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THE COMPETENCE FRAMEWORK FOR THE MANAGEMENT OF A SOCIAL COOPERATIVE ENTERPRISE (LEVEL 2 ANALYSIS)			
<u>Investigate /assess</u> <ul style="list-style-type: none"> • Identify new opportunities and/or risks for the enterprise • Evaluate the social and environmental impact of the enterprise and its relation to current and anticipated social needs • Assess the viability of the enterprise • Evaluate the capabilities and capacities of the members of the enterprise 	<u>Plan / Decide / Improve</u> <ul style="list-style-type: none"> • Develop the business plan and associated policies, plans and strategies to ensure the effective and sustainable operation of the enterprise. • Ensure that policies, plans and strategies are feasible, ethical and promote the aims of the enterprise 	<u>Manage the enterprise</u> <ul style="list-style-type: none"> • Work effectively with the Executive Board / General Assembly to implement the business plan and the associated policies, plans and strategies, and ensure that the enterprise's objectives are met • Invest in know-how to support the objectives of the enterprise • Communicate and collaborate with other organizations and/or stakeholders to promote the enterprise's goals • Ensure that the enterprise is effectively and accurately represented • Resolve conflicts • Implement and promote the principles of participative leadership 	<u>Review / evaluate / analyse</u> <ul style="list-style-type: none"> • Review financial outcomes and performance • Implement internal evaluation procedures and present the results. • Use evaluation results to recommend changes to policy, planning and practices
<u>Ethical issues</u> <ul style="list-style-type: none"> • Maintain up-to-date knowledge of, and act in accordance with, relevant legislation • Act in accordance with the statutes and the internal regulations of the enterprise • Operate according to the principles of transparency and accountability • Ensure that the business practices are balanced with the social and person-centered approach of the enterprise 		<u>Self-management and continuing development</u> <ul style="list-style-type: none"> • Acknowledge and fulfil the expectations and procedures related to own role • Maintain and further develop own knowledge and skills in relation to current and future work requirements 	

THE COMPETENCE FRAMEWORK FOR THE MANAGEMENT OF A SOCIAL COOPERATIVE ENTERPRISE (LEVEL 3 ANALYSIS)

1. Investigate and assess factors for the development of the enterprise

1.1. Identify new opportunities and/or risks for the enterprise

This includes:

- Implementation of proper methodologies to identify opportunities and risks for the enterprise (as for example SWOT analysis)
- Research to identify market needs for products and services that can be offered by the enterprise
- Identifying the extent of competition in the enterprise's potential markets
- Identifying and assessing financing opportunities and other forms of support provided by sponsors, supporters, and external (including EU) sources of funding
- Making use of (formal and informal) networks to gain intelligence and to exchange information and views.

1.2. Evaluate the social and environmental impact of the enterprise and its relation to current and anticipated social needs

This includes:

- Identifying and assessing existing and emerging social and environmental needs relevant to the enterprise's area of operation
- Choice of proper methodology and tools to assess/ measure social impact
- Reviewing the social impact of the enterprise and assessing the extent to which it can be oriented towards identified needs
- Assessing the effectiveness of the enterprise in relation to identified social need / where necessary designing and recommending changes to its focus or operations.

1.3. Assess the viability of the enterprise

This includes:

- Assessing the overall financial performance of the enterprise, and identifying the reasons for any shortfalls
- Assessing the effect of the fiscal environment and other external factors on the performance of the enterprise
- Identifying opportunities to improve financial outcomes without compromising the values and principles of the enterprise
- Identifying any issues relevant to the market relevance of products and services,
- Identifying opportunities to improve/update products and services
- Identifying needs and opportunities as regards products and services offered by other social and solidarity economy organisations.

1.4. Evaluate the capabilities and capacities of the members of the enterprise

This includes:

- Collecting and collating data on the knowledge, skills and qualifications of the enterprise's members, their availability and their wishes, and any obstacles or difficulties they are experiencing.
- Identifying how the enterprise is best placed to take forward its objectives by making effective use of its members' capacities through job creation.

2. Plan / Decide / Improve

2.1. Develop the business plan and associated policies, plans and strategies to ensure the effective and sustainable operation of the enterprise.

This includes:

- Developing various scenarios regarding entrepreneurial activity and business planning.
- Open dialogue among members and joint decision on the best scenario.
- Developing a business plan for the enterprise that defines activities, resources, economic, social and environmental objectives
- Developing associated policies, plans and strategies that support the business plan and provide a framework for the management and development of the enterprise
- Developing proposals for the development of enterprise's human resources that meet the needs of the enterprise, make effective use of members' capacities, and provide opportunities for unemployed members
- Ensuring that policies, plans and strategies are mutually supportive and complementary to each other

2.2. Ensure that policies, plans and strategies are feasible, ethical and promote the aims of the enterprise

This includes:

- Ensuring that the policies, plans and strategies are feasible and conform with the principles and values of the enterprise
- Implementation of participative decision-making procedures in relation to the content of the policies, plans and strategies.

3. Manage the enterprise

3.1. Work effectively with the Executive Board / General Assembly to implement the business plan and the associated policies, plans and strategies, and ensure that the enterprise's objectives are met

This includes:

- Implementing, and monitoring the implementation of the business plan and the associated policies, plans and strategies
- Ensuring effective human resource development in accordance with the agreed human resource policies
- Preparing any suggestions for the Executive Board and the General Assembly, and ensuring that they are adequately documented
- Implementing the decisions of the Executive Board and/or General Assembly by interpreting them into tasks and obligations, both for the manager and for delegation to others taking into account factors, such as work load and personal traits.
- Ensuring that staff understand and are able to carry out the matters and tasks delegated to them.

3.2. Invest in know-how to support the objectives of the enterprise

This includes:

- Reviewing the sectoral press (domestic and international), events and other relevant sources of information to identify new developments and sources of expertise and to acquire know-how relevant to the enterprise operation.
- Ensuring that the needs of the enterprise for know-how are adequately identified and assessed
- Identifying and making use of funding opportunities and sources of free or subsidised support that support the acquisition of relevant know-how
- Securing know-how that is sufficient to meet the objectives of the enterprise and to enable it to develop in accordance with its longer-term ambitions.

3.3. Communicate and collaborate with other organizations and/or stakeholders to promote the enterprise's goals

This includes:

- Identifying the communication needs of the enterprise
- Ensuring and coordinating an effective communication strategy
- Developing effective networking at enterprise level, in the sectors, locations and communities that are relevant to the enterprise's activities
- Pursuing the development of networking and synergies with complementary organisations where this is possible and likely to be effective
- Monitoring networking activities for their effectiveness and efficiency.

3.4. Ensure that the enterprise is effectively and accurately represented

This includes:

- Ensuring that the enterprise is represented effectively in the sectors and communities that are relevant to it
- Ensuring that personal communications, and those of staff members and where relevant volunteers, represent the enterprise accurately and effectively.

3.5. Resolve conflicts

This includes:

- Designing formal and informal procedures for conflict resolution
- Locating emerging conflicts and taking effective preventive action
- Defusing tensions and overcoming differences of opinion using relevant conflict resolution skills and tools.

3.6. Implement and promote the principles of participative leadership

This includes:

- Involving staff and members in decision-making using the principles of participative leadership as they apply in the context of the expectations, procedures, values and vision of the enterprise
- Encouraging others with management or leadership roles in the enterprise to adopt participative leadership approaches in their work.
- Implementing empowerment practices, for the promotion of participative leadership

4. Review / evaluate / analyse

4.1. Review financial outcomes and performance

This includes:

- Reviewing the annual financial performance outcomes together with social and environmental impact results, in the light of previous performance, agreed objectives and budget forecasts.
- Drafting of the presentation of annual outcomes, on the basis of the standards of the enterprise.
- Analysing causes for divergence from goals and expectations
- Presenting the annual report to the Executive Board and the General Assembly

4.2. Implement internal evaluation procedures and present the results.

This includes:

- Applying previously-agreed internal evaluation methodologies and criteria
- Reviewing actual performance against agreed performance indicators, customer satisfaction and social impact criteria
- Exploring any specific problems that arise from the evaluation and from interaction with colleagues
- Presenting the results to the Executive Board / General Assembly. Preparing material of annual report for general publication
- Using the results of the evaluation to improve future criteria and indicators.

4.3. Use evaluation results to recommend changes to policy, planning and practices

This includes:

- Drawing out and summarising evaluation findings that have implications for how the enterprise operates
- Using the findings to make changes to day-to-day management practices
- Making recommendations for change, backed by relevant documentation and data, to the the Executive Board / General Assembly.

5. Self-management and continuing development

5.1. Acknowledge and fulfil the expectations and procedures related to own role

This includes:

- Recognizing and acting in accordance with the expectations associated with the role and the principles and procedures of the enterprise
- Working within the limits of authority of the role, referring matters outside of this to the Executive Board / General Assembly
- Developing a personal work programme, managing own time and resources effectively to achieve it
- Responding positively and constructively to any criticisms arising from formal and informal review and evaluation.

5.2. Maintain and further develop own knowledge and skills in relation to current and future work requirements

This includes:

- Ability for self-evaluation
- Identifying own strengths and limitations in respect of current and emerging work requirements, and taking action to develop the knowledge and skills needed to be able to act effectively (this may be through various means e.g. formal training, events and networks, discussion with colleagues and experts, self-directed study and investigation, and action-based learning)
- Identifying any technical expertise (e.g. accounting, law, marketing, the specific field/s of the enterprise) needed personally to operate effectively, and acting to gain this at the appropriate level
- Using feedback at work, whether formally from reviews and evaluations or informally from colleagues, members and customers, to help identify areas for development or changes in approach.

6. Ethical issues

6.1. Maintain up-to-date knowledge of, and act in accordance with, relevant legislation

This includes:

- Having, and being able to apply to day-to-day operations, a comprehensive knowledge of the legislation specific to social enterprises
- Ensuring that the enterprise operates within the law, drawing on an adequate knowledge of the law relating to both business operations and the specific field of operation of the enterprise
- Pay particular attention on the issue of personal data protection (where applicable)
- Knowing when legal advice is necessary or beneficial
- Working effectively with legal specialists from within or outside the enterprise.

6.2. Act in accordance with the statutes and the internal regulations of the enterprise

This includes:

- Working in accordance with the spirit and the values of the enterprise's statutes and internal regulations, and ensuring that others do the same
- Acting in a way that takes into account the social and environmental impact of the enterprise (and the need to assess it).

6.3. Operate according to the principles of transparency and accountability

This includes applying the principles of transparency and accountability

6.4. Ensure that the business practices are balanced with the social and person-centered approach of the enterprise

This includes:

- Maintaining a balance between the business and social or community objectives of the enterprise, in line with its values and vision
- Ensuring equality of opportunity and fair treatment for the enterprise's staff, volunteers, customers/supporters, and stakeholders
- Promoting the person-centered approach with means and tools that render the members, employees, volunteers and target-groups agents of change
- Making fair and ethical use of any voluntary support that the enterprise uses.