

Social Enterprise North West Master Classes supported by the Office of the Third Sector and the North West Development Agency

These Master Classes represent a catalyst to create stronger social enterprises, which can capitalise on opportunities, increase organisational performance and increase profitability.

All Master Classes will be followed by with Action Learning Sets; this will support participants to implement within their own organisation the key tools identified during the Masterclass. The Action Learning also includes an allowance for email contact to support successful set-up, as well as a possible final session in mid-March 2010 to receive feedback on progress, facilitate peer-to-peer learning, and troubleshoot any problems.

Strategic Business Planning Master Class

Friday, 15th January - Opening Doors, Carlisle

Trainers: Janine Hyland from ELECT and Tim Slack from Appreciating People

Central to the proposed workshop will be the use of the Organisation Development methodology Appreciative Inquiry (AI). At the heart of the AI approach is the evidence that concentrating on the strengths and on “what works” in organisations, as opposed to solving problems, creates more effective and sustainable organisations, able to make full use of the internal creativity and skills.

Appreciating People and ELECT have been successfully using this approach and philosophy in a range of Social Enterprise development projects, ELECT has begun to integrate AI approaches into its business development work by working from a strength based perspective and replacing SWOT with the Appreciative Inquiry version - **SOAR** (Strengths Opportunities, Aspirations and results). Evidence so far indicates this is leading to more robust and creative business planning.

The Master Class will take participants through SOAR which is a strategic planning framework with an approach that focuses on strengths and seeks to understand the whole system – it focuses on what an organisation is doing right, what skills could be enhanced, and what is compelling to those who have a stake in the organisation’s success. It helps a company deliver innovation and respond to unremitting daily challenges. It connects strategic planning conversations to participants’ aspirations and values – and these are a particular strength of social enterprises. This generates increased energy and momentum to deal with challenges and potential barriers.

Human Capital Management Master Class

Monday, 25th January - The Kirkgate Centre, Cockermouth

Trainers: Matt Mc Donald, Jez Hall and Laurie Smith

This Master class will examine the concept of human capital management and its implications within social enterprise settings.

Developed within the for-profit sector, human capital management looks at the human “capital” we each hold as individuals and ways and methods to draw out the wealth of this potential that sits within our staff, volunteer, directors/trustees and beneficiaries for the benefit of our organisations or mission. The workshop will extend to on-line learning set, encouraging participants to share knowledge, learning, problems and good practice and addressing participants' learning needs.

The workshop and learning set is delivered by Shared Future CIC. The workshop facilitator, Matt MacDonald, was previously Senior Lecturer in Social Enterprise at the University of Cumbria and is currently at Lancaster University researching the transition towards social enterprise by traditional Charities. He also acts as Social Enterprise Advisor for the Connecting Consortia project in the North West.

Jez Hall and Laurie Smith, also Directors at Shared Future CIC, are experienced leadership educators and learning set facilitators, having delivered on the Lancaster University Lead programme and the Thrive programme for social enterprises, as well as wider work within the sector.

Workplace Learning Master Class

Friday, 29th January - Westmorland Agricultural Society, Milnthorpe

Trainer: Suzanne Quinney

Suzanne Quinney co director of Appreciating People CIC, her company is underpinned by Appreciative Inquiry which is one of the most effective 21st Century organisation development approaches to fostering the creation of a learning organisation, and more importantly, enable the whole organisation to both contribute to its creation and ensure its delivery. The methodology and philosophy will be at the heart of the master classes and the action learning sets

Appreciative Inquiry (AI) is strength based whole system approach and philosophy for organisation, community and strategic development. AI is not a technique or model, but a philosophy and a way of working differently with a whole system, which generates change using the organisation's own strengths and skills. (President Obama and his people have been trained in and use whole system approaches.) It is part of the positive psychology and ‘working from strengths’ movement, pioneered by Martin Seligman, Barbara Frederickson and Marcus Buckingham. It has particular resonance for the 21st Century - a time of rapid change and need for resilience, organisational agility, and flexibility. AI is based on the view that change comes about through conversation, narrative, stories and dialogue. Doing more of “what works”, and working from strengths - as opposed to concentrating on “what does not work” - leads to creative and effective learning organisations.

The overall aims of the session are:

- Understanding key characteristics of a Learning Organisation and how to support this
- To know about recent theory and the writings of key practitioners in the field of Organisational learning
- Provide techniques and practical tips to support creating learning organisations
- To understand the contribution whole system thinking can make to supporting learning organisations.
- To understand and be able to use Appreciative Inquiry - a recognized tool to achieve workplace learning
- Full engagement of learners
- Active and practical learning
- To develop a practical strategy for participants' own organisations

Finance– Investment Readiness Master Class

Friday, 5th February - Quaker Tapestry, Kendal

Trainer: Roy White from the Social Enterprise Loan Fund – (TSELF)

Roy White is the Regional Director for the Social Enterprise Loan Fund in the North West before Roy became the Regional Director in 2003 he was manager of a community transport organisation who were a client of TSELF, Roy has direct experience of the difficulties faced by social enterprises trying to access loan finance.

Over the last five year Roy has helped many organisations across the region, from Carlisle to Crewe, to access over £2 million of loan finance. He has also provided them with ongoing support during the period of their loans. Roy says: "Social enterprises play a vital role in our communities and he is keen to see social enterprises in the North West thrive and prosper. The focus of our efforts is to help Social Enterprise grow in a responsible way so that they achieve long term sustainability, which is not only good for them and their employees, but also for the people they help."

Through his work at TSELF Roy has identified were many small organisations fall down when looking for loans, financing, funding and capital investment.

Accessing finance to help develop a business can be challenging for many successful, well-established companies. For small enterprises it can often be nigh on impossible – and, with the credit crunch, things have got a whole lot tougher.

This master class will help participants understand what lenders and funders are looking for and will outline the requirements for

- presenting a budget
- developing a cash flow
- presenting your case
- demonstrating key staff experience

- track record
- Due Diligence

Social Enterprise Impact Assessment Tools Master Classes

Friday, 19th February - Cumbria Wildlife Trust, Kendal

Trainers: Chris Hart and David Waterford, Pulse Consultancy

Pulse Regeneration is a specialist social enterprise and regeneration consultancy. The company was formed in 2001 by Chris Hart, Pulse Regeneration Managing Director, and an acclaimed and successful social entrepreneur with many years' community and regeneration experience. Pulse have a simple vision – to improve quality of life through sustainable regeneration. For Pulse, regeneration is about people, and they believe should create lasting benefits for the future. They are passionate about regeneration and are committed to providing their clients with outstanding service.

Chris is also a member of SROI UK, and has recently delivered workshop sessions nationally on impact assessment for a variety of third sector support organisations, including New Deal for Community, Council for Voluntary Service, and for the DTA Northwest.

The aim of the Masterclass is to enable attendees to appreciate the benefits of assessing their impact and providing attendees with the understanding needed to implement key impact assessment tools within their own organisations.

1. Understanding impact
2. The difference between impact, value, and cost
3. Difficulties in quantifying impact
4. Principles of impact assessment
5. Benefits of assessing impact and the triple bottom line
6. Key tools and methods
7. Social Return on Investment (SROI)
8. Social Auditing
9. Local Multiplier 3 (LM3)
10. Taking impact assessment forward

At the end of the Master Class participants will not only have developed an understanding of the importance of evidencing the value of their own activities, but will also have developed initial skills to be able to quantify the impact of what they do within their own organisation.

Skills Audit Master Class

Monday, 22nd February - Eden Mind, Penrith

Trainer: Annie Weir

After 25 years experience in teaching and training adults at work, Annie started **IVITA Learning** in early 2004 and has steadily built a reputation for offering quality training and assessment in the North West and North East of England.

Annie is committed to the principles of lifelong learning having recently completed my MA (Education), and Diplomas in Life Coaching and Performance Coaching.

The aim of the Master Class is to equip participants with the skills and knowledge required to develop skill audits within their own organisations and will cover:

- what is a skills audit?
- outline of the stages of the skills audit
- discuss business objectives and why they are key to the process
- discuss organisation charts and how well they match existing job descriptions and person specifications.
- analysing the findings of the skills audit
- devising training and development plans – for the organisation and individuals within it
- discuss training budgets and funding that may be available for different groups of people
- discuss the different types of training and development activity that an organisation can access
- building in a review for the process using existing processes such as induction, supervision, appraisal, away-days, team meetings, etc.

If available participants should bring with them:

- Business plan + business objectives
- Organisation chart
- Examples of job descriptions and person specifications
- Any issues they have which they are prepared to discuss in Action Learning Sets

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