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Secretary (automatically generated)

UKgb THE CULTURAL SHIFT UKgb-125

DPs involved ([Edit](#))

Italy INC.I.SO IT – G2 – TOS - 051

Poland SEARCHING FOR A POLISH MODEL OF SOCIAL ECONOMY PL-43

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## A. Rationale and Objectives

### 1. Common interests/methodology/underlying problem ([Edit](#))

Common issues (and differences) can be stated in very vague terms (e.g.: “the common underlying problems which exist are the inequality and barriers to employability which face disadvantaged groups who are socially excluded”). It should be clear that this section is meant as a help for discovering what DPs have in common in their national programmes, in terms of interests, problems addressed, and methodologies. The purpose is not to explain what will be their common methodology (this is a second step).

*The partners are seeking methods of developing and incubating a sustainable social enterprise sector by offering start-up support, access to financial support, business mentoring and consultancy and management training. The partners are also seeking to influence the attitudes and perceptions of mainstream not-for-profit service providers and the private sector towards the social economy, by demonstrating their contribution to community development and inclusive employment opportunities.*

*Specifically, research in the South East of England identified a lack of entrepreneurial culture within the public sector, regulatory barriers and a lack of awareness of models and opportunities for social enterprise sector development in the region.*

*In Tuscany, in the last few years, the social economy sector has been increasing in terms of employment. The need to have best quality in the management of social enterprises, and to create new social enterprises by improving the quality of services provided, represent the main aims of our project to be transferred at European level.*

*While the concept of the social economy is new in Poland, a very high unemployment rate and the number of people facing social exclusion make it very necessary for NGOs to become more involved in it. This requires the creation of favourable conditions for incubating social enterprise projects at the level of individual enterprises, locally and developing a national strategy for the social economy sector as a whole. Currently, Polish public administration and the non-profit sector are concentrating on the division of labour in the delivery of public goods. Italian legislation was a major inspiration for regulating the Polish social enterprise sector, whereas the relations between civil society and public administration were influenced by the British model.*

### 2. Lessons learned from previous relevant actions ([Edit](#))

In this part partners are expected to guide their future collaboration by agreeing some principles derived from their past transnational experience (Some TCAs simply provide a list of previous projects for each DP and then it is not so useful).

*Some of the Italian and UK DP partners have been involved in the first round of Equal. The Polish partner also has experience of transnational co-operation in other programmes.*

*Our experience has shown that it is important that transnational partnerships must be realistic in their objectives and workplan, and that the responsibilities of each partner must be clearly understood to ensure that the objectives are achieved.*

*We have incorporated these principles in this transnational co-operation agreement by keeping the objectives clear and simple, assigning responsibility for co-ordination and facilitation of each objective to one partner, and agreeing a process which promotes the maximum possibility for mutual learning.*

### **3. The common objectives of the DPs ([Edit](#))**

What are the objectives of your collaboration? Indicate similarities and differences to objectives in the national work.

- 1. Testing models of developing and incubating sustainable social enterprises at a local level (this objective is designed to widen the range of models and learn from the expertise in partner countries which operate from a different historical and cultural perspective)*
- 2. Influencing organisational culture in the public, private and voluntary and community sectors (this objective reflects the different attitudinal and organisational barriers which exist in different partner countries.)*
- 3. Parallel research based on a common framework to identify success factors (this objective intends to explore the different cultures in which the social enterprise sector operates and the political and environmental support structures needed to promote an entrepreneurial approach to social enterprise)*

### **4. The (common/complementary) products/deliverables foreseen ([Edit](#))**

Here information about the common products foreseen should be described, to see what the complementarities can be to national work etc.

*Common products/outputs/deliverables anticipated –*

- comparative research on developing best practice models of developing and incubating a sustainable social economy*
- a strategic framework to engage the public and private sectors in positive relationships with the social enterprise sector (eg Best Practice in Procurement Protocols)*
- training needs analysis and framework for social entrepreneurship and ethical trading*
- mechanisms for dissemination of best practice models*

### **5. Added value on the strategy and intended results of each of the DPs involved ([Edit](#))**

Specify this as precisely as possible, and in terms of possible impacts on the organisation and activities of their DPs, not only on the end beneficiaries or on their context.

*Each of the partners is developing different models of social enterprise or building capacity within the social enterprise sector. The added value of the transnational activity will be in the parallel research, transferring, testing and adapting different approaches and support mechanisms. A shared understanding of the historical and cultural development of the social economy in each of the partner countries will assist each to influence the perceptions of public and private sector organizations.*

*The partnership will explore issues at macro/mezzo/micro levels and, through the research framework, provide an analysis of the current relationships between the public, private sectors and social enterprise sector in each partner country.*

*The opportunity for exchanges of social entrepreneurs, mentors and researchers will transfer new ideas, alternative models of sustainable development and expertise to each transnational partner.*

**6. Value added and financial viability of associated partner(s) ([Edit](#))**

*There are no associate partners*

**B. Work Programme & Working Methodology**

**1. Transnational activities foreseen**

**a. Overall transnational strategy ([Edit](#))**

Indicate here what you want to achieve with the transnational work jointly. Describe the strategy and approach. Make sure the tasks or activities described further down are clearly connected to one or more of the objectives.

*This transnational partnership wants to test different models of developing sustainable social enterprises, identifying the support mechanisms required, and working with the public and private sectors to influence their perceptions of the social economy and the relationship between the sectors.*

*The partnership intends to develop joint research around all these issues, a common framework for a strategy to engage the public and private sectors in relationships with the social enterprise sector, and identify models of training for entrepreneurship which may be transferred between partners.*

*The transnational objectives will be reflected in Transnational Working Groups, each co-ordinated by one transnational partner. These groups will work together during and between transnational events and report progress through the co-ordinating partner to the Transnational Steering Group.*

*The Transnational Steering Group will meet at least 4 times during the lifetime of the project after each Transnational Working Group meeting or event, in order to monitor and review progress, evaluate the effectiveness of the transnational planning and process, and agree the process of dissemination of intermediate results.*

*The national evaluators of each partner DP will agree a common framework and tools to evaluate the transnational process, outcomes and added value for the national projects.*

**b. Typology of activities ([Edit](#))**

Type of transnational activity	Rating (+ to +++)
Exchange of information and experiences	++++
Parallel development of innovative approaches	+++
Import, export or adoption of new approaches	++++
Joint development	+++
Exchange of trainees/trainers	+++
Other	

**c. Description of the activities/tasks ([Edit](#))**

Name of the activity	Description
1. Transnational Steering Group	<i>To plan, monitor, review progress against the Transnational Action Plan and Co-operation Agreement; to receive progress reports from the</i>

meetings	<i>transnational working groups; to plan and agree dissemination tools and activities.</i>
<b>2. Objective 1</b> Transnational Working Group meetings and events (Italy)	<i>Meetings/study visits/exchange work placements for social entrepreneurs study visits/exchanges for business mentors training needs analysis for social entrepreneurs joint training/learning seminars</i>
<b>3. Objective 2</b> Transnational Working Group meetings and events (UKgb)	<i>- parallel audit/survey of public and private sector attitudes - joint development of strategic framework to influence sector cultures - joint events</i>
<b>4. Objective 3</b> Transnational Working Group Meetings and events (Poland)	<i>parallel research based on a common framework; study visits; shared learning events</i>
<b>5. Evaluation</b> (max 10)	<i>common evaluation framework agreed by national evaluators to demonstrate transnational learning and added value to DP partners.</i>
<b>6. Dissemination</b>	<i>joint dissemination events, final transnational conference</i>

## 2. Methodology for sharing information, results and working tools ([Edit](#))

- *Innovation meetings – to include representatives from each partner DP – to review outcomes of transnational activities and Transnational Working Groups.*
- *A common framework for evaluating each transnational activity*
- *A partnership website to disseminate information and outcomes to the wider partnerships*
- *A glossary of terms to ensure a common understanding of the different cultural and socio-economic environments*
- *Joint learning seminars for the wider partnerships*
- *Regular reports from the researchers*
- *Electronic newsletter/bulletins, posted on the website and sent to all stakeholders*

## 3. Time schedule for milestones, outcomes and events ([Edit](#))

Objective	Activity	Participants	Location	Date
Transnational workplan agreed	Initial Planning meeting to: present national projects; agree workplan; agree research format; agree evaluation framework & criteria	Project Leaders and Transnational Co-ordinators	Poland	July 2005 (2 days)
3. Parallel Research	1 <sup>st</sup> Research Transnational Working Group mtg to: Agree Research framework & methodology; 1 <sup>st</sup> Evaluators mtg to: Agree evaluation	Project Leaders Transnational Co-ordinators National Researchers National Evaluators	UK	October 2005 (2/3 days)

	criteria; 2 <sup>nd</sup> TSG meeting to: Plan exchange programme			
1. Testing models of developing sustainable enterprises 2. Influencing sector cultures & attitudes 3. As above	1 <sup>st</sup> Transnational Working Group meetings. study visits learning events exchange ideas & practices 3 <sup>rd</sup> TSG meeting Review progress	Business Mentors, Social entrepreneurs, financial experts, Evaluators, Researchers, Project Leaders, Transnational co-ordinators	Italy	April 2006 (3/4 days)
1. As above 2. As above 3. As above	Working Group meetings; Exchanges, placements, Training seminars, 4 <sup>th</sup> TSG meeting Review progress; Interim evaluation	Social entrepreneurs, Sector stakeholders, Business mentors, Researchers, Evaluators, Project Leaders, Transnational Co-ordinators	UK	October 2006 (3/4 days)
1. As above 2. As above 3. As above	Working Group meetings; Study visits, Seminars, Placements, 5 <sup>th</sup> TSG meeting Review progress Conference planning	Sector stakeholders, Mentors, Entrepreneurs, Researchers, Evaluators, Project Leaders, Transnational Co-ordinators,	Poland	May 2007 (3/4 days)
1. As above 2. As above 3. As above  Dissemination	6 <sup>th</sup> TSG meeting  Transnational Dissemination Conference  Evaluation	All partners DP partners Stakeholders Policymakers	Italy or Poland	September 2007 (4/5 days total)

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### C. Financial Provisions

#### 1. Breakdown of budget (€) for each activity ([Edit](#))

Activities	DP1 UKgb	DP2 Italy	DP3 Poland	Total
1. Transnational Steering Group	15,000	12.500	5.000	
2. Objective 1 TWG	25,000	20.000	15.000	
3. Objective 2 TWG	20,000	20.000	10.000	

4. Objective 3 TWG	25,000	22.000	10.000	
5. Evaluation	10,000	7.500	5.000	
6. Dissemination	25,000	18.000	10.000	
<b>Total</b>	<b>120,000</b>	<b>100.000</b>	<b>55.000</b>	

## 2. Arrangements for cost sharing and avoiding double funding ([Edit](#))

Cost sharing shall list individual + common costs by type of activity

*Cost sharing is based both on individual partner costs and common costs. Specifically, common costs include interpreters, venue costs for joint dissemination events, work meals and other costs which concern all the partners. Each partner is responsible for their own travel, accommodation and subsistence costs.*

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## D. Organisational and Decision Making Arrangements

### 1. Contribution and responsibility of each DP ([Edit](#))

This section could benefit from being specified per activity to make things more clear for everyone involved.

*The transnational partnership will operate on a consortium basis, sharing roles and responsibilities to ensure that the transnational objectives are achieved.*

*Each DP will assume responsibility for co-ordinating and facilitating one of the Transnational Working Groups linked to the Transnational objectives:*

*Transnational Working Group 1 – Testing models of developing/incubating sustainable social enterprises at a local level – INC.I.SO. (ITALY)*

*Transnational Working Group 2 – Influencing organisational cultures in the public, private and voluntary/community sectors – THE CULTURAL SHIFT (UK)*

*Transnational Working Group 3 – Parallel research based on a common framework to identify success factors and mechanisms for dissemination of best practice models – SEARCHING FOR A POLISH MODEL OF SOCIAL ECONOMY – (POLAND)*

*Each DP will nominate a Transnational Co-ordinator who will ensure that all relevant information is disseminated within the domestic partnership. The Transnational Co-ordinators will communicate regularly with each other to ensure that all arrangements for transnational activities are co-ordinated and agreed.*

*The Transnational Co-ordinators will also ensure that all participants in transnational activities meet prior to the event to clarify the purpose and learning objectives of each visit, and have an understanding of the cultural and socio-economic situation of the country they are visiting. They will also ensure that each visit or event is evaluated on a common framework following the activity.*

*There will be a Transnational Steering Group with 2 representatives from each DP (including the Transnational Co-ordinator) which will meet every 6 months in one of the partner countries. The host DP will Chair these meetings, and the local Transnational Co-ordinator will take notes of the meeting and circulate them within 1 week to all members of the Transnational Steering Group, identifying Action Points and timescales.*

### 2. Role and tasks of TCA secretariat and external expertise (if any) ([Edit](#))

Clarify already from the beginning what the roles of coordination and/or expertise should have in the Transnational collaboration. Also clarify financial contributions to them if you decide to have them.

Co-ordinating the TCA –

*The Cultural Shift will prepare the TCA and will act as ETCIM Secretary*

### **3. Arrangements for decision-making** ([Edit](#))

*The Transnational Steering Group will review the progress of the Transnational Workplan, and agree any variations if they become necessary. All decisions and transnational activities must be agreed by all members of the Transnational Steering Group.*

### **4. Working language(s)** ([Edit](#))

*The working language will be English, but a translated glossary of terms will be available to all partners to enhance mutual understanding and learning, and all products will be translated into the language of each partner.*

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## **E. Monitoring and Evaluation Procedures**

### **1. Mechanisms for monitoring and evaluating of transnational experience and results**

([Edit](#))

What should be evaluated, how, by whom and when?

*The Transnational Co-ordinators will be responsible for ensuring that all activities are recorded, evaluated and made available to all DPs. Transnational activities will be monitored against agreed performance indicators and progress will be reported to all partners. This information will be placed on the transnational management website.*

*The transnational co-operation will be evaluated for relevance of the activities and results to the common objectives of the transnational partnership. It will also be evaluated for efficiency in terms of how the activities are planned and executed; effectiveness in terms of how these activities contribute to the transnational objectives; and the impact of the transnational work on the domestic projects and the contribution to policy and good practice at local, national and European levels.*

*The monitoring and evaluation will be an integral part of a continuous learning process for the transnational partnership. The evaluators of the domestic projects will work together and with the transnational co-ordinators to ensure that the partnership benefits from this process when reviewing progress against objectives.*

### **2. Mechanisms for updating work programme, working methodology and organisational arrangements** ([Edit](#))

It is better to agree on how to make modifications or updates from the beginning. Be careful not to make this procedure too "heavy" since it is something you most probably have to go through.

The transnational partners will review progress against the workplan at each Transnational Steering Group meeting. Any changes required will be agreed by consensus.

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## **F. Other**

### **1. Links to other information/material** ([Edit](#))

[www.fip.ngo.pl/labeo/app/cms/x/97343](http://www.fip.ngo.pl/labeo/app/cms/x/97343)

**2. Links (hyperlinks) to other linguistic versions of the TCA ([Edit](#))**  
Other linguistic versions of the TCA should be displayed on web pages.

**3. Dates of (this version of) the TCA**

1. Sent to validation by the DP in charge of the TCA secretariat
2. Validated by all DPs
3. Approved by all MA