



Social Enterprise Adviser

Endorsed Programme 35 hours

Learning Outcomes for this Programme

The learner will:

- Assess whether the ethical and professional standards expected of business advisors are met
- Plan and implement own personal development
- Develop own professional networks
- Review and improve social enterprise support services offered by self or employers
- Interact effectively with clients
- Deliver social enterprise support that is right for each client
- Deliver a social enterprise support service that meets the needs of your organisation
- Encourage clients to develop their confidence, knowledge and skills
- Help clients to review their business
- Help clients embrace change
- Support clients when action planning to improve their business
- Use their knowledge of social enterprises in their interactions with clients
- Communicate effectively with their clients
- Manage clients expectations of confidentiality
- Help clients choose and use social enterprise support
- Examine whether an organisation is suited to the social enterprise model
- Evaluate the organisational and legal structures of social enterprises
- Evaluate the financial arrangements of social enterprises
- Identify support needs and sources of support for social enterprises
- Identify and promote opportunities to establish social enterprise activities
- Support the formation and development of a group of stakeholders to develop a social enterprise proposal
- Investigate the viability of a social enterprise proposal
- Review and improve own practice in supporting new social enterprises
- Support clients in determining the purpose and objectives of their enterprise
- Explore organisational design options and legal structures for their enterprise
- Help clients develop social enterprise business plans
- Analyse the key determinants of sustainability and performance of a social enterprise
- Review the sustainability and performance of a social enterprise
- Examine ways of improving the sustainability of a social enterprise



This programme is made up of seven sections

Section 1	Personal Professional Development	7 hours
Section 2	Building Business Support Relationships	7 hours
Section 3	Delivering Business Support	7 hours
Section 4	Understanding Social Enterprise	7 hours
Section 5	Promoting Social Enterprise	7 hours
Section 6	Developing Social Enterprises	7 hours
Section 7	Sustaining Social Enterprises	7 hours

Sections 1 – 3 are mandatory, plus 4 and either section 5 and/or 6 and/or 7.

Duration

- 35 guided development and assessment hours

Assessment methods

- Assessment is undertaken in line with the SFEDI National Assessment Strategy for Business Support 2006
- Assessment will include observation of practice, work based product evidence and presentation of CPD plan and record.



Title:	Personal Professional Development	Section 1	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Assess whether the ethical and professional standards expected of business advisers are met	1.1	Review own work practices in order to assess whether they meet the ethical and professional standards expected of business advisers, and identify improvements that could be made to own work practices	
2. Plan and implement own personal professional development	2.1 2.2	Investigate own continuing professional development needs, taking into account changes in own work roles and operating environment Devise and implement personal development plans based on identified needs	
3. Develop own professional networks	3.1 3.2	Assess the quality of own current networks and identify how they could be improved Implement plans for improving own professional networks, and identify the outcomes of these efforts	
4. Review and improve business support services offered by self or employers	4.1 4.2	Use performance monitoring techniques to review the business support services offered by self or employers Identify and implement opportunities for improving business support services offered by self or employers	
Additional information about the unit			
Links to NOS: Based on Units 5-8 of SFEDI NOS for Business Support (approved 2006)			
Unit aim(s)			
To equip business advisers with the skills to manage their continuing personal professional development.			

	Indicative content:
1	<ul style="list-style-type: none"> • The reasons for reviewing their own performance and the limitations of self-appraisal • Professional codes of conduct and ethics for business advisers • Reliable sources of feedback from, for example, line managers, supervisors, peers, mentors, fellow learners and professional associations • Methods for monitoring and recording work practices with clients • The standards of performance set by professional associations, commissioning bodies, contractors and business support providers
2	<ul style="list-style-type: none"> • The principles of continuing professional development • Personal learning styles and preferences • Action-planning techniques • A range of work-based learning activities, for example: <ul style="list-style-type: none"> • Learning logs • Mentoring • Projects • Work shadowing • Books, journals, videos, CDs and other media • Sources of continuing professional development for business advisers • The personal development policies and practices of their employer
3	<ul style="list-style-type: none"> • Communication and interpersonal skills associated with networking • How networks are established and developed, the distinctions between formal and informal networks, and methods for extending and strengthening networks • The ethics of using contacts and networks for the benefit of clients, and the limitations of networks in recruitment, procurement and contracting • Policies and guidelines on client confidentiality, sharing client data, sharing access to management information systems, equal opportunities, diversity and social inclusion
4	<ul style="list-style-type: none"> • The importance of establishing and applying appropriate measures for evaluating the performance of business support services • Sources of information about the performance of other business support providers • Systems for collecting and assessing performance monitoring data • How to use performance assessments to identify opportunities for improvements to services • Customer services standards and practices used by business support providers, including practices for contracts and agreements with clients, handling complaints and disputes, client confidentiality, and professional indemnity • Current approaches to evaluating business support services used by and for



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	government agencies
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Title:	Building business support relationships	Section 2	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Interact effectively with clients	1.1	Find a style of discussion and exchange that helps clients to be open about business matters	
	1.2	Maintain contact and exchange information with each client, in ways that are appropriate and meet their needs	
2. Deliver business support that is right for each client	2.1	Use a mode of consulting that is effective for each client at each stage of the relationship	
	2.2	Direct clients to other services when these will meet their needs more closely	
3. Deliver a business support service that meets the needs of your organisation	3.1	Make sure clients understand the roles and responsibilities of the support process and the limits of any contractual obligations.	
	3.2	Follow your organisations processes and procedures when delivering business support.	
4. Encourage clients to develop their confidence, knowledge and skills	4.1	Work with clients in ways that allow them to develop their skills and knowledge for themselves	
	4.2	Work with clients in ways that improves their confidence in how they manage their business	
Additional information about the unit			
Links to NOS: Based on Units 1-4 of SFEDI NOS for Business Support (approved 2006)			
Unit aim(s)			
To equip business advisers with the skills to build effective business support relationships with their clients.			

	Indicative content:
1	<ul style="list-style-type: none"> • How to use effective interpersonal and communication skills, including, when appropriate: <ul style="list-style-type: none"> • listening fully and attentively; • questioning; • checking accuracy; • summarising; • reflecting back; • challenging; • respecting and acknowledging issues; • negotiation; • giving, receiving and passing on constructive feedback; • dealing with difficulties. • The benefits and drawbacks of different kinds of communication in different circumstances (for example, face-to-face contact, phone, fax and e-mail). • The dynamics of business support relationships. • How to detect if a client is anxious about their business and raise the matter sensitively.
2	<ul style="list-style-type: none"> • Ways to respond to clients' values, ways of thinking and business needs • Ways to tailor your approach to align with clients' goals and circumstances • How to agree with the client: <ul style="list-style-type: none"> • When you will provide feedback • what actions you will carry out • when you will make yourself available • Ways to • Methods to encourage clients to clearly explain what they want to achieve so that you can identify and arrange support services that may help them • Ways to propose and promote services (including costs) that are likely to meet clients needs • The principles and practice of different modes of consulting (for example, acceptant, catalytic, confrontational and prescriptive). • Ways to encourage clients to judge when and how to share their views and concerns with you and among their team. • Ways to clarify the roles and needs of different team members if you are working with a client team • Ways of resourcing, including financing, support for business development and assessing returns on investment. • The boundaries of the relationship between you and the client • The ways that different clients prefer to work; • The limits of your own abilities and understanding of business practice. • Ways to recognise when a client needs more specialist: <ul style="list-style-type: none"> • personal support (for example, through conversation with you, reference to a counsellor or agreeing it's nothing to do with you); and • business advice (for example, an accountant, financial advisor,

	<p>marketing specialist, IT consultant, e-business adviser and so on).</p> <ul style="list-style-type: none"> • The features and benefits of the business support services you provide, and those of any other services that you direct clients to. • Who is qualified to give specialist advice and when to direct clients to them. • How to co-ordinate support services that match different client needs. • The funding that is available and relevant to clients' needs. • The procedures of funding agencies.
3	<ul style="list-style-type: none"> • Ways to end an engagement with a client in a way that encourages them to contact you for support in the future. • Ways to review with clients how they feel the relationship with you and your organisation is going • Processes for keeping up-to-date and accurate records of client contact at all stages of the relationship. • How to maintain client confidentiality. • The conditions for accepting clients onto different business support services • The benefits and drawbacks of working in different physical locations (for example, your organisation's premises or your client's premises) • The limitations of your role and responsibilities. • Any relevant contractual obligations. • The guidelines for providing support services set by your organisation or professional body about: <ul style="list-style-type: none"> • maintaining confidentiality in different working environments; • ethics, values and professional standards; • equal opportunities, diversity and social inclusion; • funding and other support available to the client; • using information management systems; • using invoicing systems, pricing and credit-control policies; and • procedures for quality assurance and handling complaints. • The role of your organisation in developing competition among local businesses.
4	<ul style="list-style-type: none"> • Ways to work with clients to help them to review and develop skills that will improve their ability to compete with other businesses (for example, mentoring, coaching and e-learning). • Ways to identify the knowledge and skills that clients need • The theories and application of learning styles (for example, Kolb experiential model; auditory, visual, tactile/kinaesthetic; collaborative/activist, individual/reflective, theory-based/theorist or practice-led/pragmatist). • Ways to identify effective ways of learning • What obstacles or barriers there may be to changing working or business practices (for example, personal emotional baggage or objections from other business partners). • The available support services and resources and how they can be accessed, combined and co-ordinated • Ways to develop clients' self-confidence. • Ways to respond to the client's values, ways of thinking and business needs. • Ways to assist client's decision making to promote their autonomy.



	<ul style="list-style-type: none">• Effective delegation
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Title:	Delivering business support	Section 3	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Help clients review their business	1.1	Work with clients to analyse their business and decide the way forward	
	1.2	Inspire clients to decide how to develop their business	
2. Help clients embrace change	2.1	Evaluate clients' readiness to implement changes and help them develop the necessary commitment.	
	2.2	Challenge clients to evaluate and prioritise changes and put them into practice	
3. Support clients when action planning to improve their business	3.1	Work with clients to devise and evaluate an action plan for improving the performance and sustainability of their business	
	3.2	Show clients how to implement and monitor their action plan and deal with any necessary contingencies or re-planning.	
Additional information about the unit			
Links to NOS: Based on Units 2-4 of SFEDI NOS for Business Support (approved 2006)			
Unit aim(s)			
To equip business advisers with the skills to work with their clients to develop their businesses.			

	Indicative content:
1	<ul style="list-style-type: none"> • Ways to identify clients': <ul style="list-style-type: none"> • business aspirations; • style of learning; • obstacles and stated and unstated objections to changing their ways of working or doing business; • thoughts and feelings about business performance, direction and shared values of the business and stakeholders • The information needed to review a business and how to obtain it • Ways to use established measures and diagnostic tools to evaluate business situations, including: <ul style="list-style-type: none"> • Business performance data analysis and performance measures (for example, benchmarking). • Qualitative and quantitative analytical and diagnostic techniques (for example, SWOT, PEST, five forces or variance analysis). • Market appraisal, pricing and evaluating the different types of products offered (product mix). • Evaluation of production processes and techniques. • Financial appraisal techniques. • Risk assessment techniques. • Analysis of business culture • Identification of stakeholders and their influence • Profiling of individuals' strengths, weaknesses and motivation • Common problems and opportunities small businesses (including structured business formats such as franchising, direct selling, licensing and distribution agreements) may face. • Ways to identify: <ul style="list-style-type: none"> • trends and developments that may affect the client's business (for example, consumer demand, new technology or government legislation). • Barriers or obstacles to improving performance (for example, personal, interpersonal issues, funding or skills). • which parts of a business would benefit from change • Ways to solve business problems, by: <ul style="list-style-type: none"> • identifying possible problems and opportunities; • monitoring and evaluating progress; and • evaluating the benefits and drawbacks of different decisions. • The most suitable options and the options most appropriate to specific issues. • How to challenge clients in overcoming obstacles and barriers to achievement. • How to support clients in dealing with problems and difficulties that may exist in achieving solutions. • How to define business objectives, actions, organisational structures, roles and responsibilities. • How to set practical, specific and ambitious personal and business objectives for the short-, medium- and longer term

	<ul style="list-style-type: none"> • How to improve competitiveness and the benefits and drawbacks of different kinds of competition • Cash flow forecasts and survival planning. • Profit and loss accounts, balance sheets and cash flow statements. • Development, presentation and use of business plans. • Sources of new opportunities (for example, networking, collaboration with other businesses or carrying out first hand research with their customers). • The benefits and drawbacks of different business models including franchising, direct selling, licensing and distribution agreements (either when replicating their business or purchasing a structured business format). • Business, financial and legal rules and methods. • The range of legal and governance structures available to small businesses
2	<ul style="list-style-type: none"> • The impact of change on an organisation • Ways to judge clients readiness and commitment to making changes • Methods to develop commitment to change including: <ul style="list-style-type: none"> • Evaluating them against personal and business objectives • Identifying the business and personal benefits • Resolving personal and interpersonal issues and habitual behaviour that are obstacles to change • Countering stated or unstated objections with facts and arguments • Resolving conflict between competing ideas • Identifying the urgency of changes needed • Ways to decide which changes should be made including: <ul style="list-style-type: none"> • Evaluating them against business and personal objectives • Evaluating the risks and benefits • Finding out what may be involved personally and in business terms • Forms of business plan that can be used to record and manage change
3	<ul style="list-style-type: none"> • Ways to enable clients to plan, set objectives and decide what is important • Resources that are needed to achieve desired results, such as: <ul style="list-style-type: none"> • Commitment of other people • Skills, • Knowledge • information • The stages in developing and implementing an action plan including: <ul style="list-style-type: none"> • setting short- and longer-term goals; • actions and timescales; • identifying what resources will be needed, where they will come from and how they will be used; • assigning roles and responsibilities; • managing risks; and • monitoring performance. • When plans need to be adapted. • Ways to engage clients with contingency planning and risk assessment. • Ways to identify stakeholders and other people who help develop or



	<p>carry out the plan or whose support is needed</p> <ul style="list-style-type: none">• Methods of consulting with and getting buy in from stakeholders• Ways to achieve results through the guided actions of others
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Title:	Understanding Social Enterprise	Section 4	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Examine whether an organisation is suited to the social enterprise model	1.1	Examine a specific organisation, explain in detail why it is suited to the social enterprise model, and how this is reflected in its purpose, values and activities	
	1.2	Compare this organisation with another social enterprise to highlight their common purpose and values	
2. Evaluate the organisational and legal structures of social enterprises	2.1	Analyse the organisational and legal structures of a social enterprise and examine how effective these structures are in achieving the enterprise's social and commercial objectives	
	2.2	Identify how the organisational and legal structures could be improved, based on comparisons with another social enterprise	
3. Evaluate the financial arrangements of social enterprises	3.1	Analyse the capital and revenue models of a social enterprise, identifying its principal sources of funding and resources	
	3.2	Identify how the financial performance could be improved, based on comparisons with another social enterprise	
4. Identify support needs and sources of support for social enterprise	4.1	Use the examination and analysis of a social enterprise to identify its support needs, and appropriate sources of support to address these needs	
Additional information about the unit			
Links to NOS: Based on SFEDI social enterprise support NOS standard Unit A submitted for approval by RAs in December 2006			
Unit aim(s)			
To develop the understanding of social enterprise necessary for a manager, adviser or consultant to a third sector organisation, including an emerging or established social enterprise			

	Indicative content:
1	<ul style="list-style-type: none"> • The meaning of the term 'social enterprise' when used by the Government and other agencies that promote social enterprise • The values of social enterprise • The circumstances that may lead to a social enterprise being established • The similarities and differences between social enterprises and other organisations including: <ul style="list-style-type: none"> • private businesses • charities • voluntary organisations • community groups
2	<ul style="list-style-type: none"> • The similarities and differences between different types of social enterprise including: <ul style="list-style-type: none"> • social objectives; • management and ownership structures • who is involved with making decisions • Alignment between social and commercial objectives, and ways to achieve this • The features of various legal formats and structures used by social enterprises
3	<ul style="list-style-type: none"> • What start-up capital is available for social enterprises • How trade income in social enterprises is handled and the issues involved in mixing trade income with grants, donations, volunteers and so on
4	<ul style="list-style-type: none"> • What specialist support is available for social enterprises locally, regionally and nationally, and how this specialist support is linked together



Title:	Promoting Social Enterprise	Section 5	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Identify and promote opportunities to establish social enterprise activities	1.1	Investigate market conditions, social needs and economic trends in order to identify opportunities for new social enterprise initiatives	
	1.2	Promote these opportunities with the organisations and people most likely to get involved in developing new social enterprise initiatives	
2. Support the formation and development of a group of stakeholders to develop a social enterprise proposal	2.1	Support the formation and development of a group of stakeholders as an effective business team with a common interest in developing a social enterprise proposal	
	2.2	Establish a client relationship with this group of stakeholders, clarifying the rights and responsibilities of both parties, and agree a process for investigating a social enterprise proposal	
3. Investigate the viability of a social enterprise proposal	3.1	Identify and research potential trading activities that are consistent with the clients' social objectives, competencies and resources	
	3.2	Support the clients' work in researching and evaluating the viability of their social enterprise proposal, and help them to decide what future actions they should take	
4. Review and improve own practices in supporting new social enterprises	4.1	Obtain feedback from clients, and use this feedback to identify ways of improving own support practices	
Additional information about the unit			
Links to NOS: Based on Units 1-4 of SFEDI NOS for Business Support (approved 2006) and SFEDI social enterprise support standard Unit B submitted for approval by RAs in December 2006			



Unit aim(s)

To equip social enterprise advisers with the skills to promote social enterprise concepts to potential stakeholders, and support stakeholders in investigating proposals for new social enterprise initiatives.

	Indicative content:
1	<ul style="list-style-type: none"> • Definitions of social enterprise and the social economy, and techniques for mapping the range and scale of social enterprises in a locality • Sources of information about the local community and the local economy • National, regional and local government policies supporting social enterprise development • Techniques for reviewing the strengths, weaknesses, opportunities and threats facing organisations, communities and local economies • Techniques for identifying how political, economic, social, technological, legal and environmental trends might affect the social economy • Marketing research techniques for spotting potential business opportunities • How to present complex ideas to new audiences and engage their interest in those ideas
2	<ul style="list-style-type: none"> • Understanding of the role of advisers and their relationship with clients, focusing on: <ul style="list-style-type: none"> • Methods of establishing the terms of engagement • Boundaries and limitations of the role of advisers • Rights and responsibilities of clients • Strategies for completing an adviser-client relationship • A range of group development theories and descriptions used to design and review group processes, for example: <ul style="list-style-type: none"> • Four stages of group development (Tuckman) • Team roles (Belbin) • Johari window (Ingham and Luft) • Ladder of participation (Arnstein) • The availability of learning and development opportunities to improve the competencies of individuals and teams • The availability of resources to support the formation and development of social enterprise initiatives, including specialist advice, grants, and other resources • The different types of social enterprise, and their principal characteristics in terms of purpose, objectives and organisational structures
3	<ul style="list-style-type: none"> • Business development processes and their impact on organisations shifting from grant-funded activities to trading activities • Community consultation techniques for engaging product and service users in the development of a social enterprise proposal • The main sources of competitive advantage for social enterprises over private enterprises and public sector service providers • The principal factors affecting the success or failure of new social enterprises • Sources of information on trade sectors, market structures, customer and competitor behaviours, and market trends • Sources of specialist support and resources available to social enterprises



4	<ul style="list-style-type: none">• Methods of providing, reviewing and improving own business support skills, focusing on:<ul style="list-style-type: none">• Maintaining effective business support relationships with clients• Helping clients analyse the business and decide the way forward• Enabling clients to implement changes in their business• Encouraging clients to act for themselves
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Title:	Developing social enterprises		Section 6	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)			
1. Support clients in determining the purpose and objectives of their enterprise	1.1	Encourage clients to explore their reasons for establishing a social enterprise, and help them prepare a statement of their purpose and objectives		
	1.2	Examine with clients how they can align the social and commercial objectives of their social enterprise		
2. Explore organisational design options with clients to choose the most appropriate organisational and legal structures for their enterprise	2.1	Investigate with clients the most appropriate legal format and structure for their enterprise, taking into account the purpose of the organisation, its social and commercial objectives, stakeholder involvement, and capital investment requirements		
	2.2	Explore organisational design options with clients, addressing issues of management, governance, accountability and operational effectiveness		
3. Help clients develop social enterprise business plans	3.1	Work with clients to identify the contents and structure of their business plans, and agree a process for preparing and reviewing such documents		
	3.2	Advise clients on potential sources of funding, resources and in-kind support, and how to present their business plans to investors		
4. Review and improve own practices in supporting new social enterprises	4.1	Obtain feedback from clients, and use this feedback to identify ways of improving own support practices		
Additional information about the unit				
Links to NOS: Based on Units 1-4 of SFEDI NOS for Business Support (approved 2006) and SFEDI social enterprise support standard Unit C submitted for approval by RAs in December 2006				



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Unit aim(s)

To equip social enterprise advisers with the skills to support social entrepreneurs developing new social enterprises

	Indicative content:
1	<ul style="list-style-type: none"> • Different methods of providing business support including coaching, mentoring, training and advice giving • Motivation theories and their relevance to social entrepreneurs, for example: <ul style="list-style-type: none"> • Theory X and Y (McGregor) • Hierarchy of needs (Maslow) • Need for power, affiliation and achievement (McClelland) • Two-factor theory (Herzberg) • Definitions of charitable objects and community interest objects • The values and principles of different types of social enterprises, and their different approaches to stakeholder involvement • The use and treatment of profits by social enterprises and the implications for funding and investment
2	<ul style="list-style-type: none"> • Methods of identifying and analysing stakeholder roles • The pros and cons of different legal formats that can be used to incorporate a social enterprise, including: <ul style="list-style-type: none"> • Charities • Companies • Community interest companies • Industrial and provident societies • Sources of information and expert support in selecting the most appropriate legal format for a social enterprise and preparing the governing document • Forms of governance and accountability used by social enterprises and how this is expressed in their governing document • The legal requirements and responsibilities of directors • Appropriate organisational and legal formats for joint ventures, subsidiaries and franchises • Different methods of promoting stakeholder involvement in a social enterprise • The eligibility requirements for organisational membership of the main national social enterprise promotional bodies, including: <ul style="list-style-type: none"> • Co-operatives^{UK} • Development Trust Association • Social Firms UK • Association of British Credit Unions
3	<ul style="list-style-type: none"> • The contents of social enterprise business plans and how they typically address issues such as: <ul style="list-style-type: none"> • Social purpose and objectives • Competencies and anticipated contributions of key stakeholders • Proposed trading activities and market forecasts • Organisational, managerial and governance structures • Financial needs and forecasts • Risk assessment and contingency plans • The principal sources and eligibility criteria of national, regional and local funding, resources and in-kind support for social enterprises • The availability of business planning tools, templates and training courses



	<p>suitable for social enterprises</p> <ul style="list-style-type: none">• The techniques used by funding bodies to assess and appraise business plans and funding applications
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Title:	Sustaining social enterprises	Section 7	
Learning outcomes The learner will	Assessment criteria The learner can (in an organisation with which the learner is familiar)		
1. Analyse the key determinants of sustainability in social enterprises	1.1 1.2	Motivate social enterprises to engage with and explore the issues associated with sustainability Analyse the key determinants of sustainability in social enterprises, and the relationship between business growth and sustainability	
2. Review the sustainability and performance of a social enterprise	2.1	Formulate plans with clients to review the performance and sustainability of their social enterprises	
3. Examine ways of improving the sustainability of a social enterprise	3.1 3.2	Work with clients to devise and implement strategies for improving the performance and sustainability of their social enterprises Show clients how to act for themselves, and develop independent organisational learning and support systems	
4. Review and improve own practices in supporting established social enterprises	4.1	Obtain feedback from clients, and use this feedback to identify ways of improving own support practices	
Additional information about the unit			
Links to NOS: Based on Units 1-4 of SFEDI NOS for Business Support (approved 2006) and SFEDI social enterprise support standard Unit D submitted for approval by RAs in December 2006			
Unit aim(s)			
To equip social enterprise advisers with the skills to work with established social enterprises that want to review their performance and improve their sustainability.			

	Indicative content:
1	<ul style="list-style-type: none"> • The modern usage of the term sustainability, and associated concepts, such as the triple bottom line • The challenges associated with simultaneously pursuing social, economic and environmental goals (the triple bottom line) • Concepts of corporate social responsibility and its relevance to social enterprise and sustainability • Government policies promoting sustainability and their relevance to social enterprises • The impact of economies of scale on the performance and competitiveness of enterprises • The factors determining the optimum size and scale of operations of a social enterprise
2	<ul style="list-style-type: none"> • The similarities and differences between performance reviews, quality assurance procedures and impact measurement techniques • The range of quality and impact measurement tools that can be used by social enterprises to review their performance, for example: <ul style="list-style-type: none"> • Social accounting and auditing • Business Excellence Model • Business Healthcheck • Ethical Explorer • Social Return on Investment • Balanced Scorecard • PQASSO • Performance measures and indicators promoted by national social enterprise bodies, including: <ul style="list-style-type: none"> • Key social and co-operative performance indicators (Co-operatives^{UK}) • Social firm performance dashboard (Social Firms UK) • Social reporting requirements for community interest companies • Techniques for gathering information and feedback from stakeholders • The performance monitoring requirements for stakeholders external to the social enterprise, such as lenders, funders and commissioning bodies
3	<ul style="list-style-type: none"> • Barriers or obstacles to improving organisational performance, for example: <ul style="list-style-type: none"> • Personal and interpersonal issues • Skills deficits • Lack of funding • Methods of achieving business growth which are consistent with the values and principles of social enterprise, including partnerships, joint ventures, mergers and franchises • Sources of capital investment for established social enterprises including equity, patient capital, mezzanine finance, loans, grants and gifts, and the associated legal and regulatory requirements governing such finance • The legal duties of directors and changes in corporate law that may affect



	<p>their responsibilities</p> <ul style="list-style-type: none">• Methods for involving stakeholders in social enterprises, ranging from formal systems of ownership, control and representation, to informal practices such as consultation and voluntary participation in activities• Descriptions of learning styles and methods in organisational settings, for example:<ul style="list-style-type: none">• Experiential learning model (Kolb)• Action learning sets (Revans)• Organisational learning (Argyris, Schon)• Sources of specialist advice and business support with experience of working with established social enterprises
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