



**3<sup>RD</sup> PHASE OF IMPLEMENTATION**

**(2019 - 2020)**

## ELBA 3 Summary

Title of the action	<b>ELBA 3</b> - Developing Social Economy in South East Europe, 3 <sup>rd</sup> phase
Locations of the action	<b>8 countries in South East Europe:</b> Albania, Bosnia and Herzegovina, Bulgaria, Greece, Kosovo, Macedonia, Montenegro, Serbia
Total duration of the action	20 months (01.05.2019 – 31.12.2020)
Total budget	Euro 165.000,00
Objectives of the action	<p><b>General goal</b></p> <p>To develop the Social Economy in South East Europe, as a tool for fighting poverty and for innovating the services to people in need.</p> <p><b>Specific goals</b></p> <ol style="list-style-type: none"> <li>1. To increase the knowledge in South East Europe about Social Economy</li> <li>2. To develop the Social Enterprises in South East Europe</li> <li>3. To develop a proper ecosystem for Social Economy in South East Europe, by animating communities and by lobbying toward the local institutions</li> </ol>
Target groups	<p><b>Direct</b></p> <ul style="list-style-type: none"> <li>- Caritas networks and staff in 8 countries in South East Europe</li> <li>- Social enterprises and Social entrepreneurs in South East Europe</li> <li>- People in need to be involved in Social Enterprises</li> </ul> <p><b>Indirect</b></p> <ul style="list-style-type: none"> <li>- Church communities in 8 countries in South East Europe</li> <li>- Local institutions and networks acting in Social Economy</li> </ul>
Main activities	<p><b><u>1. EDUCATIONAL PROGRAMME</u></b></p> <ul style="list-style-type: none"> <li>- <b>1.1 REGIONAL MEETINGS OF THE LOCAL COORDINATORS:</b> Improving the knowledge and skills of Local Coordinators</li> <li>- <b>1.2 WORKING GROUPS:</b> for the development of social economy in South East Europe and improvement of the Caritas impact</li> <li>- <b>1.3 TRAININGS FOR SOCIAL ENTREPRENEURS:</b> Improving the knowledge and skills of the Social Entrepreneurs</li> </ul> <p><b><u>2. DEVELOPMENT OF THE SOCIAL ENTERPRISES</u></b></p> <ul style="list-style-type: none"> <li>- <b>2.1 ACCOMPANIMENT &amp; MONITORING:</b> Follow-up of the Social Enterprises</li> <li>- <b>2.2 REGIONAL FORUM:</b> Networking of the Social Enterprises in the region</li> </ul> <p><b><u>3. DEVELOPMENT OF LOCAL ECOSYSTEMS FOR SOCIAL ECONOMY</u></b></p> <ul style="list-style-type: none"> <li>- <b>3.1 REGIONAL VISIBILITY:</b> Visibility tools for the supported Social Enterprises and for Caritas achievements in Social Economy</li> <li>- <b>3.2 AWARENESS MEETINGS:</b> Animation inside Church communities</li> <li>- <b>3.3 ADVOCACY &amp; NETWORKING:</b> Networking with other organizations and Advocacy toward local institutions</li> </ul> <p><b><u>4. FUTURE DEVELOPMENT</u></b></p> <ul style="list-style-type: none"> <li>- <b>4.1 REGIONAL APPLICATION:</b> joint application to a Call for proposal</li> <li>- <b>4.2 CONNECTION WITH CARITAS EUROPA</b></li> </ul>

## VISION and STRATEGY

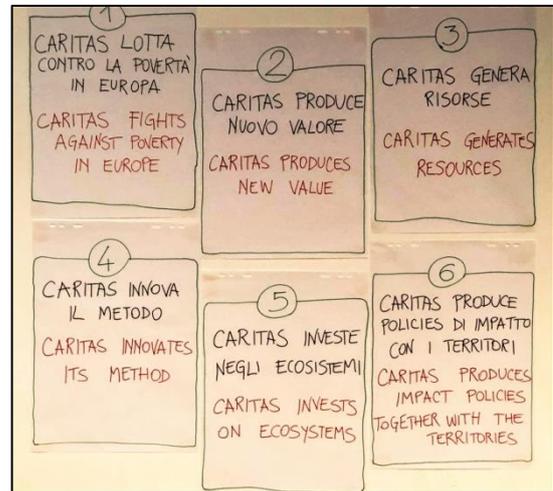
### for Caritas in Social Economy sector in South East Europe

The National Caritas in South East Europe, involved in the implementation of Social Economy initiatives, have identified a **common vision and a joint strategy** related to “Elba 3” and more in general to all the projects affecting the Social Economy sector.

#### COMMON VISION

The common vision is to develop Caritas in South East Europe that is able in doing the following:

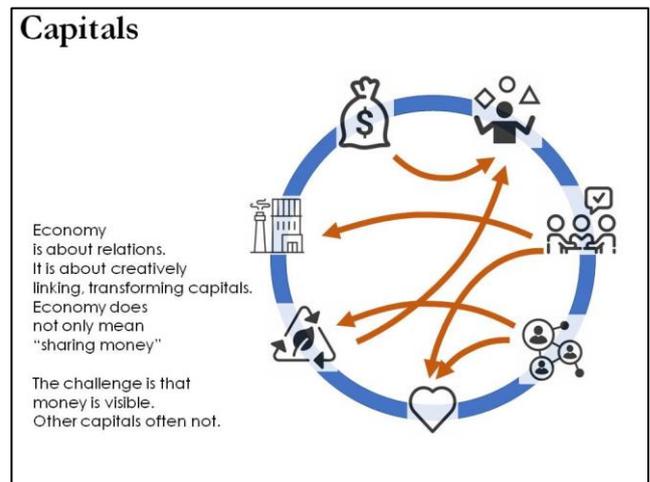
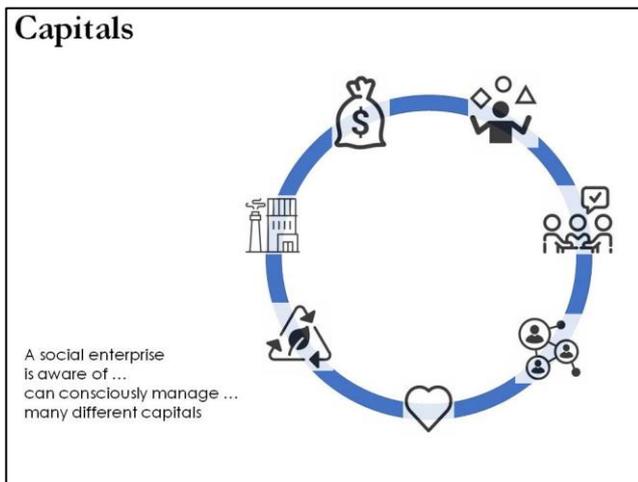
- Caritas fights against poverty in Europe
- Caritas produces new value
- Caritas generates resources
- Caritas innovates its methods
- Caritas invests on ecosystems
- Caritas produces impact policies together with the territories



#### JOINT STRATEGY

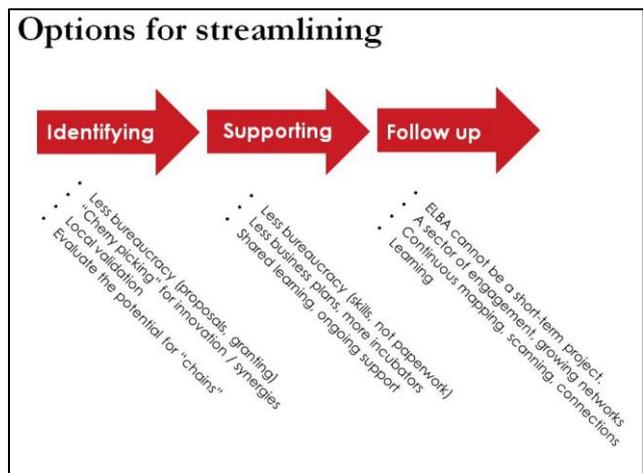
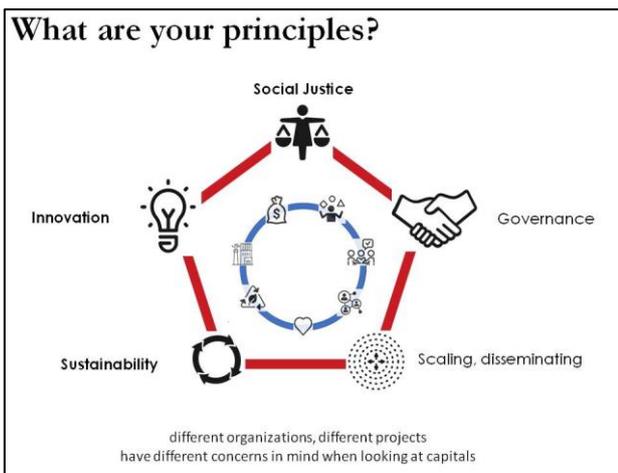
Elba recognizes that Social Economy is not only related to financial issues but it allows the development of a larger value-chain. Elba aims at **creating, developing, increasing the value-chain** in the region, by investing in the following capitals:

- Financial capital (money) 
- Physical capital (assets) 
- Human capital (capacities and competences of the people) 
- Social capital (relationships) 
- Institutional capital (links and partnerships with institutions) 
- Natural capital (environment) 
- Spiritual capital (moral and spiritual values) 



In order to develop those capitals, Elba recognizes that the decisions and initiatives to be taken need to be based on the following **Priority principles**:

- Social justice 
- Sustainability 
- Participatory governance 
- Innovation 
- Dissemination 



## DETAILED DESCRIPTION

### of the Activities

With the strategy of creating, developing and increasing the following capitals:



and based on the following Priority principles:



Elba 3 develops its intervention through the following Activities' clusters:

**Assessing**

**Building capacities**

**Connecting**

**Communicating**

**Advocating**

**Raising resources**



# 1. EDUCATIONAL PROGRAMME

## Activity 1.1 - REGIONAL MEETINGS

### Improving the knowledge and skills of Local Coordinators



The Local Coordinators during the Elba 3 implementation will have the opportunity to exchange practices, ideas, know-how; they will also continue to be trained and to develop tools that are useful for the Social Economy sector. This process will happen through **5 meetings for Local Coordinators**.

The calendar of the meeting is defined as follows:

- **1<sup>st</sup> meeting, Bar (Montenegro), May 2019**  
back-to-back with the “Societies” Steering Group Meeting
- **2<sup>nd</sup> meeting, Madrid (Spain), June 2019**  
some Local Coordinators will participate to Caritas Europa Training on Social Impact Measurement
- **3<sup>rd</sup> meeting, Shkodra (Albania), September 2019**  
back-to-back with the “Your Job” kick-off event
- **4<sup>th</sup> meeting, Assisi (Italy), March 2020**  
during the event “The Economy of Francesco”
- **5<sup>th</sup> meeting, Mostar (Bosnia and Herzegovina), September 2020**  
during the Regional Forum for Social Entrepreneurs (see activity 2.2)

The hosting country will provide the logistics of those events; the agenda will be defined by the Regional Manager in consultation with the Local Coordinators.

Some elements to keep in mind are:

- Methodology. The methodology used for these meetings can be formal training, workshop, study visits, peer-to-peer learning.
- Exchange of experiences among the Local Coordinators. The meetings represent the opportunity for an exchange of experiences among the Local coordinators, where it will be possible to discuss concrete cases or based the work on real situations. The Local coordinators can suggest which cases to discuss and share, according to their own experience.
- Synergy with other social economy related programmes. The Elba meeting will be open also to the participation of staff involved in other social economy related programmes in the region (such as Your Job, Societies...). The possibility of sharing practices, challenges and possible solutions from other projects is an added value for Elba.

## Activity 1.2 - WORKING GROUPS

### For the development of social economy in South East Europe and improvement of the Caritas impact



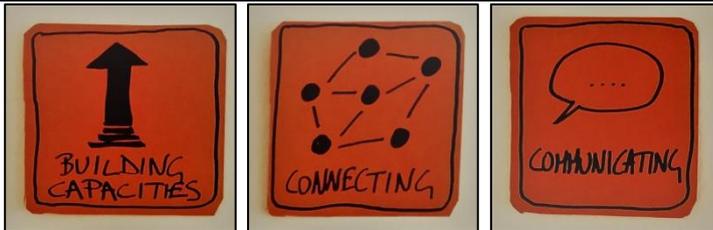
Based on findings and recommendations described in the “Elba 2 Final Evaluation Report”, the Steering Group has considered as an essential element the improvement of the methods and the impact in the following 5 areas:

1. **Knowledge Management**
2. **Communication**
3. **Modelization, Mapping, Monitoring**
4. **Internal Advocacy**
5. **Fundraising**

Accordingly, the Regional Manager in will provide the **ToR for the creation of those 5 Working Groups**, that will be composed by the Local Coordinators and eventually by other Caritas staff members in the selected topic. According to the ToR, **each Working Group will provide defined outputs** that are needed for the Elba group and in general for the Social Economy sector in Caritas offices, as suggested by the findings of the Evaluation report.

The meeting of the Working Groups will happen mainly online or during the already defined meetings of the Local Coordinators (see activity 1.1), so that no extra costs are required. The Regional staff will provide the Secretarial role for those 5 groups (calling the meetings, minutes, documentation, reminders...).

### Activity 1.3 – TRAININGS FOR SOCIAL ENTREPRENEURS Improving the knowledge and skills of the Social Entrepreneurs



Each Local Coordinator will organize **trainings/workshops for Social Entrepreneurs** in his/her own country, according to the needs of the entrepreneurs and the funds available. The goal of these Trainings is to contribute to the formation of the complex knowledge and of the practical skills for the successful and efficient functioning of the established Social Enterprises.

The training program can help the managers and the teams of the social enterprises to:

- stay motivated, to manage efficiently with the problems that arise,
- to manage successfully the various processes, people and finances,
- to develop the multi-stakeholders approach of the social enterprises, by identifying the stakeholders in the area and by developing proper connections with them,
- to maintain the balance between the business and economic goals and the social effect of their work,
- to show in an understandable and visible way the precise social effect of their work and how they contribute to real social change,
- to attract additional financial and social support,
- to successfully sell their products/services as a result of producing qualitative products that are competitive in the market,
- to act and behave according to local legislation on social economy.

Some elements to keep in mind are:

- **Methodology.** The training can be developed through classical frontal lessons, but also different methodologies can be used: sharing of experience and understanding by successful practical workers (successful social entrepreneurs), exchange of experience and ideas between the participants (discussion of problems and challenges, finding flexible and innovative solutions on concrete cases of the existing social enterprises), practical lectures by social experts and trainers in the field of social entrepreneurship, mentorship, on-the-job education, peer-to-peer learning. Each Local Coordinator will have a disposal a specific amount at country level for this activity, and will decide the methodology to adopt case-by-case.
- **Follow-up and Mentorship:** if needed, it is possible to invite mentors to offer consultations to the participants also outside the training sessions, as a follow-up activity on various current and important issues. Depending on the needs of each SE, the appropriate mentor will be selected by the Local Coordinator.
- **Technical support / On-the-job education:** in some cases, the existing or new born Social Enterprises will need to be supported by Experts that can tackle on-the-job particular matters of concern and give solutions to a number of technical issues that the social enterprises are confronted with. The subject matter of the technical support required can vary from case to case; the experts to be called for may target the specific business sectors (e.g. needs for agronomists, experts in textile sector, or in service provision, etc.) and/or other managerial, administration, organizational roles of expertise.
- **Possibility for participation in other trainings:** the Local coordinator can decide case-by-case, when is better to organize the trainings/workshops autonomously, and when it is better to rely on the training proposals organized by other entities in the countries. If there are trainings already available in the country in topics of interest for the Social Entrepreneurs, it will be possible to support the participation of the Social Entrepreneurs in those trainings (if needed, by paying their participation fees).

## 2. DEVELOPMENT OF THE SOCIAL ENTERPRISES

### Activity 2.1 - ACCOMPANIMENT & MONITORING

#### Follow-up of the Social Enterprises



A significant part of the tasks foreseen for the Local Coordinators in Elba 3 will be fostering on the **accompaniment of the Social Enterprises** that have been created over the last two Elba projects – and eventually over other social economy projects implemented by the National Caritas offices. In fact, the Local Coordinators are the reference persons for the development of social economy initiatives in their countries.

This encompasses the basic operation and support of social economy initiatives at any stage of their development, from the initial idea and the formation of a team, to initiatives and entities that have already developed their ongoing economic activity. In practical terms, it involves providing accurate information, updating about educational programs, seminars and available tools but also, building a close relationship with each and every initiative accompanied, through the provision of personalized counselling. As a result, the existing and/or newborn Social Enterprises will be accompanied and supported by the Local Coordinators, through the development of direct and trustful relationships that can allow the Social Enterprises monitored, to grow and to progress. Each Local Coordinator will be in charge to accompany all Social Enterprises granted through the last Elba projects (1 and 2), but also of any other newly established.

The accompaniment process will be also structured through Monitoring processes. The Local Coordinators will use the main monitoring **instruments and tools** produced by Elba (such as: Checklist, Dashboard) and any other useful instrument that can be adopted in each country. On a regular base, LCs will provide with monitoring reports to the Steering Group about the developments of the Social Enterprises in each country respectively.

Lastly, when needed and when required by the National Caritas offices, the Local Coordinators shall offer their accompaniment and monitoring to other Social Enterprises and Social Initiatives, not directly granted by Elba (e.g. Societies, Your Job, and/or other projects). In such cases, appropriate provisions will need to be taken under considerations (e.g. instruments used for the evaluation will be calibrated accordingly and time provisions or personal dedicated to the monitoring purposes, shall be allocated accordingly).

### Activity 2.2 - REGIONAL FORUM

#### Networking of the Social Enterprises in the region



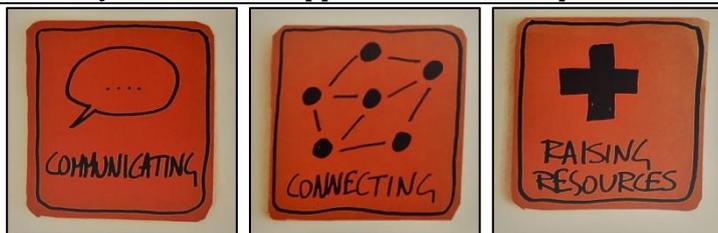
In order to foster the Social Economy experiences in the region, and to promote the mutual learning among the Social entrepreneurs, the project Elba 3 will organize **1 Regional Forum / meeting of the managers of the Social Enterprises** related to Caritas. This Regional meeting would be accompanied by a presentation of the best practices of social enterprises, as well as by the general achievements of Elba.

This event will be a unique opportunity to share the knowledge, discuss about social economy and its perspective, promote products and services, advocate for legal framework, etc. It is planned the participation of at least 3 social entrepreneurs per country, accompanied by the Local coordinators (tot. 4 people per country). It is foreseen to be organized in Mostar (Bosnia and Herzegovina), in September 2020.

### 3. DEVELOPMENT OF LOCAL ECOSYSTEMS FOR SOCIAL ECONOMY

#### Activity 3.1 - REGIONAL VISIBILITY

##### Visibility tools for the supported Social Enterprises and for Caritas achievements in Social Economy



In order to increase the visibility of Elba, the flow of information and the achievements of the project, the following **online tools** will be put in place:

- **Website:** During ELBA 2 the project team has developed a website to promote activities related to the ELBA project, social business and social economy in Balkans (<https://elbaproject17.wixsite.com/elba-social-economy>). In this website are presented all the Social Enterprises funded during the implementation of the project, through two tenders for existing social enterprises and start-ups. This website is not only an “Elba project website”, but it is conceived as a platform for all the social economy related initiatives of Caritas in the region. An *Elba Communication Officer* will be hired in order to follow up the Elba communication tools, and in particular for maintaining, uploading and promoting the Elba website – in cooperation with the Local and Regional Coordinators. This website will be promoted and published to the official websites of all national Caritas involved in the project as well as on the official Facebook page and other social media. This website will serve as a platform for communication and collaboration between SE in the framework of ELBA and beyond. If useful for a larger visibility, a new, more user-friendly domain of the website will be purchased.
- **Facebook page:** In order to increase the visibility of the action on social business and social economy, the project will launch its Facebook page, to be furnished by all the countries with the activities of social enterprise, the management team and different initiatives in each country on the social economy. The Communication Officer will update the Facebook page.
- **YouTube channel:** Elba launched a channel (<https://www.youtube.com/channel/UCRCYWP97AXsv-hdSY8YhrxA>) with the videos and documentaries produced during the first and second ELBA. This channel will be update with other videos with successful stories from the social enterprises and different social business initiatives. The Communication Officer will be in charge of updating the YouTube channel.
- **Online database:** The project will use the opportunities and instruments already in use by Caritas network (such as Ospoweb) to create a database of the social enterprises, not only ELBA funded, that are connected with Caritas and operate in each country. The database can include the information about the enterprises as well as about the people involved in them. The Regional Coordinator will take care of the functioning of the online database, while the Local Coordinators will take care of the regular upload of information.
- **Dropbox folder:** For the management purposes, the Steering Group members and the Local Coordinators will continue to share the documents through a joint Dropbox folder. The Dropbox folder will be managed by the Regional coordinator; only the members of the Elba management will have access to this folder.
- **Baobab (Caritas Internationalis):** The Elba Steering Group will explore the possibility of uploading all its material in a section within Baobab, so that the access to the documents is easier for all the Caritas network and the materials can be shared at a worldwide level.

#### Activity 3.2 - AWARENESS MEETING

##### Animation inside Church communities



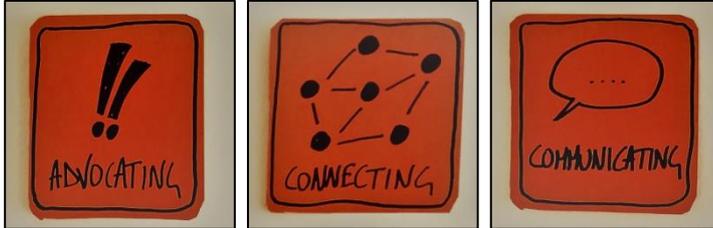
The animation program for local Churches will be organized mainly as **info sessions**, in order to increase the knowledge and the awareness of local Bishops, priests, Caritas directors and staff, local communities. The goal is

to make the local Churches fully aware about the importance of Social Economy as an important mechanism to reduce poverty and empower disadvantaged categories.

Each Local Coordinator will organize the Info meetings in his/her own country, about Social Economy Catholic Social Teaching and their role on this process. The meetings will be held by LC and other relevant experts, including SE managers in particular cases. Local Coordinators can rely also on the information, tools and experiences described in the Social Economy Handbook *"Putting people before profit"* (Caritas Europa, 2019).

### Activity 3.3 - ADVOCACY & NETWORKING

#### Networking with other organizations and Advocacy toward local institutions



Each National Caritas from South East Europe involved in Elba is developing advocacy & networking actions for positioning Caritas in the local Social economy networks, for creating alliances and partnerships, and for improving the legislative frameworks (often weak or even lacking laws on social economy).

During Elba 3, these advocacy & networking efforts will be continue, and can take the form of:

- Organization of **Conferences** for presenting Caritas as an important actor in Social economy: showing the achieved results through ELBA project, promoting the Social Enterprises supported, as well as debating various themes specific for each country. These Conference will involve the most relevant stakeholders working in this field: local and international NGOs, state institutions, other social business, etc.
- **Membership in local existing networks** of social economy and NGO network working in this field. Each National Caritas will increase the efforts in becoming active members of the Social economy network that are existing in each country
- Depending on the country specifics regarding the legal framework, the Local Coordinators will organize proper **advocacy actions towards public institutions**. These actions can target different goals, such as: to improve the local legislation on social economy; to set up local networks between public and nonpublic institutions/associations to boost the social economy; to provide inputs for the national institutions based on project findings and information sources related to social businesses, social economy and challenges faced; to support the local focal points on strengthening the responsiveness toward the demands of target groups; and others.

## 4. FUTURE DEVELOPMENT

### Activity 4.1 - REGIONAL APPLICATION Joint application to a Call for proposal



Elba is already the platform of different initiatives and projects and it is a very good opportunity for further fundraising activities. The group of Local Coordinators will discuss and agree when and how to apply for a common project, by **searching for a Call for proposal at regional level**, during the implementation of Elba 3, related to the topics of social economy and social innovation.

Some elements to keep in mind once approaching a new Call for proposal:

- Building adequate local partnerships: Networking activities (activity 3.3) are crucial also for establishing collaborations and for identifying proper partners, that can be included in the Call for proposals;
- Possibility to use the Western Caritas connections and influence: Western Caritas were already engaged in finding possible partners when applying to different calls. In most of above-mentioned projects, the Western Caritas has been involved as a partner or as a main applicant. This approach resulted successful and should be used also when approaching other funds.

### Activity 4.2 - CONNECTIONS WITH CARITAS EUROPA Bring the Elba issues at European level & Giving to Elba an European dimension



The main goal of this activity is to **increase the exchange of information and know-how** among ELBA and Caritas Europa groups and initiatives on social economy. In fact, ELBA as a Social Economy platform of 8 national Caritas in South East Europe should increase the connections with the Caritas Europa structures working on Social Economy and Social Innovation.

The experience and knowledge built in these years can provide very valuable information to Caritas Europa in its advocacy activities towards European institutions, defining policies and developments in the social economy. Furthermore the exchange of knowledge within the CE network is very important for ELBA to share experiences and follow trends in other countries and to preserve the Caritas spirit within it.

The Steering Group will agree how and when to strengthen the connections between Elba and Caritas Europa. The already available online tools of Caritas Europa (website, mapping system) can be further explored and used for the purposes of the Elba implementation.