

# Functions of JOB COACHING in WISEs (Work Integration Social Enterprises)

*Profiles and  
Training Package*

**INTELLECTUAL OUTPUT 2**



EPP PROJECT

Strengthening Emergent Professional Profiles in the third sector – a way to foster innovative bridges to work and social inclusion of disadvantage group

## EPP project

EPP (Strengthen emerging professional profiles in the third sector) is an innovative project to promote routes into work and social inclusion for disadvantaged groups. It is a European project funded by the Erasmus + Key Action 2, between November 2014 and October 2016.

It is a strategic partnership coordinated by A3S Association (Portugal), in partnership with ARBEIT (Austria), ENSIE (Belgium) SCF (Italy) and SEE (UK). Partners have lengthy experience in training, consultancy, research, networking and lobbying in the fields of social enterprises, and especially WISE (Work Integration Social Enterprises). We are members of ENSIE, sharing a common mission for social and professional integration of disadvantaged groups.

With a **background** of the new European priorities on social innovation in the Europe 2020 Strategy, EPP focuses on the current challenges of WISE' professionals-- particularly coaching and marketing, and proposes training and advocacy instruments for work integration of disadvantage groups.

The **objectives** are:

- To identify the needs and challenges in training, qualification and certification of skills for professionals working in this sub-sector of social enterprises in the EU.
- Create instruments for intervention.
- Lay the foundation for a structured and strategic intervention of medium and long term partnership for advocacy and lobbying.

The ultimate **purposes** or the expected impacts of the project are to contribute to strengthening the training offer to enhance professional skills of WISE and to promote effectiveness and innovation in the inclusion of disadvantaged groups in work.

There are four **products** from this project:

- One study: The coaching and marketing functions in WISE - an exploratory study in five European countries
- Two training packages: coaching and marketing for WISE
- One document with Guidelines and recommendations around professional qualifications of WISE

At the moment (from April to September 2016) we are validating and disseminating the products, with key stakeholders and at local, national and European levels.

## EPP Partnership

### [Associação A3S](#) (Portugal)

Coordinator of the EPP Project

Coordinator of the intellectual output 1 - The coaching and marketing functions in WISE: Exploratory study in 5 European countries

### [ARBEIT](#) (Austria)

Coordinator of the intellectual output 3 - Functions of marketing in WISE

### [ENSIE](#) - European Network of Social Integration Enterprises – (Belgium)

Coordinator of the intellectual output 4 – Guidelines and recommendations for the qualifications of WISE Human Resources

### [Scuola Centrale Formazione](#) (Italy)

Coordinator of the intellectual output 2 - Functions of job coaching in WISE

### [Social Enterprise Europe](#) (U.K.)

Project evaluator (and co-author, as well as all partners of the fourth intellectual outputs)

## Table of contents

EPP project.....	2
EPP partnership.....	3
Table of contents.....	4
Introduction.....	5
1. Profile of functions of job coaching in WISEs.....	6
1.1 Description.....	6
1.2 Coaching in WISEs.....	7
1.3 Core skills.....	9
1.4 Profile of technical functions.....	9
2. Training package.....	12
2.1 Methodology.....	12
2.2 Topics of the training.....	15
3. Training package.....	17
Annex 1 .....	28
Annex 2 .....	38
Annex 3.....	47

## INTRODUCTION

The partnership started from one fundamental premise: WISEs, despite being enterprises with a special focus on providing jobs to people who are disadvantaged in the labour market and often at risk of poverty and social exclusion, have different “faces” and “peculiarities” in different European countries.

A common feature in all types of WISEs in Europe is that they coach disadvantaged people into work according to individual need.

During the project, we have discussed the concept of “job coaching” and the different forms it takes in different contexts. The methodology proposed is to build a relationship between the Coach and the disadvantaged person and through an agreed pathway, enhance the development and recognition of the person’s ability to find work.

During our investigation, we have identified a strong need to focus on communication. Success depends on a job coach being able to “communicate” in the broadest sense with the disadvantaged person, with the working team and with local enterprises and businesses. So the partners agreed to deepen, in terms of skills and training content, one module on “communication”.

We reflected on the link between “coaching” and “social marketing.” In almost all the social enterprises analysed, marketing was actually carried out by the job coach rather than by a marketing professional. This included “external communication”, and promotion of the image and reputation of the WISE in the local community.

So the Partnership decided to focus our work on IO3-marketing for social enterprise, on the needs and skills useful for the job coach connecting the two professional profiles and related training proposals. We wanted to address job coaches’ needs for making contact with the potential employers and supporting the beneficiary’s entry into employment.

## 1. PROFILE OF JOB COACHING IN WISES

### 1.1 Description

We observed that the term "job coach" has different connotations in each European country, but we identified common features. We considered only job coaches working with people with special needs (such as people with disabilities, with critical illness, cognitive or relational difficulties, past or current addiction, ex-offenders, immigrants<sup>1</sup>) and aimed to reduce the distance that separates them from the ordinary labour market, and promote social integration.

The main functions of the job coach are:

- a. to integrate disadvantaged people, helping them throughout the whole pathway to work including preparation, recruitment, placement and stabilization in the workplace;
- b. to detect and analyse the capabilities, needs and resources available to help each individual
- c. to search for local employment opportunities, making direct contact with companies and representative bodies;

*One of our case studies Job TransFair<sup>2</sup> is interesting because of their strategy for job search and for their individual monitoring process. Expectations about employment and training needs are identified and previous job applications are evaluated. Evaluation begins in the second week and Monitoring is biweekly or monthly (via phone) from the time the individual is placed in a job in the regular market onwards. Parallel to the training programme set for each individual, Job TransFair offers a space for free access during the day, with computers, internet access and printers, and support from facilitators. Here users can make job searches and receive guidance and information on opportunities and applications. There is a short preparation meeting before the signing of the leasing contract. From the moment that a placement opportunity is identified, the job candidate meets for 30 minutes with the human resources technician to prepare for a meeting with the employer, with whom TransFair will sign the contract. The job position, conditions of remuneration and security rules to be observed are explained. The worker's personal objectives are reviewed. Finally, there is a short meeting at the end of each leasing agreement, with an evaluation of the experience, learning and feedback from employers for the following steps.*

- d. to plan a project to integrate the individual into work, in collaboration with the network of public services;

*YGES It<sup>3</sup> is a small social cooperative in Veneto Region, that was able to create a strong network of relationships within the territory. This strong link with public social health services, enterprises, associations of volunteers, foundations and organisations of the families of disabled persons, allows them*

<sup>1</sup> Given the high immigration that Europe is now facing many social workers in social enterprises in the partner countries have expressed the need for training on immigrations issues in their daily activities.

<sup>2</sup> For more information, see "The marketing and coaching functions of Work Integrated Social Enterprises (WISE) - An exploratory study in 5 European countries", Intellectual output 1 of EPP project.

<sup>3</sup> Ibidem.

to give their target group real support for social and work inclusion.

- e. to support the disadvantaged person in roles and responsibilities at work, considering the activities of the company;

*Groupe Terre<sup>4</sup> has adopted a specific strategy for workers to participate in management: “By prioritising people who have most difficulties in the labour market and the establishment of permanent long-term contracts with the workers, Groupe Terre’s approach to integration is centred on lifelong learning in a participatory organisational culture, anchored in the values of the social economy. The organisational culture - with its democratic and socialist values - is a critical factor of this model. Within the organisation, training is structured with 32 hours annually, in citizenship, participatory methods, civil rights and the situation, challenges and internal organisation of the WISE. New employees can access additional vocational training at their own request or at the suggestion of the monitoring team<sup>5</sup>.”*

- f. to support the company in the organization of activities for the disadvantaged, intervening, if necessary, to make changes in the project, and support the company tutor;

*SILL<sup>6</sup>’s job coach continues to support the disadvantaged person for at least one year after leaving the organisation. The coach is continually in contact with the enterprise and can intervene in support of the person or the enterprise. This is common to the majority of the WISEs, which we analysed.*

- g. to promote the professional and personal development of disadvantaged individuals, motivating them, empowering them and monitoring their working performance.

## 1.2 Coaching in WISEs

Normally the pathway followed by a disadvantaged person in a social enterprise is:

- i. Recruitment;
  - ii. Training/work experience;
  - iii. Search for a job;
  - iv. Integration and stabilization.
- i. The recruitment models for the disadvantaged vary according to the recruiting organisation and the skills and capabilities of the individual. In some cases, the social enterprise receives a self-referral, or a referral from a temp agency, another social enterprise, unemployment register, etc.), but in most cases the disadvantaged person is referred by social services. Some social enterprises have internal training courses, in agreement with the social services, to

<sup>4</sup> Ibidem.

<sup>5</sup> Ibidem.

<sup>6</sup> Ibidem.

benefit the disadvantaged.

In this first "recruitment" phase, the job coach's functions involve communicating with the disadvantaged person, an interview to assess how to support, organising support groups for daily interaction with trainers and tutors, analysis of skills of the individual, etc.

- ii. The training phase is about building basic competences on health and safety at work and their specific jobs. The job coach must be able to design an inclusive professional training pathway, tailored to the individual, involving learning objectives, training etc., in collaboration with the responsible social services (when it is not a self-referral).

The coach must monitor the pathway periodically and adjust it if necessary.

The learning methodology, used in WISEs, is "Work Based", providing trainees with real life work experiences, where they can apply knowledge and technical skills and develop their employability.

- iii. Phase 3 is search for a job. Normally job seekers post their resume online and apply for jobs, but it is a little different for disadvantaged people, who are not so used to LinkedIn, social networking sites, and apps to help their search.

Individual social enterprises have different approaches here.

*In miEnterprise<sup>7</sup>, "IPS – Individual Placement and Support" is used. The object is to empower the individual to search for a job that fits his/her skills. The staff member responsible trained in the IPS methodology develops a program to help the person to search themselves.*

- iv. At the end of each part of the pathway, those people who show appropriate skills and knowledge for work, may find a job in other organisations, depending on the job market. Recently, the market for disadvantaged persons has decreased because of the economic crisis. However, there is still a "model", in almost all the countries involved in the project of three phases: recruitment, training and finding employment. In the last phase, the disadvantaged user is helped to search actively for a job, preparing his own "individual marketing" strategy (e.g. CV, cover letter, etc.) and using supporting tools (internet, employment register, etc.).

*For example, Sorrisos Centro Social de Soutelo<sup>8</sup> prepares testimonials and letters of recommendation for all their workers. The testimonials help to ensure that training courses are relevant.*

The job coach and the social services normally monitor the disadvantaged person after leaving the WISE (in some cases, the person receives support for at least 4-6 month after the end of the contract in the WISE).

<sup>7</sup> Ibidem.

<sup>8</sup> Ibidem.



### 1.3 Core skills

- To be able to analyse the job history, competencies and skills of the disadvantaged person
- To be able to communicate
- To be able to design work integration pathways
- To be able to help the person on the pathway
- To be able to analyse the work offer.

### 1.4 Profile of technical functions<sup>9</sup>

	Unit of competence	Capabilities (To be able to...)	Knowledge (To know)
<i>Life coaching</i>	<b>Communication</b>	<ul style="list-style-type: none"> <li>- use targeted interpersonal relation strategies;</li> <li>- be able to manage communication with the beneficiary;</li> <li>- be able to manage relationships with the beneficiary;</li> <li>- be able to put the beneficiary at ease;</li> <li>- be able to communicate with the beneficiary in the workplace;</li> <li>- understand the science of interpersonal communication.</li> </ul>	<ul style="list-style-type: none"> <li>- techniques and tools for the analysis of behaviours (non-verbal communication) and techniques of active listening;</li> <li>- techniques of put the beneficiary at ease (for example: visits, video, manual, etc.);</li> <li>- Technique of assertive communication;</li> </ul>
	<b>Conflict management</b>	<ul style="list-style-type: none"> <li>- understand the causes of the conflict;</li> <li>- mediate between the involved parties;</li> <li>- build a positive relationship between the parties;</li> <li>- manage the conflict with awareness and in a constructive way;</li> <li>- negotiate;</li> <li>- use emotional intelligence, be assertive and resilient.</li> </ul>	<ul style="list-style-type: none"> <li>- techniques of communication and management to be used with the disadvantaged beneficiaries;</li> <li>- knowledge of the psychosocial context of beneficiaries</li> </ul>
	<b>Team group management</b>	<ul style="list-style-type: none"> <li>- lead and motivate;</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge of how to anticipate and mediate conflicts;</li> </ul>

<sup>9</sup> This profile of JOB COACH's functions was drawn up on the basis of the European Qualifications Framework (EQF). It is a European framework, used to relate the systems and national frameworks of qualifications of the member countries. Technically EQF is a grid of translation/interpretation to eight levels, within which each Countries puts, according to an ascending order - from minimum to maximum complexity, all the qualifications, granted following educational and training programs, based on the results of learning (Learning Outcomes "LO"). The Framework applies to all qualifications, from those obtained in compulsory school course, at the highest levels of education and academic / vocational training, to those non-formal and informal. (Source: ISFOL).

For more information on the EQF and its use within the project, refer to IO4- The European Framework for VET and the recognition of qualifications in Wises.

		<ul style="list-style-type: none"> <li>- build a positive working environment;</li> <li>- agree with the group's objective;</li> <li>- recognise the different roles (team leader, facilitator);</li> <li>- manage a shared operative approach;</li> <li>- use a clear and efficient communication;</li> <li>- share the common results intended to be reached;</li> <li>- manage possible emerging conflicts;</li> <li>- recognise the differences in order to make innovative solutions emerge;</li> </ul>	<ul style="list-style-type: none"> <li>- techniques of conflict prevention;</li> <li>- techniques of conflict resolution: cooperation;</li> <li>- leadership models;</li> <li>- techniques and tools for the collection and the evaluation of the individual's competences and personal resources;</li> <li>- characteristics of the contexts and the professions in which are performed;</li> <li>- local labour market, productive and occupational trends.</li> <li>- main applicative software and web-based services for the management of the vocational guidance services.</li> <li>- European CV templates and techniques to edit a motivational letter and</li> </ul>
<i>Job coaching</i>	<b>Recruitment</b>	<ul style="list-style-type: none"> <li>- put at ease and integrate the beneficiary/disadvantaged candidate in the working environment;</li> </ul>	
	<b>Entrance</b>	<ul style="list-style-type: none"> <li>- identify tools and apply techniques of analysis and mix of attitudes, behaviours, interests, motivations, etc.</li> <li>- establish the beneficiary's needs about their interests, motivation, willingness to work, taking into account their work and school history;</li> </ul>	
	<b>Evaluation and assessment of skills</b>	<ul style="list-style-type: none"> <li>- understand hidden attitudes, capacities and abilities;</li> <li>- identify tools and apply techniques of evaluation and assessment;</li> </ul>	
	<b>Participation, empowerment</b>	<ul style="list-style-type: none"> <li>- elaborate data collecting tools, if not available in the main working context.</li> </ul>	

<p><i>Employment coaching</i><sup>10</sup></p>	<p><b>Active search of a job</b></p>	<ul style="list-style-type: none"> <li>- establish the sectors on which to focus the search;</li> <li>- collect information on local work opportunities;</li> <li>- establish the professional needs of local enterprises;</li> <li>- find useful data bases and digital tools;</li> <li>- analyse local labour market, in order to facilitate the work integration;</li> <li>- select relevant information on training and other activities, that could help to improve skills;</li> <li>- select the more appropriate information for the support of activating actions towards the actors of the work and/or training system;</li> <li>- identify and choose techniques of individual marketing, tailoring tools and programs to the needs and preferences of each individual<sup>11</sup>.</li> </ul>	<p>prepare an interview;</p> <ul style="list-style-type: none"> <li>- techniques and methodologies for skills conversion;</li> <li>- techniques of role play.</li> </ul>
--	--------------------------------------	---	--

<sup>10</sup> under “employment coaching”, the partnership discussed including “Self-employment”, but because it is rare and there are national differences, we decided to not focus on it. The English partner shared a draft of “Key Issues” that could be developed into a local Pathway to Trading. Please see annex 1 to this training package.

<sup>11</sup> The distinction between job searching and marketing for inclusion of disadvantaged people in a WISE, is narrow. After a wide debate, the partnership agreed to concentrate on “communication with the community” in the IO3 marketing package.

Also the “individual marketing”, the techniques to design a CV or a cover letter, or communicative strategies to manage an interview, could be inserted in the topics of social marketing, but, concerning job coach functions, we decided to focus on the “individual”, meanwhile we chose the perspective of the “social enterprise” for what relates the functions of the responsible of social marketing.

## 2. TRAINING PACKAGE

As we explained in the introduction, we have described one subtopic in more depth within “life coaching”: COMMUNICATION.

There are many elements to take into consideration in “communication”, but here we focus only on fundamental points:

### Communication with the disadvantage person<sup>12</sup>:

Learn about “empathy” and assertive communication	3 hours (suggested)
Analyze your beneficiaries feedback	3 hours (suggested)
Understand non-verbal communication	3 hours (suggested)
Listen actively	3 hours (suggested)
Ability to change your message according to interlocutor	3 hours (suggested)

### 2.1. METHODOLOGY

In the first phase of the project, Scuola Centrale Formazione developed a tool to collect information to identify the main functions of the job coach and design a training package that could enable our social workers to become job coaches by identifying and addressing their needs. This tool is a grid divided into six sections, including

- Skills and qualifications of the job coach;
- Activities carried out;
- Channels of communication and relationship;
- Evaluation systems, used in assisting the disadvantaged person, during his/her path of social and work integration.

The data collected using the grid allowed us to build a picture of the professional profile of the job coach in several European countries.

The grid and partners’ contributions helped us to understand the activities of the job coach and the tools used.

Then we analysed the range of skills, already in our countries, which helped us identify the core skills of the job coach.

<sup>12</sup> The training hours will depend on the social worker’s know-how already acquired.

From the interviews and existing profiles in some European countries, SCF prepared a first draft of IO2, which was discussed with the rest of the partnership.

The partnership chose to focus on life coaching, job coaching and employment coaching. The boundary between skills and abilities of coaching and social marketing is very thin.

The Partnership prioritised “communication” as a key theme because of the misunderstandings that can arise from “lack of clarity” of meaning and terminology. Poor communication generates frustration and demotivation; while, clear communication leads to great benefits especially in dealing with a disadvantaged person. That's why we decided to focus on this topic.

The training package started from the professional profile, that SCF developed, following the social workers’ interviews, the analysis of the national contexts, and the “knowledge” (fourth column of the framework), that a social worker/job coach needs.

using the communication skills and knowledge and needs identified we proposed an example training package

### **Capabilities:**

- be able to use targeted relational strategies;
- be able to manage communication with the beneficiary;
- be able to manage relationships with the beneficiary;
- be able to put the beneficiary at ease;
- be able to communicate with the beneficiary in the working context;

### **Knowledge:**

- of techniques and tools for the analysis of nonverbal communication and techniques of active listening;
- techniques to put the beneficiary at ease (for example: visits, video, manual, etc.);
- Technique of assertive communication.

In other words, we tried to translate into a “training proposition” the needs expressed by the job coaches of our social enterprises, starting from “knowledge” and “capabilities” identified and shared with the rest of the partnership.

Between March and May 2016, each partner organised a workshop<sup>13</sup> with its local stakeholders and social workers, in order to present the working drafts of the intellectual outputs, and collect suggestions and comments to finalize them.

After the workshops and discussions, we finalized the training package, adding all observations and comments collected.

---

<sup>13</sup> It was foreseen in the project only one pilot phase in Portugal.

## 2.2. TOPICS OF TRAINING

MODULE		CONTENTS	TOOLS
<b>INTRODUCTION</b> The pathway undertaken with disadvantaged person in a social enterprise could follow the process, composed by following step: - Recruitment - Training/work experience - Search of a job - Integration/stabilization in ordinary labour market	<i>Work in wises</i>	a. Definition of WISEs and of the sector's ideals (participation, empowerment) b. Characteristics of the audiences in a situation of integration c. Different ways of promotion integration through work	Description of the case study, in the initial stage of characterisation of the 10 organisations: What are the differences and similarities to the reality that you are familiar with? (see Annex 1)
	<i>Coaching for wises</i>	a. Definition of the different types of coaching: life coaching, employment coaching and job/skills coaching b. Presentation and validation of the professional coach profile	Presentation and validation of the professional coach profile
<b>1. LIFE COACHING</b>	<b>1.1 COMMUNICATION</b>	1.1.1. Empathy, relation ability, assertive communication 1.1.2 Analysis of listener's feedback 1.1.3 Attention to non-verbal communication 1.1.4 Ability to change your message according to interlocutor	
	<b>1.2 CONFLICT MANAGEMENT</b>	1.2.1 Problem solving 1.2.2 Listening and mediation 1.2.3 Communication of group	

	<i>1.3 TEAM GROUP MANAGEMENT</i>	1.3.1 Listening and mediation 1.3.2 Techniques of team building 1.3.3 Communication and solution building	
<b>2. JOB COACHING</b>	<i>2.1 RECRUITMENT</i>	1.1.1. - 1.1.2 - 1.1.3 2.1.1 Sharing tools for the collection and analysis of information	Videos, slides, working group, case studies  Tool A - Description of CASE D's process of evaluation  Tool B - Impact Measurement   Example of CASE A.
	<i>2.2 ENTRANCE</i>	2.2.1 Design of the working integration pathway	
	<i>2.3 EVALUATION AND ASSESSMENT OF SKILLS</i>	2.3.1 In-depth analysis of techniques used for the assessment of skills 2.3.2 Sharing tools	
	<i>2.4 PARTICIPATION, EMPOWERMENT</i>	2.4.1 Empowerment of the disadvantaged person	
<b>3. EMPLOYMENT COACHING</b>	<i>3.1 ACTIVE SEARCH OF A JOB</i>	3.1.1 Identification of search channels 3.1.2 Creation/implementation of a database of contact 3.1.3 Individual marketing	Videos, slides, working group, case studies (for example CASE B).



### 3. Training package<sup>14</sup>

#### *Topic 1.1 COMMUNICATION*

##### **1.1.1. Empathy, relation ability, assertive communication**

To communicate effectively means “to be able to communicate in any situation, with any person, both verbally and non-verbally (facial expression, voice and posture), in a clear and consistent way “.

Empathetic communication is not only essential for a supportive relationship, but it also in any working environment or social sphere. The term “empathy” comes from the Greek and it refers to the capacity to see the world through another person’s eyes.

The key elements of empathetic communication are understanding and active listening.

Empathetic communication that leads to understanding is based on three main elements:

1. Transparency: do not hide your emotional reactions. You can disagree with someone and tell them, but lying will block communication;
2. Self-control: don’t confuse your reactions with other people’s, nor impose your own needs. People do not always want advice;
3. Unconditional acceptance: Avoid judging other’s behaviour, but focus on what they feel.

*Topics to be addressed:*

1. Understanding activated by empathetic communication

When you communicate with another person, there are two main styles of understanding:

The first is “intellectual understanding”, typical of someone who wants to understand the facts. The listener concentrates on historical facts and how they have transpired. The focus is on what the other is saying.

The second is empathetic understanding, focusing on how the speaker is communicating. The focus is on the emotional nuances that colour the conversation and provide information on the state of mind of the speaker. Often we feel understood only when our listeners understand what we are experiencing and not just the words.

---

<sup>14</sup> During the workshops with job coaches and stakeholders of the WISEs, the majority of participants stressed the need to have access to new training methods. Among the proposals that emerged during meetings, were: learning communities, or communities WBL, for mutual learning, courses and resources online to be accessed just-in-time by professionals.

## 2. Active listening for empathetic communication

Active listening can avoid communication blocks and build empathy. What are the characteristics of these blocks:

- An Inquiring attitude, more attentive to the details than to what happened;
- Imposition of solutions based on our own experience. If easy solutions are offered, they may get offended and will not listen;
- Consoling general phrases that do not acknowledge the specific nature of the situation;
- Expression of personal judgments about what happened

-----  
*Suggestion of exercises:*

### 1. FRAMEWORK FOR SELF-ASSESSMENT OF COMMUNICATION SKILLS

Evaluate, in a calm and objective way, the level of our own capacity in the areas listed below, using the following rating scale:

5 = excellent; 4 = good; 3 = sufficient; 2 = not sufficient; 1 = inadequate.

Am I able to:	Rate
<b>1</b> Listen with interest to others' points of view	
<b>2</b> Organize and reframe the information to make it more easily understandable	
<b>3</b> Keep calm and not react negatively even in difficult situations	
<b>4</b> Quickly grab what others say or want to say, putting them in a better position to express themselves	
<b>5</b> "Manage" my objections so as not to create negative reactions	
<b>6</b> "Orient" a discussion with questions	
<b>7</b> Postpone, during a group discussion, all observations that do not fit in the expected sequence	
<b>8</b> Use a language easily understandable by the listener	
<b>9</b> Facilitate the interviewee to express their points of view	
<b>10</b> Show my appreciation toward the interviewee, in a pleasant and non-irritating way	
<b>11</b> Be aware, in discussions or group work, of objective	

<b>12</b>	Understand a situation, in the shortest possible time by knowing how to ask the right questions	
<b>13</b>	Obtain, from the interviewees, the acceptance of my point of view and of my arguments, in a sequential and systematic way	
<b>14</b>	Make, during a group work, short recaps that provide greater clarity to other participants	
<b>15</b>	Predict the reactions of others, in different situations	
<b>16</b>	Use, as appropriate, blackboard diagrams, illustrations and examples to make my message more understandable and effective	

### Instructions for self-assessment

Scores must be added up considering four categories of reference, as in the table, which is to be distributed or simply transcribed on the blackboard

The categories		The Score
1^ CATEGORY 1 - 4 - 9 - 12	Listening skills and information gathering	
2^ CATEGORY 2 - 8 - 14 - 16	Ability to communicate information, communicate with others, to share content, messages, information	
3^ CATEGORY 3 - 5 - 10 - 15	Ability to relate to others	
4^ CATEGORY 6 - 7 - 11 - 13	Empathy, to be in harmony with others	

Interpretation of the scores:

From 16 to 20 → your skills are very good. It's ok!

From 12 to 15 → These skills are not your strong point, you have to work on it

Less than 12 → You must act systematically to improve your skills

## 2. COUNT UP TO...

Material: none

Time: 5-30 minutes

Participants: all

Execution: in circles, count from 1 to x, without overlapping of voices; if the numbers overlap it is necessary to restart.

Objective: Communication, listening

Penalty: if the rules are not respected, one point is removed for each irregularity defined by the judge (-1).

The first team, that finishes without voice overlaps, wins.

N.B. The judge, named by the three other teams' captains, will control the execution of the game along with the captain of an opposing team.

---

### **1.1.2 Analysis of listener's feedback**

One of the most important skills of interpersonal communication, and also one of the most difficult, is to give and receive feedback in an effective way, to provide collaborators, colleagues and superiors, with information on how to achieve individual, team and organisation goals and facilitate learning and awareness.

A first aim is to feedback to a client about the effect of what they said on the recipient. Is their message understood how was it received?

In coaching, feedback is crucial. The coach and the client set goals, develop strategies and assess results. In the process of coaching, feedback can be positive or negative.

For feedback, to be effective, it must be:

- Immediate: indicating the presence, listening and emotional involvement of the coach;
- Specific, precise and not overloaded: it should be as detailed and descriptive as possible, without overgeneralising;
- Based on behaviour: seen by the coach, and not influenced by personality, character or appearance;
- Honest, in other words authentic, constructive and intended to support and motivate,
- Oriented to an achievable goal: any proposed change should be realistic and achievable by changing behaviour;
- Nourishing: it must offer another point of view, to encourage change and emphasise the positive.

Constructive feedback is the first step toward change, as it allows a client to "look from outside", without judgment and without feeling inadequate or wrong.

-----  
*Suggestions for exercises:*







**"Six hats to think"** by Edward de Bono<sup>15</sup>

Used with well-defined and explicit Return On Investment success in corporations worldwide, Six Thinking Hats is a simple, effective parallel thinking process that helps people be more productive, focused, and mindfully involved. A powerful tool set, which once learned can be applied immediately!

---

<sup>15</sup> Available at: [http://www.debonogroup.com/six\\_thinking\\_hats.php](http://www.debonogroup.com/six_thinking_hats.php)

You and your team members can learn how to separate thinking into six clear functions and roles. Each thinking role is identified with a coloured symbolic "thinking hat." By mentally wearing and switching "hats," you can easily focus or redirect thoughts, the conversation, or the meeting.

	<p>The White Hat calls for information known or needed. "The facts, just the facts."</p>
	<p>The Yellow Hat symbolizes brightness and optimism. Under this hat you explore the positives and probe for value and benefit.</p>
	<p>The Black Hat is judgment - the devil's advocate or why something may not work. Spot the difficulties and dangers; where things might go wrong. Probably the most powerful and useful of the Hats but a problem if overused.</p>
	<p>The Red Hat signifies feelings, hunches and intuition. When using this hat you can express emotions and feelings and share fears, likes, dislikes, loves, and hates.</p>
	<p>The Green Hat focuses on creativity; the possibilities, alternatives, and new ideas. It's an opportunity to express new concepts and new perceptions.</p>
	<p>The Blue Hat is used to manage the thinking process. It's the control mechanism that ensures the Six Thinking Hats® guidelines are observed.</p>

### **1.1.3 Attention to non-verbal communication**

Interpersonal communication is much more than the explicit meaning of words, the information or message conveyed. It also includes implicit messages, whether intentional or not, which are expressed through non-verbal behaviours.

When we communicate, non-verbal cues can be as important, or in some cases even more important, than what we say. Non-verbal communication can have a great impact on the listener and the outcome of the communication. People tend to have much less conscious control over their non-verbal messages than of what they're actually saying. This is partly because non-verbal communication is much more emotional in nature, and therefore much more instinctive.

If there is a mismatch between the two, therefore, you should probably trust the non-verbal messages, rather than the words used.

A lack of non-verbal message may also be a signal of sorts, suggesting that the speaker is carefully controlling their body language, and may be trying to hide their true emotions.

Non-verbal communications include:

- facial expressions;
- the tone and pitch of the voice;
- gestures displayed through body language (kinesics);
- the physical distance between the communicators (proxemics).

These non-verbal signals can give clues and additional information and meaning over and above spoken (verbal) communication.

There are many different types of non-verbal communication. They include:

- Body Movements (Kinesics), for example, hand gestures or nodding or shaking the head;
- Posture, or how you stand or sit, whether your arms are crossed, and so on;
- Eye Contact, where the amount of eye contact often determines the level of trust and trustworthiness;
- Para-language, or aspects of the voice apart from speech, such as pitch, tone, and speed of speaking;
- Closeness or Personal Space (Proxemics), which determines the level of intimacy;
- Facial Expressions, including smiling, frowning and even blinking; and
- Physiological Changes, for example, sweating or blinking more when nervous.

Non-verbal Messages Allow People to:

- Reinforce or modify what is said in words. For example, people may nod their heads vigorously when saying "Yes" to emphasise that they agree with the other person, but a shrug of the shoulders and a sad expression when saying "I'm fine thanks," may imply that things are not really fine at all;
- Convey information about their emotional state;
- Define or reinforce the relationship between people;
- Provide feedback to the other person;
- Regulate the flow of communication, for example by signalling to others that they have finished speaking or wish to say something<sup>16</sup>.

Non-verbal communication can be also very culture-specific<sup>17</sup>.

The popular stereotype of Italians, involving big gestures, lots of hand-waving, and plenty of loud and excited shouting, may be a stereotype, but it exists for a reason. In the Italian culture, excitement is shown a lot more obviously than in the UK, for example, and non-verbal communication tends to be a lot more obvious. This can make it much harder for Italians to interpret non-verbal communication in the UK or USA, where it is subtler.

Making an OK gesture with thumb and forefinger. Making a circle with your thumb and forefinger like this means OK in Western cultures. It is used in particular by divers in this way. In Japan, however, it is reputedly the sign for money, and in Arabic countries, it is a threat<sup>18</sup>.

-----

*Suggestion of exercises:*

### **Game: STAND UP**

This game creates the conditions to raise interest in the aspects of non-verbal communication:

- Need of regulation of our behaviour based on what the others are doing.
- Abolition of the word as a vehicle of information.
- Importance of the look as a tool of turn management.
- Trying to anticipate the intentions of others based on their body attitude.

All participants are in a circle, sitting on chairs. At this point, the coordinator may explain the activities.

---

<sup>16</sup> For more information: <http://www.skillsyouneed.com/ips/nonverbal-communication.html#ixzz4J6g4ifsQ>

<sup>17</sup> For more information: <http://www.skillsyouneed.com/ips/nonverbal-communication.html#ixzz4J6h9oPFa>

<sup>18</sup> Non verbal communication, SkillsYouNeed, available at: <http://www.skillsyouneed.com/ips/nonverbal-communication.html>



Today we start with a simple activity to explain, but difficult to execute. We will have to pay great attention to others. How it works: when the coordinator says “GO”, two of us will stand up. Then everyone will choose to stand or sit, the important thing is that we follow three basic rules:

- it is necessary that, at the same time, no more and no less than two persons must be standing.
- It is absolutely not possible to speak: not allowed coughing or whistles.
- It is absolutely not possible to do signs to others to say to stand up or sit down.

All clear? Let's try...

The facilitator participates actively in this game, in this way he/she can intervene in an impasse situation, without speaking: it is enough that he/she stand up or sit down to liven up the activity.

It is not real control: typically, the participants are able to self-regulate, realising the errors. Five minutes are sufficient, even less, to learn to pay attention to non-verbal aspects. Then it is possible to start a discussion on the lessons learnt.

The feedback should be fast enough, but it must allow everyone to think and express the style and strategies adopted during the activity.

---

#### **1.1.4 Ability to change your message according to interlocutor**

Consider the communication as a process; each communication event does not end in itself, but it produces effects on interlocutors, directly or indirectly involved, which affect the ways in which they face the future events. Each one of us has different ways to represent their experience of the world and then to communicate it So one of the major obstacles we face when we interface with our interlocutors is the capacity to "get in tune" with each one of them. The world around us is so varied that we are aware of only some of the many possibilities of interpretation of it. What we grasp is filtered by our individual ways of being, from our personal culture, from our interests and our past experiences.

Depending on the type of interlocutor, the situation of symmetry or asymmetry between speaker and listener, much can and must change our discourse, such as the way to present it, the distribution and succession of the information, the choice and order to be assigned to words.

Only in the case where the listener has in common with those who speak a profession, a type of training and knowledge, we can assume they have in common both the culture and the suitability of a technical-professional language.

If the listener is indeterminate, in a position of asymmetry with respect to the speaker, the first rule is to be explicit as possible in order to help the listener reconstruct and understand the meanings.

In everyday life, it is common that there is no agreement between the assumptions of the participants in communicative exchange. For example, if you ask an explanation to a technician, he will reply with a specialist language that will not take into account the other interlocutor's skills. In this way the communication becomes incomprehensible, because it has not respected the principle of complementarity between speaker and listener.

To improve the results of communicative events, we consider the communication as a process that takes place in 3 phases:

1. Preparation: Objectives, target analysis and context, content

- a) Provide the facts as they are, without prejudice, or reference to what you may want that the others do or don't do with the information. It is important to provide the information in a descriptive and not evaluative way, so that others may come to their own conclusions.
- b) The transmitted messages should be accurate and not generic so that the other can understand them without misunderstandings.
- c) Make explicit the premises.
- d) Choose the appropriate moment to express criticisms or compliments.

2. Implementation: management of the "here" and "now"

It is important to focus on the present moment, moment by moment, being aware of what enters your field of awareness, without letting go in reasoning, judgment, attempts at explanation, but concentrate on what our interlocutor wants to tell us.

3. Check: initial objectives and results evaluation

The result is strongly influenced by the level of sharing of code between the parties involved in the communication.

-----  
*Suggestion of exercises:*

Communication is effective: storytelling

Take a paper and a pen and describe your story from the beginning to end (it could be invented or a business case history). Read what you have written and refine boring points, edit

cumbersome and unnecessary passages, with the purpose of telling the main message continue to re-read, and correct until the story cannot be further edited without losing meaning.

Through this first exercise, we will become aware of the mental processes that we activate during the organisation of a speech.

## Annex 1

### TRAINING EXERCISE

---

#### WORK INTEGRATION SOCIAL ENTERPRISES (WISE) IN EUROPE: CASE STUDIES

---

Please read the following case study(ies) and identify

1. The main features of the WISE.
2. The main features of the methodology of work integration with target groups.
3. Practices of this WISE that are similar or different from other WISE that you know.
4. Are there any practices or features from this WISE that you would like to implement in your own organisation? Which ones and why?

## CASE 1: Job-TransFair, Vienna, Austria

---

### *The WISE model*

---

The Job-TransFair was founded in 2001 through the coordinated initiative between a training centre, the public employment service and the unions of the metallurgical sector of Vienna. The basic idea of this model was a replica of other local experiments that were already under way. The aim was to create a temporary-work agency, whilst also responding to the problem of the long-term unemployed. A temporary employment company, i.e. a company that recruits and hires temporary workers offering (in leasing system) companies, which are looking to respond to temporary production needs, is a growing business model in competitive markets to provide human resources services to companies.

Most Austrian WISE's are small and JobTransfair is an exception, also the type of this WISE is not very common in Austria in number of employees and in quantity and diversity of provided services/opportunities of integration for their target groups - long term unemployed with features and various problems in relation to the labour market.

It has the legal status of not-for-profit company with limited liability, owned (100%) by the training centre. The growth of this WISE was exponential, from 10 to 195 workers in 2015. Today it has 6 offices in the city. The annual contract established with public employment services is around 1900 beneficiaries.

In addition to their main tools (training, coaching etc.), JobTransfair has developed its own production units in the fields of cleaning, catering, laundry, gardening, construction and IT services.

Two-thirds of the funding is provided by the State and the other third derives from the selling of services from the leasing of the work performed by their target groups.

---

### *The organisational structure and Human Resources*

---

Job TransFair's organisational chart presents a relatively simple hierarchical structure, based on autonomous work teams and parallel support bodies dedicated to additional functions to the operation of the WISE and welfare of HR.

---

### *The coaching function*

---

The coaching process is structured in 12 components, which are adjusted to answer the needs and singularities of each individual. The integration process might vary between 3 and 9 months.

1. *The recruitment.* It is carried out by the 6 offices with a weekly regularity.

2. *Planning of the process to access a job.* In the first two weeks the process focuses on a set of activities, some of which have continuation in the following stages.
3. *Social work.* Identification of barriers to access and maintenance of a job (problems associated the health, safety, housing, etc.). This support is triggered whenever necessary throughout the process.
4. *Initial training.* In the first two weeks this component is dedicated to skills assessment, preparation of job applications, training for job interviews.
5. *Complementary training of the HR department.* The need for additional training is proposed to strengthen the basic skills for employability.
6. *Definition of strategy for job search* and for their individual monitoring process. The expectations regarding employment requirements and training needs are identified and there is an evaluation of results of job applications, etc. This phase begins in the second week and has biweekly or monthly regularity (via phone), from the time the individual is placed in a job in the regular market onwards (through the leasing system).
7. *Active Employment Search Office.* A space of free access during the day, with computers, internet access and printers, animated by facilitators.
8. *Short preparation meeting for the signing of the leasing contract.* From the moment that a placement opportunity is identified, the job candidate meets in 30 minutes with the human resources technician to prepare said meeting with the employer.
9. *Short meeting at the end of each leasing agreement.* Evaluation of the experience, learning, feedback from employers and utility for the following steps.
10. *Verification of the educational goals.* A monthly evaluation held between the individual and their work instructor where his/her performance, learning, the training needs and the prospects for future work are discussed.
11. *Final debate.* The completion of the integration process is performed through a final evaluation meeting, a debate on the next steps and reporting to the public employment services.
12. *Follow up.* Individuals may continue to access some free access resources, such as the office of active employment search and remain on the Job Transfair database, being contacted every two months, to track their professional situation.

---

### ***The marketing function***

---

With an exclusive marketing department, this organisation has a dissemination strategy with a strong social nature that is materialised in the organisation of events, creation of leaflets and participation in publications, as well as in the dissemination of testimonies and news on social networks. The events are of leisure nature, as for example, cinema and summer festivals, and seek to obtain funds. It is up to the department to disseminate the values of the organisation and maintain the relations with the various stakeholders.

## CASE 2: Groupe Terre – Liège, Wallonia region, Belgium

---

### *The WISE model*

---

Officially established in 1963, the Groupe Terre is constituted as a non-profit organisation, with the purpose of the integration of individuals who are far away from the labour market and have low qualifications. They have a strong culture of social economy values and the develop policy of participatory management.

Groupe Terre is composed by eight organisations (non-profit associations and companies) with a common mission and in different branches of activity. This group integrates about 650 employees, of which 350 are employees, 100 are social disadvantaged individuals and 200 workers are volunteers.

They provide services in several areas, among which: the collection, separation and processing of recyclable materials (textiles, glass, paper); training for the development of projects; transportation; social housing; construction; support to partners in the South (Peru, Burkina Faso, Mali, Senegal) in the areas of recycling, agriculture, commerce and theatre.

---

### *The organisational structure and Human Resources*

---

Groupe Terre is headed by the non-profit association which gives its name to the group of companies. They have tasks of coordination s of the whole group, concentrating cross-cutting services, such as the Human Resources Department, financial services, information services and technologies.

The group is driven by a set of values inscribed in a "Letter" - a document that regulates the decision-making processes of the Group and in each of its companies. In respect to each of the companies, their internal structures respects the democratic logic with a general meeting, a supervisory fiscal board and an executive director. Team meetings are also imposed to conduct evaluations and monitoring of the integration of workers.

---

### *The coaching function*

---

By prioritising target groups that are further away from the regular labour market and the establishment of permanent or long-term contracts with the workers, Groupe Terre's integration process is based on an approach centred on lifelong learning and On a participatory organisational culture anchored in the values of social economy. The organisational culture - opportunity to participate in mechanisms of socialisation and social inclusion for democracy and citizenship -, is a critical factor of this model of intervention.

Within the group training is structured on a yearly basis, with a duration of 32 hours, targeted at the issues of citizenship, participatory methods, civil rights, and on the challenges and internal organisation of the WISE. Employees in the integration process can access additional vocational training by their own request or by the monitoring team's suggestion.

There are teams dedicated exclusively to training and assistance for workers. The workers are monitored from the moment of recruitment, selection and admission in the organisation up until the evaluation of their work performance. Each worker is guided by a supervisor and there are annual assessments carried out by the group and by external experts. The assessment consists of a feedback on work, social skills, self-esteem and level of satisfaction of the worker and the supervisor.

Additionally, to this internal structuring of the coaching of target groups (in the wide meaning we have assumed in this study), the group uses the support of external specialised services in this area provided by RES- Réseau d'entreprises sociales (Regional Network of Social Enterprises). Each worker receives coaching services on the base of their individual needs and expectations.

---

### ***The marketing function***

---

At Groupe Terre there isn't a marketing department. These functions are led by one of the founding leaders of the group, who takes on the role of director of public relations. He is supported by two professionals, one assigned to the marketing component and the other to fundraising.

The marketing strategies that have been implemented are classified as ' classic ' with the publication of a magazine (with 5000 copies per quarter), an official website, the organisation of 3 annual meetings targeted to the general public and press conferences. There is a clear policy of banning the use of sponsorships. The group must not be associated with brands that do not fit with its ethics and values.

They bet on long-lasting relationships and trust with customers, which are mostly companies in the private sector. In some of its branches of activity the mission of integration of disadvantaged groups is specified, in others emphasis is given exclusively to the quality of the services. They classify their strategy as having been developed with a basis on past experience. There has been no need to search for new costumers.

Like all other of workers of the Group, the workers dedicated to these functions may ask for specific training. However, more than specific training, the identified need is to create a global marketing strategy more geared towards the new perspectives of the social marketing approach. The idea is to more effectively advocate the values and mission of the group. For this purpose, an internal group was created in 2014.



### CASE 3: "SOCIETA' COOPERATIVE CONSORTILE SOCIALE Fare Comunità" –Bagnacavallo, Emilia – Romagna, Italy

---

#### *The WISE model*

---

*Fare Comunità* is a consortium of organisations with distinct and complementary profiles around common territorial development objectives. It integrates three vocational training centres, a consortium, seven social cooperatives, two cooperatives dedicated to research and development, which collaborate together with various regional and local organs of the province of Ravenna. Created in 2010, the mission of this consortium is to promote the social inclusion of disadvantaged people.

It integrates 15 workers spread over four departments: R&D, communication, project design and administration and finance. Supported by strong partnerships, it develops its work alongside with a solid and extensive network of associations and government-wide organisations. Its funding sources are mostly public (80%) and a residual portion (20%) results from the sale and marketing of services on the market.

SILL is a service of integrated support for working integration, developed by the consortium. Founded in 2009, it aims to empower people with disabilities in the labour market (disability rate superior to 46%), and although in a smaller scale, people with social vulnerabilities. Of those involved, there are 6 workers, 45 individuals in training, of which 40 with disability and social handicaps and 5 in situation of social disadvantage. Its main services are the support to integration in the labour market -through internships and interviews-, the mediation in the period after the hiring of individuals and support to businesses.

SILL budget consists, in its entirety, of State funding: in detail, the Regional fund for disabled gives them an amount for the services provided by SILL; this amount, as well as all the parameters and indicators to be respected, is established into a call, to which SILL participates. SILL receives also some resources from the social services of the Municipality, thanks to an agreement.

---

#### *The organisational structure and Human Resources*

---

SILL strategic top consists of four institutional members that make up the service, including Fare Comunità that takes the lead, with a delegated representative, who oversees the executive management. This management is led by a professional from one of the members of the partners that make up SILL.

The productive base is composed of three local groups (Faenza, Lugo and Ravenna), each with a coordinator. All the professionals are "operator of mediation", even if they have different profile (psychologists, social workers, pedagogics, etc). They organise each week a team group to share and discuss together about the work and the activities. There is a general coordinator for each group that manages the budget and the administrative aspects, in order to respect all the parameters requested by the public funding.

---

### ***The coaching function***

---

There are three main services, which individuals in the integration process can use:

1. support for integration into the labour market, through the preparation for selection interviews and placement in internships;
2. The follow-up after the placement in a job position;
3. Support for employers.

The training and integration services are structured in the following steps:

1. *Recruitment*: in the case of people with disability individuals are referred to an interview with SILL; people with serious social disadvantages are forwarded by the public social services
2. *Initial interview*: dedicated to the completion of a questionnaire to assess the appropriateness of the candidates' characteristics with the possible options: professional training or internships.
3. *Training*: that takes place in the training centres of Fare Comunità's members. The programmes include 350 hours (250 of training and 100 for an internship). There are other professional training courses without the internship component (100 h). There are also training programs for the active search for employment (30 to 50 hours).
4. *Follow up*: the operators organise periodically some interview with the disabled person, but also with social assistants, the family and the tutor in the enterprise.
5. *Internships*: take place in the territorial enterprises, but also in members' cooperatives. An internship contract is signed and can vary between three months and two years. The funding of this contract is sometimes provided by SILL, but in most cases it is provided by the local public administration bodies (members of Fare Comunità).
6. *At the end of the integration process* SILL provides a questionnaire for companies to assess the beneficiaries. Some cooperatives, however, have their own questionnaire.

SILL continues to follow individuals, even after *their integration* through a permanent contract of employment. This monitoring tends to decrease over a year after the labour integration. The “mediation operators” remain however available if needed.

---

### ***The marketing function***

---

Social marketing plays a key role in the mission of Fare Comunità. Their aim is to develop and promote an awareness of the added value of the products produced by social cooperatives and promote it through instruments of social communication (newsletters, social networking, among others).

They also working with the tourism sector, involving as much territory as possible, through “brands of marketing with social connotations”.

## CASE 4: MiEnterprise – Leominster Herefordshire UK

---

### *The WISE model*

---

miEnterprise is an entirely new model of social enterprise of *supported self-employment* and as such it is a model for consideration for employing people who are most difficult to employ in a conventional job. It arises directly out from the entrepreneurs' practical experience of the limitations of other approaches to employment for disabled people and is the UK's leading supported self-employment specialist.

The model is based on a social enterprise that operates as a mutual marketing co-operative. It's mutual structure means the beneficiaries own the company. Members, who have learning disabilities, use their personal social care funding to buy support from the company. The company also ensures that their welfare benefit income is not affected by them running a micro business. miEnterprise exists at two levels: an umbrella designed to promote the model around the UK and help others develop local groups, and a pilot site that grew out of a local authority day service and is now an independent organisation.

Based on highly individualised and flexible best practices in supporting adults with learning disabilities the coaching function is different to most WISEs. The beneficiaries are individually coached and mentored to become self-employed individuals running their own micro businesses. Marketing is a core aspect of the model of intervention and develops in a number of different aspects.

miEnterprise (miE) was created in order to provide a response to the problems of people with learning disabilities and other disadvantages, like mental illness, in the labour market, who would like to work.

A pilot project was created with the support of the local authority in Herefordshire - which ran the day care centre for adults with learning disabilities - having obtained some initial funding through government programmes. It is a small community-based business, in which all those involved help each other. However, the context of austerity led to the reduction of public funding and limited the initial project.

MiEnterprise has the legal status of a Community Interest Company. It works with the Employment (Job) Centre and connects to local/central government social services.

---

### *The organisational structure and Human Resources*

---

The organisational chart presents a conventional structure of a network organisation, with an overall Umbrella body of the local bodies of mutual marketing cooperatives adopting the miEnterprise model - this body is the miEnterprise Umbrella CIC. In the pilot project there were two full-time professionals that accompanied the 9 micro created in the meantime. The model is owned or controlled by its members.

---

### ***The coaching function***

---

The selection of MiEnterprise's professionals is based on their experience in the area of business and, simultaneously, on their ability to work towards the acquisition of skills and the creation of conditions of autonomy for individuals in the process of integration.

miEnterprise offers its members a comprehensive package of business support tailored to their individual strengths & needs. They remain a member as long as they wish to (and have funding to be so). The range of support offered includes business planning, registrations, risk management, marketing, book keeping & reporting, tool & equipment hire, insurance, etc. They can pay for membership from their personal social care budget.

Given the personal development distance some people have to travel to start an enterprise, or support others to do so, recent work has led the miE Umbrella to consider developing an intermediate step – an *enterprise club* – to provide support in an enterprise culture that is informal but supports people to develop skills, confidence and products, including test trading, and achieve many of the 'softer' outcomes that are very important. Progressing to a formal structure and trading should then be a logical evolution.

What miEnterprise does is take all the hassle out of self-employment – the paperwork, accounts, selling, and so on - so that 'earning disabled' people can make the products or deliver the services they like and get paid for them – whether they work 4 or 40 hours, whether they get £10 or £100 per week. Most will start slowly - and make a slow, low-stress and flexible transition from traditional care to employment.

As the pilot site organisation is small, and the membership stable, long term relationships have been built up and in some cases very strong relationships with member's families have been established. Some of the support offered includes areas not strictly within an enterprise remit but are essential in maintaining wellbeing – and on occasion safeguarding. Enterprise support, like enterprise itself, is very flexible and responsive to a range of business or personal situations.

It does not formally record outcomes or results although it has developed some accessible ways of measuring 'softer' outcomes like increased self-confidence which it will start to use. At the present moment there are seven trading member businesses (sole traders) set up legitimately with HMRC (tax) & Jobcentre Plus (welfare benefits), all presenting annual accounts, insured and individually supported. There are two more people working towards trading. There have been some very positive developments in independence and quality of life for most members as well as economic benefits.

---

### ***The marketing function***

---

Although there isn't a specific marketer profile, employees assume these functions and also have capabilities to do so. There are directed marketing procedures, which define different strategies depending on the group they wish to reach. We note that:

- Marketing to attract people with learning disabilities to the model

- Marketing to attract customers to the micro enterprises set up by those with learning difficulties and to sell to or trade with them
- Marketing to volunteers, funders and supporters
- Marketing of the miEnterprise model to help other local groups consider setting up similar groups.

## Annex 2

### EPP Erasmus+ - Supported self-employment IO2

**The organisational structure** through which to support self-employment - assuming this to be a mutual social enterprise structure based on a marketing co-operative.

This model and approach can offer members real business advantages that can go some way to compensate for the disadvantages a person may face in employment.

#### CONTEXT

Subject	Competencies	Knowledge
<b>Legal structure.</b> <i>What is the social enterprise structure?</i>	Ability to explain at a simple level the structure, how it works and why it is appropriate	What the structure is, advantages to the structure, some knowledge of alternatives, legal requirements of the structure
<b>Mutuality.</b> <i>How a mutual structure is owned by its members</i>	Ability to explain the principles and mechanics of a mutual structure	What 'mutual' means, why it is appropriate, how it should operate, how it works for members/owners

Subject	Competencies	Knowledge
<b>Joining</b> <i>Who can join and what it takes to join and remain a member.</i>	Ability to explain the process for a member to join and the opportunities and responsibilities that go with that	What the membership options, requirements and responsibilities of membership are. Those that are legal requirements and those (rules) that are specific to this co-op.
<b>Business sector</b> <i>There is a lot of sense in working in a single business sector</i>	Ability to offer business guidance for relevant sector/s of business activity, e.g. food - see below	The co-op, and its member businesses, may benefit most if a co-op specialises in a specific business sector. Therefore, the coach should have knowledge of this sector - see also below. This knowledge may be held already or may be a training need.

### KEY ISSUES FOR SUPPORTING SELF-EMPLOYMENT - MEMBER FOCUSED.

These skill sets could divide into two distinct but connected roles; e.g. business/person coaching and business administration support.

Making knowledge and resources accessible and readily understood will be a priority so that people can maintain their businesses with minimized support although this will depend on the individual and the disadvantage - as well as the funding opportunities for support.

In any case group arrangements (for access to resources and admin support) may be a more affordable and efficient option for members than working alone.

The subjects are in a logical order for a Pathway to Trading but are flexible in how and when they can be achieved.

Another important ability of the model is to support test trading which can help with many of the steps.

And the model can be pro-active in marketing activity that can be to the benefit of all member businesses.

The needs will vary greatly by individual and disadvantage/disability and some may be less or not at all relevant and take varying amounts of time.

Subject	Skills & Competencies	Knowledge
<p><b>Member eligibility.</b> <i>Does a possible member meet the organisations definitions for membership?</i></p>	<p>Able to gather relevant information evaluate and refer for eligibility decision. If person is ineligible be able to advise if anything could change that.</p>	<p>Understanding of the membership requirements and restrictions of the organisation - e.g. disadvantage, age, locality?</p>
<p><b>Planning - person</b> <i>Planning around the strengths, abilities, interests and disadvantages/challenges of the person.</i></p>	<p>Able to support person to convene, conduct and record meeting outcomes. Ability to support person to be at centre of planning and know when to step back and avoid planning 'for' the person. May require good meeting management skills to support person.</p>	<p>A sound understanding of the principles of person focused planning to understand the person, gifts, talents, interests, circumstance, barriers, need to maintain health, etc Knowledge of how to support and deliver this planning process.</p>



Subject	Skills & Competencies	Knowledge
<p><b>Planning - business</b> <i>Informed by the above planning a business opportunity or opportunities.</i></p>	<p>As above plus ability to offer constructive guidance to support business planning process.</p> <p>Ability to add realism or perspective, without eliminating risk, as part of a constructive challenge process.</p>	<p>Knowledge of business planning techniques.</p> <p>Understanding of proportional planning - not overdoing it with detailed plans when someone moving into business for the first time is likely to need to adapt plans as they go.</p> <p>Knowledge of likely logistical challenges and opportunities, e.g. access to premises, tools or equipment, markets, etc.</p>
<p><b>Financial viability indicators.</b> <i>Is the planned business likely to be profitable - at whatever level is appropriate?</i></p>	<p>Ability to support person in assessing the likely viability of a business proposal.</p> <p>Ability to evaluate what the person wishes to achieve from their business - it may be more about first steps and building confidence than making a lot of money. Able to support accordingly.</p>	<p>Knowledge to support person to establish a viable start point with potential for growth.</p> <p>Knowledge of basic financial planning tools and ability to relate these to business proposal.</p> <p>If the organisation focuses on a specific business sector this knowledge will become increasingly embedded in the organisation.</p>
<p><b>Employment status.</b> <i>If genuinely self-employed or employed?</i></p>	<p>Ability to follow guidelines and policy to assess status and refer or advise accordingly.</p>	<p>Knowledge of national/regional/state legislation regarding the employment status of individuals, i.e. self-employed or employed.</p> <p>Knowledge of how to apply relevant indicators of above.</p> <p>Knowledge of implications of status - e.g. tax.</p>

Subject	Skills & Competencies	Knowledge
<p><b>Mental Capacity.</b></p> <p><i>Ability to understand and make decisions - likely to apply mainly to learning disabilities or mental health issues.</i></p>	<p>If required - to have the skills to appropriately gather information to inform a decision regarding mental capacity and self-employment - this will vary by country.</p> <p>Knowledge of when to seek expert opinion, guidance or support.</p>	<p>Dependent on national policy to have knowledge of any relevant legislation regarding the mental capacity (ability to understand and make decisions) of individuals.</p> <p>Knowledge of techniques to make information, and therefore decisions, accessible/easily understood.</p> <p>If relevant - knowledge of how to assess capacity or involve others (safer) in doing so.</p>
<p><b>Welfare Benefits - provisions, eligibility, criteria, restrictions - the rules.</b></p> <p><i>What are the rules for people becoming employed - and specifically self-employed - if claiming state benefits, including any earnings limits or other conditions?</i></p>	<p>Ability to inform members of implications to welfare benefit entitlement or rates if self-employed.</p> <p>Able to advise on risks and advantages.</p> <p>Able to introduce materials or resources to aid understanding.</p> <p>Able to refer to specialists as required.</p> <p>Able to support member to complete any relevant paperwork.</p>	<p>Sound knowledge of the national welfare benefits that are most likely to apply to members and how they are, or are not, affected by self-employment.</p> <p>Understanding of how fluctuating earnings are managed in relation to benefits.</p> <p>How to inform relevant authorities of self-employment and what the reporting requirements are.</p> <p>Knowledge of any relevant limits, e.g. to earnings or time spent - per week or for how long.</p> <p>Knowledge of where specialist knowledge or impartial advice can be found.</p> <p>Access to knowledge of any relevant changes to legislation, etc</p>

Subject	Skills & Competencies	Knowledge
<p><b>Business registrations</b></p> <p><i>What is required to become officially self-employed, local and national requirements.</i></p>	<p>Able to advise member on registration requirements for general self employed business activity and support with compliance.</p>	<p>Knowledge of national/regional/state legislation regarding the registration of micro businesses/self employment and the process required for registration/s</p>
<p><b>Licences &amp; sector specific legislation.</b></p> <p><i>Are there specific requirements for types of business in addition to the above.</i></p>	<p>Able to advise on business sector compliance issues - e.g. for food businesses, market trading licences, etc.</p>	<p>Knowledge of any specific licence, inspection, training needs or registration required for specific businesses e.g. food premises, market trading, etc</p> <p>As above a business sector organisation will efficiently develop this knowledge and may be able to address some requirements, e.g. compliant premises.</p>
<p><b>Training needs.</b></p> <p><i>In order to comply with the above is there relevant training available? Is there additional training that could enhance the business?</i></p>	<p>Able to inform members of different classes of training - from essential to desirable and ability to support member to access training.</p>	<p>Knowledge of appropriate training and how it can be accessed.</p> <p>Training &amp; qualification may be essential or just desirable.</p> <p>Some training may be ad-hoc aimed at product development - e.g. learning new techniques or products. Knowing what is available.</p>

Subject	Skills & Competencies	Knowledge
<p><b>Tax</b></p> <p><i>What are the national or regional requirements and rules/allowances for self-employed people and tax?</i></p>	<p>Ability to explain tax registration requirements, personal allowances and tax rates for self-employed people.</p> <p>Able to support members to complete relevant tax registration forms for self-employed people.</p>	<p>Knowledge of tax as it applies to self employed persons.</p> <p>What the registration requirements are for the tax authorities.</p> <p>How to support someone to complete relevant documents and file them.</p>
<p><b>National Insurance</b></p> <p><i>As above for relevant contribution systems</i></p>	<p>As above for any relevant national scheme for social welfare contributions including pensions.</p>	<p>If relevant what are the requirements, entitlement considerations, contribution and registration requirements for any national/regional/state 'national insurance' or contribution systems.</p>
<p><b>Recording &amp; reporting</b></p> <p><i>In order to comply with tax and welfare benefit rules what financial records need to be kept and when and how do they need to be reported to relevant authorities?</i></p>	<p>Knowledge of appropriate business financial recording and ability to explain clearly to members including advice on processes to ensure regular and straightforward record keeping including how to invoice customers if required.</p> <p>Able to explain &amp; support member to report earnings, etc to tax and welfare benefit authorities as required. Information needed will come from records kept.</p>	<p>Knowledge of the reporting requirements (of earnings, profit &amp; loss, etc) for tax and welfare benefit purposes and when they need to be reported and in what format.</p>

Subject	Skills & Competencies	Knowledge
<p><b>Risk</b></p> <p><i>How to assess and manage risk in a way that doesn't stop people doing things by being over-cautious.</i></p>	<p>Ability to support person in assessing risk in an appropriate and accessible way that enables members to run their business without taking undue/unsafe risk.</p>	<p>Knowledge of organisations 'risk enabling' strategy and how to support members to assess and manage risk, record assessments and review.</p>
<p><b>Insurance</b></p> <p><i>How to insure against managed risks and potential liability</i></p>	<p>Able to advise member on insurance requirements - both mandatory and desirable.</p> <p>Able to assist member in completing necessary forms.</p>	<p>Knowledge of appropriate business insurance (public &amp; product liability, etc) required related to risk and how to obtain it.</p> <p>Organisation may have an arrangement with an insurer for member cover?</p>
<p><b>Product development &amp; test trading</b></p> <p><i>How to help someone develop the best product (or service) that they can in order to maximise profit.</i></p>	<p>Able to offer constructive advice and feedback on how to develop &amp; maintain quality to maximise profit in the relevant market - how to add value and increase profit margins and manage costs.</p> <p>Be able to support the member to test trade and make constructive use of findings and feedback.</p>	<p>This knowledge may be very business sector specific. Have an understanding of relevant products and services and how to achieve consistency, how value can be added and how to manage stock and wastage.</p> <p>How to achieve customer loyalty and repeat business.</p> <p>How to trial a product through test trading - and how the model could trade to explore new markets - to refine a product, try different pricing, outlets, etc</p>

Subject	Skills & Competencies	Knowledge
<p><b>Marketing</b></p> <p><i>How to tell potential customers about the product and the business. How to make the product available. How to make the product stand out in the market.</i></p>	<p>Be able to offer advice on how and where to market products.</p> <p>Share local market information and knowledge.</p> <p>Be pro-active in helping members access market opportunities - including using the model to set up shared marketing solutions like shared delivery or shared market stalls.</p> <p>Able to support the member to take advantage of group marketing activity.</p>	<p>Understand the market for specific products - national trends and local market conditions and opportunities. Where to position a product - low cost or premium.</p> <p>Knowledge of potential niche markets or unique selling propositions.</p> <p>Have a knowledge of and have contacts in local market opportunities.</p> <p>Knowledge of how a sector specific model can drive marketing to benefit all member businesses.</p>
<p><b>Ongoing business (&amp; personal) development.</b></p> <p><i>A combining of many of the above to ensure ongoing personal and business development and growth.</i></p>	<p>Ability to offer appropriate support and constructive challenge to enable appropriate maintenance and growth of the person and their business including explaining and facilitating how the mutual model can help both of these agendas.</p>	<p>Knowledge of how to combine many of the above in ongoing support able to respond to opportunity and challenge including using the model to further this agenda.</p>

## Annex 3

### EPP Erasmus+ - TOOLS

Although we were not able to analyse in detail the second part of our training package, covering the issues related to "job coaching", the phase of evaluation and monitoring is very important within the capabilities of a job coach of WISEs. The monitoring of the disadvantaged person, of his/her acquisition of skills along the pathway, the psychological and social impact that the inclusion can have on the individual and the ability to interact in a work context, alone or in groups, are elements that a job coach must know how to analyse, with the help of different types of assessment tools. We found that there are in particular four ways of intervention that our social workers use during their daily activities: self-assessment, "face to face" interviews with the disadvantaged person, group assessment, and/or external evaluation (normally, the evaluation of the enterprise that integrates the individual, or the evaluation of job coaches, who regularly goes to the company to see if the integration phase proceeds as expected).

Not having thorough in detail each type of monitoring and the related supporting materials, partners decided to include here, as an annex, two different types of evaluation/monitoring tools:

1. those used within social enterprises, during the process of follow-up and analysis of the path of the disadvantaged person, or during job coach's daily activities;
2. those developed and used specifically for this project, during the different stages of work, which led to this intellectual production: the survey, analysis and elaboration of the needs that have emerged in the WISEs, as well as the moments of work and comparison during the workshops with stakeholders and coaches, to discuss and gather feedback and suggestions about our products.

#### 1. Tools used in our WISEs:

##### A. Description of CASE D's process of evaluation

Case D's process of the workers' performance has two main objectives: First, to follow every worker in his/her professional path inside the group and second to (further) develop Groupe Terre's social aims, including the participative and democratic management within the social enterprises that constitute Groupe Terre. The evaluation process contributes to the workers well-being and his/her evolution at the work place as well as to ensure the continued existence of Case D as a company.

These objectives should be met through the pursuit of human values, by enabling equality of chances among staff members and through strengthening participative management practices.

The evaluation process follows the principles of self-evaluation, takes place in a “guided setting” and in a group. These characteristics are designed to contribute to a human, empathetic, and supportive way of evaluation. Furthermore, this evaluation practice provides each worker with a contact person on the same hierarchical level, who takes on the role of a “mentor” during the first month at work.

In more concrete terms, there are two crucial moments in time in which the group’s HR management gets involved with the individual worker: Around one month after starting working in the group, the worker meets with the HR responsible, together with the supervisor, to check on the worker’s satisfaction, well being at the work place, and work performance (eventual further (specific) training needs are discussed here too). Also, the worker’s individual “accompaniment plan” is agreed on during this first meeting. Later on, HR responsible, supervisor, and worker meet once a year for an annual evaluation of the worker’s performance and to see if any (new) objectives should be defined.

The evaluation meetings provide the worker with support in terms of his/her workplace performance by motivation through positive feedback, by discussing his/her accomplishments and by examining together with the worker possible career trajectories within the company / group. If any problems are to be discussed the talk should take a solution-oriented approach, always seeking to maintain an objective perspective (and, as already said above, if evaluation takes place, self-evaluation and evaluation in a group-setting should be preferred). Furthermore, the discussion should pursue an open (-minded) and confidential spirit, assuming the equality between worker and interviewer (regularity and the possibility of individually adapting the setting to each worker strengthen the notion of confidentiality too). At the same time, the interview should follow a method or methodology to maintain certain objectivity.

According to the Case D’s chart, the evaluation process is one of five elements of the HR management, alongside the detailed description of functions, recruitment, wages, and training .

**B. Impact Measurement** | Example of Case A together with other WISEs in Styria has developed a tool to measure the (social) impact of a temporary employment in a WISE. The tool was also discussed in several working group meetings with the Public Employment Service and with the job coaches and social workers in the WISEs.

Eight fields were defined and they have several subsections. The data for each target group person are entered into a database during the first month when entering the enterprise and when leaving it. There is a scale of ten points:

10	excellent, does not need any intervention
9	very well qualified for the regular labour market
8	Fulfils all requirements for working on the regular labour market,
7	Highly motivated to get a job on the regular labour market, tries hard to fulfil all necessary requirements
6	Needs still some intervention to fulfil the requirements for the regular labour market



5	Fulfils all requirements for working in the WISE
4	Tries very hard to fulfil the requirements for the job in the WISE, needs still some intervention and support
3	Needs still support to fulfil the job, does not have professional knowledge
2	Very low performance, needs a lot of support, very little motivation to succeed
1	Not able to work in a WISE

The data base allows a lot of different analyses and comparison of data.

The data are entered without names but give information about age, sex, country of origin etc.

### Impact Measurement Factors

- Working area:
  - Quality of work
  - Professional knowledge
  - Manual and craft skills
  - Working speed
  - Treating material and equipment
  - Physical and mental resilience
  - Working independently
- Duties of an employee:
  - Behaviour when sick
  - Dealing with care responsibilities
  - Dealing with reporting obligations
  - Professional outward appearance
  - Recording of working hours
- Work ethics:
  - Punctuality
  - Mobility
  - Flexibility concerning duties
  - Flexibility concerning working hours
  - Motivation
- Ability to learn and develop:
  - Interested/ready to learn new things
  - Ability to accept changes
  - Memory of new duties

Ability to use newly acquired skills in different scopes of functions

Social competencies: Dealing with colleagues

Dealing with customers

Dealing with superiors and supervisors

Dealing with criticism

Personal Competencies:

Communication

Reliability

Concentration/Memory

Dealing with stress

Realistic self-perception

Knowledge of German

Basic knowledge of reading, writing and calculating

ICT knowledge

Orientation toward labour market:

Finding one's way on the labour market

Active search for a job (CV, application documents)

Ability to use internet, e-mail, google etc.

Personal environment: Housing conditions, residential situation

Financial situation (debts)

Physical fitness (lifting, carrying ability, standing during work)

Mental fitness

Addiction problems

Personal support (family, partnership, friends)

The data base calculates a value for each field and gives an overall average for each person. It also calculates an average value for a single enterprise and compares the entry data with the exit data giving the development during the stay in the WISE.

## 2. Tools used during project working phase

### Italian questionnaires used during workshop

I° professional profile: JOB COACH

1. Do you consider that the functions and the competences identified in the profile represent the ones really requested to the job coach (job coach for persons in disadvantaged situation)?

(1 = not at all, 5= completely)

1    2    3    4    5

What other functions/competences would you like to be inserted?

...

2. Do you think that the identified modules (life coaching, job coaching and employment coaching) reflect the real needs of the job coaches from your social enterprise or from the social enterprises you are in contact with?

(1 = not at all, 5= completely)

1    2    3    4    5

3. Order by relevance the following three identified topics

(1= most relevant, 3= less relevant)

... Life coaching

... Job coaching

... Employment coaching

4. Are there any topic that were not dealt with and that you would like to be inserted into the single modules?

Life coaching:

Job coaching:

Employment coaching:

5. List other topics that you think may improve the training package for the job coach:

II° professional profile: MARKETING MANAGER OF WISE

1. Do you consider that the functions and the competences identified in the profile represent the ones really requested to social enterprise marketing manager?

(1 = not at all, 5= completely)

1    2    3    4    5

What other functions/competences would you like to be inserted?

2. Do you think that the three identified modules (marketing, social marketing and insertion marketing)

reflect the real needs of the marketing manager of your social enterprise or from the social

enterprises you are in contact with?

(1 = not at all, 5= completely)

1 2 3 4 5

3. Order by relevance the three identified topics (1= most relevant, 3= less relevant)

... Marketing (traditional marketing for the social enterprises' products)

... Social Marketing (promotion of the idea and of the social activities of the social enterprise)

... Integration Marketing (how to promote the integration of the disadvantaged persons into the labour market)

4. List other topics that you think may improve the training package for the marketing manager of the social enterprise

5. Other experiences/courses/ concrete examples of social enterprise marketing that you would like to recommend