



## Meeting Minutes

3<sup>rd</sup> Transnational meeting | Arezzo  
27<sup>th</sup> and 28<sup>th</sup> October, 2011

LLP/Leonardo da Vinci Programme | Grant agreement number: 2010-1-PT1-LEO05-05164

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## 1. Participants

<b>Name</b>	<b>Organisation</b>	<b>Country</b>
<b>Itziar Gomez</b>	<b>Inveslan</b>	<b>Spain</b>
<b>Caterina Casamenti</b>	<b>Oxfam Italia</b>	<b>Italy</b>
<b>Francesco Lucioli</b>	<b>Oxfam Italia</b>	<b>Italy</b>
<b>André Barbosa</b>	<b>SPI</b>	<b>Portugal</b>
<b>Mette Christensen</b>	<b>SPI</b>	<b>Portugal</b>
<b>Marcin Podogrocki</b>	<b>University of Lodz</b>	<b>Poland</b>
<b>Sonia Hetzner</b>	<b>Institut für Lern-Innovation</b>	<b>Germany</b>
<b>Vasco Soares</b>	<b>ASI</b>	<b>Portugal</b>
<b>Ramona Ciuca</b>	<b>University of Pitesti</b>	<b>Romania</b>
<b>Armando Pardo</b>	<b>ACBBA</b>	<b>UK</b>

## 2. Introduction | Day 1

The meeting started at 9.00 where Oxfam and SPI bid all partners welcome and confirmed that the agenda for the two meeting days was approved. All partners presented themselves briefly, as new participants were present at the meeting.

## 3. WP1 Project Management | SPI

André explained how far the development of the interim report was (it was ready to be submitted), and that it will be sent on Friday the 28<sup>th</sup> of October to the National Agency.

André suggested that the next virtual meeting would be scheduled for the 14<sup>th</sup> of December, 2011, and all partners agreed to that.

Concerning WP2, the needs analysis and the case studies report are both done and will be distributed to all the partners. Considering the translation of the case studies report and that it is delayed quite a lot, partners will translate the ppt report until 10<sup>th</sup> of November, 2011.

Regarding WP3, both the report on SIED experience and the report on content adaptation are both done, and the draft content of the training course is available.

The following deadlines are noted within this WP:

- ✓ Draft version of each module to be ready 25<sup>th</sup> of November
- ✓ ACBBA revision of all the modules until 20<sup>th</sup> of December
- ✓ Final pilot version until 6<sup>th</sup> of January
- ✓ Draft version of Support handbook 23<sup>rd</sup> of January.

With regard to the interactive tool the decision (as already decided during the 2<sup>nd</sup> project meeting) would be to use moodle as the platform for the tool. The tool would contain all the modules, including additional information such as exercises and case studies.

Within WP4, the following activities for the next months would be:

- ✓ Guideline handbook
- ✓ Pilot training course
- ✓ Promotion of workshop
- ✓ Dates for the course

#### *Other items discussed*

- ✓ The brochure is missing two paragraphs to translate partners will do this as soon as possible. SPI is responsible for printing in all partners languages.
- ✓ The newsletter is still missing to be translated in PT, DE and PL - this would be done until 5<sup>th</sup> of November.
- ✓ Concerning the press release translations in PT, DE, PL and RO are still missing and should be completed until 5<sup>th</sup> November.

Within dissemination the website is done in English and shall soon be online in all the other languages as well, only the PL languages is missing for the additional small translation that was asked from the partners. All the documents that are available now such as the needs analysis report, the case studies report and for instance the brochure and press release will also be uploaded soon. The links section will also be developed, everything will be done until the 18<sup>th</sup> of November.

Concerning exploitation the network database from all the partners' countries is done and ASI will send the unified document to all until 11<sup>th</sup> November.

Within WP9 the first evaluation report was done in June, and the second evaluation report will be ready here in November.

Sonia distributed through mail the questionnaire and all partners are asked to complete it as soon as possible and no later than the 8<sup>th</sup> of November.

ILI will prepare the Second evaluation report until 15<sup>th</sup> of November.

#### **4. WP9 Quality and Monitoring | ILI**

Sonia provided a presentation of the objective of this WP and the aim of it. Concerning the monitoring process and assessment, it is important to have the numbers of visitors for instance per month.

Sonia reminded the partnership of future issues to consider would be the IPR agreement, synergies with other projects, and quality assessment of the modules.

Perhaps a peer assessment internally of the modules would be beneficial and in the following months it is also necessary to develop the evaluation instruments for an external evaluation of the workshops (that is,

questionnaires to be fulfilled by the trainees and an interview with the trainers).

Sonia explained the first evaluation report, in general the results were very positive; however it was noted that concerning administrative and financial matters were rated slightly less than other indicators, but this is mainly based on the initial part of the project where there were some delays in the distribution of the grant agreement.

All partners are satisfied with the project, committed and understand what they need to do and what their tasks are.

It was noted that partners believed that the level of feedback could be improved especially concerning the developed documents.

The report suggested the following for improvement: to understand better the difference between SIED and Best form, as for many this is not very clear and to more clearly define the target group.

The Second interim evaluation report will be ready 15<sup>th</sup> November, 2011.

## **5. WP3 Content development |ACBBA**

ACBBA made a brief presentation about the progress and the objectives of this WP.

The content development is not just a matter of developing the content, but also to consider national realities and that all partners envisaged these results out to the workshop.

50% of the workshop should be interactivity from the participants and the trainers need to be good to engage with people, it was noted that the workshops should not be lectures.

All partners were encouraged to use ACBBA as much as possible in the content development phase and all partners should consider using parts of the FREE content ([http://www.spi.pt/free/interactive\\_tool/](http://www.spi.pt/free/interactive_tool/))

Armando stressed that the project will be successful only if we engage the beneficiaries – they need to understand what they are joining, what would be the benefits for them. The offer provided by Best Form thus must be more concrete.

Armando talked about to think out of the box and be innovative and creative during the content development and in the workshops and use guest speakers, case studies, exercises etc.

Armando suggested not having just experts as trainers, but also people from the communities to deliver the

training sessions, as guest speakers (people running small business invited to answer questions based on their own experience).

It was also referred that the pilot courses can have a flexible approach in terms of workload and number of workshops, according to the reality of each country.

As a concrete example of this flexible approach, the target group of the pilot courses will be slightly different in Portugal and in Italy. In Italy, the main focus would be in intercultural mediators and not in the directors of immigrant-oriented associations. In Portugal, on the other hand, the focus would be on these directors, as they could pass the message into the organization in a more effective way.

Following Armando's introduction each of modules were presented by the partner responsible for the content development of the module.

#### Module 1: Making business support accessible to all | Univ. Pitesti

Ramona presented the training programme and the balance of the local content and global content, statistics can be included for all countries, and the needs analysis will be provided to the trainer.

The structure of the modules was also discussed/template and partners will discuss this later on in WP4.

It was emphasized the need to have a template to develop the contents.

#### Module 2: Understanding business | Oxfam

It was stressed that the idea would be to focus on practical things in this module, such as exercises, interactions, etc.

Armando suggested to improve the soft skills section and that all the content should be developed from a micro enterprise point of view.

The business plan needs to be adapted to small companies these kinds of businesses do not need a professional business plan but perhaps more a outline of who their customers could be etc.

It was also highlighted the importance of ACBBA's review of the contents developed, in order to avoid replication.

**Coffee break - at 11.15**

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Module 3: Starting up business | Univ. Lodz

It was noted that the module had a good practical approach and that the test is included as a way of personal assessment.

It was decided to use as much case studies per modules as possible, to provide a practical view. These can be identified from the case studies report, where applicable, and then new case studies can also be identified for instance from ACBBA content or from other sources where applicable.

It was also suggested to undertake an interview with immigrant entrepreneurs that started their business and are currently in a advantageous situation.

Module 4: Working with clients | SPI

It was noted that it would be good to address 2 different goals in terms of communication skills: effectiveness (how to communicate effectively); interculturality (how to communicate better with this specific target group).

One of the exercises of this module could be that one of the participants is playing the role of an immigrant and another participant playing the role of the business advisor and then use the information in the module to improve their skill and then after the participants could swap roles.

It was also suggested to have a mix of trainees with different cultural backgrounds, since the issue of cultural awareness is not only related to the mainstream/immigrant relationship, but also to the relationship among immigrant communities.

**Lunch break - at 13.00**

Module 5: Finance for business advisors | ASI

Module 7: Spreadsheet for business | ILI

Due to the content similarities of the modules, they were presented and discussed together.

Sonia suggested making a demonstration video of how to use the forecast tool (module 7). Sonia will look into this and see if it is possible to build a small video around the module and the module might be attached to module 5 and be a part of it, if applicable in the end.

Sonia also suggested to use a scenario-based approach with regards to module 5.

It was noted that the content of both modules should be built on concrete examples and should aim at demystifying finance (that is, to give the idea that finance is available for all).

The partnership agreed that both modules should have a practical approach, focusing on concrete examples and just explaining theoretical approaches afterwards. These concepts should come as additional information (in the interactive tool, for example), rather than main information. The goal is not for business advisers to know the concept, but for them to know how to explain and interpret the numbers together with the client (immigrant entrepreneur).

#### Module 6: Marketing for business advisors | Inveslan

It was noted that the central idea of the module is to define strategies to attract customers.

It was also referred that this module is about seeing what other are doing correctly or incorrectly.

#### **Coffee break - at 16.00**

#### WP3 debate session

The following conclusions were taken from the discussions held during the modules presentations:

- The modules should rest on concrete examples, stories, case studies, etc., that will help introduce the concepts.
- The trainers should have discretionary power to use the training material and to conduct the workshop in the most effective manner.
- Module 1: the aim is not just to introduce a foreign model, but to secure the participation of the trainees during the pilot courses.
- Module 2: the focus should rest upon small business.
- Modules 3 and 4: The main goal is to make the trainees feel more confident in dealing with clients.
- Modules 5 and 7: there are many synergies between them. The focus would be discussing money matters as a way of introducing financial concepts.
- Module 6: the basic aim is to make marketing a critical issue for the business.
- Target group of the pilot courses: business advisers – so the focus of the pilot course is to train people to deal with other people (thus more important than to understand the concept is to know how to transmit it).
- The training materials are raw materials, so they do not need to be extensive and exhaustive. The idea is to focus on concrete examples and case studies, leaving discretionary power for the trainer.
- The case studies to be included in the training materials and to be used during the training sessions should be simple and focused on the skills and competences trainers are working with.

The partners also discussed and defined a template for the development of the modules:

- Average of 20 pages;
- The first part of the module should describe its aims and scope;
- The second part should describe the skills to be developed and worked during the training sessions, as well as the expected results for the module (learning outcomes);
- The third part should describe the activities of the module
  - The activities should be structured according to the themes headings and have an allocated time;
  - The type of activity must be clearly defined (exercise, case study, group work, pair interview, etc.);
  - It is also necessary to include the sources of information to be used and the pedagogical approach;
  - The activity description should also include additional sources/links, specially for the case studies.
  - Finally, there will be guidelines on how to prepare case studies for the trainers of the workshop.

## **6. Introduction | Day 2**

SPI and Oxfam welcomed everyone to day 2 of the meeting and asked if there was any pending issues from the previous day, there was not.

## **7. WP4 debate session | Oxfam**

The first WP that was discussed was WP4 and it was decided that the workshops should be in March, 2012. A decision was also made with regards to the profile of the trainees - in Portugal they would be the leaders of immigrant-related associations, especially those of other Portuguese speaker countries. ASI will discuss this issue with ACIDI to figure who will participate in the course, as well as with Marilyn (from ASI). In Italy, they would like to mix up different types: intercultural mediators, Italian business advisers and community leaders.

Concerning the trainer profile in IT there will be different trainers, implementing their area of expertise in the workshop. In PT the trainers will be from internal resources from both SPI and ASI and perhaps sub

contract one or two other trainers (people experienced in immigration issues, business support and training course).

Concerning the dissemination of the pilot courses:

- ✓ Dissemination brochure - SPI will develop the workshop brochure and possible an invitation. Oxfam will need to translate it.
- ✓ Oxfam and SPI/ASI will make use of face to face dissemination methods.
- ✓ There is a conference in November in PT, which would be good to face to face dissemination.
- ✓ Include information on organisations' websites, ENTER, ACIDI, and local immigrant centers.
- ✓ Oxfam Italia will disseminate information in the Center of Employment of the Social-Health zone of Arezzo;
- ✓ The next newsletter should include information about the workshops including dates/venues.
- ✓ A press release should be available in January, 2012 and also promote the workshops.

The format of the workshops was discussed and it was decided that adjust the length of some of the modules in order for the workshops to have a duration of 30 hours in total.

So the module 5 would be shorten so it would have a duration of 4,5 hours, module 4 would now have a duration 5,5 hours and module 6 would have a duration of 6 hours.

It was suggested in order to increase the participant rate and engage the trainees better to develop a certificate and provide all participants with over 80% of participation rate with this certificate.

SPI, ASI and Oxfam will together develop the specific guidelines for the workshop and distribute to partners.

## **8. WP6 Dissemination | Univ. Pitesti**

First Ramona presented the interim dissemination report, which Univ. Pitesti had been so kind to develop and it provided the partners with a good overview of the dissemination activities conducted to date.

The International seminar was discussed and it is proposed to take place in the last week of April 2012 (23 to 27). The 4th meeting would be held in conjunction with this seminar, but Univ. Pitesti will need to see their availability and inform partners.

There is no budget for bringing a person from the target group for the seminar, but it will be investigated the possibility of other kind of funding and inform partners.

The 2nd newsletter should be in late November or in December and will announce the workshops and the 3rd newsletter in March should announce the international seminar.

## 9. Deadlines

What?	Who?	When?
<b>WP1 - Project Management</b>		
Send minutes from 3 <sup>rd</sup> meeting	SPI	03/11/11
Send presentations, pictures etc from 3 <sup>rd</sup> meeting	SPI	03/11/11
3 <sup>rd</sup> virtual meeting	All partners	14/12/11
Schedule 4 <sup>th</sup> project meeting	All partners	23-27/04/2012
<b>WP2 - Needs Analysis</b>		
Send final needs analysis and case studies report to partners	SPI	02/11/11
Translate Case Studies Report to national languages	All partners (except ACBBA)	10/11/11
<b>WP3 - Content adaptation</b>		
Draft version of each module content	All partners except ACBBA	25/11/11
Revision of all modules	ACBBA	20/12/11
Draft EN version of interactive tool	SPI	30/12/11
Final version of each module content	All partners except ACBBA	06/01/12
Draft Support Handbook	ACBBA	23/01/12
Interactive tool in IT	SPI	27/01/12
Interactive tool in PT	SPI	28/02/12
<b>WP4 - Test and Validation</b>		
Dissemination activities	SPI, Oxfam, ASI	December/11 – February/12
Guideline Handbook-draft version	SPI, Oxfam, ASI	23/12/11
Trainers selection	SPI, Oxfam, ASI	08/02/12
Trainees selection	Oxfam, ASI	08/02/12
Special virtual meeting	All partners	10/02/2012
Survey questionnaire for trainees	SPI, Inveslan, Oxfam	10/02/2012
Guidelines for the assessment interview with trainers	SPI, Inveslan, Oxfam	10/02/2012
Implement pilot courses	SPI, ASI, Oxfam	March 2012
Data collection and comparative analysis	SPI, Oxfam, ASI	April 2012

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<b>Assessment report</b>	Oxfam	23/04/2012
<b>Discussion of the pilot course results</b>	All partners	4 <sup>th</sup> project meeting in Romania
<b>WP6 - Dissemination</b>		
<b>Decide dates of international seminar</b>	Univ Pitesti in conjunction with all partners	As soon as possible
<b>Newsletter translation PT, DE, PL</b>	SPI, ILI, Univ Lodz	07/11/11
<b>Press release translations in PT, DE, PL and RO</b>	SPI, ILI, Univ Lodz and Univ Pitesti	07/11/11
<b>Printing of brochure-1200 copies</b>	SPI	23/11/11
<b>Development of 2<sup>nd</sup> newsletter</b>	Univ Pitesti	15/12/11
<b>Translation of 2<sup>nd</sup> newsletter</b>	All partners	22/12/11
<b>Development of the pilot course brochure</b>	SPI, Oxfam	06/01/12
<b>Development of 2<sup>nd</sup> press release</b>	Univ. Pitesti	06/01/12
<b>Translation of 2<sup>nd</sup> press release</b>	All partners	13/01/12
<b>Development of invitation to the international seminar</b>	SPI	13/01/12
<b>Development of the “planting the seed” brochure</b>	Univ Pitesti	13/02/12
<b>Preparation of the International seminar</b>	Univ Pitesti with support from all partners	January – March/2012
<b>Development of 3<sup>rd</sup> newsletter</b>	Univ Pitesti	02/03/12
<b>WP7 - Exploitation</b>		
<b>Send network database</b>	ASI	11/11/11
<b>WP8 - Website</b>		
<b>Upload of documents</b>	SPI	18/11/11
<b>Website available in all national languages</b>	SPI	02/12/11
<b>News update</b>	SPI	02/12/11
<b>WP9 - Evaluation</b>		
<b>Send completed questionnaire to Institut für Lern-Innovation</b>	All partners	08/11/11
<b>2<sup>nd</sup> evaluation report</b>	ILI	15/11/11