



*EUCoopC*

**PROJECT Nr.: 527301-LLP-1-2012-1-IT-LEONARDO-LMP**

MULTILATERAL PROJECTS FOR DEVELOPMENT OF INNOVATION

## **WORK PACKAGE II**

### **D 2.1. COMPARATIVE STUDY**

**Understanding the existing supply of training programs by partners**

### 1. The aim of the grid and premises to the data analysis

The work package has the aim to collect information on the all training activities that the partner institutes in the different countries already conduct to train managers and elected members in the cooperative sector. The second aim is the identification of the specific competences and topics included in training activities provided devoted to managers and elected members to arrive at a common professional profile.

The professional profile considered in the analysis of training programs refers to “middle managers”, “senior managers”, and “elected members” in the cooperative system, where elected members are defined as any cooperative member voted into a position of decision-making authority (i.e. board of directors, policy committee, social committee etc.).

#### Glossary:

As regards the type of cooperatives that can represent target groups for training programs we distinguish:

**Worker co-operative.** A co-operative owned and democratically controlled by its worker-owners. Worker co-operatives enable members to obtain more favorable working conditions than those available on the market, both in terms of quality and economy.

**Retail co-operative.** A co-operative formed to purchase and supply goods and services at competitive conditions in the interest of members (retailers).

**Consumer co-operative.** A co-operative owned and democratically controlled by its main consumers. Consumer co-operatives enable members to obtain supplies and/or durable goods on more favorable conditions than those available on the market. They work to safeguard the quality of products and services as well as sales prices.

**Purchasing co-operative.** A co-operative formed to aggregate demand to get lower prices from selected suppliers. It is often used to reduce costs of procurement.

**Producers co-operative.** A co-operative owned and democratically controlled by producers who band together to process or market their products.

**Co-operative bank, financial co-operative, credit union.** Private co-operative enterprise providing banking and financial intermediation services, democratically controlled by its member customers (borrowers and depositors). Consider Credit unions and banks whose capital is composed also by individuals without rights regarding the management of the bank.

**Insurance co-operative and mutual.** A co-operative owned and democratically controlled by its main insured. Insurance cooperatives enable members to obtain insurance policies on more favorable conditions than those available on the market.

**Housing co-operative.** A co-operative formed to provide an owned or rented property on more favorable conditions than those available on the market. This category includes both housing co-operative and co-operatives in the sector of Construction.

**Social co-operative.** A co-operative that manages health, social or educational services and productive activities for work integration of socially disadvantaged people.

**Other type.** Other types of co-operatives not included in the above categories.

As regards types of learning, we utilize the definitions by the CEDEFOP Glossary<sup>1</sup> and in general we distinguish:

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<sup>1</sup> <http://www.cedefop.europa.eu/EN/about-cedefop/projects/validation-of-non-formal-and-informal-learning/european-inventory-glossary.aspx>

**Formal learning:** learning typically provided by an education or training institution, structured (in terms of learning objectives, learning time or learning support) and leading to certification. Formal learning is intentional from the learner's perspective.

**Non-formal learning:** learning that is not provided by an education or training institution and does not typically lead to certification. It is, however, structured (in terms of learning objectives, learning time or learning support). Non-formal learning is intentional from the learner's perspective. Courses, seminars and workshops are considered in specific areas, both in improving technical and socio-institutional skills.

**Informal learning:** learning resulting from daily life activities related to work, family or leisure. It is not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional but in most cases it is non-intentional (or "incidental"/ random). The long tradition in the cooperative field transferred from one generation to another; the day to day experience working in the cooperative; and actively participating in its activities are important for informal learning. These concepts were validated in the SKILLS project, on which this project is partially based.

As regards other terms used:

**Competence:** identifies the general area of training, specifically, as defined by ECVET: "the proven ability to use knowledge, skills, social and/or personal methodologies in work or study situations and in professional and personal development."

**Topic:** identifies the single skill/knowledge that represents a trait for a complete manager. Topics therefore split the general competence that a manager should develop in specific traits and profiles of the management in relation to the competence. Since the assumption is that both technical and behavioural skills must be implemented for achieving a good job profile and managers' professionalization, topics relate to both aspects and must be as much as possible (but coherently) multi-disciplinary, complementary, multi-perspective, specific to the management of a "co-operative enterprise" (i.e., covering both the co-operative and the enterprise side).

**Learning outcomes:** statements of what a learner knows, understands and is able to do on completion of a learning process and which are defined in terms of knowledge, skills and competence.

**Unit of learning outcomes (unit):** a component of a qualification, consisting of a coherent set of knowledge, skills and competence, that can be assessed and validated.

**ECVET system:** The European Credit system for Vocational Education and Training (ECVET) is the European instrument to promote mutual trust and mobility in vocational education and training. Developed by Member States in cooperation with the European Commission, ECVET has been adopted by the European Parliament and the Council in 2009. ECVET's purpose is to enable recognition of learners' achievements during periods of mobility by creating a structure, bringing a common language, and stimulating exchanges and mutual trust among VET providers and competent institutions across Europe. In the context of international mobility but also mobility within countries, ECVET aims to support recognition of learning outcomes without extending learners' education and training pathways. ECVET supports flexibility of programmes and pathways to achieve qualifications, enhancing the opportunities for lifelong learning. It makes it easier to recognise the learning achievements that young people or adults have gained in other contexts - be it countries, institutions or systems (for example initial or continuous training) but also formal, non-formal, or informal ways of learning.

**EQF system:** The European Qualification Framework (EQF) is a translation instrument – a conversion and reading grid – which makes it possible to relate and collocate the various qualifications (diplomas, certificates etc.) issued by the Member States within an 8-level structure;

their comparison is based on learning outcomes. It is a meta-structure in the light of which, on a voluntary basis, the Member States are asked to reconsider their own education and training systems, to establish links between the individual national systems of reference for qualifications and the EQF. The EQF is thus not a duplication of the national systems at a European level, nor is it an attempt to impose standardisation of the qualifications at a European level.

**EQF: how it relates to ECVET:** The integrated European credit transfer system (ECVET) is part of the set of instruments included in the EQF strategy. In practice, it is a system which assigns credit points to qualifications and/or to their component units. A unit is defined as the “smallest part” of a curriculum, of an education or training process, or of a qualification, and corresponds to a specific combination of knowledge, skills and competences. Each unit may vary in size, according to the national education and training system of reference. It corresponds to a specific result at an industrial level, in terms of expected results. A unit is associated with a professional figure/profile in turn inserted within a given level of the qualifications structure.

The credits are assigned to the learning outcomes achieved, taking into consideration the set of knowledges, skills and competences required for a qualification or a unit. The requirements for acquiring a qualification or a unit must be defined by the competent bodies at a national level. The integrated European credit transfer system explicitly correlates the units to the levels of the EQF for the purposes of capitalising and collecting credits.

## *2. General information on partners and training programs provided*

The first aim of the analysis is to sketch a picture of existing training programs supplied by the partners. Obviously, first to be taken into account is that partners diverge in their characteristics and in the type of cooperatives that they represent and involve in training programs. It must therefore be noted that one partner (Coexphal for Spain) relates with agricultural cooperatives only, one partner (Fundatia pentru Dezvoltarea Societatii Civile – FDSC - Civil Society Development Foundation, for Romania) relates with producer and agricultural cooperatives, credit cooperatives and mutuals, and social cooperatives, while the other partners (Federazione Trentina delle Cooperative - FTC for Italy, Co-operative College for the UK, and Akademie Deutscher Genossenschaft - ADG for Germany) represent the interests of all the cooperative forms, although the German partner only describes the training programs provided to banks and credit unions since this cooperative form represents their core target group.

The different cooperatives that partners represent primarily influence the approach of their training programs, their number and their contents. However, training programs also diverge depending on the extent of the training aim: some courses only provide for specific training on a single specific topic, others are general, may require a high number of training hours, and therefore include several topics.

By looking in detail at the training programs, as a consequence of the above observations, we can schematize the following situations:

- One partner only (Co-operative College UK) provides many courses for practitioners with a minimum national requirement in terms of hours with certificate of attendance (and the requirement range from 48 to 245 hours); two other partners (Spain and Romania) provide one course only each with similar minimum requirements in terms of hours of teaching; the Italian partner provides executive programs on specific topics, while they mainly consist of just a few hours of teaching; refresher courses are provided by the Spanish, the English and the German partners; seminars and workshops characterize the training programs of most of the partners.

The preliminary analysis seems therefore to underline the lack in academic teachings, masters and Ph.D. programs, formalized academic teachings supported by the institutes themselves or in partnership with other local institutes and that would be useful to train young people with intensive courses and scientific knowledge. These courses are in fact provided by the German partner only.

- Courses are provided to the cooperative types that exclusively relate with the institute: trainings supplied in Spain therefore only involve cooperators from agricultural coops; Romania supplies their training courses in particular to agricultural cooperatives, while the general teaching on the social economy entrepreneur engages people coming from agricultural, social, and credit cooperatives; the most inclusive courses are supplied in Italy, where all executive programs involve people coming from theoretically all cooperative types, but also in Germany, where the existing training program is provided to all cooperative types except workers coops, and in the UK, where the existing courses involve worker, consumer, credit, and housing cooperatives.

The perception is that, while some institutes could therefore host all types of cooperators and provide for trainings that can cross different sectors of activity and industries, some others are better devoted to train single and specific classes of cooperators.

- All of the partners offer their training programs to directors, managers, coordinators, and members of the Board of Directors of cooperatives. Courses are also supplied to employees of the coops in Spain, Germany, and Italy. Courses for coops' volunteers, members in trial periods prior to full membership, and future managers, are only provided in Italy by Federazione Trentina della Cooperazione.

As a conclusion, certainly the partnership can offer a good and complementary range of training programs for managers, while country exchanges among other types of cooperative participants could be quite difficult to realize.

- Courses provided are organized and managed by the partner institutes themselves in Spain, the UK, and Romania. In the other countries, the institutes have a primary role as organizers, but they also conduct activities in partnership with universities/training centers and a network of institutes in Germany, and networks of institutes and training institutions in Italy.

Academic/scientific teaching seems therefore not formalized in terms of institutions supplying the programs, while this statement must be verified with information about teachers and types of teaching.

- By looking at the professional figures who teach the lessons included in the training programs, we note that three partners (the UK, Germany, and in one course only in Romania) involve, at least partially, professional teachers or researchers; practitioners are involved as instructors in all the countries, probably because they can provide a direct knowledge coming from their experience and support the problem solving approach and the case study analysis; the use of experts and organizational consultants changes depending on the topic taught, especially in Italy and Romania.

A combined analysis with the previous question helps in claiming that only few courses are provided with the support of academic institutions or their professionals, while most of the courses listed seem to focus more on the practical development of knowledge and follow the consultancy approach. This does not mean that courses are incomplete, but they are

rarely or differently supported by a scientific and theoretical view, which however is not necessarily the case for all the courses and topics learned.

- Finally, the names/titles of courses provided by partners give a preliminary indication of some of the topics that they are particularly interested in. We note the presence of some big and comprehensive courses, such as “Social Economy entrepreneur” and “Social Economy for Agricultural Cooperatives” in Romania, or the intermediate and advanced diplomas provided in the UK and entitled “on cooperation and mutuality/mutual directorship”. Most of the other courses provided are instead more specific to a single topic or related to a specific competence: in the former case, “Strategic planning”, “Market analysis”, “Marketing of Fruits and Vegetables”, “Rights and Obligations of Coop Directors and Boards”, “Organization and Functioning of a Cooperative” for Spain, “The history, ideology and status of the cooperative movement”, “Governance: managing the cooperative enterprise”, “New elected board member training”, “Governing bodies; tasks and responsibilities of board members”, “Fiscal practice and accounting in the cooperative enterprise” and many others for Italy, “Funeral directing” in the UK; while in the latter case, we count “Management and leadership” and “Cooperative learning” in the UK.

The general analysis of courses provided by partners also gives information on the procedures that the partner institutes follow in planning and managing their courses.

The first step in the creation of the classroom consists of the identification of participants; some of the questions from the grid help with the understanding of this step. The analysis of all the partners’ responses shows that:

- All partners state their institution provides courses to all managers and elected members from any cooperative types; usually, in the UK and in Germany participants are ex-ante selected and sent to the courses by the cooperatives themselves; in Romania, participants are both ex-ante selected by the cooperatives and ex-post selected by the institute itself; the selection process is compulsory and all techniques of selection are applied in Spain and Italy, where frequently the former methods are integrated with the selection of participants from member (or affiliated) cooperatives of the institute, or by following specific selection methods, like the supply of the training activity to new-entering members of the affiliated coops.
- Usually, since the partner institutions select applicants based on their role in the cooperative (managers and elected members mainly), they do not require any educational background—specifically any minimum education level and any minimum experience in the cooperative system—from their participants. This is the case of Spain, the UK, and Italy. A minimum education level is instead required for the training program on Social entrepreneurship in Romania, and minimum education and experience is usually required in Germany.
- The relevance of education, as well as of other indicators of the applicants’ experience and personal traits are therefore taken into account in the selection process of some training courses only and differ country by country. The German and the English partners do not take into account any personal trait emerging from the CV of applicants, and in some cases the CV is not required at all in the application process. The education level is evaluated by the Spanish and the Romanian partners, together with the length of experience in the cooperative system, but also by considering the specific training needs stated by applicants. The Italian training system supplied by the partner assigns instead higher importance to the applicants’ motivations, needs, experience as a member in the

cooperative system, and participation in previous training programs organized by the same institution or others.

The panorama therefore reflects a flexible selection process based on training needs more than formalized around specific requirements and personal traits.

- Since personal traits and CV analyses are not priorities in the selection process, with the exception of the Romanian course in Social entrepreneurship, other partner institutes usually select the participants of their training courses in different ways. Spain and Italy tend to favor the participation of cooperators from member cooperatives of their institutes, while some other courses are provided in Italy only to cooperators with a specific role in their cooperative, and in Spain the closed number of participants requires selecting them on a first-come first-selected basis. The UK and Germany do not apply any selection of their participants, accepting in training courses all managers and elected members asking to participate.
- At the end of the selection process, the composition of classes is mostly and in all countries heterogeneous in terms of gender, age of practitioners, experience in the cooperative, education level; the opportunity to open classes to practitioners coming from different cooperative types at the same time only occurs in Romania and in a few courses in Italy.

The situation, however, allows for including in classes practitioners with different skills and experiences, with the positive consequence of integrating their knowledge with peer-to-peer learning in the classes and comparisons among their experiences. In that sense, the opening of enrollment to include people coming from other countries could be an enriching experience for all of them.

As a second step in the management of training activities, institutions must decide whether to formally evaluate participants and whether/how to recognize course participation. The analysis of courses provided by partners shows that:

- Italy is the only country in which most of courses provided, due to their length and training aims, do not require any final examination. All other courses provided by the partner institutes conclude with some final evaluation and tests. However, in the UK and Romania courses require some tests without marks and some final examinations and formal tests; courses in Germany include final evaluation and formal tests; while the Spanish partner tests the learning of their participants through tests with marks assignment.

Courses therefore differ a lot in the partner countries and some homogenization among them would be required in order to align the approaches to a more formalized and recognized system.

- Similarly, the validation process makes use of certifications of attendance, depending on the methodologies, intensity and aims of courses provided. Attendance certificates, which represent the less institutional type of certification, are given when attending the courses in Italy, Spain, the UK, and Germany. However, while Italy is the only country in which no other type of certification is provided, the Spanish partner also provides diplomas, the English partner also gives participants diplomas or other certificates, and the German partner differs the assignments of formalized certificates depending on its courses. Finally, the Romanian partner makes use of certificates attesting the attendance of the course.

This preliminary analysis seems therefore to demonstrate a low level of formal recognition of courses provided, while it needs to be investigated on other aspects of the recognition process.

- The lack of a recognition system for the training activities seems to be more evident in Spain and in Italy when looking at the credit system: for all courses in the former country and most of the courses in the latter, credits are not provided for training activities. In Germany credits are instead provided for some courses only, while the UK and Romania have the most formalized credit system, which could be therefore taken into account by other partners in order to apply and adapt to their education systems the methodology of credit assignment.
- No training program in any country follows an ECVET framework, and therefore this step of the recognition process of training activities must be completely built.
- Similar limitations characterize the alignment of training programs to the European system EQF. Only few courses supplied by the Italian partner follow this recognition rule, while all other courses in the other countries do not. Also in this case, the recognition process must therefore be completely designed.
- As a final question, we also investigated whether some of the courses provided are mandatory for practitioners, meaning they represent a prerequisite for working as cooperative managers or elected members. Answers show that most of the courses are not mandatory, while only one specific course related to technical skills in Spain for agricultural cooperatives and the course provided by the German partner are mandatory. The fact that most courses are optional for cooperators explains the payment requirements. The payment of fees is frequently required and they are mostly paid by the cooperatives in which the participants operate or by the participants themselves (as in the UK, in Germany and in Spain). The Cooperative Education Funds partially or completely cover the costs of training programs in Spain, while umbrella organizations, cooperative associations and regional training programs finance courses in Italy, and finally European funds and private founders respectively cover the costs of the two training courses provided by the Romanian partner.

### **3. The competence to be included in training programs for cooperators**

As a first step for the understanding of the competence that cooperators should develop in order to implement their skills and knowledge as managers and elected members of cooperative firms, we need to have a general definition of the competences themselves. We therefore asked the partners to define the most important competence that cooperators should own and therefore the traits that start in sketching the job profile of managers and elected members of cooperative firms.

Let's look at the definitions provided by partners and keywords that we identified in the definitions themselves and that can therefore represent a synthesis of topics to be learned:

#### **COMPETENCE 1 – COOPERATIVE KNOWLEDGE AND IDENTITY**

*“The understanding and experience of the cooperative values, that allows to differentiate itself from other business models. Ethical behavior in balance with the business objectives.”*

*“Supervising how cooperative values and principles are currently put into practice in the cooperative enterprise; acknowledging value of diversity and taking responsibility for strategies for active membership; taking responsibility for innovative ways of inter-cooperation.”*

*“The cooperatives' role in the economical micro- and macro-system, as a form of putting together social and financial capital in the benefits of the community.”*

*“The characteristics of a co-operative distinguish it from other types of business; the origins, meaning and contemporary relevance of co-operative values and principles; the key stakeholders in a co-operative and the mutual benefits for them of embedding co-operative values and principles in the business.”*

*“Knowledge of the principles and defining characteristics of the cooperative business form and movement, with a general knowledge of how it functions and its purpose, institutions and goals. Understanding of the role, both present and historical, that local and non-local cooperative(s) have played in the economic development of the local and non-local community.”*

**Keywords:** be different, ethical behavior, value, principles, taking responsibility, social benefits, mutual benefits, organizational mission, socio-economic role

## **COMPETENCE 2 – LEADERSHIP**

*“The ability to lead a group of people to the achievement of common goals.”*

*“Participating in and managing of the cooperative, cultivating social values whilst respecting ICA's principles and values; taking responsibility for ethical choices; demonstrating will to compromise, democratic behavior and ability to build trust.”*

*“All the skills needed to motivate cooperative members to stay together.”*

*“The knowledge, skills and understanding required to 'drive' the vision, culture and values of the organization by motivating, inspiring, managing and developing people, communicating well both inside and outside the business, effectively applying financial, technical and business skills within the context of the co-operative and managing stakeholder expectations”*

*“The ability to anticipate necessary actions and to synthesize and articulate common goals and motivate various actors and stakeholders to understand, value and strive to achieve such goals.”*

**Keywords:** common goals, ethical choices, democratic behaviors, build trust, motivate to stay together, drive the vision, communicating, managing expectations

## **COMPETENCE 3 – GOVERNANCE**

*“The ability of setting up the adequate strategies, structures and guidelines, in order to achieve the business' economical and social objectives. Compliance with legal requirements; ensuring transparency regarding decision making processes; and avoiding conflicts of interests.”*

*“Managing the cooperative enterprise in accordance with reciprocal exchange; demonstrating capacity to pursue objectives of cooperative mutualism; being able to manage and transform integrated strategies which include the community, cultural and economic factors.”*

*“How the governance models assure a democratic system of management and the elements that are important for governance.”*

*“Knowledge and understanding of corporate governance in relation to a co-operative; how legislation and codes of good practice impact on the leadership and governance of a co-operative”*

*“The framework of rules and practices by which the cooperative board ensures accountability, fairness, and transparency in the cooperative’s relationship with all of its stakeholders (financiers, customers, management, employees, government, and the community). Governance activities involve (a) contracts (formal and informal) between the coop and stakeholders for distribution of responsibilities, rights, and rewards, (b) procedures for reconciling stakeholder conflicts of interest, always in accordance with their established obligations, rights and roles, and (c) procedures for proper monitoring and control, as well as information-systems so as to provide checks-and-balances.”*

**Keywords:** guidelines, compliance, decision making process, reciprocal exchange, cooperative mutualism, governance legislation, stakeholders’ interests, distribution of responsibilities and rights, reconciling stakeholders’ conflicts, peer monitoring

#### **COMPETENCE 4 – HUMAN RESOURCE MANAGEMENT**

*“The ability to manage people in an organization, in a structured way. It encompasses the process from hiring the right people for the job, to the performance assessment, motivation and development of the personnel.”*

*“Taking responsibility for managing professional development of individuals and groups; evaluating and reviewing performance of self and coop staff ; demonstrating capacity to be inclusive, respecting the differences present in the coop (religion, race, gender, disability); being collaborative and pooling ideas, objectives,....”*

*“How to assure an optimal management of the human resources as to have the best work productivity.”*

*“Skills, knowledge and understanding required for effective human resource planning, recruitment and selection, developing individuals and teams, managing/leading equality and diversity, designing, implementing, monitoring and reviewing HR policies and procedures, implementing, monitoring and reviewing performance management, managing and monitoring individual and team training and development plans and measuring/improving colleague job satisfaction.”*

*“Knowledge and management of motivation, team management, leadership and the psychology of people, including the specific dynamics of cooperative internal organizational structures.”*

**Keywords:** performance, motivation, skills, work productivity, professional development, fair procedures, pooling ideas, human resource planning, monitoring, job satisfaction, psychological wellbeing, team

#### **COMPETENCE 5 – FINANCIAL MANAGEMENT**

*“The ability of effectively planning, organizing and controlling the financial resources of an organization in order to achieve the financial targets.”*

*“Exercising ethical financial management and supervision of income streams; demonstrating the capacity to account for intangible assets”*

*“How to predict and understand the financial indicators and statements, in order to assure a good cash flow and achieve the economic and social goals, using the best financial decisions for the cooperative and respecting the legal framework.”*

*“Skills, knowledge and understanding required for planning, organizing, directing and controlling the financial activities such as procurement and use of funds of the co-operative.”*

*“The planning, directing, monitoring, organizing, and controlling of the monetary resources of the cooperative, with particular understanding of cooperative financial structures vs. IOF.”*

**Keywords:** financial planning, financial targets, ethical financial management, income streams, intangible assets, financial indicators, economic and social goals balancing, procurement, accounting

## **COMPETENCE 6 – EXTERNAL STAKEHOLDER MANAGEMENT**

*“Knowing all interested parties who are relevant for the organization and their expectations, needs, concerns, wants and authority. The ability to manage the relationship with them in favor of the organization.”*

*“Being able to involve stakeholders from the community, including those not yet represented; putting into practice the 7th ICA principle (interest for community); acknowledging both implicit and explicit local needs; taking responsibility for producing reports that measure social, economic and environmental impacts using the same tool for accountability; taking responsibility for inter-cooperation between coops and/or other coop systems; being able to encourage cooperative group thinking”*

*“How to transform the stakeholders in resources, in the benefits of the cooperatives and how to minimize the impact of stakeholders that do not support the cooperative system.”*

*“Identifying the key stakeholders/ stakeholder groups in a co-operative; communicating with stakeholders; meeting stakeholder needs; understanding of how stakeholders/ stakeholder groups benefit from the collective implementation of co-operative values and principles.”*

*“The process of forming, monitoring and maintaining constructive relationships with stakeholders and the attainment of common goals and satisfaction of interests.”*

**Keywords:** relevant reference agents, expectations and needs, constructive relationships, social responsibility, cooperative group thinking, common goals, social measurement and reporting

## **COMPETENCE 7 – MARKET AND PRODUCTS/SERVICES**

*“Market and customer orientation. Knowledge of the products offered by the company, and of the market served. Knowledge of marketing strategies, market research techniques, product development according to customer needs, and customer satisfaction monitoring.”*

*“Demonstrating capacity to foresee local needs and to implement innovative strategies based on trust and relations with the community”*

*“How can the cooperatives have the best marketing position and marketing strategy, along with all the four P: product, price, promoting, placement.”*

*“The development of marketing; the need for marketers to act in an ethical and socially responsible manner; relationship marketing; the concept of market segmentation ; marketing planning; managing ideas and innovation”*

*“Understanding of the management process through which goods and services go from idea to the final customer. It includes the coordination the following four principles of marketing: (1) identification, selection and development of a product, (2) processes which determine or influence price, (3) selection of, participation in, or influence over, distribution channels to reach the customers, and (4) development and implementation of a promotional strategy. The cooperative function is very important in this competence, as it is the fundamental manner in which small farmers can group together to obtain market presence and weight to counteract the pronounced concentration and market abuses of the 5 or 6 global distributors in the food supply chain.”*

**Keywords:** customer orientation, marketing strategies, research techniques, product development, needs individuation, innovation, price, placement, promoting, market segmentation, ideas, distribution channels, coordination, demand individuation.

## **COMPETENCE 8 – TECHNICAL SKILLS**

*“Specific knowledge related with the manager function and the field of work of the cooperative.”*

*“Technical skills concern educational background and depend on the field of activity where members work, so maybe it is not relevant for the purpose...”*

*“How cooperatives can assure the best quality of their products.”*

*“Mastery of the technical knowledge needed to carry out the business activity to a high standard that complies with all regulation and also is coherent with the nature of the cooperative.”*

**Keywords:** field-related competence, best quality, high standards

## **FROM COMPETENCES TO TOPICS**

After the agreement on the competences to be developed in training programs devoted to cooperators and after the general description of the meanings of these competences, partners have been asked to describe programs provided in relation with specific topics to be included in each competence. Since the definition of competences by partners was supplied at the moment of filling in the grid of analysis, the topics included relate not to the keywords identified in the definitions of the competences, but rather stem from European projects on training programs recently developed (Leonardo projects).

A preliminary comparison between topics and keywords however underlines their evident overlapping in some of the single skills and knowledge that cooperators must hold in the development of the general competence. Nonetheless, we can add that:

- some topics administered to the partners and included in the previous projects are more specific than and complementary to the keywords provided; in that case, the study of their presence in the grid but not in the partners’ definitions should anticipate that some learning topics are not actually provided, i.e., considered in the training programs, by partners; this would represent a need of integrating actual courses with some new topics, but the questions directly asked our partners will help in putting light on the point;
- some keywords are not included in the taxonomy of identified and proposed topics; in most of these cases we can claim that keywords specified are more related to learning

outcomes, activities conducted by practitioners and ways in which the topics learned must be implemented in the daily life of the cooperative; in other words, while the topics identified represent the contents of the teachings, some keywords explain how the manager/elected member should translate theory into practice and apply the learning to the management of the cooperative. As an example, learning the topic of “cooperative principles, values, and mission” will help in understanding how the management must “be different” (as specified in the keywords).

- All topics included in each competence are presented and described in their meaning in the following table. Partners had the opportunity to add additional topics, though this only occurred in a few limited cases.

Competence 1	Competence 2	Competence 3	Competence 4	Competence 5	Competence 6	Competence 7
<u>Cooperative principles</u>  The 7 ICA principles and their relevance for the cooperative aim	<u>Values</u>  Defining the coop's mission, putting values into practice, paying attention to other-regarding and cooperative behaviors (fairness, trust...)	<u>Governance models</u>  To compare different organizational charts, to structure the membership, board of directors, control bodies; to manage democracy	<u>Policies/management</u>  To manage selection, job design, work flow, incentive strategies... To anticipate different planning scenarios in terms of HR, according to the organizational strategic objectives and boundaries	<u>Understanding financial accounts/statements</u>  To identify, analyze and interpret the indicators of financial results	<u>Stakeholder map</u>  To describe who stakeholders are and their needs/expectations; to individuate the organizational priorities to respond to their needs and the strategies to relate with them	<u>Local market dynamics</u>  To investigate micro-markets (one's sector of activity, regional or national markets) and their evolution both in terms of demand and supply
<u>History of own coop and movement/sector</u>  To define the origins, the motivations, the identity and the evolution of coops. To position the coop in its context	<u>Social and relational skills</u>  To develop abilities in listening, communicating, developing empathy, etc.	<u>Legal requirements</u>  To individuate boundaries and opportunities in the legal articles defining mutuality, profit sharing, governance systems...	<u>Leading equality and diversity</u>  To be attractive and retain young staff, to be sensitive to the particular needs of the different groups, to manage appropriately the different groups and their relationships	<u>Performance management</u>  To understand the cost structure and to be able to raise revenues to cover those costs; to understand market dynamics and answer competition	<u>Social impact</u>  To individuate the consequence of the coop presence on the local community in terms of externalities, environmental impact, social capital, employment, etc.	<u>International market dynamics</u>  To understand the development of competition, demand, supply, at an international level and its impact on the coop's strategies

Deliverable: 2.1 Comparative Study

Work package: 2 State of the art analysis

Date: 12/03/2013

<p><u>Economic role - advantages and limits of coops</u></p> <p>To understand how coops can solve market failures and marginalization, and can increase efficiency and effectiveness</p>	<p><u>Organizational culture</u></p> <p>How to create an organizational culture which pays attention to the diverse stakeholders and how to transmit it</p>	<p><u>Involvement strategies/member engagement</u></p> <p>Starting from the individuation of the diverse stakeholders' interest, to plan loyalty models and strategies to increase the psychological participation</p>	<p><u>Intrinsic motivation and engagement</u></p> <p>To know the diverse levers for workers' engagement in terms of intrinsic motivation, non-monetary compensation, attention to the workers' needs and personal objectives, marks of recognition, feedbacks, trust, involvement</p>	<p><u>Managing diverse income streams</u></p> <p>To ensure a good financial mix (to understand the link between sources of funding and types of benefits generated by the cooperative); to diversify the income sources</p>	<p><u>Communication strategy</u></p> <p>To manage the interface between the organization and the diverse stakeholders, by developing communication strategies</p>	<p><u>Innovation &amp; social innovation</u></p> <p>To invest in and develop new products and to change procedures and processes; to innovate in social terms, by developing initiatives in favor of the community/the social interest</p>
<p><u>National legal frameworks</u></p> <p>Analysis of the national Law</p>	<p><u>Leadership styles</u></p> <p>How to be a manager able to increase the sharing of the mission among workers and to individuate strengths and weaknesses of the management</p>	<p><u>Mission and vision</u></p> <p>To provide a shared vision of social enterprise across the team, notably by being part of the appropriate networks</p>	<p><u>Stress and satisfaction monitoring (job quality monitoring)</u></p> <p>To monitor and manage the determinants of stress and satisfaction in order to develop a serene work atmosphere encouraging collaboration and wellbeing</p>	<p><u>Financial strategy (risk evaluation and decision-making)</u></p> <p>To develop a proactive approach to the risk and profitability of the financing means, according to the cooperative's needs and realities</p>	<p><u>Networking and business coordination</u></p> <p>To map the existing networks among coops, to pick out the existing and potential competitors and partners; to collaborate with local communities, public authorities, etc.</p>	<p><u>Project management</u></p> <p>To manage various projects; to find, to plan, to organize, to control resources to achieve specific goals; to manage a project office</p>

<p><u>International legal frameworks</u></p> <p>Analysis of the international laws and guidelines</p>	<p><u>Communication</u></p> <p>To manage the interface between the organization and the diverse stakeholders, by developing communication strategies</p>		<p><u>Volunteer recruitment and management</u></p> <p>To individuate the opportunity for volunteer involvement, to create networks for their recruitment, to develop strategies for their loyalty</p>	<p><u>Achieving economic and social goals</u></p> <p>To elaborate various scenarios and answers to achieve better performance while increasing the wellbeing of members/the local community</p>	<p><u>Advocacy/political representation</u></p> <p>To position the coop as part of a social movement and to develop strategies to enforce the voice of the movement</p>	<p><u>Marketing and Sales</u></p> <p>marketing policies and strategies</p>
<p><u>Mutuality versus community/social interest</u></p> <p>Understanding the relevance of managing the coop by paying attention to both the members' interest and the social impact/community interest</p>	<p><u>Problem solving</u></p> <p>To develop emotional intelligence and abilities to manage unexpected situations; to be able to elaborate various scenarios</p>					<p><u>Quality assurance and Customer Satisfaction</u></p> <p>To check and certify the quality of products/services and of procedures in accordance with regulations and in terms of client/user/customer satisfaction</p>

#### 4. *The relevance of competences and single topics*

Some of the grid questions were designed to help in understanding the relevance that both the partner institutes and managers and elected members of cooperatives with which the institutes collaborate assign to the development of specific topics within the general competences.

Data collected from partner institutes through a complex grid have been elaborated and summarized in the following schemes and most important points. Given that only two partners responded to the optional questions in competence 8 (i.e., Technical skills), and that the responses were very specific, these responses are not included in this overall summary of the results.

Question 1: **What is the interest your institute assigns to this competence in general?**  
(scores from 1-none- to 10-total-)

Question 2 : **What is the interest that the managers and elected members you relate to/represent express for this competence?**  
(scores from 1-none- to 10-total-)

The analysis of the two questions can be summarized in a unique analysis in order to also have a comparison of results on the same topic from the point of view of the institutes and the cooperators.

##### Results:

Overall , all of the competences and topics seem to resonate with the partners, moderate to high importance in general with a few exceptions for certain topics for certain partners.

##### Competence 1 – Cooperative Knowledge and Identity

- all topics marked fairly important;
- cooperative knowledge and identity overall is confirmed as an important competency, with international legal frameworks receiving more mixed results. Coexphal placed less importance on “mutuality vs community interest”;
- all perceive the managers’ interest as lower than the institution’s, with Coexphal managers expressing less interest in the economic role of coops and national legal frameworks.

##### Competence 2 - Leadership

- high importance pretty much across the board;
- importance given by institution and managers more closely aligned;
- FSDC doesn’t specifically have “problem solving” topic;
- “organizational culture” less important for Romanian managers;
- “Leadership styles”, “communication”, and “problem solving” all receive lower interest from Coexphal managers though Coexphal as an institution places a high importance on these topics.

### Competence 3 - Governance

- high importance across the board – all received high marks, but legal requirements in particular is very important for all institutions;
- From the manager’s perspective, “governance models” and “legal requirements” are marked as high interest, with “involvement strategies/member engagement” and “mission/vision” receiving more mixed results.

### Competence 4 - Human resource management

- More mixed results than the first 3 competences, but still generally important;
- “Policies/management” and “leading equality and diversity” marked of high importance to all institutions;
- “Intrinsic motivation and engagement” marked high, but slightly lower for Coexphal;
- “Stress and satisfaction monitoring (job quality monitoring)” - very important for ADG, Co-operative college UK, FTC and moderately important for Coexphal and FDSC;
- “Volunteer recruitment and management” - fairly important for Coexphal, FTC, FDSC; not important at all for ADG and Co-operative college UK (0);
- ADG added 2 topics, marked as 10: 1) Human resource management - To establish the strategies for training and career development of employees. To improve their capabilities and efficiency, and those of the organization; 2) Performance appraisal - To formally review the individual performance of the employees against previously established objectives; to guide, and determine improvement plans;
- In terms of manager’s interest for the topics, in general there is less interest in these topics, with more mixed results. “Policies/management”, “leading equality and diversity”, “intrinsic motivation and engagement”, and “stress and satisfaction monitoring” all receive relatively high interest from ADG, Co-operative College UK, FDSC and lower interest from managers at Coexphal and FTC;
- “Volunteer recruitment and management” not important for the managers, a little higher though for FDSC;
- ADG again added the 2 topics: 1) Human resource management - To establish the strategies for training and career development of employees. To improve their capabilities and efficiency, and those of the organization; 2) Performance appraisal - To formally review the individual performance of the employees against previously established objectives; to guide, and determine improvement plans.

### Competence 5 - Financial management

- In general this is a very important competence with all the topics receiving pretty high marks;
- Co-operative College UK says: Financial management is included in our 'full' management and leadership course but is not usually demanded as an individual topic;
- “Understanding financial accounts/statements” received slightly lower importance from ADG both for the institution and the manager’s interest;
- “Achieving economic and social goals” was marked with slightly lower interest from Coexphal managers;
- But again, pretty high overall for both question 1 and 2.

### Competence 6 - External stakeholder management

- This topic is generally important, but with slightly lower scores in some areas;
- The institutions marked all the topics as pretty important, except for ADG who places lower importance on “stakeholder map” and very low importance on “advocacy/political representation”, which is done through cooperative associations and not a topic of training for ADG;
- All partners expressed slightly lower interest on the part of managers for all the topics, with ADG again expressing low interest for “stakeholder map” and “advocacy/political representation”.

### Competence 7 - Market and Product/service

- This competence is overall pretty important for all, except for Co-Operative College UK, who says that there is relatively low demand for this topic from our co-operatives who tend to request the more generic management subjects. They marked all of the individual topics with lower importance except for “Project Management” and “Marketing/Sales”;
- “Quality assurance and Customer Satisfaction” was given high importance from ADG and Coexphal, less for FTC, not really for Co-operative college UK, and FDSC doesn't cover this topic;
- In general, lower interest expressed from the managers across the topics, with some mixed results.

Question n.7:

**If you (or other trainings in your country/coop system) do not provide formal training on this topic, have your participants ever expressed training needs on this topic?**

(1) yes, formally asking us or their cooperatives (2) yes, we perceive their need, but without formal expressed demand (3) no, never

In addition to the previous questions on the general relevance of topics suggested, we also investigated the perceived relevance by managers about the possible gap, i.e., when formal training is not provided.

Data collected from partner institutes through the grid have been elaborated and summarized in the following schemes and most important points.

### Competence 1 – Cooperative Knowledge and Identity

- Coexphal has received formal training requests for all topics of this competence;
- ADG provides formal training for most of the topics, and it has not received any formal or informal requests for the others topics;
- Co-operative College UK provides formal training on all topics of this competence;
- FDSC has not received any formal or informal requests;
- FTC affirms that it has perceived the need for formal training on all topics of this competence;
- All partners provide formal training in “International legal frameworks” or have received formal or informal requests to do it. “International legal frameworks” seems to be the topic more needed or the topic in which formal training seems to be more useful.

### Competence 2 - Leadership

- For all topics of this competence there are offers or requests for formal/informal training. It is possible to say that leadership competence is hard to learn only on the job or in informal way;
- ADG did not provide an answer;
- Co-operative college UK has received formal training request for all topics;
- Coexphal too, but only for the topic “Problem solving” it perceived a feeling of formal training needed;
- FDSC and FTC perceived the need of formal training on all topics, but Romanian provides formal training only on topic “Problem solving”.

### Competence 3 - Governance

- For all topics of this competence, all partners declare they do not receive any requests for formal training;
- All partners, with the exception of FDSC, perceive that all topics of this competence require formal training;
- Co-operative Collage UK and ADG provide formal training for the topics “Involvement strategies/member engagement” and “Mission and vision”;
- Coexphal and FTC answer 2 in relation to all topics;
- FDSC answer 3 in relation to all topics.

### Competence 4 - Human resource management

- ADG has added two topics due to importance : 1) Human resource management - To establish the strategies for training and career development of employees. To improve their capabilities and efficiency, and those of the organization; 2) Performance appraisal - To formally review the individual performance of the employees against previously established objectives; to guide, and determine improvement plans;
- Co-operative college UK and ADG do not answer, maybe because they provide formal training for all topics?
- Coexphal and FDSC have highlighted an educational requirement in relation to all topics of this competence, even if they have not received any formal request;
- FTC has not received any formal request, and at the same time it does not perceive educational requirements for all topics of this competence;
- For the competence HRM no one has perceived a formal request for training.

### Competence 5 - Financial management

- All topics of this competence are perceived by almost all partners (FDSC, Coexphal, FTC) as important and formal training needed, even if they have not received any formal request;
- ADG and Co-operative college UK have not shown any educational requirement

### Competence 6 - External stakeholder management

- No partners have shown any formal training request for all topics;
- Co-operative college UK did not answer, maybe they provide formal training?
- With reference to the first topic, only Coexphal declares to have perceived an educational need, all partners affirm that never have perceived an educational need or formal request for training;

- All partners, with exception of FDSC, declare to perceived an educational need in relation to the topic “social impact”;
- “Community strategy” and “networking” are perceived as formal training needed by ADG and Coexphal.

#### Competence 7 - Market and Product/service

- all topics of this competence are perceived for the majority of partners as formal training needed, even if no topics has been requested;
- in particular, the "internal market dynamics" topic is perceived by 4 out of 5 partners as the topic which requires more training, while the last topic “Quality assurance and Customer Satisfaction” is perceived by 2 out of 5 partners as training needed;
- As in the previous competences, ADG and Co-operative college UK perceive or receive formal training request on all topics;
- Coexphal, FDSC and FTC affirm to perceive the educational requirement on all topics of this competence.

#### **5. Learning methods**

Some questions aim at providing information on the knowledge of the topics by cooperative managers and the way in which they are learned or would be best to learn them.

Data collected from partner institutes through the grid have been elaborated and summarized in the following schemes and most important points.

<p><b>Question 3: Is the topic learned through:</b></p>
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<p>(1) formal learning, (2) non-formal learning (3) informal learning (4) no learning on this topic</p>
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#### Competence 1 – Cooperative Knowledge and Identity

- All partners state that there is training on all the topics. FDSC did not reply on topic “International Legal Frameworks”. Co-operative college UK refers that “Some co-operatives request individual units from a qualification where the learners complete an assignment but are not registered for a 'formal' award”;
- Non formal training is used by all partners in all topics, followed by formal training. On topics “Economic role - advantages and limits of coops”, “National legal frameworks” and “International legal frameworks” informal learning is not often used.

#### Competence 2 - Leadership

- All partners state that there is training on all the topics. FDSC did not reply on topic “Problem solving”. FTC took into account the training of Cedefop, but without certification. On all topics FTC stated that there is only formal training.
- Formal and non formal training are equally used by the partners (4 out of 5), while informal learning is not often used.

#### Competence 3 - Governance

- All partners state that there is training on all the topics. On topics “Governance models” and “Legal requirements” ADG does only non-formal training; on all topics FTC noted that there is only formal training. FTC took into account the training of Cedefop, but without

certification.

- In general non formal learning is the most used while informal is not often used.

#### Competence 4 - Human resource management

- All partners state that there is training on all the topics except topic “Volunteer recruitment and management”; ADG and Co-operative College UK do not train on topic “Volunteer recruitment and management”. For all the topics, FDSC does only non-formal training; on topics “Policies/management” and “Leading equality and diversity” ADG does only non-formal training; on topics “Intrinsic motivation and engagement” and “Stress and satisfaction monitoring (job quality monitoring)” FTC does only formal training;
- In general non formal and formal learning are the most used. Topic “Volunteer recruitment and management” is generally not often trained;
- ADG added 2 topics where they run formal and non-formal training: 1) Human resource management - To establish the strategies for training and career development of employees. To improve their capabilities and efficiency, and those of the organization; 2) Performance appraisal - To formally review the individual performance of the employees against previously established objectives; to guide, and determine improvement plans.

#### Competence 5 - Financial management

- All partners state that there is training on all the topics. FDSC does only non-formal training. FTC does only formal training on all of the topics;
- In general non formal and formal training are the most used. Informal is used only by 1 of the 5 partners (Coexphal).

#### Competence 6 - External stakeholder management

- On topics “Social impact” and “Communication strategy” all partners state there is training; ADG does not train on the topic “Stakeholder map” and considers topic “Advocacy/political representation” to be non relevant, FTC does not train on topic “Networking and business coordination” and “Advocacy/political representation”;
- In general non formal and informal training are the most used.

#### Competence 7 - Market and Product/service

- All partners state that there is training on all the topics. FTC does only formal training on all the topics. FDSC did not reply on topic “Quality assurance and Customer Satisfaction”;
- In general non formal and informal training are the most used. Topic “Quality assurance and Customer Satisfaction” is the one with the least training.

Question 4: **What do you think would be the ideal way to learn this topic?**

(1) formal learning, (2) non-formal learning (3) informal learning (4) no learning on this topic

#### Competence 1 – Cooperative Knowledge and Identity

- All partners agreed that the best way to learn all the topics of this competence is non-formal learning. Then positions are different: some partners do not consider at all informal learning; on topics “Cooperative principles” and “History of own coop and movement/sector” formal learning is not well considered.

### Competence 2 - Leadership

- All partners agreed that the best way to learn all the topics of this competence is non-formal learning. Then positions are different: some partners do not consider at all informal learning (in particular Co-operative College UK and FTC do not consider at all informal learning for all the topics); formal learning is also considered a good way to train the topics (4 out of 5 partners).

### Competence 3 - Governance

- All partners agreed that the best way to learn all the topics is non-formal learning. ADG, Co-operative College UK and FTC do not consider at all informal learning for all the topics which results as the worst way to train this competence.

### Competence 4 - Human resource management

- Partners have different views on this competence: ADG does not think learning is possible on topic “Volunteer recruitment and management”. FTC considers only formal learning for all of the topics, while FDSC considers only non formal learning from topics 1 to 4. In general informal learning is taken into account only by Coexphal.
- ADG added 2 topics: 1) Human resource management - To establish the strategies for training and career development of employees. To improve their capabilities and efficiency, and those of the organization; 2) Performance appraisal - To formally review the individual performance of the employees against previously established objectives; to guide, and determine improvement plans.

### Competence 5 - Financial management

- All the Partners agree that the ideal way to learn the topics is non-formal learning. Informal learning is considered only by Coexphal.

### Competence 6 - External stakeholder management

- All the Partners agree that the ideal way to learn topics “Social impact”, “Communication strategy” and “Networking and business coordination” is non-formal learning. ADG considers topic “Advocacy/political representation” not applicable. Informal learning is well considered for this competence overall (4/5).

### Competence 7 - Market and Product/service

- Four of the partners agree that the ideal way to learn the topics are non-formal and informal learning. FTC considers only formal learning, FDSC does not consider formal learning for any of the topics;
- The three methods of learning are well considered as they are chosen by 4 out of 5 partners.

**Question 5: If managers/elected members in your country/coop system have access to formal training activities on this topic, are training credits provided? (please add in notes whether the training is provided but managers do not attend in large numbers)**  
(1) yes (2) yes, with minimum number of hours requirement (3) no credits

#### Competence 1 – Cooperative Knowledge and Identity

- all partners state that managers have access to formal training on the topic, four partners state that there are credits provided;
- Co-operative College UK notes that “All our member and director and management courses are externally accredited”.

#### Competence 2 - Leadership

- all partners state that managers have access to formal training on the topic, four partners state that there are credits provided, 1 partner provides credits with a minimum of hours completed (FTC);
- ADG added a Note: All these subjects are included in the TOP program, a high management level program with certification, and credit system to continue with the MBA program in cooperation with Steinbeis University.

#### Competence 3 - Governance

- all partners state that managers have access to formal training on the topic, credits are given for only some of the topics and not by all partners.

#### Competence 4 - Human resource management

- all partners state that managers have access to formal training on the topic, credits are given for only some of the topics and not by all partners;
- on topic “Stress and satisfaction monitoring (job quality monitoring)”, ADG and Co-operative College UK do not have available information;
- ADG added 2 topics where there is formal training with credits provided: 1) Human resource management - To establish the strategies for training and career development of employees. To improve their capabilities and efficiency, and those of the organization; 2) Performance appraisal - To formally review the individual performance of the employees against previously established objectives; to guide, and determine improvement plans.

#### Competence 5 - Financial management

- all partners state that managers have access to formal training on the topic, credits are given for only some of the topics and not by all partners.

#### Competence 6 - External stakeholder management

- For topics 1, 2, 4 and 5: 4 out of 5 partners say that managers have access to formal training on the topic, credits are given for only some of the topics and not by all partners, 1 partner (ADG) states that there is no formal training provided for managers on topics 1, 2, 4 and 5;
- ADG doesn't have formal training on some of the topics.

### Competence 7 - Market and Product/service

- For all the topics except topic “International market dynamics”: all partners state that managers have access to formal training, credits are given for only some of the topics and not by all partners. For topic “International market dynamics” ADG says that there is no formal training.

Question n.9: **Does this topic represent a knowledge/skill that managers/elected members generally have even without specific training?**

(1) Yes, it belongs to the general culture/feeling of people (2) Yes, it is included in the educational background (3) Yes, we think so (4) No

The question completes the information about the type of learning, by looking to the informal or non-formal learning and its consequence on the possession of some skills by managers and elected members.

Data collected from partner institutes through the grid have been elaborated and summarized in the following schemes and most important points.

### Competence 1 – Cooperative Knowledge and Identity

- with the exception of FDSC, all partners declare that all topics are a sort of knowledge that managers have without any specific training, or that this competence will be part of business culture or educational background.

### Competence 2 - Leadership

- with the exception of Co-operative College UK, all partners declare that usually managers have all topics of this competence without any specific training. No predominance between general culture and educational background as source of this competence.

### Competence 3 - Governance

- All topics of this competence are perceived as capabilities that managers are able to acquire with a specific training and so these topics do not belong to general culture or educational Background.

### Competence 4 - Human resource management

- No partners have declared that topics of this competence are part of a manager’s educational background, so it has not been learned in the education system;
- “Intrinsic motivation and engagement” and “Volunteer recruitment and management” are the topics that are perceived as needing specific training in order to gain the competence;
- All others topics are considered as a capacity that manager have or belonging to general culture.

### Competence 5 - Financial management

- All partners declare that all topics of this competence do not come from general culture or educational background, and in most cases the managers do not have this competence without training.

### Competence 6 - External stakeholder management

- Managers seem to have acquired topics “Stakeholder map”, “Networking and business coordination” and “Advocacy/political representation”, even if they are not topics present in the general culture or education background;
- Managers do not acquire topics “Social impact” and “Communication strategy” without any specific training;
- According to Co-operative College UK, managers cannot possess any topics of this competence without any specific training;
- Coexphal and FDSC affirm that managers possess these capabilities, even if they do not provide any details with regard to the source (general culture or educational background).

### Competence 7 - Market and Product/service

- Topics “Innovation & social innovation” and “Project management” are perceived from all partners as less present in the managers’ skills and knowledge and therefore they can represent abilities to be acquired with learning activities;
- According to FDSC and FTC, managers do not acquire topics “Local market dynamics”, “International market dynamics”, “Marketing and Sales”, and “Quality assurance and Customer Satisfaction” without specific training, on the contrary according to ADG and Coexphal it is possible;
- Topics “Innovation & social innovation” and “Project management” are those topics that managers do not possess without any specific training.

**Question n.8: If you (or other trainings in your country/coop system) do not provide formal training on this topic, do you think it would be useful for managers/elected members to have formal training?**

(1) Yes, very important (2) Yes, important (3) Important only for some of cooperators (4) Not important

In light of the answers on the gap of knowledge and skills that are not provided through formal courses and are not acquired in informal ways (previous questions) partners have been asked to evaluate if the single topics would be useful to be introduced in formal learning and courses.

Data collected from partner institutes through the grid have been elaborated and summarized in the following schemes and most important points.

### Competence 1 – Cooperative Knowledge and Identity

- Coexphal gives very important formal training on all topics of this competence; Co-operative College UK and ADG provide formal training on most of the topics in this competence;
- FDSC indicates that all of the topics are important only for some cooperators;
- FTC perceives topics “Cooperative principles ” and “History of own coop and movement/sector” to be very important, while others are not perceived as important;
- in general, all topics of this competence are perceived as important to all partners.

### Competence 2 - Leadership

- Coexphal, FDSC and FTC give importance to formal training on all topics of this competence;
- ADG and the Co-operative College UK provide formal training on all topics of this competence;
- no partners mark any of the topics of this competence as not important;
- in general, topics of this competence play a fundamental role in formal training and so they are clearly part of the educational needs of cooperatives.

#### Competence 3 - Governance

- FTC and Coexphal give high importance or importance to formal training for all the topics of this competence;
- FDSC does not give importance to formal training for any topics of this competence;
- ADG and the Co-operative College UK provide formal training on topics “Involvement strategies/member engagement” and “Mission and vision”, but they do not give importance to topics “Governance models” and “Legal requirements”;
- in general this competence has a lower priority for formal training.

#### Competence 4 - Human resource management

- all partners perceive formal training to be important on all the topics of this competence.

#### Competence 5 - Financial management

- all partners perceive all the topics of this competence as very important for formal training. In addition, ADG and the Co-operative College UK provide formal training on all the topics showing the priority and importance of this competence in formal training.

#### Competence 6 - External stakeholder management

- FTC and Coexphal give importance to formal training on all topics of this competence, while ADG and FDSC perceive formal training as not important on all topics. Co-operative College UK also does not provide training on some topics of this competence;
- topic “Social impact” is the only one to be perceived as important for all partners, while topic “Advocacy/political representation” seems to be as less important in formal training;
- in general, formal training is not perceived as a priority for this competence.

#### Competence 7 - Market and Product/service

- ADG provides formal training on all the topics of this competence; Co-operative College UK provides formal training for most of the topics;
- FDSC and Coexphal give high importance or importance to the need for formal training on all the topics of this competence, while FTC perceives that all the topics are important only for some cooperators;
- No partners have marked as "not important" any of the topics for formal training, showing that formal training is of high importance for this competence.

## 6. Learning outcomes and topic specificities

Question 6: **Do trainings in your country/coop system provide formalized learning outcomes pertaining to this topic?**

### Results:

Most of the answers are “yes” across all the topics, with only the occasional no and some n.a., meaning the partner does not offer training on that particular topic.

Question n.10: **Do you think this topic is very "country-specific"?**

(1) Yes (2) No

Answers to this question supply information that will be useful in order to plan future exchanges between the partners/countries and international training programs, since it helps in understanding the possibility for people to travel to different countries to receive diverse training that is unavailable in their country.

Data collected from partner institutes through the grid have been elaborated and summarized in the following schemes and most important points.

### Competence 1 – Cooperative Knowledge and Identity

- In general, “no” is the overall response for the topics in this competence;
- The only topic that is perceived as country-specific is “National Legal Frameworks”;
- FTC is the only partner with a majority of responses indicating country-specificity, which is contrary to all the other partners.

### Competence 2 - Leadership

- These topics all have a majority of answers pointing to “not country specific”; it is much more clear that the preceding competence;
- The only response indicating country specificity is from FTC, again the only partner with a majority of responses indicating country specificity for these topics.

### Competence 3 - Governance

- Overall majority of answers are again “no”, not country specific indicating that this competence is not considered to be specific to particular country contexts;
- Topics “Legal requirements” and “Involvement strategies/member engagement” are the only ones with 2 positive answers, from ADG and FTC, which could be a result of their particular local governing system.

### Competence 4 - Human resource management

- Almost unanimous responses on the topics of this competence, which clearly is not considered country-specific;
- The only exception is for topic “Volunteer recruitment and management” from ADG and FTC who consider that topic to be country specific

### Competence 5 - Financial management

- High majority of “not country-specific” responses for the topics in this competence, which is therefore not considered country specific overall.
- The only exception is FTC who considers topics “Understanding financial accounts/statements”, “Managing diverse income streams” and “Financial strategy (risk evaluation and decision-making)” to be country specific.

#### Competence 6 - External stakeholder management

- Overall majority of “not country specific” responses for the topics in this competence as well, which is not considered country specific;
- The exception is FTC who responded that all the topics in this competence are country specific, with ADG also marking topic “Advocacy/political representation” as country specific

#### Competence 7 - Market and Product/service

- All of the topics receive a high majority of “not country specific” responses for this competence as well, which is therefore not considered country specific;
- The exceptions are topics “Local market dynamics” and “Quality assurance and Customer Satisfaction”, which are considered country specific by ADG and Co-operative College.

**Question n.11: Do you think this topic is very specific to one/some cooperative types only  
(please specify what cooperative type)?**  
(1) Yes (please specify) (2) No

Answers supply information that will be useful in order to plan future inter-cooperative exchanges and transversal training programs, since it helps in understanding the possibility for managers from different cooperative types to compare their experience in mixed classes.

Data collected from partner institutes through the grid have been elaborated and summarized in the following schemes and most important points.

#### Competence 1 – Cooperative Knowledge and Identity

- All of the partners, for all of the topics, responded that this competence is not specific to one type of cooperative;
- The only exceptions is ADG, who responded that National Legal Frameworks is specific to cooperative types.

#### Competence 2 - Leadership

- Unanimous response from all the partners on all the topics: no, this competence is not specific to a particular type of cooperative.

#### Competence 3 - Governance

- This competence received a higher number of negative responses on the individual topics, which are therefore not considered specific to certain types of cooperatives;
- The exception is from FTC, who considers topics “Legal requirements”, “Involvement strategies/member engagement” and “Mission and vision” as specific to certain types of cooperatives.

#### Competence 4 - Human resource management

- Very high majority of negative responses for all the topics in this competence, which is not considered specific to a certain type of cooperative;
- The only exception is topic “Volunteer recruitment” which is considered specific to cooperative type by ADG.

#### Competence 5 - Financial management

- Large majority of negative responses for these topics as well showing that this competence is not considered specific to a cooperative type.
- The only exceptions are from FTC on topics “Managing diverse income streams” and “Achieving economic and social goals”.

#### Competence 6 - External stakeholder management

- Large majority of negative responses for this competence as well, therefore it is also not considered specific to a certain type of cooperative;
- The only exception is from FTC who considers topic “Communication strategy” as specific to cooperative types.

#### Competence 7 - Market and Product/service

- Large majority of negative responses for this competence as well, therefore it is also not considered specific to a certain type of cooperative;
- The only exceptions are from FTC on topics “Local market dynamics”, “International market dynamics”, “Marketing and Sales” and “Quality assurance and Customer Satisfaction”.

### *7. Conclusions and further steps of the analysis*

The analysis of data collected helps to point out some preliminary conclusions on the existing supply of training activities, on the main traits of professional profiles, and on the expected learning outcomes.

As regards the training activities, we identified that training programs provided in the different countries diverge quite a bit based on the type of cooperatives to which the partner institutes relate (e.g., one cooperative type only or a cross-sector representation of cooperators), and therefore while some institutes could therefore host all types of cooperators and provide for trainings that can cross different sectors of activity and industries, some others are better devoted to train single and specific classes of cooperators. Training programs also diverge in terms of length and content (e.g., some courses only provide for specific training on a single specific topic, others cover a high number of training hours and therefore include several topics). The preliminary analysis seems to underline the lack in academic teachings, masters and Ph.D. programs, formalized academic teachings supported by the institutes themselves or in partnership with other local institutes; these courses are in fact provided by the German partner only. Moreover, only few courses are provided with the support of academic institutions or their professionals, while most of the courses listed seem to focus more on the practical development of knowledge and follow the consultancy approach. This does not mean that courses are incomplete, but they are rarely or differently supported by a scientific and theoretical view, which however is not necessarily the case for all the courses and topics learned. As a conclusion, certainly the partnership can offer a good and complementary range of training programs for managers.

Although the range of programs seems quite good and the analysis of questions on competences and topics supports the existence of a lot of interest and learning activities on many different professional skills and traits, we note that most of the courses do not follow a rigorous process: the selection process of participants is usually quite open and no specific requirements are tested or estimated in the selection process; this however helps in achieving a good composition of classes in terms of variety. Furthermore, and mainly, only one country follows the ECVET system and also the attendance of courses must be better formalized. Finally, by looking in detail at the question on credits provided, while managers have access to formal training, most courses provided for developing cooperative knowledge and leadership competences are also assigned credits, while for the other competences credits are given for only some of the topics and not by all partners. Co-operative College UK provides credits for every topic.

As regards the professional profiles, we have individuated the competences that the partner institutes feel are essential to be learned for cooperative managers and we collected some information that helps in matching the job profile with the training activity. Specifically, overall, all of the competences and topics suggested to the partners seem to be considered very or quite important by all the partners and by the managers that they represent, with a few exceptions for certain topics for certain partners: human resource management had the most mixed results, while learning volunteer management is the least important topic and therefore does not represent a competence in the professional profile. Notwithstanding these results, partners claim that in many cases the managers don't express formal demand for some of the topics, since knowledge can be acquired also through informal or non-formal learning. The aspects of highest interest to the managers and for which managers express higher formal training needs are leadership, financial management, market and product/service; also the topic of social impact and international legal framework are of high interest.

As a second result to be taken into account when building the professional profile, for most of the competences (cooperative knowledge and identity, leadership, governance, human resource management, and financial management) both formal and non-formal learning are very used methods, while informal learning is always more difficult to apply to these topics. However, non-formal and informal (less formal) learning are particularly important for the development of competences on external stakeholder management and market/product dynamics. None of the partners retain that "no learning" is needed on competences and topics suggested, except with the non relevance of volunteer management for some of the partners. Moreover, while non-formal learning seems to be the best way for learning most of the topics, formal learning can support the development of competences on leadership, governance, market and product/services, though formal learning seems to not be the ideal way to learn external stakeholder management.

Some of the questions also help in opening the discussion on the existing gap in managers' knowledge. Specifically, formal training on all of the competences is deemed important, in particular for Financial Management. Governance and External Stakeholder Management are deemed less important for formal training, with the exception of the topic "social impact", which is given high priority for formal learning, while "advocacy/political representation" received low importance for formal learning. These answers can be intersected with considerations on the managers' natural traits, abilities acquired through their work experience, and educational background. In fact, interviewed institutions think that managers usually have higher personal competences on cooperative knowledge and values; leadership is also considered a natural trait of people and is more difficult to acquire. In contrast, managers usually do not have specific knowledge on governance and therefore training is needed on these competences. Some of the

topics included in the development of human resource management, financial management, and external stakeholder abilities should be covered by specific training since they do not usually belong to the managers' natural traits and knowledge. Special attention should be devoted to a better understanding and training on the relevance and management of intrinsic motivations, on the understanding of the social impact produced by cooperatives, on innovation and project management, which are not considered to belong to the general culture or educational background of cooperative managers.

As a further step of the analysis, we wanted to test the possibility of training programs where managers coming from different cooperative types or countries participate in the same classrooms and courses. Institutions providing training in the different countries claim that all of the competences are not country oriented or specific to sectors, but they can be considered transversal. The only things that stand out are some particular topics, which are considered by FTC-Italy and ADG-Germany to be country-specific, maybe due to regional differences. Moreover, all of the competences and most of the topics are also considered not specific to some cooperative types only. These answers confirm that competences and topics proposed in the analysis can be assumed to be good proxies for describing the profile of cooperative managers as a whole.

Finally, as regards learning outcomes, while the comparative study does not aim to achieve a precise definition of the learning outcomes, data collected on the competences and proposed definitions of topics and competences themselves help in individuating some keywords that must be taken into account when formalizing learning outcomes. It is in general important to note that most partners have learning outcomes for all the topics, with only occasional no and some n.a. responses.

In light of these important results, more attention can be devoted to some aspects in order to find confirmation especially on the gaps and on the professional profile. The focus groups conducted by the partners will be the best way to integrate our existing information and add specifications. In the focus groups, partners will discuss the following questions with practitioners:

- a. Is the job profile accurate/does it resonate with the participants' experience? Is there something they find irrelevant or is there anything missing?
- b. For each of the 7 competences, what is the topic/aspect that stands out as a characteristic of a co-operative manager as opposed to a manager in a different enterprise form?
- c. Please tell us which competence(s) you think can be learned in formal training settings (e.g. university course), informal training (e.g. on the job), or non-formal training (e.g. workshops, seminars, brief courses without credit).
- d. For you personally, which is your strongest/most utilized competence? Which one do you use least? And for which competence do you feel you are most in need of training?
- e. Thinking about challenges faced today, what do you think is the competence that must absolutely be learned by cooperative managers?