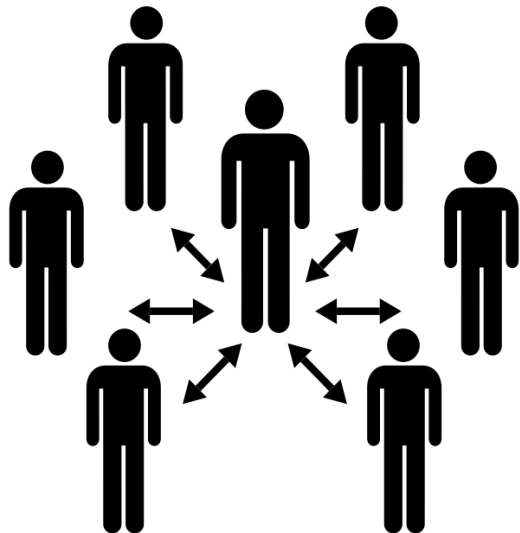


# The SEDETT project

## Example Training Materials

1



Created by gilbert bages  
from Noun Project

### Social enterprise and capacity assessment for organisational development

*EXAMPLE OF  
EDUCATION / TRAINING  
WORKSHOP MATERIAL  
Module 3*

# The SEDETT project

## Example Training Materials

### Module 3

2

## Aims of this workshop...

- (i) To understand how capacity for future organisational development could be assessed by key actors in social enterprises through an appreciation of the development of the SEDETT social enterprise capacity assessment tool (SECAT)
  
- (i) To gain an appreciation of the use in practice of the SEDETT social enterprise capacity assessment tool (SECAT)



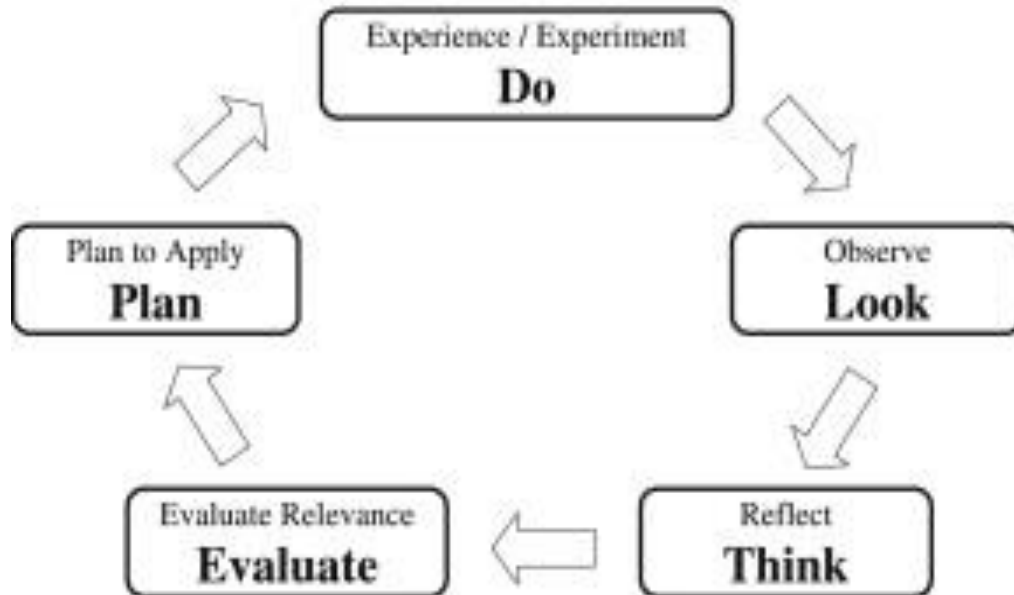
Created by Dinosoft Labs  
from Noun Project

# The SEDETT project

## Example Training Materials

### Module 3

### Reflective Learning Process



### Approach

learning through reflections on

(i) own and each others practice or

(ii) practices of practitioners in SEDETT case study

Organisations ([www.sedett.eu](http://www.sedett.eu))

# The SEDETT project

## Example Training Materials

### Module 3



## Resources

Each others experiences & observations

SEDETT Project Case Studies ([www.sedett.eu](http://www.sedett.eu))

SEDETT SECAT Framework ([www.sedett.io1output.eu](http://www.sedett.io1output.eu))

For further written information, please see

<https://www.emeraldinsight.com/doi/abs/10.1108/17508610680000713?journalCode=sej>

<http://www.pactworld.org/capacity-development-social-enterprise>

The following links provide short 'you tube' video clips on the following

The meaning of capacity building <https://www.youtube.com/watch?v=KLU7H0QtiDI>

Assessing organisational capacity <https://www.youtube.com/watch?v=5VZX0yi5axk>

Capacity assessment <https://www.youtube.com/watch?v=RTC5AexMI1g>

# The SEDETT project

## Example Training Materials

### Module 3

5

## Creative Exercises



Created by Gregor Cresnar  
from Noun Project

Before starting the workshop lets  
do the following

[www.sedettio3outputromania.eu](http://www.sedettio3outputromania.eu)

(overcoming tensions in strategic  
directions)

or

[www.sedettio3outputuk.eu](http://www.sedettio3outputuk.eu)

(singing from the same hymn sheet)

# The SEDETT project

## Example Training Materials

### Module 3

6



Created by Kevin  
from Noun Project

### Reflective Exercise (i)

Consider what you think capacity building / development is and what its assessment needs to address

and

(a) Talk about your ideas to others in your group

# The SEDETT project

## Example Training Materials

### Module 3

#### Feedback on Reflective Exercises (i)

Capacity development is

*“The process by which **individuals, groups, organizations, institutions** and **societies** increase their **abilities** to .....*

Sources: UNDP (1997); UNDP (1998); UNESCO (2005).



Created by Dan Hetteix  
from Noun Project

- Individuals** - the process of equipping individuals with the understanding, skills and access to information, knowledge and training that enables them to perform effectively
- Organisations** - the elaboration of management structures, processes & procedures, not only within organizations but also the management of relationships between the different organizations and sectors (public, private and community)
- Institutional** - making legal and regulatory changes to enable organizations, institutions and agencies at all levels and in all sectors to enhance their capacities

# The SEDETT project

## Example Training Materials

### Module 3

8



Created by Gregor Cresnar  
from Noun Project

### Reflective Exercise (ii)

Consider a social enterprise (S.E) that you are either

(i) familiar with, or

(ii) as described as case study A or B (see [www.sedett.eu](http://www.sedett.eu))

and

(a) Talk about your chosen S.E. to others in your group



# The SEDETT project

## Example Training Materials

### Module 3

9



Created by Gregor Cresnar  
from Noun Project

### Reflective Exercise (iii)

In the context of your chosen S.E. consider

(a) the nature of its capacity development

(b) how its capacity is currently assessed

and

Talk about your experiences in terms of  
(a), & (b) above to others in your group

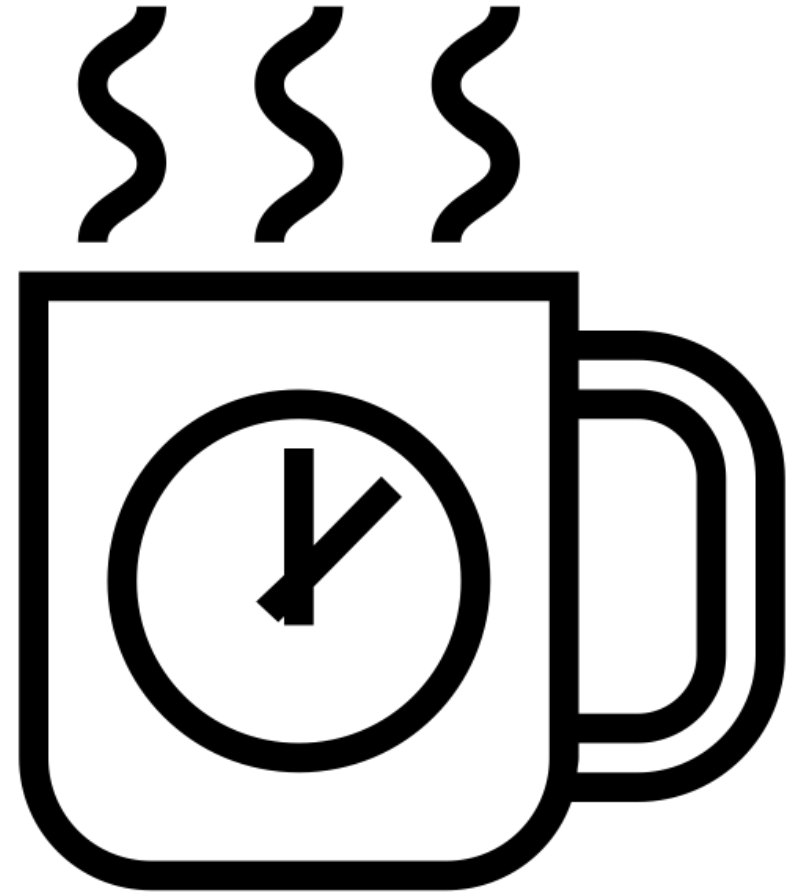
# The SEDETT project

## Example Training Materials

### Module 3

10

***Time for a  
break...***



Created by I Putu Kharismayadi  
from Noun Project

# The SEDETT project

## Example Training Materials

### Module 3

## Feedback on Reflective Exercises (iii)

Consider the following



- (a) The nature and context of the SEDETT project & an inter-active framework of factors that practitioners identified as being significant issues for social enterprises seeking to develop, grow and become sustainable as business organisations.
- (b) This inter-active framework was developed as a social enterprise capacity assessment tool (SECAT).

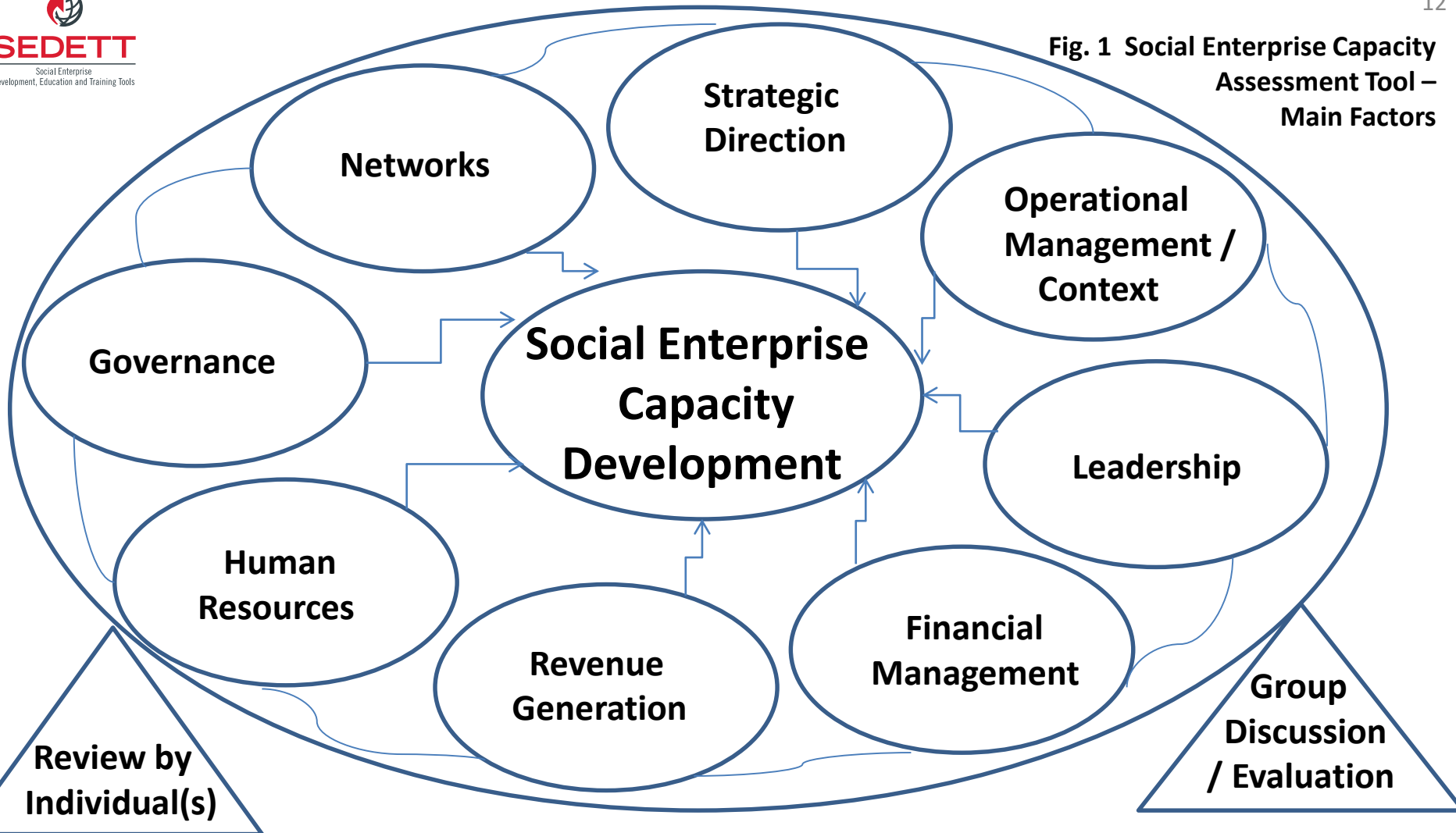
This tool was developed following the analysis of over 60 interviews taken from key stakeholders involved with 22 case study organisations located across Europe in countries such as *Ireland, Italy, Lithuania, Poland, Romania, Spain and the United Kingdom*

# The SEDETT project

## Example Training Materials

### Module 3

Fig. 1 Social Enterprise Capacity Assessment Tool – Main Factors

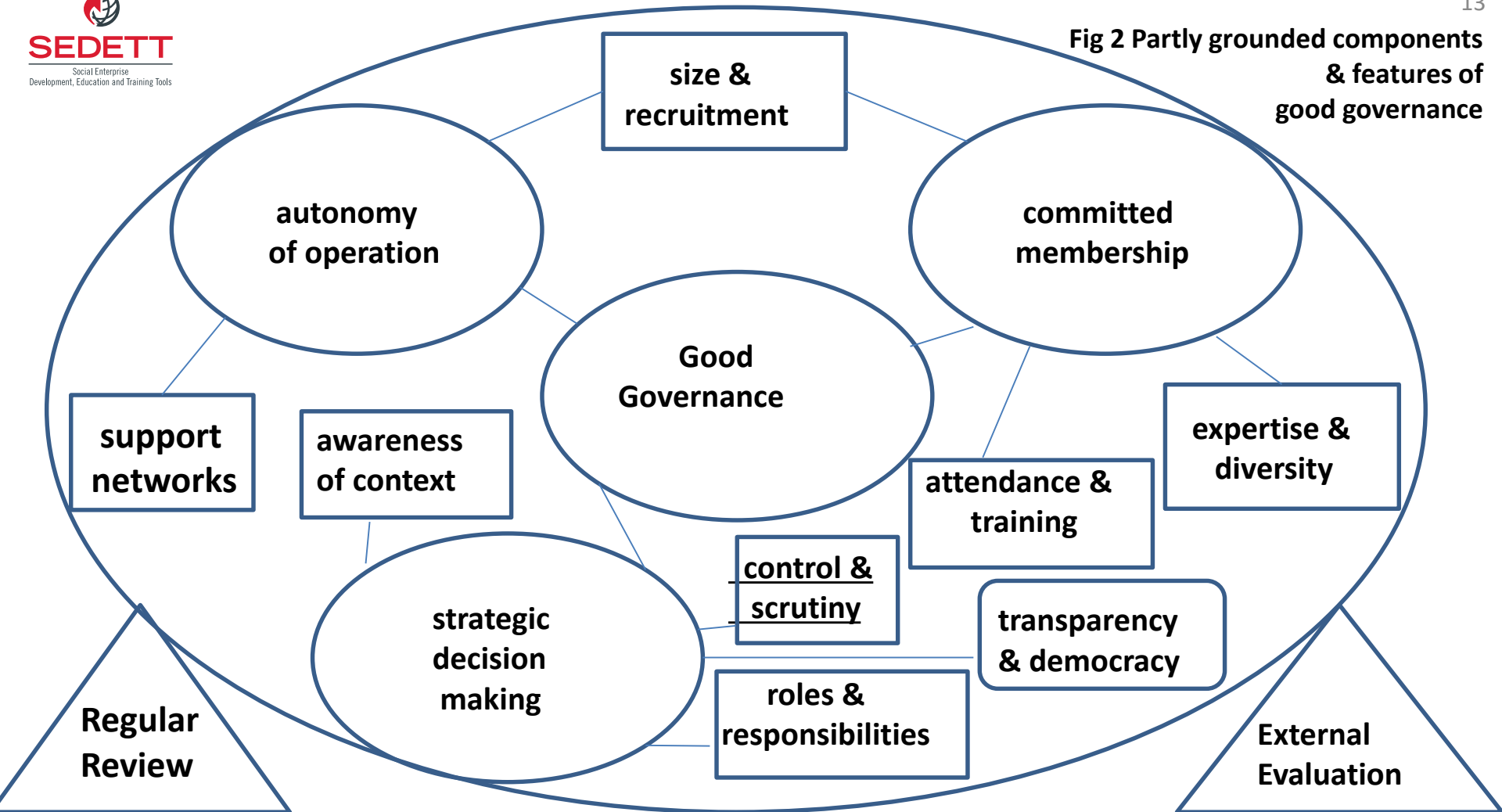


# The SEDETT project

## Example Training Materials

### Module 3

Fig 2 Partly grounded components & features of good governance



# The SEDETT project

## Example Training Materials

### Module 3

Fig. XX Initial conceptual model of factors affecting leadership, human resource and operational management in social enterprises

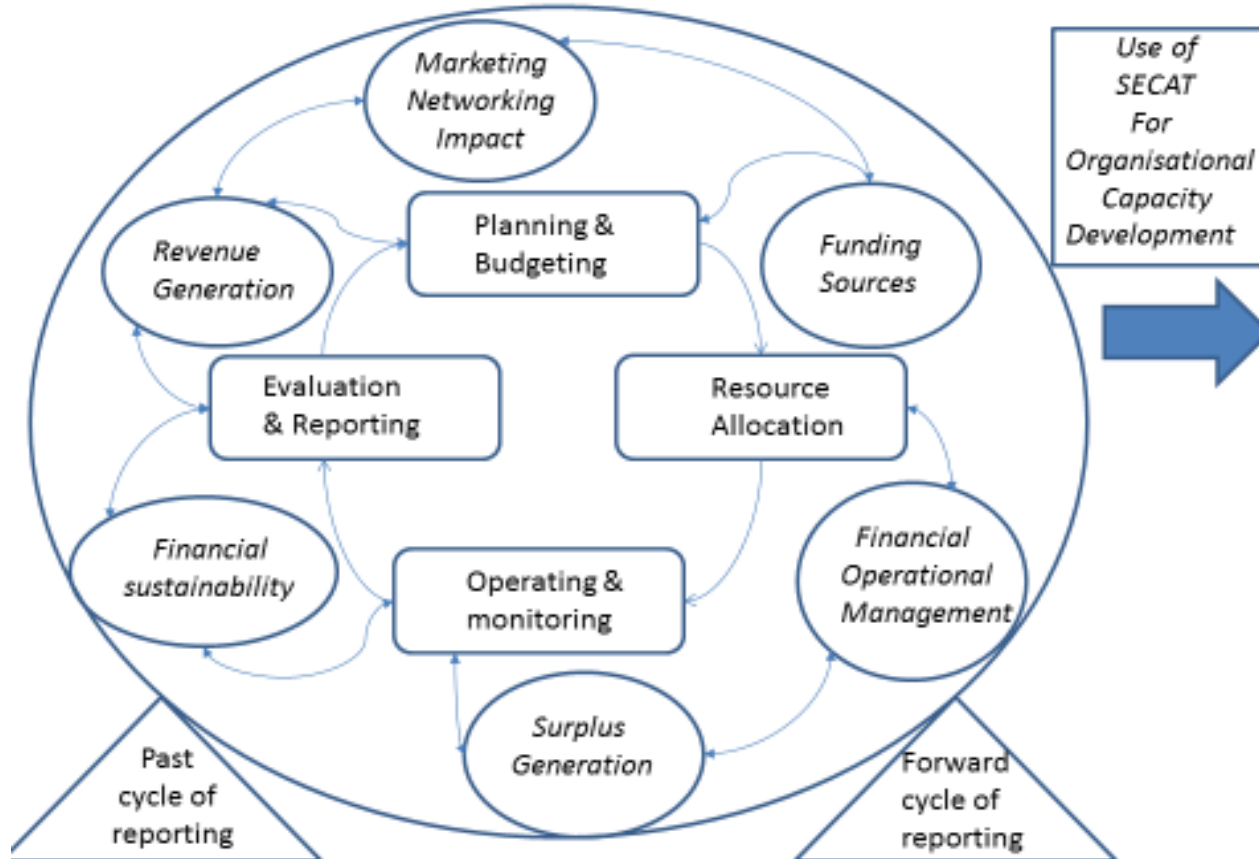


# The SEDETT project

## Example Training Materials

### Module 3

**Fig. XX Financial Management Cycle in Social Enterprises**



# The SEDETT project

## Example Training Materials

### Module 3

#### What is the SECAT ?

The SECAT is a generalised **web enabled inter-active framework** developed for social enterprises to create a profile of their own organisational capacity through the establishment by key actors within the S.E. of a profile of its current activity.

The SECAT sets out the eight main **factors** that have been identified in the emergent SEDETT learning materials (see [www.sedett.eu](http://www.sedett.eu)) i.e.

- strategic direction
- management and operational context
- leadership
- financial management
- revenue generation
- networks
- governance
- human resources

Each of the **main factors** listed above has its own section in the SECAT within which a number of **components** have been developed.

A series of phrases indicate common **features** of related organisational activity associated with each **component** of the framework was developed to enable differing sectional and overall organisational profiles to be developed (**profile A, B or C**)



# The SEDETT project

## Example Training Materials

### Module 3

#### Why use the SECAT ?

The inter-active web enabled framework can be used by differing actors within a social enterprise to identify :-

- different views on organisational capacity can be generated through use of the framework to facilitate discussion and decisions on strategic policy formulation
- elements of capacity that have the most components / features within a S.E. organisation (most - profile C - orange) as well as those elements where the organisation has the fewest components / features within a S.E. organisation (profile A - yellow)
- any overall or elemental change of profile over a time period can be captured by repeated use of the framework across a time line.

#### **BUT**

the SECAT framework is neither sector specific nor a scientific tool.  
the descriptive phrases / features within each element's components are not meant to be exact or reflect any ranking or scoring but need to be *loosely interpreted* for application to the context of the user.

# The SEDETT project

## Example Training Materials

### Module 3

#### How to use the SECAT

The tool is to be used electronically either through [www.SEDETT.eu](http://www.SEDETT.eu) or downloaded as an excel spreadsheet file.

An organisation needs to decide on who, when and for what purpose the capacity assessment is to be undertaken.

#### Application

Consider each of the main factors (see above) of the SECAT framework in turn for its relevance (or not) to the social enterprise.

For each component of each of the main factors within the framework, that is appropriate to the context of the social enterprise, determine the descriptive phrases or features that are most reflective of the organisation's situation and **click on in the relevant text box**

The text box will then become highlighted and provide a coloured visual profile (**Yellow – profile A, Blue – profile B or Orange – profile C**) of the users view of their own organisation's capacity situation

# The SEDETT project

## Example Training Materials

### Module 3

#### Note :

- If either a particular component or factor of the Tool is **not** relevant to the user of the framework then there is **no** need to make a response – leave it blank.
- The use of colours to provide an sectional and overall visual profile **does not imply any level of ranking or scoring** in terms of the perceived optimal organisational position
- If appropriate use the spaces provided in the **‘additional comments’** text box at the end of each of the main factors of the SECAT framework to record relevant information to aid further discussions on the SECAT’s outputs.
- After considering each of the components of the Tool in turn and clicking on the most appropriate descriptive phrase for their own organisation the user must press the **ENTER** button to finalise the sectional & organisational capacity profile.
- The responses for each individual component statement will now become highlighted in a relevant neutral profile colour (yellow, blue, or orange).

# The SEDETT project

## Example Training Materials

### Module 3



- An indicative profile colour will appear at the end of each of the eight main factors of the framework and a sectional and /or overall organisational profile colour will be produced that can be used for discussion so as to determine future directions.
- The file can be saved and printed with any written comments if required.
- To reset the Tool, press the **RESTORE** button and the Tool is cleared of previous entries and is ready to be restarted.

20

### How to interpret the SECAT output

The overall organisational profile (profile A- yellow, B –blue and C- orange) – see below provides a generalised organisational view of its capacity development status and the colouring at the end of each section of the framework (yellow, blue and orange) provides an indication of the organisation’s particular positioning within that main factor at the time the self-assessment(s) were taken.

Organisation Capacity Level	Organisation Capacity Level	Organisation Capacity Level
Profile A	Profile B	Profile C

# The SEDETT project

## Example Training Materials

### Module 3

#### Example of a sectional completion for SECAT Factor 1. Strategic Direction

Factors	Organisation Capacity Level	Organisation Capacity Level	Organisation Capacity Level
	Profile A	Profile B	Profile C
<b>1. Strategic Direction</b>			
Vision	<b>Vision exists and is held by only a few but rarely used to direct actions or set priorities</b>	Clear understanding of what organisation aspires to become or achieve held by many in the organisation: often used when setting policies and future directions.	Specific understanding of demanding yet achievable vision that sets organisational aspirations or achievements: consistently used to monitor performance
Mission	A written mission that outlines reason for existence, reflects values and purpose, awareness of sector of operation and target group/s but may lack clarity: not understood by all stakeholders: rarely discussed:	Clear expression of reasons for existence: strong reflection of values and purpose: held by many within the organisation and often referred to:	Detailed mission statement that documents strong social perspective and organisational values and purpose that is integrated across the organisation
Overall strategy	Strategy is either non-existent or informal and restricted to senior management; little influence on day to day activity:	Strategy in place linked to mission and vision; processes begin to address enterprise and community needs; strategy has some influence on activity; embraced by governors and senior management;	<b>Clear and coherent strategy; clearly in harmony with mission and vision; balance between community needs and enterprise activity achieved; fully embraced by all; used to drive activity at all levels</b>

<b>Additional comments:</b>	

# The SEDETT project

## Example Training Materials

### Module 3

### Note

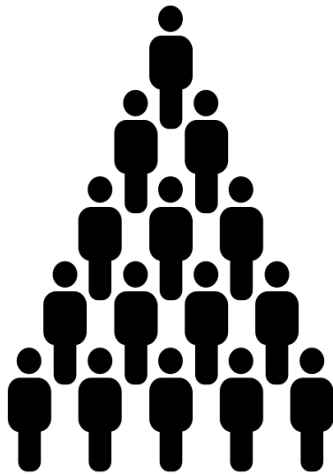
- the SECAT output does ***not measure organisational performance*** and no inference should be made as to the merit of one profile over another. The output of the tool is for internal organisational reflection / discussion and decision making only.
- Each social enterprise that makes use of the SECAT may well be at a different level of maturity, size and contextual situation in the sector within which it operates.
- an overall profile of A (yellow) or B (blue) or C (orange) **does not** imply any overall ranking or scoring or any ranking or scoring of the main factor's profiles established by the tool user as it could reflect the capacity level that the organisation wants to be at.

# The SEDETT project

## Example Training Materials

### Module 3

#### Reflective Exercise (iv)



Created by Elliricon  
from Noun Project

In the context of your chosen S.E.

(i) Go to [www.SEDETT.eu](http://www.SEDETT.eu) and consider each of the main factors and their components so as to develop a profile of features (A,B or C) that is appropriate to your contextual situation

and

(ii) Talk about (a) & (b) in the context of your chosen S.E. to others in your group

# The SEDETT project

## Example Training Materials

### Module 3

## Feedback on Reflective Exercises (iv)

### Summary

- The development of the S.E. capacity assessment tool (SECAT) was based on the as lived experiences of practitioners associated with the SEDETT project.
- In the consideration of the sustainability of a S.E. then it is clear that an assessment of how and where an organization can alter its capacity profile is needed.
- The use of the SECAT provides a mechanism for an organisation to establish an evidence base from which discussions and eventual capacity decisions can be taken.

### **BUT ....**

- The SECAT has been developed from data gathered from S.E. organisations of differing sizes, types and levels of maturity and which were based in differing home locations across Europe with differing legal structures and regulations and which operated in differing sectors.
- Therefore the use of the SECAT can only be for guide purposes as more focused research is needed with particular types of sector specific S.E. organisations to enable more robust dedicated frameworks to be established.

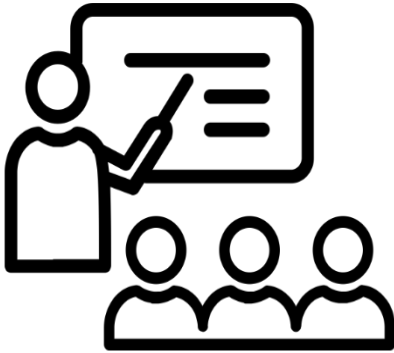


# The SEDETT project

## Example Training Materials

### Module 3

## Workshop Summary



Created by Arijit Adak  
from Noun Project

Consider the following questions and indicate the main points you would make in response to the following questions :-

- (i) *What is organisational capacity development ?*
- (ii) *What are the main factors that a S.E. should consider when it wants to consider its capacity development*
- (iii) *How could the SECAT inter-active framework be further refined to make it more applicable to the circumstances of your organisation*