity Building seminars

The main objective of the project is the promotion of social entrepreneurship in rural regions with special transformation challenges to advance economic and social innovation. The rural regions Saalekreis (DE), Hajdu Bihar (HU), Duga Resa (CR) and rural areas in Piedmont Region (IT) work together with the specific objective to improve funding for public support structures for social entrepreneurship and further develop finance and funding instruments for social enterprises. The project wants to facilitate a quadruple helix cooperation process of regional and local stakeholders for social entrepreneurship in a rural environment.

The partners developed a toolbox (WP1) for promotion of social entrepreneurship in rural regions, which were tested in four pilot projects (WP2). 8 capacity building seminars with focus on municipalities and finance institutions have been organised to further spread the developed knowledge (WP3). 4 actions plans will be developed in the partner regions to ensure sustainability and mainstreaming of project results.

Capacity Buildings seminars are the goals of the WP3 of the Delfin Project, regarding the increase of knowledge and competences about social enterprises.

Usually the definition of Capacity Building is *a process of investment of time and resources to improve the results of an organization and the knowledge of its employees about a specific topic.*

From the Delfin perspective, Capacity building increases knowledge and understanding on how social economy is, how it works and how it can be efficiently promoted and supported by the ecosystem, in order to disseminate to a broader audience knowledge and experiences generated in the WPT1 Analysis and Tool Development and WPT2 Pilot Implementation.

The general goals are generating knowledge and sharing it among the multi-stakeholder participants (Quadruple Helix Ecosystem) with the purpose to better understand and recognize SE's needs and opportunities in order to maximize socio-economic impacts, to be transferred in the final Project Action Plan WPT4.

The results and achievements of the Capacity Building seminars have been evaluated and discussed among the partnership at transnational level. Partners developed conclusions on how to use the format of Capacity Building in the future to continue promotion of social entrepreneurship.

In the Application Form is stated that each country should deliver 2 CB seminars, 8 in total, for

- a) local and regional authorities, development agencies and BSO (110 participants)
  - b) financial institutions and regional authorities (80 participants)
- for the promotion of social entrepreneurship.

The integration of a larger number of involved stakeholders from administration and financial ecosystem should improve the cooperation and networking in the area of social entrepreneurship.

### Overview and Timeline

The preparation of WP3 activities has been started in May 2021. PP7 as the leader of the WP presented the concept, milestones and deliverables of WP3 Capacity Building at the Transnational Working Group meeting in May 2021.

Supported by LP, PP7 coordinated the development of a joint concept of seminars focusing especially on the competences raised.

Asking PPs to follow a process to determine a methodology that could be replicable, PP7 collected informations from PPs and created a common guideline to develop the CB concept. Here the importance of the joint process phase.



PPs adapted their regional capacity building concepts which had been presented during the Transnational Working Group Meeting on the 21st of July, 2021.

According to the comments, remarks and recommendations of the WPL, PPs improved their capacity building concept and started the preparation and organization of capacity building seminars.

The CB seminars took place as shown:

	SEMINAR 1	SEMINAR 2
GERMANY	23/09/2021	30/09/2021
HUNGARY	20/10/2021	21/10/2021
CROATIA	29/09/2021	27/10/2021
ITALY	28/09/2021	30/09/2021

Stakeholder of the local and regional ecosystem (e.g. SE, finance institutions, BSO, local and public authorities) had been involved in the CB seminars as speakers, panelists and participants.

Caused by the late pilot evaluation after the Impact Conference, the joint concept for capacity building (D.T3.1.1) has been submitted some weeks later.

Due to Corona restrictions German (D.T3.2.2; D.T3.2.3) and Italian (D.T3.2.6; D.T3.2.7) Capacity Building seminars were held online.

There was a delay at implementing Croatian (D.T3.2.8; D.T3.2.9) and Hungarian (D.T3.2.4; D.T3.2.5) Capacity Building seminars which resulted in a postponement to October 2021, as the organization of live events required additional effort.

Since most the seminars has been implemented at the end of September or in October, their report on achievements (D.T3.2.10) is finalized in Reporting Period 6.

The number of trained persons involved during the activity was 165, below the expectations of a total of 190: partnership discussed the reasons for this, that are presented in next chapters of the report.

From now on, to facilitate the reading of the report, it is divided in 3 main parts: it will explain the importance of the steps done in the process, the guidelines provided from the WPL to build a shared framework; then the focus is on the local point of views of the 4 countries and their main findings; at the end of the report, final consideration from partners and analysis of results.



## 2. A collaborative process for a Joint Concept

In order to build a coherent joint concept for the overall Capacity Building in all countries, PPs under the guideline of the WPL, validate a joint process that kept together the local implementation and the transnational framework.

The process that brought the partnership to a CB joint concept took inspiration from the Lean Startup Method, the process results as a continuum cycle between WPL, transnational level, and local implementation, with an high level of flexibility and adaptation but at the same time some common point to compare the results.

WPL designed a 6 steps framework that highlight roles, methodological tools, timeline and expected results:

- Identify - Identify relevant info to map and assess the local ecosystem that can support SEs
- Collect - Identify local participants to the CB, collect info on local ecosystem with the objective of a first draft of need analysis to set CB contents
- Return - elaboration of guidelines to define the local CB plan
- Validate - local validation of CB with the ecosystem, sharing the agenda
- Implement - preparation, communication, realization and follow up of seminars
- Evaluate - questionnaires and report

It has to be said that during the WP3 period, the process changed itself because of some delays due to the already mentioned factors (not easy involvement of stakeholders for in-presence events; late evaluation from the Pilot phase,...)

As a proof of flexibility of the system set, the Consortium decided to merge the Validation and Implementation phases in shorter steps, without delivering template and to reduce management calls in order to not exceed the deadline.

Phase	Identify	Collect	Return	Validate	Implement	Evaluate / report
<b>Charge of</b>	WPL	PPs	WPL	PPs	PPs	WPL+PPs
<b>Objectives</b>	Identify relevant info and needs to map and assess the local ecosystem that can support SEs	Identify local participants to the CB, collect info on local ecosystem with the objective of a first draft of need analysis to set CB contents	Eelaboration of a guideline to define the local CB plan Structure the report for the joint concept	TWGM Croatia : Each tandem PPs explains his CB local plan and share the agenda of both seminar Local validation of the JC	Involvement of stakeholders Communication of seminars Delivery Collect proof and information (results achieved; recommendations) for the final report Report	PPs: Draft final report describing seminars implementation, analysing and reporting results achieved FGB: Draft joint concept based on PPS final report.
<b>Output tools /</b>	template	Mapping and assessment of local ecosystem	Joint concept (Deliverable)	TWGM + toolbox + evaluation report + CB guidelines	event report è thematic indicators + output factsheet	Evaluation report
<b>Time</b>	May 14	May 31	June-July	July-September	September-October	June-December



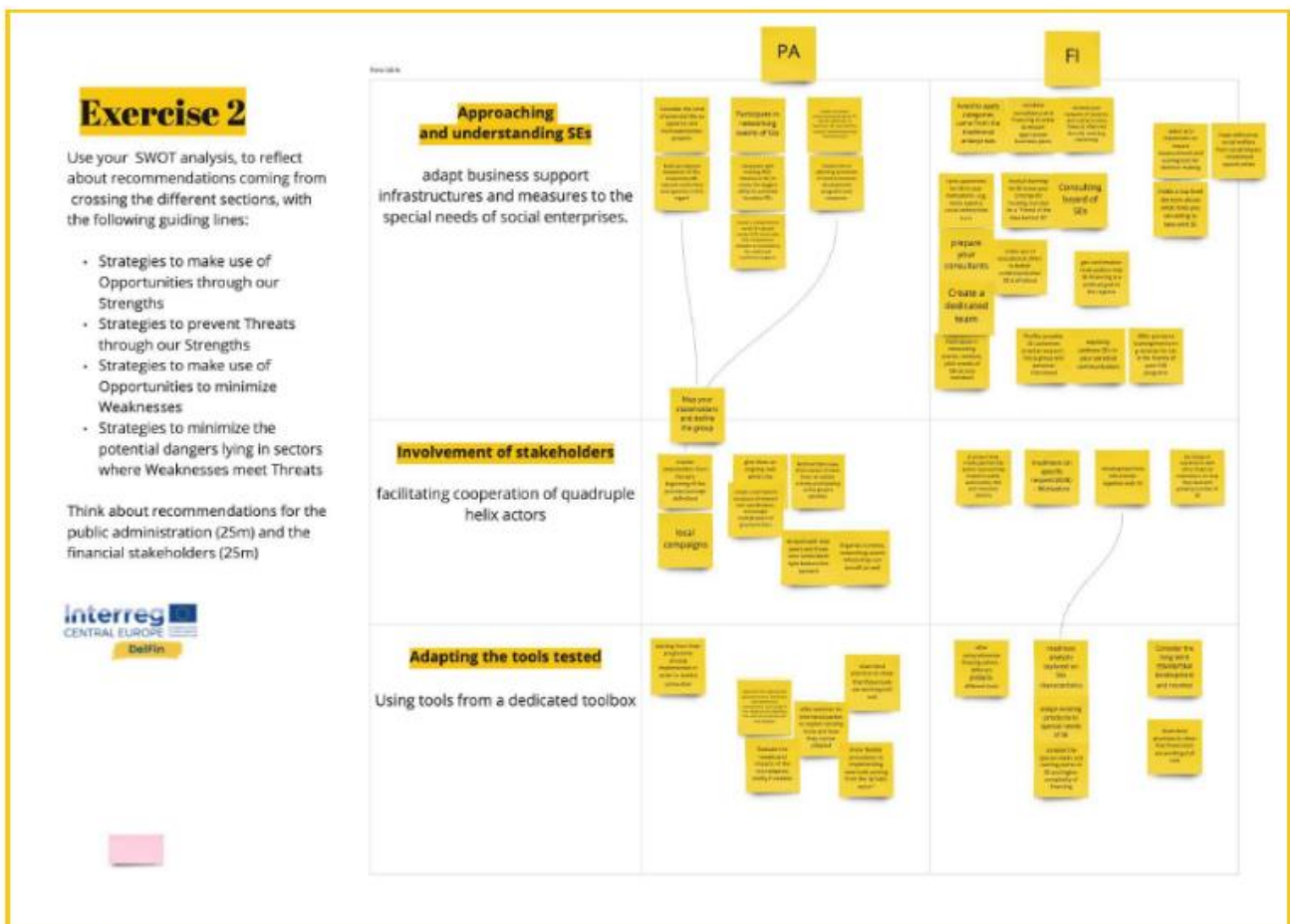
A further essential step to build the shared process was achieved thanks to the Transnational Working Group Meeting of the 20th of April 2021 workshop, held on by an external expert. The links between WP2 and WP3 emerged to build the foundations for a joint concept.

One of the objective of the workshop indeed was to collect and elaborate recommendations starting from the lesson learnt from the pilot experience: the partners were asked to collaboratively share their recommendations for a) Regional or local authorities; b) Financial institutions

Starting from the material available from the templates and using sticky notes, the partners elaborated recommendations in three different areas

- Approaching and understanding SEs: adapt business support infrastructures and measures to the special needs of social enterprises
- Involvement of stakeholders: facilitating cooperation of quadruple helix actors
- Adapting the tools tested: using tools from a dedicated toolbox

See the complete report of the TWGM attached as Annex 1



Shred from the TWGM report 20/4/21

In order to set a clear and shared vision, the process was supported by different coordination tools such as:

- Periodical update call/management call/bilateral call
- 1to1 contact mail
- Template provided from the WPL to the PPs to accompany the process.



- Dedicated area on Confluence and mail attachments, in order to ensure that every Tandem received the updated contents.

## Map the ecosystem

The first step of the process was the assessment of local stakeholders involved in different ways in the lifecycle of SEs.

The ecosystem template represents the point of view of the tandem partners on the territorial ecosystem that supports social enterprises during their life cycle.

The ecosystem template has the goal of identify and collects needs and starting to define the content of the seminars and at the same time to visualized the participants, it lets understand the PPs if other stakeholders or institutions needed to be involved to have a complete audience (referring to the target numbers of 110-80).

It was important to begin with the state of the art because later is has been possible to deduce local objectives, needs in terms of competences, understand who already was aware of DelFin project and who was not still included in the project ecosystem and in the next steps.

ROAD TO CAPACITY BUILDING MAPPING THE ECOSYSTEM, IDENTIFY ACTIONS AND NEEDS												
<p>The template represents the point of view of the <b>tandem</b> partners on the <b>territorial ecosystem</b> that already supports (or willing to support/aimed at supporting) social enterprises during their life cycle.</p> <p>The PPs insert the key actors who would like to involve in the seminars (remembering that about 30 people will have to participate in seminar 1, about 20 people in seminar 2)</p> <p>The template represents a non-exhaustive but representative picture of future participants, and if needed it helps to identify the missing target groups to involve in the process.</p> <p>You should already have at disposal most of the information requested.</p> <p>To compile it, we recommend keeping into account the initial <b>regional analysis</b> results, taking a cue from the <b>local workshops</b> and <b>stakeholder meetings</b>, keeping in mind the lessons learned from the <b>pilots</b> and from the <b>TTMW</b>: the result is an updated draft of the ecosystem mapping to be involved in the CBs.</p> <p>Starting from this basis, the goal is to outline the <b>state of the art</b> of the actions carried out in the territories in support of social enterprises, <b>hypothesize the needs</b> of the actors (needs in terms of mindset, skills, good practices), on these hypotheses <b>build the contents of the seminars</b>, as useful and effective.</p> <p>The table is the first step in a <b>process</b> that will help us define a <b>joint concept</b> and <b>locally implement</b> the seminars .</p>												
organization	target group	mission	territorial level	Delfin involvement	action intervention /	Delfin toolbox	macro - categories	macro - categories	status	frequency	description	needs
name of the organization - refer to stakeholder you would like to involve in CB	choose from the list of target groups refer to the AF	describe the area of competence of the organization	choose from the list the option that represents the territorial jurisdiction	write if the organization gets already in touch with Delfin project or not. If yes, in which activity/phase?	name the main existing action carried out by the organization, aimed at social enterprises in rural areas	write if the action is in the toolbox or not	choose the macro-category that describes the action	if you choose "other", define here the category that describe the action	choose the status, to define the maturity level of the action	choose the frequency, to define the maturity level of the action	briefly describe the action	describe in your opinion what the organization needs in terms of competence, mindset or practical tools, referring to the CB.

*Shred from the template - PP7*

## Identify target groups and need clustering

After mapping the ecosystem, next move was its targeting: goals of the phase is to identify the participants to the seminars (possible or desirable), define their degree of involvement, the methods of involvement, and keep in mind the project's target groups.




Above all, define their needs in terms of skills on SEs.  
For a more specific view on the local analysis see the Annexes

From the need analysis it was deduced that the main clusters of skills needed for target groups at were referred:

- to create awareness and common understanding on SEs - what are SEs specific characteristics and needs
- to support social economy and inclusive growth
- to gather public and private funds available on the territories
- to share Knowledge on new financial measures and adapt existing tools (from DelFin Toolbox)

From the need clustering, the next move was to highlight the local goals of each seminar, they came directly from the analysis of the target.  
This step was mainly conducted locally and related to the results of the local ecosystem mapping. See Annex - Local ecosystems maps

PP7 proposed the template shown below to support PPs in the clusterization of needs and identification of the related competences, identification of categories of actions and recommendations needed to reach the local goals.

**PRACTICAL APPROACH** 

### FROM NEEDS TO COMPETENCES



Referring to the last TWGM clusterize the need of your CB target and identify the categories of actions and recommendations needed to reach your local goal **in terms of competences**

	Target	Need	Competences to deliver during CB	CB activity/method /tools
Example	Financial institution	Lack of competences to dialogue properly with SEs	Build a common ground and a common language	Identikit and profiling
	Financial institution	Lack of competences to dialogue properly with SEs	Build an ad hoc readiness analysis with specific indicators for SEs and not traditional startups	TBD
Your turn				







## Select the approach: tools, methodology and assessment criteria

An important part of setting the conceptual framework of each seminar was giving hints for the practical implementation: PP7 provided suggestions on the methodology to adopt during the seminars in order to deliver knowledge in a more suitable way.

Here follow some suggestions and examples of delivery methods and tools to take inspirations from, that let PPs implement the best CB seminars to reach their local goals.

### LEARNING BUILDING SITE

training approach structured in sequential steps articulated on a case study that will be provided to the participants and on which they will have to work by experimenting "learning by doing" methodologies. In carrying out the case, the participants will be followed by a facilitator who, along the way, will transmit them methods and tools applicable for the solution of the case. This approach is particularly useful both for the development of skills to improve performance and for the creation of collaborative networks and operational partnerships.

### PEER LEARNING

aimed at investigating issues through the active support of the participants. In particular, the frontal lesson, in which basic principles and technical knowledge will be transferred, will be accompanied by a "revision" and "elaboration" work by the participants who will have to re-read the contents on the basis of their experiences and working methods

### FOCUS GROUP - GROUP DISCUSSION

aimed at creating, through the active involvement of the participants, learning on concrete objects. Starting from a specific theme, a question or a keyword, the group will be guided in the presentation of experiences, in the comparison and exchange of ideas, in the presentation of new proposals and in the assimilation of fundamental concepts and information necessary for development. of the theme itself

### EMPOWERMENT LAB

approach based on gamification, i.e. the application of game-specific techniques (points, credits, levels, challenges) to the training activity. Participants will be involved in learning paths related to both transversal and technical areas of competence, functional to the improvement of their performances by experimenting with new strategies and new identification paths of themselves and their organization. The topics covered by gamification will be both technical (e.g. efficient management of resources, development of partnerships, collaboration with stakeholders, etc.) and transversal (e.g. leadership, human resources management, problem solving, etc.).

### WORLD CAFÉ' - PROBLEM SOLVING

the World Café methodology is a simple, effective, and flexible format for hosting large group dialogue. Each element of the method has a specific purpose and corresponds to one or more of the design principles:

*Setting:* Create a "special" environment

*Welcome and Introduction*

*Small-Group Rounds:* The process begins with the first of three or more twenty-minute rounds of conversation for small groups. At the end of the twenty minutes, each member of the group moves to a different new table. They may or may not choose to leave one person as the "table host" for the next round, who welcomes the next group and briefly fills them in on what happened in the previous round.

*Questions:* each round is prefaced with a question specially crafted for the specific context and desired purpose of the World Café

*Harvest:* After the small groups (and/or in between rounds, as needed), individuals are invited to share insights or other results from their conversations with the rest of the large group.




Based on the local analysis of the target and the identification of the skills to be transmitted, each PP has established the most suitable methodology.

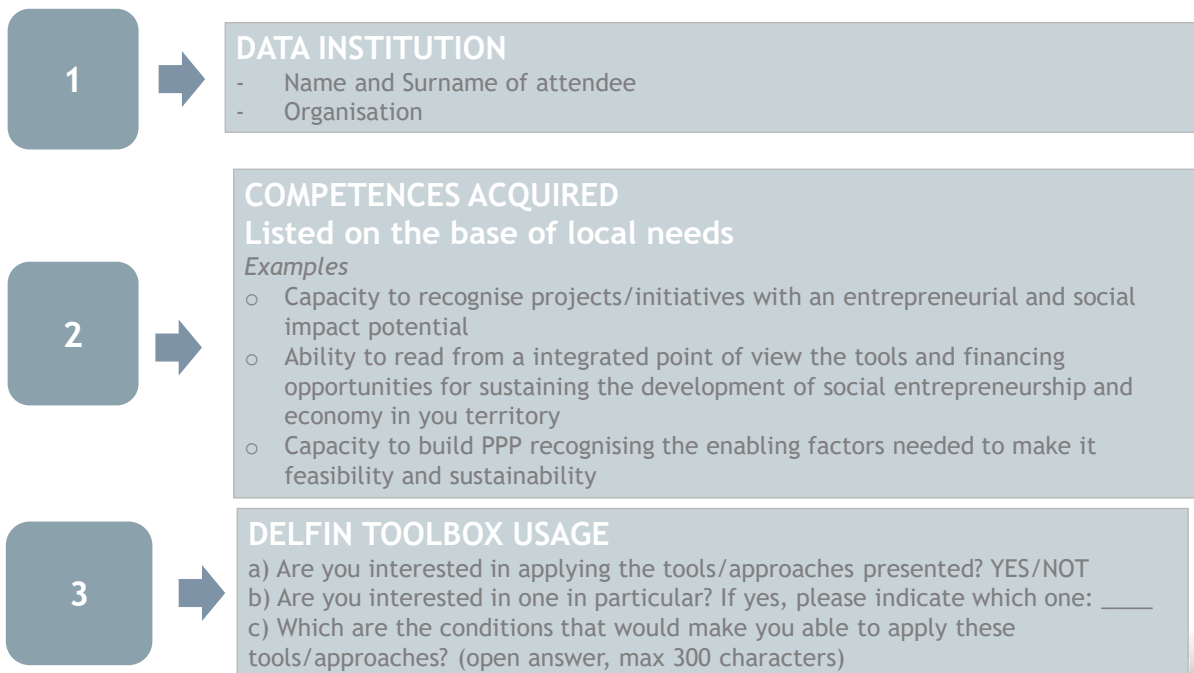
Strictly related to methodology and local goals, is the evaluation criteria. The Consortium needed a flexible system suitable for different delivery methods but at the same time that let compare local results at transnational level.

During the TWGM in July first, and the during the MGM call on September, PPs agree on a set of questions useful to evaluate the satisfaction of the participants to the Seminars.

The purpose of the survey was to produce evidence on the seminars and let analyse attendees and type of organizations involved; the competences acquired and the interest raised on the toolbox. Was agreed on a Google form tool to deliver the survey, a specific one for Local Public Authorities and another for Financial institution, not anonymous survey. Was suggested to deliver it just after the event, but was easier for online participants.

Below the agreed survey's structure.

**SURVEY STRUCTURE AND CONTENTS** 





### 3. Capacity Building seminars implementation

In the following paragraph the 8 seminars will be explained following the logic behind the joint process, for each seminar it will be presented:

- Objectives that Tandem had in mind while planning the seminars
- Competences and Topics delivered to the audience
- Method adopted to reach the objectives and to disseminate skills
- Survey results, findings, considerations

Contents of the section is a summary built by collecting data from different documents produced by the PPs from June 21 till December 21, it has not always been possible to disaggregate the data and information extracted from the documents produced by the PPs. (Available documents in the Appendix)

- Local concept
- Template of local results
- Event reports
- Thematic indicators

This approach helps keeping together in the same logic framework such different contexts for seminars.

#### Germany

The CB Seminars in Germany involved a total of 38 participants, 22 trained persons, (11 for the first; 11 for the second), took place online on the dates 23 and 30 September 2021. Details are following

#### SEMINAR 1 - D.T3.2.2

##### OBJECTIVES

- Set up minds by sensibilization
- Make tools available to participants
- Foster future collaboration of participants

##### COMPETENCES AND TOPICS

- Raising awareness about SE, its potentials for the rural regions and its specificities
- Imparting knowledge about the peculiarities of SW
- Provide support in dealing with SE
- Overview of tools and options to better support SE.
- Where can I get more information?
- Generating understanding for the common use of regional resources

##### METHOD - online

- Storytelling
- Peer Learning



## SUVERYS RESULTS, FINDINGS, CONSIDERATIONS

- Positive feedback on: structure of workshop, understanding and knowledge gain of SE, interest in toolbox
- Desirable: consulting and further training opportunities for BSO as well as a Contact point in Saxony-Anhalt
- Areas for improvement: opportunity to expand network
- Strong intention to support SE in the future

## SEMINAR 2 - D.T3.2.3

### OBJECTIVES

- Awareness raising and change of mindset
- Knowledge about specialities of SEs
- Develop/discuss option for actions/ideas on how to close fundings gaps
- Strengthen regional financial ecosystem

### COMPETENCES AND TOPICS

- Sensitization of the representatives of the financial institutions for the target group of SE, their potentials and their particularities.
- Pointing out possibilities for target-oriented actions to improve the financing situation of SEs encouraging the broad use of the tools from the toolbox to support the development of SEs.
- Identify financing gaps for which the country/IBs could create offers.
- Insight into the special needs, which SE`s do have financing their business

### METHOD - online

- Panel discussion leaded by experts of financing and social founding
- Two parallel group discussions

## SUVERYS RESULTS, FINDINGS, CONSIDERATIONS

- Positive feedback on: structure of the workshop, understanding and knowledge increase of SE, interest in toolbox
- Improvable: possibility to expand network, connection to day-to-day work
- Great intention to support SE in the future

### Thematic considerations:

- SEs need coaching and mentoring on topics of business and economics
- Special rating systems for SEs needed (include social impact)
- Development of central counselling and coordination offices is desirable
- Banking products geared to the needs of SEs
- Alignment of mutual expectations

## Hungary

The CB Seminars in Hungary involved a total of 50 trained persons, (29 for the first; 21 for the second), took place in presence on the 20<sup>th</sup> and 21<sup>st</sup> October 2021.  
Details are following

## SEMINAR 1 - DT3.2.4



## OBJECTIVES

- Increasing awareness on social entrepreneurship concept and social enterprises being registered and active in the targeted municipalities
- Providing tools and knowledge to make them able to identify social enterprises and their specific needs for public support
- Providing tools for supporting SEs by local public authorities

## COMPETENCES AND TOPICS

Common ground for understanding social entrepreneurship

- Terminology of social entrepreneurship
- Theory of social entrepreneurship

Knowledge on

- SE characteristics
- Specific development and support needs

Familiarity with existing / adaptable SE development programs/tools

## METHOD - in presence

- Introduction to social entrepreneurship
- Card game
- Joint elaboration of definitions - group discussion
- Practice based learning of SE characteristics and development/support needs
- Storytelling (pitches)
- Problem solving (world café)
- Marketplace
- Peer learning

## SURVERYS RESULTS, FINDINGS, CONSIDERATIONS

The capacity building seminar had been evaluated by the participants through an evaluation survey. According to the answers of the respondents the seminar achieved its goals as they rated the usefulness of the event with an average of 4.35 points of the maximum of 5. Detailed share of the evaluation of the different aspects of the seminar was the following:

The CB event was helpful

to explore our knowledge on SEs: 4,33

to understand the special needs of the SEs: 4,08

to discover the opportunities for cooperation with and among SEs: 4,66

to know more about how to support SEs: 4,33

## SEMINAR 2 - D.T3.2.5

### OBJECTIVES

- Increasing awareness on social entrepreneurship concept and social enterprises
- Providing tools and knowledge to make them able to identify social enterprises and their specific financing needs
- Making them able to find and offer relevant financial instruments for SEs either from the financial institution itself or from the market

### COMPETENCES AND TOPICS

Common ground for understanding social entrepreneurship

- Terminology of social entrepreneurship
- Theory of social entrepreneurship



Familiarity with existing / adaptable SE financing programs/tools

Knowledge on

- SE characteristics
- Specific financing needs

METHOD - in presence

- Introduction to social entrepreneurship
- Joint elaboration of definitions - group discussion
- Practice based learning of SE characteristics and development/support needs
- Storytelling (pitches)
- Problem solving (world café)
- Marketplace
- Peer learning

## SUVERYS RESULTS, FINDINGS, CONSIDERATIONS

The capacity building seminar had been evaluated by the participants through an evaluation survey. According to the answers of the respondents the seminar achieved its goals to an acceptable degree as the usefulness of the event had been rated with an average of 3.65 points of the maximum of 5. Detailed share of the evaluation of the different aspects of the seminar was the following:

The CB event was helpful

to explore our knowledge on SEs: 4

to understand the special needs of the SEs: 3.8

to discover the opportunities for cooperation with and among SEs: 3.4

to know more about how to support SEs: 3.4

The capacity building seminar had been integrated in the institutional capacity building program of UniCredit Bank Social Impact Banking Directorate as a pilot. Although the content and methods of the seminar has to be developed yet according to the above evaluation in case of financial institutions, UniCredit has nevertheless rated it a success. Based on the outcomes and the lessons learnt from this pilot, UniCredit has strong intentions to integrate the capacity building into the official training programs of the bank and expand it at the national level.

## Croatia

The CB Seminars in Croatia involved a total of 46 trained persons, (20 for the first; 26 for the second), took place in presence on the 29<sup>th</sup> September and online on 27<sup>th</sup> October 2021.

Details are following

## SEMINAR 1 - D.T3.2.8

### OBJECTIVES

- To better inform, encourage and support SEs
- To recognize the value they bring to local communities
- Articulate government objectives and available mechanisms at local / regional level

### COMPETENCES AND TOPICS

- providing representatives of local government with knowledge about financial and other supporting mechanisms related to SE through presentations on upcoming schemes
- good practice examples from other regional/municipal representatives outside the Karlovac County of supporting SE in their areas, and how they do it



- presentations of how multi-sector cooperation can be achieved and what its role is in the SE ecosystem

#### METHOD - in presence

- Thematic presentations followed by Q&A
- Interactive group work
- Focus group
- Open discussions

#### SUVERY'S RESULTS, FINDINGS, CONSIDERATIONS

The evaluation questionnaire consisted of assessment questions (on a scale from 0 to 10; where 0 is weak and 10 is excellent) and multiple-choice questions with one and / or more answers. A total of 14 evaluation sheets were collected, which is 70% (14/20) of the total number of seminar participants, excluding the presence of project partners.

The evaluations were not anonymous: three representatives from the public sector (state level of government), higher education and SMEs (21.4% for each target group). 14.3% of responses relate to business support organizations and stakeholders including NGOs. 7.1% or one local government representative.

When asked if they were familiar with the objectives of the seminar, all participants gave an affirmative answer (14/14 - 100%), and satisfaction with the seminar in terms of meeting the objectives of the seminar are generally very high, ranging from 8.92 to 9.21.

Seminar participants point out that their knowledge of social entrepreneurship has increased.

When it comes to raising the level of awareness about the use and accessibility of instruments to help the development of SE, programs and availability of funding, participants point out that they have greatly increased awareness of available instruments (average score 8.92), with an average score of 9.0, pointed out that they were well acquainted with local policies, support programs and financial mechanisms to improve support for social entrepreneurship.

#### SEMINAR 2 - D.T3.2.9

##### OBJECTIVES

- To better inform, encourage and support SEs - contribute to the understanding of what SE is, and how to better clear misunderstanding about who can use support aimed for SEs in Croatia
- presentation of financial instruments for rural development

##### COMPETENCES AND TOPICS

- To increase awareness and communicate the lessons learned.
- To explore new ways to empower and engage social entrepreneurs.
- To stress the importance of creating and showing social value (impact measurement).
- To create a discussion of teaching environment. To explore possibility to design and develop a social entrepreneurship initiative utilizing the academia
- To build knowledge about grants, public procurement and social return on investment instruments, as well as linking them with partners, investors and networks.
- Create a discussion between stakeholders

##### METHOD - online

- Working group
- Frontal presentation and thematic session





## SURVERYS RESULTS, FINDINGS, CONSIDERATIONS

6 audience members people completed the questionnaire (there was no way of making it mandatory as audience followed through Facebook live) and here are some conclusions:

- 4 were already acquainted with the term SE/SEs: what they miss is concrete examples of SE; a user-friendly list of SEs in the country; good practices of supporting SEs; criteria that distinguishes SEs from ordinary Es
- what they found most useful: that the Ministry explained the upcoming funding scheme in detail; banks describing their support to ‘impact entrepreneurship’ and how they assess this impact
- what they would like to see differently next time during a similar event: examples from more banks and / or FIs if there are any in the country (examples of SE support); if not, to invite them still and ask them why they do not recognise the S in “SE” and what would need to happen for them to change their mind and start offering this kind of support; somebody from the tax office to explain why tax cuts are not possible for SEs; to communicate directly with the panelists in a way that the panelists answer questions from the audience (perhaps in smaller private groups with audience especially interested in the topic)
- last remarks: “it seems banks are more likely to support SEs than state/ governmental institutions - too bad”

### Italy

The CB Seminars in Italy involved a total of 66 participants, 47 trained persons, (28 for the first; 19 for the second), took place online on the 29<sup>th</sup> and 30<sup>th</sup> September 2021. Details are following

#### SEMINAR 1 - D.T3.2.6

##### OBJECTIVES

- Increase awareness on “Social Enterprises”
- Boost multi-funding and multi-governance approach
- Strengthen an ecosystem in a multi-level governance and multi-funding approach to sustain SEs

##### COMPETENCES AND TOPICS

- Overview on the Regional strategy → Ability to read the context
- How to recognise SEs → Ability to read the context
- How to create PPP to support SEs → Ability to interact with other part of the same organisations and/or stakeholders in the same local ecosystem
- Reading of funding sources and PNRR → Cross-sectoral and multilevel governance way to work

##### METHOD - online

- Frontal lessons
- Thematic session
- Working group
- Learning Building site

## SURVERYS RESULTS, FINDINGS, CONSIDERATIONS

Out of 34 participants, the indicator was 28 trained persons, of these only 10 answered the evaluation questionnaire.





The main reason is due to the duration of the seminar, transposed online due to Corona. Many exponents of the participating organizations had other commitments not being able to participate beyond the time. It is well known that it is difficult to obtain results afterwards an online event.

Did the seminar help improve the following skills?

Ability to recognize projects and initiatives with potential for social and entrepreneurial impact

→ 100%

Ability to read with an integrated point of view the financial tools and opportunities to support the development of social entrepreneurship and the economy in the reference area?

→ 90%

Ability to build PPPs, recognizing the enabling factors necessary for their feasibility and sustainability.

→ 60%

Tools, initiatives and methodologies were presented during the seminar:

Did you find the approaches and tools presented interesting?

→ 100%

Do you think some are replicable and usable by your organization?

→ 90%

Considerations:

Avoid generalist sessions - organise sectoral training workshops and differentiate targets

Have restricted number of participants to enable practical sessions and inclusive interaction

Enrol qualified speakers

Impact on targets:

Overall positive results but Exercises should be divided in more steps in order to be more easily taken up from all the level of audience and to guarantee increased interaction

## SEMINAR 2 - D.T3.2.7

### OBJECTIVES

- Increase awareness about impact finance to support social enterprises
- Enhance the local ecosystem: favour the emergency of synergies between public and private funding organizations in local development

### COMPETENCES AND TOPICS

- Overview on ESG and related concepts → Familiarise with a standard terminology and a methodology for practical application (Sustainable/Ethical finance, impact evaluation,...)
- Sustainable finance in the EU framework → Be informed on the most recent regulations and requirements that apply at European and national level
- Financial Ecosystem in support to start-ups and SEs → Finding its own positioning within the ecosystem and understanding the opportunities it may offer

### METHOD - online

- Three thematic sessions
- Frontal lessons in plenary
- Group work for exercise and discussion
- Conclusions in plenary

### SUVERY RESULTS, FINDINGS, CONSIDERATIONS

Out of 32 participants, the indicator was 19 trained persons, of these only 7 answered the evaluation questionnaire.



The main reason is due to the duration of the seminar, transposed online due to Corona. Many exponents of the participating organizations had other commitments not being able to participate beyond the time. It is well known that it is difficult to obtain results afterwards an online event.

Did the seminar help improve the following skills?

True familiarity with the meaning of the expressions "ESG" "Corporate social responsibility", "Sustainable finance", "Ethical finance", "Social and environmental impact".

→ 100%

Be informed on the most recent regulations and requirements that apply at European and national level

→ 100%

Finding its own positioning within the ecosystem and understanding the opportunities it may offer

→ 100%

How do you judge the proposed approach and instruments?

→ 75%

Do you think some of them can be applied to your work/organisation?

→ 100%

Considerations:

Avoid generalist sessions - organise sectoral training workshops and differentiate targets

Have restricted number of participants to enable practical sessions and inclusive interaction

Enrol qualified speakers

- from well recognised sectoral institutions, with strong reputation and credibility (attractiveness)

- with sound skills, on-the-field experience and practical tools and methodologies to be shared and discussed (effectiveness)

Impact on targets:

- local banks: highly receptive, mature enough to start applying ESG and ready to be an active player in the ecosystem and local networks that support impact-businesses;
- LAGs not yet ready, far from the application of ESG, need to work further on awareness rising and skills/methodologies learning;
- Bank Foundations did not respond: evidently these are issues on which they already have consolidated awareness and skills.



## 4. Evaluation

The evaluation of the results of capacity building is divided into 4 parts, as shared with the PPs in the creation of the joint concept.

- Target achievement
- Satisfaction of participants
- Acquired skills
- Tools used / interest in tools shown

it must be specified that:

- in the target count, the selected value was Trained Persons, that is not equal to the Participants
- only persons who were not part of Delfin staff were reported
- If someone attended both seminars, was counted once

The target is slightly below the expected threshold

	Germany	Hungary	Croatia	Italy	Sum	Target
PA/Mun	7	26	20	28	81	110
FI	12	19	14	19	64	80
Sum	19	45	34	47	145	190

Reasons why seminars did not easily reach the thresholds were discussed among PPs during the MGM call in December, the reasons hypothesized by the partners are:

- problems with online meetings - lack of digital resources (human and technic) for some kind of target group
- Due to Corona, other strategic topics are more urgent and fewer resources are available for new topics, such as SEs.
- Overload of online training opportunities (competition, lack of time)
- One 1 day event was considered too long for online seminars
- Distinctly fewer networking opportunities online

But PPs were satisfied with the results anyway.

Satisfaction of participants and the acquisition of knowledge were measured by surveys as seen in the previous chapters

The results are quite positive even if the data collected are below an average evaluation threshold. The difficulties of gathering feedback on the seminars results' were explained in Chapter 3 in the specific section of each seminar.

According to the data provided by PPs, target groups involved in both local seminars were:



TARGET GROUP	GERMANY	HUNGARY	CROATIA	ITALY
LOCAL PUBLIC AUTHORITY:	4	8	6	0
INTEREST GROUPS INCLUDING NGOs	2	0	3	13
HIGHER EDUCATION AND RESEARCH	0	1	3	4
EDUCATION/TRAINING CENTRE AND SCHOOL	1	0	0	0
SME	4	6	4	3
BUSINESS SUPPORT ORGANIZATION	5	3	2	1
REGIONAL PUBLIC AUTHORITY	2	3	1	1
SECTORAL AGENCY	0	2	4	1
OTHER	8	1	1	13

According to the data provided by PPs, tools disseminated during both local seminars were:

	GERMANY	HUNGARY	CROATIA	ITALY
TOOLS DISSEMINATED	7	*	3	1

\*data not provided by Tandem PP3 - PP4

For a more specific view on the local results in terms of target group reached see the Annexes

In terms of competences and needs, as already anticipated, the main clusters of were:

- to create awareness and common understanding on SEs - what are SEs specific characteristics and needs
- to support social economy and inclusive growth - how to support enabling factors for strengthening the ecosystem
- to gather public and private funds available on the territories
- to share Knowledge on new financial measures and adapt existing tools (from DelFin Toolbox)

According to the data provided by PPs, specific competences araised in each seminars were:

#### SEMINAR 1

GERMANY	HUNGARY	CROATIA	ITALY
Raising <b>awareness</b> about SE and Imparting knowledge on SEs characteristics	Common ground for understanding entrepreneurship: <b>Theory</b> of entrepreneurship	To increase <b>awareness</b> and communicate the lessons learned.	Ability to read the context: Overview on the <b>Regional strategy</b>



Provide <b>support</b> in dealing with SE	Knowledge on SEs <b>characteristics</b> and specific development and support needs	To explore new ways to <b>empower and engage</b> social entrepreneurs - Create a discussion between stakeholders	Ability to read the context: How to <b>recognize SEs</b>
Overview of <b>tools</b> and options to better support SE	Familiarity with existing / adaptable SE <b>development programs/tools</b>	To stress the importance of creating and showing social value ( <b>impact measurement</b> ).	Ability to interact with other part of the same organizations and/or stakeholders in the same local <b>ecosystem</b> : How to create PPP to support SEs
Generating understanding for the common use of <b>regional resources</b>		To build knowledge about grants, public procurement and social return on investment <b>instruments</b> , as well as linking them with partners, investors and networks.	<b>Cross-sectoral and multilevel governance</b> way to work: Reading of funding sources and PNRR

## SEMINAR 2

GERMANY	HUNGARY	CROATIA	ITALY
<b>Sensitization</b> of the representatives of the financial institutions for the target group of SE, their potentials and their particularities.	Common ground for <b>understanding</b> social entrepreneurship: Terminology and Theory of social entrepreneurship	Providing representatives of local government with knowledge about financial and other supporting mechanisms related to SE through <b>presentations on upcoming schemes</b> (presented by representatives of relevant Ministry);	Familiarise with a standard <b>terminology and a methodology</b> for practical application
Pointing out possibilities for target-oriented actions to improve the financing situation of SEs encouraging the broad use of the <b>tools</b> from the toolbox to support the development of SEs.	Knowledge on SEs <b>characteristics</b> and specific development and support needs	<b>Good practice examples</b> from other regional/municipal representatives outside the Karlovac County of supporting SE in their areas, and how they do it	Be informed on the most recent <b>regulations and requirements</b> that apply at European and national level
Identify <b>financing gaps</b> for which the country/IBs could create offers.	Familiarity with existing / adaptable SE <b>development programs/tools</b>	Presentations of how <b>multi-sector cooperation</b> can be achieved and what its role is in the SE ecosystem	Finding its own <b>positioning within the ecosystem</b> and understanding the opportunities it may offer
Insight into the <b>special needs</b> , which SE's do have financing their business			



## 4. Sustainability and transferability

QUESTION	ANSWER
<b>Sustainability</b> (institutional, financial and political) How will the work package outputs be further used by project partners once the project has ended?	Project Partners will incorporate knowledge gained in their own everyday work with social Enterprises. Municipalities and other business accelerators should be enabled to support social entrepreneurship, allocate financial resources and set political priorities for this topic. PP will also share CB-content with education centres and associated partners in core partner regions for reuse after project end. CB-activities help to promote uptake of project results by organisations outside core PP.
<b>Transferability</b> (linked to the WP Communication) Which work package outputs will be transferred to which additional target audiences during project lifetime and beyond? Why are these outputs the most	The content of the CB seminars will be transferred to multipliers of public authorities and financial institutions outside regional coverage of implemented seminars (i.e. European association of public banks) and network organisations for social entrepreneurship to take up seminars outside of areas covered within WPT 3 activities. This additional target group will be included in WPC activities like newsletter or participation in public events.

Regarding the Sustainability (institutional, financial and political) of the outputs, in the AF it was planned: to incorporate the approaches used during the seminars in the everyday work of PPs who work in contact with SEs; to enable local institutions to support and learn about the world of social enterprise, creating measures and including the topic among the priorities. Furthermore, regarding Transferability (linked to the WPCommunication) it was planned to promote the results of the CB seminars also outside the DelFin network.

The Consortium adopted a shared point of view (MGM call in September), decided to focus on the methodology used to set the process and define the different local approaches, not on the contents that of course were suited on local needs.

As already said, and here summarized, the partner's approaches for both seminars were:

METHODOLOGY	GERMANY	HUNGARY	CROATIA	ITALY
CARD GAME		X		
FOCUS GROUP			X	
FRONTAL PRESENTATION / THEMATIC SESSION			X	X
GROUP DISCUSSION	X			X
PANEL DISCUSSION	X			
PEER LEARNING	X	X		
Q&A SESSION			X	
STORYTELLING / MARKETPLACE	X	X		
WORKING GROUP			X	X
WORLDCAFè / PROBLEM SOLVING		x		
LEARNING BUILDING SITE				X

The dissemination of CB methods involves different channels:

- Newsletter
- Article on the projects website
- 3<sup>rd</sup> Video



## 6. Recommendations and Lessons learnt

The results and achievements of the Capacity Building seminars have been evaluated and discussed among the partnership at transnational level. Partners developed conclusions on how to use the format of Capacity Building in the future to continue promotion of social entrepreneurship.

The lessons learned were structured according to two macro themes and related specific questions:

Evaluation of experience in terms of content with a focus on targets and skills

- *What are the new/missing targets you would like to reach through CB activities and for which purpose?*

Evaluation on the instrument itself with a focus on how to reuse and replicate it

- *If you were in the position to design new CB seminars, regarding the formats implemented, what you would like to maintain and what you would like to change/not repeat?*
- *How do you consider CB activities positioning within the project (timing, length, target, etc.) in terms of generating impact? Examples: they are calibrated; have to be reconsidered, anticipated/postponed, etc.*

### Evaluation of experience in terms of content, targets and skills

Increase the participation of public authorities with the purpose to strengthening awareness on what SEs is and developing capabilities to support them to born and growth, with particular regard to:

Small municipalities (< 5000 habitants)

Due to their small dimension, some local bodies have human resource constraints and lack of capabilities which makes their direct involvement in CB activities difficult (transnational perspective: PP2; PP5; PP7; PP8). Usually, in fact, small municipalities delegate their representation to intermediate bodies or to external parties to whom they entrust technical assistance.

Local Action Groups (LAGs)

LAGs are a key stakeholder for implementing local development strategies by awarding grants to local projects in the frame of European Common Agricultural Policy and improving the sense of belonging of Local Communities with their territories. Increase LAGs participation in CB activities could make the difference in settle an ecosystem strategy for supporting social economy and enterprises (Italian perspective PP7; PP8).

More social enterprises to be involved in order to open a confrontation with public authorities and financial institutions raising awareness and sharing information in the new programming period (PP4 perspective).

### Evaluation on the instrument itself with a focus on how to reuse and replicate it

*If you were in the position to design new CB seminars, regarding the formats implemented, what you would like to maintain and what you would like to change/not repeat?*



In general, it was noted that the following aspects contributed to have a successful event:

- Avoiding generalist events: organising «sectoral» training workshops and differentiating targets resulted to be a winning approach.
- Avoiding put many topics together in one seminar, in order to have time to deep some contents.
- Having a restricted number of participants enabled practical sessions and inclusive interaction, thus reinforcing the learning experiences.
- Enrolling speakers/trainers with sound on-the-field experience could provide practical tools and methodologies to be shared and discussed, thus ensuring the practical effectiveness of the training.

In particular, it was highlighted to maintain:

- The methodology chosen with plenary session alternated working groups in separated rooms (all PPs).
- The breakout rooms structure for different reasons:
  - it allowed very interactive and productive discussion among participants (all PPs)
  - it is the most efficient way to work online to get people directly involved when is not possible to meet in person (PP1; PP2).
- Mixing stakeholders is better than division per “profile” (PP6) to work with an ecosystem
- prospective.
- Specifically highlight topics on how to create private-public partnerships and the topic of measuring social impact (PP5).
- Enrolling speakers/trainers from well-recognised sectoral institutions, with strong reputation and credibility increased the attractiveness of the workshop and ensured participation (PP8).

In particular, it was highlighted to *change/not repeat*:

- Providing more interaction between the sessions to help aid participants to keep on board and not lose them during the activities (PP1).
- Splitting seminars in separated rooms or thematic sessions on two or three days to make it more handleable for and reach more participants (PP2).

*How do you consider CB activities positioning within the project (timing, length, target, etc.) in terms of generating impact? Examples: they are calibrated; have to be reconsidered, anticipated/postponed, etc.*

Almost all PPs agreed on saying the timing was good but the length of the seminar should be shortened and, if necessary, divided into different sessions or days. Workshops should be no longer that half a day, because it's difficult to keep participants on board (they don't have one day to dedicate to extra activities) and maintain their attention (especially whether workshop are online).

An open discussion was held on the opportunity to anticipated part of capacity building activities at the beginning of the project, in order to better involve relevant local stakeholders throughout the entire process.





## ANNEXES

D.T2.7.2 - Transnational working group meeting - report of the workshop

Joint Process templates

Guideline for a joint concept

Local results