



THINK SOCIAL

PROMOTING SOCIAL ENTREPRENEURIAL
MINDSETS FOR A SUSTAINABLE FUTURE

I01 - A4: THINK SOCIAL EDUCATIONAL PACK

MODULE 3. ESTABLISHING
OBJECTIVES AND GOALS. FROM
DREAMS TO PLAN!



Co-funded by
the European Union



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PROMOTING SOCIAL ENTREPRENEURIAL
MINDSETS FOR A SUSTAINABLE FUTURE





Think Social Up-skilling pathway

Educational pack

Module 3. Establishing objectives and goals. From dreams to plan!



Co-funded by the
Erasmus+ Programme
of the European Union

This project has been funded with support from the European Commission. This publication reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein.



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Objectives and goals

Main Objective

This module aims to explain how to define the objectives of a social enterprise and describe the steps and phases to create a business plan. The module will focus on these methods that will help learner to define in a clear and simply way the objectives of his/her entrepreneurial project and how to put these objectives into practice through a realistic planning and introducing techniques to measure the social impact.

Learning objectives

- Explain what is an objective with social approach.
- Introduce different methods to help learner to define the objectives of his/her business.
- Explain how to create a “social” hierarchy of objectives.
- Introduce the idea of social business plan.
- Explain different techniques to support the elaboration of a social business plan.
- Introduce the concept of sustainability in the development of the plan.
- Introduce the concept of social impact.
- Explain different methods to measure the social impact and how to incorporate the results in the definition of social business plan.

Learning outcomes

After completion of this module, the learner (you) will know:

- what are social objectives in the framework of a social business;
- identify and set social objectives;
- what are the benefits of defining objectives for a social business plan;
- pros and cos of social objectives settings;
- what a social business plan is;
- difference between a “traditional business plan” and a “social business plan”;
- the different steps to create a business plan;
- the meaning of social impact assessment; and
- how to establish a set of indicators to facilitate the assessment of social impact of a business.

Structure of the module

The content of the module is structure in three units:

- Unit 1. Defining objectives of social business
- Unit 2. Social business plan



Think Social Up-skilling pathway

Unit 3. Social impact

Duration of the module: 4 hours (see “Lesson plan” for more details)



Lesson plan

Module Title:	Module 3: Establishing objectives and goals – talk about your plans!	
Unit Title:	Unit1. Defining objectives of a social business	
Description of the Learning Activities	Duration (in minutes)	Materials or Equipment Required
<p>Workshop Opening: Ice-breaker game: the facilitator asks one or two participants to try and throw a small object into a basket while they are blindfolded. Then, the facilitator asks them to do the same exercise with their eyes open. The facilitator introduces a discussion about challenges to reach one’s objectives and how it is easier to reach goals when one has a clearer vision of their targets.</p> <p>If the course is online, the facilitator can ask the learners to play an online mini game.</p>	10'	<ul style="list-style-type: none"> - A small object to throw Something to blindfold the participant (e.g., a scarf) A basket (e.g., a bin basket)
Activity 1: Introduction video about Social entrepreneurship	5'	Screen and speakers to screen the video (https://www.youtube.com/watch?v=9_g5RqwW51l&ab_channel=CommonGoodSolutions)
Activity 2: Presentation of the powerpoint of Unit 1 and the study case: Defining objectives of a social business - Zero Waste Berlin Festival	15'	Presentation can be online or in presence with the use of computer and beamer. Website: https://zerowasteberlinfestival.com/ Video: https://www.youtube.com/watch?v=XIZFKNT61ZI
Activity 3: Presentation of the additional learning resource about S.M.A.R.T goals. After presenting the resource, the facilitator guides the learners to write their own goals for their social businesses.	20'	Printed templates to write the S.M.A.R.T goals
Activity 4: Presentation of the additional learning resource: A business planning guide for social enterprises: Putting the pieces together	10'	This article presents a step-by-step guide on how to establish the objectives for the business.
Activity 5: Development of the activity: Defining objectives of a social business - Your social entrepreneurship project and the sustainable development goals (SDG)	20'	Presentation of the SDG in printed or digital format: GRI, UN Global Compact & WBCSD. (2015). SDG Compass: The guide for



		<p>business action on the SDGs. Available at: https://sdgcompass.org</p> <p>The facilitator can use a video to introduce learners to the SDG for business: World Business Council for Sustainable Development. (2017). WBCSD CEO Guide to the Sustainable Development Goals (SDGs). Available at: https://www.youtube.com/watch?v=ovZYYdndB5Q&t=3s</p> <p>The facilitator can remind the study case to the participants and check which sustainable goals it addresses as an example. Website: https://zerowasteberlinfestival.com/</p>
<p>Workshop close The facilitator asks the participants to write their social business objectives on colorful sticky notes and to hang them somewhere in the room (if the course is in-person, otherwise it is possible to use a digital board)</p>	5'	Sticky notes / digital board
Total duration of the unit	1 hour, 20 minutes	

Unit Title:	Unit 2. Social business plan	
Description of the Learning Activities	Duration (in minutes)	Materials or Equipment Required
<p>Workshop Opening: Experience sharing The facilitator asks participants to share daily experiences of planning.</p>	10'	The facilitator can write on a physical or digital board the ideas and examples of the participants.
<p>Activity 1: Presentation of the case study (Wise Greece) and questions about its business plan</p>	10'	A presentation about the case study with images and descriptions
<p>Activity 2: Presentation of the power point of Unit 2 and presentation of the Additional learning resources:</p>	10'	A presentation about the additional learning resource as a preparation for the



Social Business Plan - A business planning guide to developing a social enterprise: Step 6 Business Planning. Pp. 35 - 41.		participants to write their social business plan. Presentation can be online or in presence with the use of computer and beamer.
Activity 2: Presentation of the Additional learning resources: Social Business Plan - Overview of the Social Business Model Canvas	10'	A presentation about the additional learning resource as a preparation for the participants to write their social business plan
Activity 3: Write your (social) business plan	30'	Templates of business plan (printed or downloadable)
Workshop close Group recap of what was learned and what the participants would like to know more about	10'	Open discussion, the facilitator can keep notes
Total duration of the unit	1 hour, 20 minutes	

Unit Title:		Unit 3: Social impact	
Description of the Learning Activities	Duration (in minutes)	Materials or Equipment Required	
Workshop Opening: The facilitator opens the lesson with a discussion about what is the impact of businesses. For example, do businesses always have a positive impact? Why? Can the learners share examples?	5'	The facilitator can prepare a series of pictures of famous brands and ask the learners if they know about the social impact of these companies. If there is no picture, it is possible to do it with everyday objects (shoes, smartphones, food or beverage, etc).	
Activity 1: Presentation of the power point of Unit 3 and presentation of the study case: DKMS	20'	Presentation can be online or in presence with the use of computer and beamer.	
Activity 2: Presentation of the Additional learning resources: Social Enterprises as Influencers of the Broader Business Community	3'	This research shows that social enterprises can play a crucial role in the transition to a new economy. Concrete tools are provided to help social companies accelerate the sustainability transitions in their industries through influencing.	



<p>Activity 3 : Presentation of the Additional learning resources: Social Impact - “Scaling Social Impact” by Empowering Changemakers</p>	<p>3'</p>	<p>This resource helps understand how your business can reach out with your target group and your community. Link: https://empowering-changemakers.eu/scaling-social-impact/</p>
<p>Activity 4: Writing social impact and performance measures thanks to a canvas (social impact - Assessing the social impact of a business)</p>	<p>25'</p>	<p>Video and PDF by Common Good Solutions provided in the activity description</p>
<p>Activity 5: Developing your SE theory of change</p>	<p>20'</p>	<p>Theory of change template can be found here: DIY. (2021). Practical tools to trigger & support social innovation. Available at: https://diytoolkit.org/tools/theory-of-change/</p> <p>The facilitator can use a video to introduce learners to the concept of theory of change for social business: https://www.youtube.com/watch?v=cg4J1g0IVHg</p>
<p>Workshop close Discussion about the positive social impacts of social businesses. The facilitator can ask what the next steps is to take before creating a positive social impact.</p>	<p>5'</p>	
<p>Total duration of the unit</p>	<p>1 hour, 21 minutes</p>	

<p>Total duration of the Module</p>	<p>4 hours</p>
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Unit 1. Defining objectives of a social business

1.1. What is a “Social objective” and how to define it

The establishment of **organizational objectives** is the starting point of a business. In general terms they consist of what a business wants to achieve or accomplish over a specified period.

Objectives are “the intended end result that an organisation desires to achieve over varying periods of time. Because of time variation, objectives may be specified in different ways in which long-term objectives are supported by short-term objectives.” (Eiilm University, 2021)

Important is to have in mind that objectives are more precise than the organization’s mission and vision.

The organisational mission encompasses the broad aims of the organisation; it defines what for the organisation strives. It lies in the philosophy of the founders of the organisation. (Eiilm University, 2021)

The vision of an organisation has a long-term orientation and is derived from organisational philosophy. The vision represents a challenging portrait of what the organisation can be in the future. (Eiilm University, 2021). A vision statement is a description of the desired state or ultimate condition that a project is working to achieve (Audubon et al., 2011)

Criteria for good vision statement	
Relatively General	Broadly defined to encompass a broad range of potential project activities
Visionary	Inspirational in outlining the desired change in the state of the targets toward which the project is working
Brief	Simple and succinct so that all project participants can remember it

Table 1. Vision statement

Source: Audubon, EETAP, U.S. Fish and Wildlife Service & TogetherGreen. (2011). Tools of Engagement: A Toolkit for Engaging People in Conservation. Chapter 2: What are you trying to do? Pp 23- 27. Available at: <https://cdn.naaee.org/sites/default/files/toolsofengagement.pdf>

In a simple way then, **Objective** is a goal (both terms are usually used indistinctively), something you want to achieve. In turn, the word **Social** can be considered as referring to the society, the others (the employees, the customers, the city, a country).

Classification of business objectives		
Business objective	Definition	Examples
Economic Objective	refer to the objective of earning profit and also other objectives that are necessary to be pursued to achieve the profit objective	Profit earning Creation of customers Regular innovations Best possible use of resources



Social Objectives	objectives of business, which are desired to be achieved for the benefit of the society. In traditional bussines these are part of the social responsibility of the business	production and supply of quality goods and services, adoption of fair trade practices and contribution to the general welfare of society and provision of welfare amenities.
Human Objectives	refer to the objectives aimed at the well-being as well as fulfillment of expectations of employees	Economic well being of the employees Social and psychological satisfaction of employees Development of human resources
National Objectives	objective of fulfilling national goals and aspirations. The goal of the country may be to provide employment opportunity to its citizen, become self-sufficient in production of goods and services, etc.	Creation of employment Production according to national priority Self-sufficiency and export promotion
Global Objectives	increased competition in the market. Today because of globalisation the entire world has become a big market. Goods produced in one country are readily available in other countries. To face the competition in the global market every business has certain objectives in mind, which may be called the global objectives.	Reduce disparities among nations Make available globally competitive goods and services

Table 2. Classification of business objectives

Source: NIOS. (2021). Business studies: Lesson 3 Objectives of Business. Available at: <http://old.nios.ac.in/Secbuscour/cc03.pdf>

While traditional businesses have as main business objective earning profit (economic objective), in social enterprises the primary objective is the achievement of social objectives.

The **European Commission** has defined a social enterprise as being “an operator in the social economy whose **main objective is to have a social impact** rather than make a profit for their owners or shareholders. It operates by providing goods and services for the market in an entrepreneurial and innovative fashion and uses its profits primarily to **achieve social objectives**. It is managed in an open and responsible manner and, in particular, involves employees, consumers and stakeholders affected by its commercial activities.”(European Commission, 2021).



What is Social Entrepreneurship?

Image 1. What is social entrepreneurship?

Source: CEDRA Split. (2016). What is Social Entrepreneurship?. Available at: <https://www.youtube.com/watch?v=aTo0qtdVMpM>

According to the definition of social enterprise, social objectives are those that have a social impact.

Social impact definition and its measurement will be explained in Unit 3 of this module. For now, students can keep in mind the following definition:

According to the Michigan Ross Center for Social Impact, Social Impact is: **“A significant, positive change that addresses a pressing social challenge.”**

Social entrepreneurs must also keep in mind that the **UN Sustainable Development Goals (SDG)** can serve as a **common framework for social enterprises**. They ensure that the social enterprise creates **social value** that benefits the society at large (BISER et al., 2018). Each goal of the 17 SDG has targets, and progress on each of the total 169 targets is measured using indicators. In total there are 230 indicators.





Image 2. Sustainable Development Goals (SDG)

Source: GRI, UN Global Compact & WBCSD. (2015). SDG Compass: The guide for business action on the SDGs. Available at: <https://sdgcompass.org>

The 17 Sustainable Development Goals (SDGs) define global sustainable development priorities and aspirations for 2030 and seek to mobilize global efforts around a common set of goals and targets. The SDGs call for worldwide action among governments, business and civil society to end poverty and create a life of dignity and opportunity for all.

How can social entrepreneurs use the SDG and help fulfil them by 2030?

Start looking at the 17 goals and find the one or the ones that appeal to you and is relevant regarding the social challenge you have chosen to tackle with your social entrepreneurship and start with that. (BISER et al., 2018).

1.2. Methodology to identify and set objectives for a social business

When identifying your social business objectives you should have in mind the following questions: Is the objective linked to a target?, Is it impact oriented?, Is it measurable?, Is it time limited?, Is it specific?.

By using the SMART methodology, the mentioned questions can be dealt in a more organized manner.

The word “smart” is an acronym, which means that every letter stands for a word, like indicated in the following table.

S.M.A.R.T goals		
S = Specific	Goals for establishing a social enterprise should be very precise.	Answer the “5W” questions: Who? What? When? Where? Which? Why?
M = Measurable	It must be possible to measure the goal quantitatively.	Example: how many customers do you want to have after one month of opening your business?
A = Achievable	It must be possible to reach the goal.	Think of the resources you have or that you are lacking to reach the goal. Do you already have everything you need? Or do you need more resources?
R = Relevant	Your business goal should be useful to	Which societal needs does it cover?



	your community or to society.	
T = Time bound	Your business goal must be reachable in a certain defined time framework	Ask yourself how much time is needed for goals to be implemented. Be precise. How many weeks, how many months? You can also start to think about breaking this timeframe into smaller periods. If your goal should be achieved in 6 months, what will need to be already done after 3 months?

Table 3. S.M.A.R.T. Objectives

Source: Eby, K. (2019). The Essential Guide to Writing SMART Goals. Available at: <https://www.smartsheet.com/blog/essential-guide-writing-smart-goals>

As presented, when writing SMART goals, you need to ask yourself and other team members questions that will help fine-tune the strategy, ensuring the goals are something that's attainable. Entrepreneurs must be as realistic as possible.

Goals need to identify exactly what needs to be done to improve the status of your target. They should articulate which "quality of life" measures will improve, such as health or jobs, for example. (Audubon et al., 2011)

Examples of goals (Audubon et al., 2011):

- By 2020, at least 80% of the Marine Reserve's intertidal zone supports healthy populations of cormorants, marine iguanas, chitons, and bivalves.
- By 2015, reduce the annual number of Stage 1 Air Quality Alerts in the Missoula air stagnation zone to less than five.
- By 2015, the number of cases of asthma in DC's 4th ward has been reduced by 15% for young people aged 4-15.

For more examples of identification of objectives check this source: SAMHSA. (2021). Setting Goals and Developing Specific, Measurable, Achievable, Relevant, and Time-bound Objectives. Available at:

<https://www.samhsa.gov/sites/default/files/nc-smart-goals-fact-sheet.pdf>

1.3. Benefits of defining objectives for a social business

The benefits of defining objectives for a social business are numerous.



The definition of objectives is the first step to take before starting to write your business plan. Defining your objectives will help you developing your business plan later. The business plan is introduced in the second unit of this module.

The definition of the social objectives will show the team and the society why the social business was created, which societal problem aims to address.

If the social entrepreneurship contributes to reaching the UN Sustainable Development Goals (SDG) then it will be easier to not only ensure the creation of social value but to also generate synergies across sectors, that is with municipalities, states, as well as with the private sector and actors and organizations of the civil society (BISER et al., 2018).

Clearly defined objectives govern the behaviour of organization members and define the organisation; therefore, they need to be as clear as possible, so all members act according to them in a unified manner and there is no confusion about the way in which the company wants to move. This also contributes to an effective integration of various groups associated with the organisation, such as founders, target group, etc.

Objectives provide the directions for decision making. The objectives set the limits and prescribe the areas in which decisions can be made in the social enterprise. This also contributes to a more effective decentralized decision-making processes, decision making authority can be more effectively assign to lower-level people.

Objectives work as a motivating force for the members of the organisation by providing a direction to them. Individuals have a framework to fit their personal needs with organisational objectives. When objectives are met team members will feel more motivated and rewarded.

Objectives provide standards that help measure the performance of the organisation and revise how effective it is in its processes.

1.4. What not to do when setting objectives for a social business plan

You should not do the following when defining your objectives:

- Do not be unrealistic. Objectives should be rational, achievable, and realistic rather than idealistic.
- Do not generate broad objectives, clearly defined objectives provide clear direction for managerial action.
- Do not underestimate the importance of defining your targets clearly previously to define your objectives, since they are the basis for setting them and later measure the success. (Audubon et al., 2011).
- Do not forget to analyse the way your target group perceive their needs. Broad objectives relating to things such as human rights or gender empowerment often mean very different things at the local level. (Lennie et al., 2011)
- Do not forget to check the current condition of the identified target (Audubon et al., 2011).



- Do not think that all objectives will be reached at the same time.
- Do not forget to think how the objectives will be measured, when identifying them.
- Do not be inflexible about the business objectives, an organisation may have multiple objectives, organisational objectives can be changed; old objectives may be replaced by new ones. Since objectives are formulated keeping in view the environmental factors and internal conditions, any change in these may result into change in objectives. (Eiilm University, 2021).
- Do not forget to evaluate the various factors that can affect the achievement of your defined objectives.
- Do not define objectives that are not consistent with the organisational mission.
- Do not forget to define objectives attached to a time frame and to review them periodically.



Activity 1. Your social entrepreneurship project and the sustainable development goals (SDG)

Module Title	Module 3. Establishing objectives and goals. From dreams to plan.
Unit Title	Unit 1: Defining objectives of a social business
Activity Title	Your social entrepreneurship project and the sustainable development goals (SDG)
Type of resource	Activity sheets
Activity code	A3.1
Type of learning	Blended learning
Duration of Activity	60'
Learning outcomes	<ul style="list-style-type: none"> • Able to identify the content of the SDG • Able to connect one or more SDG to a particular SE idea • Able to incorporate SDG as a social objective of a particular SE
Aim of activity	<p>The aim of the activity is for social entrepreneurs to learn about the SDGs and to make them part of the social objective of their venture so that they can have a greater impact, since SDG represent the most pressing social problems to be solved around the globe. Social entrepreneurs will learn that the UN Sustainable Development Goals (SDG) serve as a common framework for social enterprises and can ensure that the social enterprise creates social value, that benefits the society at large. Including them as objectives of the SE will also increase the possibilities to generate synergies with other stakeholders.</p>
Materials Required for Activity	<ul style="list-style-type: none"> • For in person delivery: a printed presentation of the SDG. Participants might need to have access to a smartphone or a laptop with an internet connection to do research on the topic. • Paper and pencil or computer (access to write in word document or similar) to write down the SDG that connect the most to the participants entrepreneurial idea. The presentation of the SDG can be found here: GRI, UN Global Compact & WBCSD. (2015). SDG Compass: The guide for business action on the SDGs. Available at: https://sdgcompass.org - For online instruction: computer with internet connection so participants can visit the aforementioned website and read about the SDG and access to a program that allows



	<p>participants to write in their computer the SDG that connect the most to the participants entrepreneurial idea.</p> <p>The facilitator can use this video to introduce learners to the SDG for business:</p> <p>World Business Council for Sustainable Development. (2017). WBCSD CEO Guide to the Sustainable Development Goals (SDGs). Available at: https://www.youtube.com/watch?v=ovZYYdndB5Q&t=3s</p>
Step-by-step instructions	<p>To implement this activity, the facilitator should introduce the following steps:</p> <ul style="list-style-type: none">• Step 1: Introduce the SDG and show the video indicated in the activity materials.• Step 2: Share the list of the SDG with the social entrepreneurs and ask them to read them through having in mind their social entrepreneurial project.• Step 3: Ask participants to write which SDG would fit to their entrepreneurial idea and to think why they consider they fit.• Step 4: Ask participants to share their thoughts with the group and check if there are SE ideas that fit to the same SDG, if that is the case make them aware of this so they can see if they can become partners or contribute to each other development of the SE.
Handout	<p>GRI, UN Global Compact & WBCSD. (2015). SDG Compass: The guide for business action on the SDGs. Available at: https://sdgcompass.org</p>



Additional resources

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 1: Defining objectives
Title of Reading Material / Video	A business planning guide for social enterprises: Putting the pieces together



Image Source: https://socialventures.com.au/assets/Business_Planning_Guide_for_Social_Enterprise.pdf

Introduction to the resource	<p>In this article, you will find a step-by-step guide on how to establish the objectives for the business.</p> <p>This guide describes that the best way to prioritise one's ideas is to arrange by asking 20 questions. This method aids the entrepreneur to rule out some ideas since some of the initial ideas might not have the right potential to develop them.</p> <p>The questions are categorized based on the 4 basic concepts a business is built on.</p> <ol style="list-style-type: none">1. Making Money2. Making a Difference3. Making it work4. Making the magic
What will you get from using this resource?	<p>The guide is primarily aimed at people and/ or organisations interested in starting a social enterprise and who don't have experience of doing this before. It is a step-by-step guide to thinking about, researching, planning for, starting and then growing a social enterprise, which will help you to:</p> <ul style="list-style-type: none">- create a rigorous business plan for a sustainable social enterprise- obtain support for your social enterprise e.g. from partners- secure investment for your social enterprise- monitor and evolve your social enterprise in future year- define the social objectives of your business



	It is also designed to be a useful resource for more experienced practitioners, acting as a reference point.
How can you use this resource to develop your own social enterprise?	In the article, you will find questions to establish certain goals. First, try and answer all the available questions to clear and prioritise all your ideas. Focus on one business idea and arrange your objectives. Then, ask a colleague, a friend or a mentor to review your goals and discuss them together. Try to improve them. It will help you set clear objectives and to get feedback for your future business plan.
Debriefing questions	After having read this additional resource, answer the questions below: <ol style="list-style-type: none"> 1. Do you find this guide helpful? How could you use this tool in your daily life? And in your job? 2. How could you use this tool to define the objectives of your social enterprise? 3. Why is this guide useful? You can find ideas to answers this question by reading the resource. 4. What challenges did you have while answering the basic filtering questions? 5. Is there something you did not understand about this tool?
Link to the resource	https://socialventures.com.au/assets/Business_Planning_Guide_for_Social_Enterprise.pdf

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 1: Defining objectives
Title of Reading Material / Video	The Essential Guide to Writing SMART Goals

S M A R T

Make your **SMART** goals:

- SPECIFIC** (Icon: Document with arrow)
- MEASURABLE** (Icon: Scales)
- ACHIEVABLE** (Icon: Line graph)
- REALISTIC** (Icon: Eye)
- TIME-BOUND** (Icon: Hourglass)



Image Source: resources.buffiniandcompany.com

Introduction to the resource	<p>In this article, you will find a step-by-step guide on how to write SMART goals.</p> <p>What does “SMART” goals mean? The word “smart” is just an acronym, which means that every letter stands for a word. Basically, S.M.A.R.T goals are:</p> <ul style="list-style-type: none">● S = Specific● M = Measurable● A = Achievable● R = Relevant● T = Time bound <p>Let’s get into details and see what these 5 words mean:</p> <ol style="list-style-type: none">1. Specific: Goals especially goals for establishing a social enterprise should be very precise. According to the article, you can start with answering the “5W” questions. The 5W correspond to Who? What? When? Where? Which? Why?2. Measurable: You should find a way to measure the progress you make and measure if you meet your goal. For this, you can use indicators. Indicators are numbers that you use to express your goals in quantity. In fact, everyone uses indicators in their daily lives. For example, planning to do at least 3 chores in your house in a day is an indicator. Planning to send 10 CVs in one week also is an indicator. The same applies to businesses. An example of an indicator for your business is: how many customers do you want to have after one month of opening your business?3. Achievable: This will help you understand which resources, skills and knowledge you need to attain your goal. Do you already have everything you need? Or do you need more resources? If you think about your indicators, what do you need to reach them?4. Relevant: Relevance means that your business goal should be useful to your community or to society. Which needs does it cover? For example, it is not so relevant to start a business that sells umbrellas in a country where it never rains. <p>Time-bound: It is better to plan in time how to reach your goal. To follow your plans and achieve your goals, open a calendar on your phone or find a paper one. Ask yourself how much time is needed for all goals to be implemented. Be precise. How many weeks, how many months? For example, if your goal is to make a cake, you should know how much time you need to prepare the butter and how much time you need to bake it. You can also start to think about breaking this timeframe into smaller periods. If your goal should be achieved in 6 months, what will need to be already done after 3 months?</p>
What will you achieve by using this resource?	<p>The goals of the S.M.A.R.T. tools are the following:</p> <ol style="list-style-type: none">1. Setting your business idea



	<ol style="list-style-type: none">2. Establishing business goals3. Checking your resources: the ones you already have and the ones you need to prepare before starting your business4. In the future, these goals can be used to develop a step-by-step business plan <p>This tool will give you a clear idea of how to achieve your business goals or even your personal goals. Also, after doing this method, it will be easier to explain your goals to others.</p> <p>Let's take an example. Imagine that your goal is to organise a birthday party. How can you make this example a SMART goal?</p> <ul style="list-style-type: none">- Specific: what are you going to do during this party? Who will be invited? Where and when will it be?- Measurable: how will you check that everything is ready? How will you measure the number of guests coming?- Achievable: what type of resources will you need? Will you need to buy things, like food, decoration, candles, gifts?- Relevant: consider the needs of the person whose birthday will be celebrated. Does she or he want a big or a small party?- Time-bound: when is the birthday happening? How long in advance will you invite other people? When will you start the preparations?
How can you use this resource to develop your own social enterprise?	<p>In the article, you will find a S.M.A.R.T. goals worksheet that you can print or copy paste. First, try to fill in all the categories of this worksheet. Put your business goals and focus on your business idea. Then, ask a colleague, a friend, or a mentor to review your goals and discuss them together. Try to improve them. It will help you set clear objectives and to get feedback for your future business plan.</p>
Debriefing questions	<p>After having read this additional resource, answer the questions below:</p> <ol style="list-style-type: none">1. Do you find S.M.A.R.T. goals helpful? How could you use this tool in your daily life? And in your job?2. Why are S.M.A.R.T. goals useful? You can find ideas to answers this question by reading the resource.3. What challenges did you have when while writing your own S.M.A.R.T. goals? <p>Is there something you did not understand about this tool?</p>
Link to the resource	<p>https://www.smartsheet.com/blog/essential-guide-writing-smart-goals</p>



Case study 1. Zero waste Berlin Festival

Module Title	Module 3. Establishing objectives and goals. From dreams to plan.
Unit Title	Unit 1: Defining objectives of a social business
Case Study Title	Zero Waste Berlin Festival



Name of the organisation / social enterprise / best practice guidelines:	Zero Waste Berlin Festival UG
What is the story behind this case study?	Once the Spanish-born migrant entrepreneur Coral Ruz, founder of Zero Waste Berlin Festival in Germany, discovered the term Zero Waste, she made changes in her life to lead a more sustainable life. But she realized that these small changes could be scaled by reaching out to communities with the same objectives: the creation of Sustainable cities and communities, raise awareness on responsible Consumption and Production and raise awareness on climate change mitigation, adaptation, impact reduction and early warning. The founder first organized small gatherings that gradually expanded the community (Zero Waste Club), to the point where she discovered that a large annual event could be organized to bring together different stakeholders interested in sustainable living: the Zero Waste Berlin Festival.
Link to the case study	Website: https://zerowasteberlinfestival.com/ Video: https://www.youtube.com/watch?v=XIZFKNT61ZI Instagram: https://www.instagram.com/zerowasteberlin_festival/?hl=es
Why is this a good example for you to follow?	it is inspiring to learn the story of a migrant woman who, motivated by her personal passion for climate change mitigation actions and sustainable living, decided to scale these actions and seek opportunities to influence others and at the same time seek support for greater impact. This journey has led her to not only undertake but to form communities of people from all over the world living in Berlin who wish to be part of the movement. The sustainable development goals are the objectives of her social business.



How can you use this case study to develop your own social enterprise?	You can learn that the sustainable development goals can be incorporated as objectives of your social entrepreneurship.
What impact has this case study achieved?	10 Events have been organized with more than 1000 Attendees and more than 40.000 People have been reached The founder was recognized in 202, by EUCLID, as one of the top 100 women in social enterprise
Follow up questions	After having completed this case study, answer the following questions: <ol style="list-style-type: none"> 1. As a migrant do you feel empowered enough to create your own social enterprise and exert a positive influence on the community around the objectives that drive your venture? 2. How can you identify the objectives of your social entrepreneurship project? 3. What are the benefits of having the objectives of your entrepreneurship defined? 4. Is there any of the 17 SDG Goals and the 169 targets, that you mainly feel you could help achieve? 5. If you run a social enterprise or if you have an idea for a social enterprise, that you want to start – try to identify which of the 17 SDG Goals your enterprise is addressing.
References	Website: https://zerowasteberlinfestival.com/ Video: https://www.youtube.com/watch?v=XIZFKNT61ZI https://web2.cylex.de/firma-home/zero-waste-berlin-festival-ug--haftungsbeschraenkt--14530846.html GRI, UN Global Compact & WBCSD. (2015). SDG Compass: The guide for business action on the SDGs. Available at: https://sdgcompass.org GRI, UN Global Compact & WBCSD. (2015). Learn More About the SDGs. Available at: https://sdgcompass.org/sdgs/

Unit 2. Social business plan

2.1. What is a social business plan?

A social business plan is just a regular business plan adapted to your social business. Generally, a business plan is a description of the social and economic activities you and your organization aim to carry out in a specific order. A social business plan is considered to be a channel of communication amongst the members of a organization and its stakeholders, since it outlines background information of the organization, states the purpose of the social enterprise, describes the important stakeholders of the organization and informs on the financial aspects that concern the organization.



Among other things, it must include the following 4 elements:

- The mission of your social enterprise
- The outline of specific actions to achieve your goals and objectives
- Establish targets for planning, measuring, and improving performance
- Project the necessary resources, costs, and revenues of your program

The business plan is a very important document that states what you will do and how you will achieve your objectives. It is like the recipe you follow to implement step by step your business project.

2.2. From a business plan to a social business plan

The key elements that are highlighted in each plan and the way each element corresponds to the other are set out below.

SOCIAL Business Plan	
1	Social objective
2	Funding programs
3	Positive social impact of products and services
4	Vulnerable people
5	Use of profit for a social cause
Business Plan	
1	Mission
2	Capital needs
3	Products and Services Portfolio
4	Target Markets
5	Revenues, expenses, losses, profits

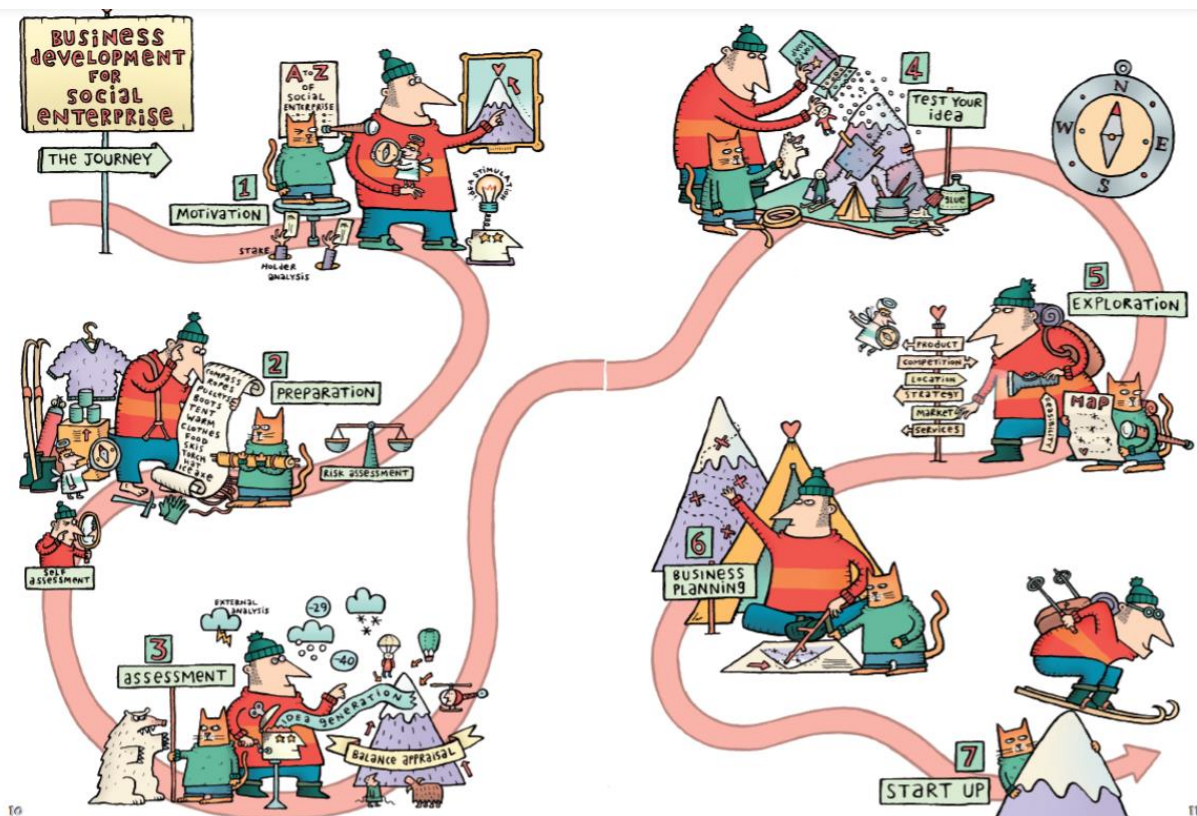


Image 3. Business development for social enterprise

2.3 How to develop a social business plan?

A social business plan clarifies the business idea a social enterprise has in terms of its mission and acts as an established framework of usually 6 – 8 chapters. The purpose of the social business plan is to portray the following parts to admit itself to the investment process.

1. Introduction to the plan

- A short description of the enterprise
- The main financial, market and social needs

2. Description of the social business plan

- State the social objectives of the enterprise
- Ways of presenting the goals of the enterprise to all involved stakeholders (clients, investors, etc.)
- State the name of the business, the potential market it aims and the direct target group.



- Mention the conditions of the industry including the present condition and future condition.
- Refer to the future potential of the new business
- State the strong ways of the new business inside the competitive area.

3. Description of the market plan

- State the current situation of the market and the environment the social enterprise will be established
- Describe the recognition of competitors and the recycling of competition
- State the ways and methods used for recording the reactions and possible impulses of the products.
- Mention and explain the evaluation method that will be applied on the marketing ideas
- State and present the marketing capacity of the business.
- State the needs and expectations of the targeted customers

4. Description of the production plan

- Refer to the establishment of the social enterprise and explain the how that particular place or location benefits the enterprise in terms of labor force (community inclusion, price rates and the society support for the producers and the consumers.
- Describe in detail the buildings that will establish the enterprise, the equipment used for all procedures (machines, special tools, vehicles, green equipment) and their associated costs
- Financial information, which is given in this part, will be used at financial estimations.

5. Description of Management

- Describe the management of the social enterprise and the key personnel also including their tasks and responsibilities.
- Provide all the detailed CV's of the management team must be stated in order to provide their relation to the social enterprise's mission.
- Refer whether the enterprise will include Human resources within its personnel or not.

6. SWOT Analysis

SWOT refers to four words' initials:

- Strengths (Specifying strong ways)
- Weaknesses (Specifying weak or powerless ways)



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- Opportunities (Finding out the opportunities)
- Threats (Specifying the dangerous risks and threats)



Activity 2. Write your (social) business plan

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 2: social business plan
Activity Title	Write your (social) business plan Activity Code: A3.2
Type of resource Type of Learning	Activity sheets (AS) Blended
Duration of Activity	70 minutes
Learning Outcome	Students will understand the basics and the purpose of a business plan. Students will be able to write a simple business plan based on their own ideas. Students will identify the main differences between a traditional and a social business plan.
Aim of activity	<p>Did you already find the greatest idea for your future business? If yes, you can start to write your own business plan. Writing a business plan is the first thing you should do after finding your idea and setting your goals. It will help you to know what to do to start your business. It will help you present your projects to investors, to people who can give you money to start your business.</p> <p>Because this module focuses on social businesses, you will also find some tips and examples to make your business a social business.</p> <p>In this activity, you will learn how to write a business plan... simply by doing it! Think that the business plan is like a recipe. To make a dish, you should first find and follow the recipe. It is the same for your business.</p>
Materials Required for Activity	<ul style="list-style-type: none"> - For in person delivery: a printed free business plan template (see links below) to fill in manually. Participants might need to have access to a smartphone or a laptop with an internet connection to research their markets or their ideas. <p>An example of simple business plan structure can be found here: https://www.thebalancesmb.com/entrepreneur-simple-business-plan-template-4126711 Or here: https://www.eu-startups.com/2018/07/how-to-write-a-simple-but-good-business-plan-for-your-startup/</p> <ul style="list-style-type: none"> - For online instruction: a business plan template can be shared to all participants and filled in individually by downloading a Word file for example. <p>The facilitator can use this video to introduce learners to the concept of the business plan:</p>



	https://www.youtube.com/watch?v=Fqch5OrUPvA&ab_channel=YoungEntrepreneursForum
Step-by-step instructions	<p>Through this activity, you will go through all the steps to write a simple business plan.</p> <ul style="list-style-type: none">- Brainstorming: Share your business idea(s) with the others. If you have several business ideas, pick only one to write your business plan. Then, say what you think a business plan should include.- Structure: read the entire template that the facilitator gave you. Write questions that you may have and words that you do not know. If you wish so, you can also write your own business plan. The business plan should include these important elements:<ol style="list-style-type: none">1. The mission: this is the introduction, the general description of your business idea. What is your business goal? What do you want to achieve with the product or the service you will offer? Why is your business special? Tip for a social business: Think about how your business could help other people or be good for the planet. This will make your business idea more original.2. Capital needs: How much money will you need to start your business? Where will you find this money? What will be your first expenses? Think about the financial resources you need to start your business. Tip for a social business: Try to find specific funding programs for social businesses.3. Products and Services Portfolio: You can describe what you want to sell to your customers and why your business will be interesting to them. For example, if you want to open a coffee shop, you should think about what types of coffees you want to sell, what types of food products, etc. If you want to open a hair salon or a barbershop, say what types of services your customers will find in your business. Tip for a social business: To find products and service with a positive social impact, be creative. For example, if you want to open a coffee shop, you can think of making it a “green” coffee shop that does not use plastic cups or that only sells coffee bought from small producers.4. Target Market(s): Who will be the most interested in your products? Children, men, women, families, people of your community? Are your target market other companies? Be as precise as possible.5. Revenues, expenses, losses, profits: Here, you can start to think about one important element: money. How much money do you plan to make in the first months? What expenses will you have (rent for example)? Tip for a social business: Think about how you can use some of your profits for a social cause, like in the case study.



	<ol style="list-style-type: none">6. Team: Who will work with you? Do you already know your future employees? If not, where will you find them? How much will you pay them? Think about the different skills you need in your team. In the example of the coffee shop, if you do not know how to bake pastries, you might need to hire someone who can do this for you. Tip for a social business: In your team, you can include people who are vulnerable and have difficulties finding a job because of discrimination. For example, you could try to employ in your team women who have a family to take care of, even if you can only employ them part-time7. Competitors: Who can be in competition with you? Are there other businesses that already offer the same products or services as you?8. Pricing: Here, describe the price you want to put for your products or services. Think about your target markets to adapt the price to them. For example, if your target is families, you should offer discounts for products bought in large quantities.9. Marketing strategy: How will you sell your products? Will you need to create a website or a page on social media (Instagram, Facebook, TikTok)? Where and how will you find your future clients? Tip for a social business: If your business has a positive social impact, it should appear in a visible way in your marketing strategy. Being a social business is unique and you can show it is a strength to choose to help other people.10. Conclusion: Sum up here the most important information about your business project
Handout	<p>In person:</p> <ul style="list-style-type: none">- The facilitator opens the session with a brainstorming of business ideas. Then, she/he can ask students what they already know how business plans.- The facilitator can show to students an instructional video to introduce the idea of a business plan. She/he can explain that there is no universal model of business plans and that they may vary according to the specificities of the business and the entrepreneur.- Then, she/he hands out the templates to the students and let them read it. She/he can also provide the step-by-step instructions above. The facilitator can answer questions about basic doubts or unknown words.- The learners should have enough time to provide basic information about their business plans in the templates individually.- Then, the facilitator asks the students to work in pair and give feedback to each other about their business plans.- Then, voluntary learners can share about their business plans on a voluntary basis. They can ask questions to the facilitator.



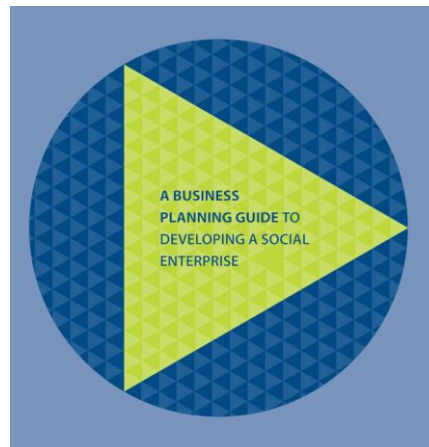
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	<p>Online: The handout is the same as for in-person learning. However, the learners can all fill in the business plan collectively and share their questions in the plenary session or in a chat while they do it in order not to feel isolated if they do the module online.</p>
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Additional resources

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 2: Social Business Plan
Title of Reading Material / Video	A business planning guide to developing a social enterprise: Step 6 Business Planning. Pp. 35 - 41.



Introduction to the resource	The guide outlines a step-by-step approach to starting up your social enterprise and focuses on the key issues surrounding business development. The guide assumes a fundamental knowledge of business planning. It focuses on the specific issues around social enterprise development.
What will you get from using this resource?	Participants will get advice and tips on how to write a good business plan. The guide offers a step-by-step division of the business plan generation that illustrates in a simpler way how to generate a business plan step by step. The guide prevents that there are numerous ways of writing a business plan and that the template it offers is only one way of doing it. Participants will be encouraged to use the model that best suits their own organisation.
How can you use this resource to develop your own social enterprise?	Participants will learn that the business plan should be tailored to suit the audience that will be reading the plan. Also, will be aware that the business will change in time and that the business plan should adapt to accommodate those changes over time. Participants will get to know the key elements that every business plan must include and will get an idea of what aspects are included in the following items: <ul style="list-style-type: none">● Executive Summary● Organisation● Key Staff● The Business● External Relations● Product or Service



	<ul style="list-style-type: none">● The Market● Social Purpose● Social Impact● Business Environment● Industry Analysis● Critical Success Factors● Business Development● Turnover and Sustainability● Marketing and Sales● Premises● Suppliers● Production and/or Operation Equipment● Action Plan● Finance● Appendices
Debriefing questions	<p>After having read this additional resource, answer the questions below:</p> <ol style="list-style-type: none">1. Who are you writing the business plan for?2. Would you fund or support your social enterprise based on the information your business plan provides?3. Do the numbers add up and are they realistic?4. What are the critical success factors?5. Do you have a Plan B?
Link to the resource	<p>The Royal Bank of Scotland & NatWest. (2011). A business planning guide to developing a social enterprise: Step 6 Business Planning. Pp. 35 - 41. Available at: http://www.socialenterprisesolutions.co.uk/wp-content/uploads/2011/03/social_enterprise_business_planning_guide.pdf</p>



Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 2: Social Business Plan
Title of Reading Material / Video	Overview of the Social Business Model Canvas



Introduction to the resource	This video introduces how to use a social business model canvas to create social enterprises.
What will you get from using this resource?	This video will introduce you in a simple way the different components of a social business model, by presenting examples and simple explanations.
How can you use this resource to develop your own social enterprise?	Participants will have a broad perspective on how to create their social business model canvas and complete all the areas that compose it.
Debriefing questions	<p>After having watched this additional resource, answer the questions below:</p> <ol style="list-style-type: none"> 1. What is the difference between a business model and a business plan? 2. What elements belong to the value proposition in the case of your business idea? 3. Can you identify your customers? 4. How is your business going to relate to others? 5. Which channels have you contemplated to reach your customers? 6. Which cost and revenue calculations have you in mind? 7. What partners does your social entrepreneurship has? 8. Have you defined the day-to-day activities of your SE? 9. Do you already have resources available to start up your social enterprise, if so, which ones and if not, which ones do you think you will need?
Link to the resource	Strategy Made Simple. (2020). Overview of the Social Business Model Canvas. Available in: https://www.youtube.com/watch?v=8aPGXqLZCS0



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	Template of the Social Business Model Canvas available in: https://strategymadesimple.ca/social-business-model-canvas-download
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Case study 2. A Social Enterprise in Greece: Wise Greece

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 2: Social business plan
Case Study Title	A Social Enterprise in Greece: Wise Greece



An Initiative
with a “wise”
mission!



Name of the organisation / social enterprise / best practice guidelines:	Wise Greece
What is the story behind this case study?	<p>Wise Greece is a Greek association and a characteristic example of a social business. The company works with small farmers who sell traditional Greek food products, by putting their products in supermarkets and promoting their food with marketing tools. The farmers who want to be part of Wise Greece use the logo on their products, so customers know that these farmers are supporting</p> <ol style="list-style-type: none"> 1) other small farmers who make organic products in Greece 2) charity organisations <p>The association contributes to the community by supporting financially the small farmers and the charity organizations when Greek food products are sold, one part of the benefit is issued to</p>



	<p>them. More specifically the association provides money to other organisations who help children, homeless people and the elderly who cannot work anymore. In other words, it uses consumers' money to help people who are in need.</p>
Link to the case study	<p>http://www.en.wisegreece.com/ http://facebook.com/WiseGreece</p>
Why is this a good example for you to follow?	<p>Olive oil, yogurt, fresh fruits... We all know that Greek food is delicious!</p> <p>The creators of Wise Greece knew this and decided to use the sale of Greek products for a good cause. They created this association not only to sell more products but to help other people such as the elderly, disabled, and homeless people.</p> <p>Of course, supermarkets in Europe offer many products. It is hard to know what is the best one, the cheapest one, and so on. So, the idea of Wise Greece can be summed up as the following:</p> <ol style="list-style-type: none"> 1. If the customers of the shop want to spend some money on a food product, they can spend it on a product that has a good impact on society. 2. Someone can buy and eat good food and help other people at the same time. <p>It is possible to help two different groups of people with one business. On the one hand, Wise Greece promotes the food made by small Greek farmers. On the other hand, it gives money to people who have no job.</p>
How can you use this case study to develop your own social enterprise?	<p>This example shows that:</p> <ul style="list-style-type: none"> - With a common effort, businesses can make a positive impact on our society - It is possible to make a profit (to earn money) and to help people who have no money - Simple ideas are good ideas! <p>This example also teaches that:</p> <ul style="list-style-type: none"> - It is important to establish good connections between the different actors involved in your business, even abroad. - The entrepreneur should know well his/her product or service. The entrepreneur should also know how to market it and promote it to others. For example, the owner of Wise Greece explained that her association became more successful when she redesigned the packaging of the Wise Greece products by a nice blue and white logo on all the products. <p>The social aspect of the enterprise is complementary to its business aspect. Wise Greece was built on a social business plan, because all the aspects of this enterprise take in account the social dimension of the business.</p>
What impact has this case study achieved?	<p>Wise Greece was created in 2013 and it is now a big success in Greece and even in other countries. It has won the Venture Impact Award of the Hellenic Initiative. Many exhibitions like EXPORTROF</p>



	<p>and organisations like Hellenic Initiative Australia also support Wise Greece through funding or supporting actions.</p> <p>Their social impact can be seen in several cities in Greece. For example, with the support of bigger associations, Wise Greece distributes launched the “Hope Boxes” project. With this project, it distributes every year hundreds of “hope boxes” (boxes of Greek food products) to elderly care centres and to child protection houses.</p>
Follow up questions	<p>After having completed this case study, answer the following questions:</p> <ol style="list-style-type: none"> 1. Can you think of a product, a service or an activity that you love, and that other people love? Or can you think of something that is very unique to your country and that many people love? Think about food, fashion, sports, beverages, jewellery... Anything! 2. Could you sell this product or service? How? 3. With the money you collect, how could you help other people? Which groups would you like to help? Why? 4. Think about your idea from question number 1, and imagine that you describe it to a friend who never heard of it. How would you describe it? How would you sell it? <p>Can you imagine the business plan of Wise Greece? How would it look like?</p>
References	<p>en.wisegreece.com/news/wise-greece-wins-the-venture-impact-award/</p> <p>http://www.en.wisegreece.com/news/%ce%b5%cf%87potrof-supports-the-non-profit-initiative-wise-greece/</p> <p>http://www.en.wisegreece.com/news/the-hellenic-initiative-australia-supports-the-non-profit-initiative-wise-greece/</p> <p>https://www.thehellenicinitiative.org/2021/02/02/melina-taprantzi-leads-wise-greece-on-an-entrepreneurial-and-philanthropic-path/</p>

Unit 3. Social impact

3.1. Definition of social impact

According to the Michigan Ross Center for Social Impact, Social Impact is:

“A significant, positive change that addresses a pressing social challenge.”

Impact means change, it is the change that occurs in society due to the social business activity.

The **European Commission** defines social impact as “The reflection of social outcomes as measurements, both long-term and short-term, adjusted for the effects achieved by others (alternative attribution), for effects that would have happened anyway (deadweight), for negative consequences (displacement), and for effects declining over time (drop-off).”(European Commission, 2015).



Social impact can be ecological –e.g., carbon reduction due to use of your solution, social – e.g., reducing social isolation, among others. (De Punt, et al.2018). Important is to consider that the challenges and needs mainly depend on local contexts, they cannot be the same everywhere and cannot be answered the same way. Thus, working deeply on the pressing challenges at a local level is vital to be able to address them and have a social impact. (ASIS, 2020).

It is important to have in mind that **social impact is what makes a business a social one**, the achievement of social impact establishes the difference between classical business and social business. Therefore, the social enterprise aside from showing a roadmap how to generate economic value, must show also **how to create social value measurably** (BISER et al., 2018)

There are several reasons why it is important measuring social impact. First, it will provide your business access to finance, since impact is very important for investors and helps them decide what initiatives they would like to fund. Secondly, Social Enterprise Impact Measurement is the sign of a well-run business, it shows donors, investors, and beneficiaries that your organization cares about improving its delivery and is willing to be held accountable for its performance. Third, the transparency of the results of measuring impact will increase engagement from donors and from employees since they are going to be able to see the progress they contribute to with their work, commitment. Fourth, it will provide you as entrepreneur with data that can help you communicating more effectively your work to others. Using empirical data as evidence of your outcomes will help you to build your narrative. Fifth, having relevant impact indicators and data of your social business will ensure your competitive advantage over those organizations that have not included impact measurement within their strategy, and sixth it will help you achieving your objectives, since you will have proof of how you are achieving them and to what extent. (SOPACT, 2019)

3.2. Building indicators to assess social impact of a business

The success of a social business is defined by its social impact. Therefore, it is relevant to measure social impact, a good measurement and results will generate trust among beneficiaries and stakeholders, so they can see that the solution proposed by the social enterprise works and generates social change (BISER et al., 2018).

Social Impact Measurement is a process of understanding how much social change occurred and can be attributed to an organization's activities (SOPACT, 2021).

Indicator is defined by the OECD as a “Quantitative or qualitative factor or variable that provides a simple and reliable means to measure achievement, to reflect the changes connected to an intervention, or to help assess the performance of a development actor.” (OECD, 2010).

Indicators can be built by using the SMART methodology (Kadam, 2021). This methodology was presented in the unit 1 of this module, since is also applicable to define objectives. Therefore, **indicators should be Specific, Measurable, Attainable, and action-oriented, Relevant, and Time-bound**. This guideline tends to suit quantitative indicators in particular.



The processes of definition of objectives and indicators have also in common that both processes must be based in a good understanding of **what change means at the community level**, what change communities strive to realise and how your project can help achieve them (Lennie et al., 2011).

Objectives and Indicators: What's the Link?

Objective: A statement that details a specific desired outcome of a project. Objectives should help a project reach its goals, which ultimately will help the project achieve its vision. A good objective is results-oriented, measurable, time-limited, specific, and practical.

Indicators of Success: These are observable and measurable "milestones" toward an outcome target. These are what you'd see, hear, read, count, etc., that would indicate to you whether you're making any progress toward your outcome target or not. Your objectives include indicators—the "things" you are measuring.

Image 4. What is the link between objectives and indicators?

Image source: Audubon, EETAP, U.S. Fish and Wildlife Service & Together Green. (2011). Tools of Engagement: A Toolkit for Engaging People in Conservation. Chapter 2: What are you trying to do? Pp 23- 27. Available at: <https://cdn.naaee.org/sites/default/files/toolsofengagement.pdf>

Another system to define indicators is called „**SPICED**“: **Subjective - Participatory - Interpreted and communicable - Cross-checked and compared - Empowering - Diverse and disaggregated**. The SPICED approach is a useful tool for thinking about how project objectives and indicators can be set in a participatory and inclusive way with local communities.

SPICED	
Subjective	Informants have a special position or experience that gives them unique insights which may yield a very high return on the investigators time. In this sense, what others see as 'anecdotal' becomes critical data because of the source's value.
Participatory	Objectives and indicators should be developed together with those best placed to assess them. This means involving a project's ultimate beneficiaries, but it can also mean involving local staff and other stakeholders.
Interpreted and communicable	Locally defined objectives/indicators may not mean much to other stakeholders, so they often need to be explained.
Cross-checked and compared	The validity of assessment needs to be cross-checked, by comparing different objectives/indicators and progress, and by using different informants, methods, and researchers.
Empowering	The process of setting and assessing objectives/indicators should be empowering in itself and allow groups and individuals to reflect critically on their changing situation.
Diverse and disaggregated	There should be a deliberate effort to seek out different objectives/indicators from a range of groups, especially men and women. This information needs to be recorded in such a way that these differences can be assessed over time.



Table 4. Spiced indicators

Source: Lennie, J., Tacchi, J., Koirala, B., Wilmore, M. & Skuse, A. (2011) Equal Access Participatory Monitoring and Evaluation toolkit. Available at: https://www.betterevaluation.org/en/toolkits/equal_access_participatory_monitoring

The difference between the SMART and SPICED systems is that the first one describes the properties of the indicators themselves, while SPICED relates more to how indicators should be used (Lennie et al., 2011).

You do not always have to use SMART or SPICED indicators, but you can use them as a way of evaluating what you are doing with your indicators. (Lennie et al., 2011).

The choice of indicators, qualitative or quantitative, to **measure social impact** is based on **the impact you want to measure. Therefore, you need to know previously** which **impact** you want to measure. To know this, you need previously to examine your stakeholders' needs and the organization's mission and take into account the desired and undesired impacts and focus of a specific area for the evaluation. (ASIS, 2020).

Examples of indicators (Lennie et al., 2011).

- At least 50% of the target group researched are sharing knowledge obtained from SSMK with family and/or peers.
- At least 50% of the target group researched give examples of how they have developed skills and knowledge to make informed decisions about one or more SSMK issues.
- At least 15% of the SSMK target group researched can give examples of how they or others in their family or community have changed their attitudes towards superstitions and social ills after listening to SSMK programs on these topics.
- At least 40% of NN listeners researched are aware of their duties and responsibilities as a citizen related to the promotion of democratic, inclusive, peaceful and sustainable systems of governance.
- At least 60% of NN listeners researched will have increased their awareness about reforms to the Justice and Security System.
- At least 10% of NN listeners researched can give examples of how they or others in their family or community have encouraged others to take part in socio-political activities and discussions during the previous 12 months.



Some useful tips and ideas for setting indicators

- **Set appropriate indicators and methods:** Develop the types of indicators that are appropriate to your programs or projects, through processes that are appropriate – link them very strongly to your program objectives. Use methods that are appropriate for the type of indicator (tangible/intangible; process/outcome).
- **Get good input from many stakeholders:** Indicators should be developed with input from a wide range of relevant stakeholders, using participatory processes that encourage discussion and enable people to identify indicators of social or behaviour change that are meaningful to them.
- **Keep indicators manageable** and keep them to a **reasonable number** – it’s more useful to use a small number of meaningful and useful indicators which can be looked at regularly and carefully than a long and complicated list that’s too time-consuming to use. Also remember that the most important indicators are often not quantifiable.
- **Enable analysis of differences:** Ensure that indicators reflect the need for gender disaggregated data, or data on other important differences such as age, educational level or caste.
- **Remember their limitations:** indicators are not able to capture complex realities and relationships – they are good ways of measuring change but not of capturing the reasons behind such change. See indicators as just one part of a PM&E strategy - they can allow you to demonstrate progress towards defined objectives, but cannot tell you why, or what this means to people’s lives.
- **Consider using alternatives:** It may be useful to consider using alternatives to indicators, such as Most Significant Change stories and ‘verifying assumptions’. In some cases, such alternatives may provide better ways to monitor significant and sometimes unanticipated or negative impacts associated with long-term CFSC goals.

Table 5. Tips for setting indicators

Image source: Lennie, J., Tacchi, J., Koirala, B., Wilmore, M. & Skuse, A. (2011) Equal Access Participatory Monitoring and Evaluation toolkit. Available at: https://www.betterevaluation.org/en/toolkits/equal_access_participatory_monitoring

There is no universal social impact indicators grid. **Each evaluation must be adapted to the objectives and particularities of the studied organisation, rather than rely on an external referential.** Nevertheless, it exists several databases of indicators to which you can refer (ASIS, 2020).

Internationally recognized tools to identify social impact indicators		
Tool	Concept	Website
IRIS Base	IRIS+ is managed as a public good by the GIIN. The Global Impact Investing Network (GIIN) IRIS is a catalogue of indicators. These indicators may seek to measure the financial, operational, environmental or social performance of an organization. At present, there are 559 indicators, both qualitative and quantitative, associated with the sectors agriculture, education, energy,	https://iris.thegiin.org https://iris.thegiin.org/metrics/



	environment, financial services, health, housing, territorial protection, water, and such. One of the advantages of IRIS is that access to indicators is easy and completely free of charge. Another advantage of IRIS is to provide a basis for possible comparison between different users of the same indicators. The IRIS also publishes on its site the reports of users who wish to share them online.	
SDG Compass	The SDG Compass website contains an inventory of business indicators mapped against the 17 SDGs and their targets. The inventory contains existing business indicators from widely recognized sources/standards such as GRI and CDP, and from other relevant sources. Your company can select the most relevant indicator(s) for each potential high impact area or use them as an inspiration to define its own indicators.	www.sdgcompass.org
Outcomes Stars	The tool graphically symbolizes a star. The British consulting firm Triangle Consulting has developed and published about 20 of them. They are aimed at different target groups, within the framework of health and/or social support.	https://www.outcomesstar.org.uk
Global Value Exchange	myGVE is a free tool to help you manage and maximize your social value generation. Map your stakeholders, outcomes and indicators, and develop a theory of change with our interactive chain of events tool.	https://impacttoolkit.thegiin.org/global-value-exchange-gve-2-0/

Table 6. Internationally recognized tools to identify social impact indicators

Source: ASIS. (2020). Social impact evaluation and indicators. Available at: <https://socialinnovationstrategy.eu/wp-content/uploads/2020/07/Guideline1-final.pdf>

It is advisable to start with few evaluation dimensions and few indicators: the ones that matter the most for you.

3.3. Methods and techniques that can support the assessment of social impact

Social Impact Assessment is a well-defined process for measuring and evaluating the positive and negative social impact of a social enterprise, of grants or investments and covers three main areas

i. Impact Framework

Choosing a framework gives provides the management of the social enterprise with a structure which allows to set targets against through which you can measure your performance.



Depending on the social enterprise that will be established the management might choose an existing framework or create your own. Some examples of existing Impact frameworks can be found here:

- The B Impact Assessment: <https://bimpactassessment.net/>
- Sustainable Development Goals: <https://www.un.org/sustainabledevelopment/sustainable-development-goals/>

ii. Assessment Results

This part should provide data visualization and demonstration of quick insights in order to achieve short term and long term results. For example, the results of your social enterprise might include reduction of hunger, reduction of stress and improvement of quality of life which can be provided through small stories connected to their immediate outcomes. These stories could be provided through different types of medium such as video.

Additionally, while moving into more digital forms and the expansion of the internet data collection which leverages such a connection does as well. The benefits are obvious - quicker collection, real-time, less resource-intensive, and can be gathered using the tools below.

- [SurveyMonkey: A powerful survey creation tool](#)
- [Qualtrics: Offers a variety of applications, including an online survey tool.](#)
- [Google Forms: Simple, but effective for collecting survey data.](#)
- [Impact Cloud: A comprehensive tool that includes collection feature](#)

iii. Performance Evaluation

The goal of Monitoring and Evaluation, in general, is to hold accountable to the impact goals through the retrieved data. Software suites specific to evaluation needs to measure the progress and performance of an organization's programs. Often these software suites are costly and obtained through grant funding.

Software tools for Performance Evaluation

- [ActivityInfo](#): Developed in collaboration with UNICEF, this software is used in over 50 countries to optimize workflows between dispersed teams and organizations.
- [DevResults](#): A dashboard for managing evaluation data; offers great mapping and collaboration capabilities.
- [Synergy Indicata: Monitoring and Evaluation Software](#): An impressive suite of features specifically for M&E processes, from the necessary dashboards and analytics to results frameworks and cross-project data collection.
- [Granity](#): Remote data collection and automated reporting are just a couple of the features that this software provides to facilitate good M&E results.



Think Social Up-skilling pathway

- [Newdea](#): They have a suite of [free tools](#) to help manage your impact data and streamline your social impact assessment.



Activity 3. Assessing the social impact of a business

Module Title	Module 3. Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 3. Social impact
Activity Title	Assessing the social impact of a business
Type of resource	Activity sheet
Duration of Activity	40'
Aim of activity	This activity aims at explaining what a social impact of a social business is. Then, it will explain how to measure your impact thanks to a canvas (or model) to plan the social impact of your business.
Materials Required for Activity	<ul style="list-style-type: none">• Introductory video: Community Impact Canvas by Common Good Solutions (https://www.youtube.com/watch?v=lvx04r91Cs&ab_channel=CommonGoodSolutions)• Community Impacts Canvas in PDF with instructions to print if the course is in person and to share online if the course is online (https://s4es.ca/media/t0wbcawy/social-impact-canvas.pdf)
Step-by-step instructions	<ul style="list-style-type: none">- First, watch the short video of the Canadian organisation Common Good Solutions. Can you say what is the social impact of a business? How is it different from making money? Cite one example that is given in the video.- Go to the PDF file and read what is in the canvas to assess the social impact (page 4). There are four categories: impact, outcomes, performance measures, and strategies.- Then, read the example in the canvas (page 5) as well as the detailed definitions of each category (page 6). If you have questions, write them down to ask them later to the teacher.- Then, download or take the printed version of the canvas and try to fill in the information for your social business. First, think of the impact you want your business to have. The impact is the general effect that your business will have on society. For example, it can be “to give jobs to single mothers”. Then, the outcomes are more precise. It is about how you will manage to create the big impact that was mentioned earlier. For example, to employ single mothers, one outcome that you will need is to improve women’s access to affordable childcare services. Then, to know if your impact is real, you need to think about performance indicators. The indicators answer the questions “how much?” or “how many?”. For example, how many single mothers will find a job thanks to your service? Last, think about the strategies that you will use to achieve your goals. This answers the question “how?”. For example, you can think of a



	<p>service to make single mothers gain new professional skills in order to find a job.</p> <ul style="list-style-type: none">- Work in pairs to share about your canvas and your social impact. Give feedback to each other. Then, you can share your ideas and impressions with the group.
Handout	<p>In person:</p> <ul style="list-style-type: none">- The facilitator introduces the topic of social impact to the learners. Then, she/he shares the video with them and discuss the points that were not understood.- The facilitator then hands out a printed version of the canvas and of the instructions in the PDF. The learners first write their own canvas individually or in pairs and share it with the facilitator and the rest of the group. The facilitator can give feedback individually or answer questions when some points are not clear. <p>Online:</p> <p>The handout is the same as for in-person learning except for the printed canvas. The canvas can be copied from the PDF file and then made available for the learners to download.</p>



Activity 4. Developing your SE theory of change

Module Title	Module 3. Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 3. Social impact
Activity Title	Developing your SE theory of change
Type of resource	Activity sheet
Duration of Activity	60'
Aim of activity	Introducing the participants to the steps to create the theory of change of their social business project.
Materials Required for Activity	<p>For in person delivery: a printed free theory of change template to fill in manually. Participants might need to have access to a smartphone or a laptop with an internet connection to do research on the topic of their social entrepreneurial idea to fill the template. If participants cannot fill the template using their computers paper and pencil will be required.</p> <ul style="list-style-type: none">• Theory of change template can be found here: DIY. (2021). Practical tools to trigger & support social innovation. Available at: https://diytoolkit.org/tools/theory-of-change/ <p>For online instruction: a theory of change template can be shared to all participants and filled in individually by downloading a Word file, for example.</p> <ul style="list-style-type: none">• The facilitator can use this video to introduce learners to the concept of theory of change for social business: https://www.youtube.com/watch?v=cg4J1g0IVHg <p>The following examples of Theory of change of different social entrepreneurs can be checked by the participants as a guide:</p> <ul style="list-style-type: none">• WOCAN. (2021). Wocan Theory of change. Available at: https://www.wocan.org/our-theory-of-change/• CDVTA. (2021). CDVTA Theory of change. Available at: https://www.cdvta.org/theory-of-change• Further reading: Avance, Social Enterprise NL & Impact Centre Erasmus. (2019). The Impact Path: An entrepreneurs guide to growth in social impact measurement. Available at: https://impactpad.nl/wp-content/uploads/Het_Impactpad_EN_2020.pdf
Step-by-step instructions	<p>To implement this activity, the facilitator should introduce the following steps:</p> <p>Step 1: Introduce the Theory of Change and show the video indicated in the activity materials.</p>



	<p>Step 2: Share the Theory of Change template with the entrepreneurs and ask them to fill it having in mind their SE project.</p> <p>Step 3: Indicate participants that they can check the above mentioned examples of theory of change and that they can also use the following resource to get more ideas on how developing a SE Theory of change: The Impact Path: An entrepreneurs guide to growth in social impact measurement. Available at: https://impactpad.nl/wp-content/uploads/Het_Impactpad_EN_2020.pdf</p> <p>Step 4: During the process of creating the pathway of change, ask participants to articulate as many of their assumptions about the change process as they can so that they can be examined and even tested to determine if any key assumptions are hard to support (or even false).</p> <p>Step 5: Ask participants to specify several details about the nature of the desired change — including specifics about the target population, the amount of change required to signal success, and the timeframe over which such change is expected to occur.</p> <p>Step 6: Once the participants finalize the creation of their pathway of change ask them to check it having into consideration the following questions:</p> <ul style="list-style-type: none">○ Will my activities generate the desired outcome and impact? Is my theory of change valid?○ Are my activities generating the desired outcome and impact? How significant is the impact I am generating?○ Are my activities generating the desired outcome and impact and how do my activities bring about this social/environmental change?
Handout	DIY. (2021). Practical tools to trigger & support social innovation. Available at: https://diytoolkit.org/tools/theory-of-change/



Additional resources

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 3: Social Impact
Title of Reading Material / Video	Social Enterprises as Influencers of the Broader Business Community



Introduction to the resource	This research shows that social enterprises – often relatively small players in their industries – can play a crucial role in the transition to a new economy. The results provide concrete tools to help social and other innovative companies from around the world accelerate the sustainability transitions in their industries through influencing.
What will you get from using this resource?	Participants will get to know the 'Influencing model' presented by Social Enterprise NL. This model shows how social enterprises can influence the broader business community. Participants will get to know the 'Influencing model' that shows that social enterprises can influence the broader business community in three main ways: 1. 'Raising the possible' (showing that it is possible to do business sustainably), 2. 'Raising the desirable' (showing that it is desirable to do business sustainably), 3. 'Raising the acceptable' (showing that it is unacceptable not to do business sustainably). In practice: The 'model of influencing' then describes eleven 'influencing activities': concrete strategies that social enterprises employ to influence. Different inspiring examples from the Dutch social enterprise sector illustrate these activities.
How can you use this resource to develop your own social enterprise?	Participants will be able to think and elaborate on the potential impact of their social business in the society by following the influencing model and will learn from real life cases of other social business how they impacted society at a bigger scale, so they can also reflect on their own social entrepreneurship.
Debriefing questions	After having read this additional resource, answer the questions below: 1. Can social enterprises take a leading role in the transition towards a new economy? 2. How do social enterprises influence other companies to act more sustainably? How do you think your social enterprise will impact society?



Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 3: Social Impact
Title of Reading Material / Video	“Scaling Social Impact” by Empowering Changemakers



Source: Image from the article by Empowering Changemakers. <https://empowering-changemakers.eu/scaling-social-impact/>

Introduction to the resource	This article is a self-study guide to understand how to increase the social impact of your business project. It was developed during the European project Empowering Changemakers.
What will you get from using this resource?	In this article, you will learn more about: <ul style="list-style-type: none">- The definition of “scaling social impact”- 5 recommendations to achieve the scaling of your social impact Furthermore, you can practice your learning skills. Reflect on the reading and answer the questions at the end of the article.
How can you use this resource to develop your own social enterprise?	<p>This resource helps understand how your business can reach out with your target group and your community.</p> <p>Social organizations are aware that to scale the impact of a social innovation often requires a different way of thinking as well as a different way of funding. The organization’s path to scaling impact might include replicating the organization in new places, or it might include influencing others to magnify the impact of the various stakeholders. What kind of support does the organization need as it starts down the scaling path? For the funder, the questions of how best to aid non-profits to manage the challenges of scale are complex and far-reaching: from capacity-building to financial modelling, from managing policy and advocacy to outcome evaluations or fine-tuning organizational structure. The “field of practice” around scaling impact for non-profits is both essential and continuously evolving.</p> <p>In conclusion, this article is about the difference between normal business scaling and scaling the social impact. Scaling the social impact cannot always be achieved by growing bigger business with higher revenues. The social impact can be increased by reaching out a higher number of people who can benefit from your activity. What matters is also the quality of the social link you create with a community, no matter its size.</p> <p>To make sure you understand the ideas described in this article, you can answer the questions at the end of the article. You can do it on your own or with a friend or a colleague.</p>



Debriefing questions	<ol style="list-style-type: none">1. According to this resource, what are the five steps to improve the social impact of your business?2. What is the social media mentioned in this resource? How can you use it for your social impact?3. Can you think of an example of business or organisation in your community that has a social impact?
Link to the resource	https://empowering-changemakers.eu/scaling-social-impact/



Case study 3. DKMS

Module Title	Establishing objectives and plan. From dreams to plan.
Unit Title	Unit 3: Social impact
Case Study Title	DKMS



Name of the organisation / social enterprise / best practice guidelines:	DKMS GmbH
What is the story behind this case study?	<p>DKMS is an international non-profit organization dedicated to the fight against blood cancer and blood disorders by organizing campaigns to raise awareness about the importance of stem cells donation and register as many potential stem cells donors worldwide to make possible the access to the only treatment that can save some of these patients lives: a bone marrow transplant from a compatible donor.</p> <p>DKMS was born in Germany as a family initiative motivated by the illness of the family's mother. Mechtild Harf was diagnosed as an adult with blood cancer. To have a chance of recovery, she needed a bone marrow transplant, but at that time few people were registered as potential donors, making it difficult to find a compatible donor. Only 30% of the people can find a compatible donor in their family. So, her husband and daughters started a campaign to add more people to the worldwide registry of potential donors. The number of registrants rose enormously because of her action, from 3.000 in 1990 to 10,5 millions of people nowadays. Sadly, despite the family's efforts Mechtild Harf passed away, but before she made her husband promise that he would continue to add people to the worldwide registry of potential donors so that more people in the world would have the opportunity to be cured of serious blood diseases. Her husband, Dr. Peter Harf, kept his promise, founding DKMS, which in its beginnings was a small social enterprise in the quest to give leukemia patients a second chance at life, but grew enormously, mainly because of its impact, having to date given 95,000 patients a chance of survival through the registration of more people as stem cell donors and their effective donations. DKMS has connected donors and patients from all over the world. DKMS has expanded internationally to Chile, Poland, South Africa, the United States, and India.</p>



<p>Link to the case study</p>	<p>Website: https://www.dkms.org</p>
<p>Why is this a good example for you to follow?</p>	<p>The example of DKMS social entrepreneurship presents a clear definition of a problem (severe blood diseases that are life threatening and the lack of donors of stem cells that can potentially cure the patients of those diseases) and offers a clear solution (raise awareness on the problem and add more people as potential stem cells donors to the world registry). This clear definition of the problem and solution is the base from which different services are generated, expanding the target groups and the impact of this social entrepreneurship.</p> <p>In a world where few bet on the selfless solidarity of individuals, organizations like DKMS bet and believe that people are ready to understand that only global and selfless actions can be the only cure for many problems, in this case for blood cancer, and invite them to be part of the solution.</p>
<p>How can you use this case study to develop your own social enterprise?</p>	<p>Key lessons to be learned for having great impact:</p> <ul style="list-style-type: none"> - How to engage more people - The importance of identifying, defining, and studying the problem that your social enterprise will tackle - The importance of communicating this problem to a bigger audience and to raise awareness about it - Raising awareness on the problem for greater impact and call for action - The importance of presenting the emergency of the problematic to be tackled - The role of campaigning in raising awareness - The power of communication and storytelling in raising awareness - The use of social media channels to raise awareness - The importance of adding more people to your cause for greater impact - Believe in the power of ideas and people to shape and reshape the world - Generation of different services around the goal of the social entrepreneurship for greater impact - The importance of defining a target group for greater impact
<p>What impact has this case study achieved?</p>	<p>DKMS has provided 95.000 second chances at life to patients of severe blood diseases all over the world. It has contributed to the World donor registry adding 10,5 millions of potential stem cells donors.</p>



	<p>The DKMS Life Science Lab in Dresden, a subsidiary of the stem cell donor center DKMS, has received the "Best Research Paper of 2019 Award" for the most influential scientific publication in the journal Human Immunology. The prize is awarded annually by the internationally renowned American Society of Histocompatibility and Immunogenetics (ASHI).</p> <p>DKMS LIFE also offers the look good feel better patient program for female cancer patients undergoing therapy that consists in free cosmetics seminars where participants receive tips on cosmetics and hair. In a year of existence of the program more than 3,500 women have already participated.</p> <p>In 2021 was inaugurated the DKMS platform for clinicians, researchers, registries and transplant centers with Information and services for healthcare professionals working in hematopoietic stem cell transplantation.</p> <p>DKMS was named the winner of a Gold Stevie® Award in the "Most Valuable Non-Profit Response" Category and of a Silver Stevie® Award in the "Most Exemplary Employer" Category in The 18th Annual International Business Awards®. The jury named also DKMS Managing Director and Global CEO Dr. Elke Neujahr as Manager of the Year.</p>
Follow up questions	<p>After having completed this case study, answer the following questions:</p> <ol style="list-style-type: none">1. What do you think is the social impact pursued by DKMS?2. Can you identify more services that your social enterprise could offer to achieve greater impact?3. What is the relationship between defining your target group and achieving greater impact?4. Can you think of a campaign connected to the ideas behind your social enterprise?5. What are your thoughts around the role of dissemination tools like social media to achieve greater impact?
References	<p>https://www.youtube.com/watch?v=3XYSILYJuUM https://www.dkms-life.de/seminare.html https://professional.dkms.org https://www.facebook.com/DKMS.us https://www.youtube.com/user/deletebloodcancer</p>



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