



*EUCoopC*

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MULTILATERAL PROJECTS FOR DEVELOPMENT OF INNOVATION

## WORK PACKAGE II

### D 2.2. BOTTOM – UP IDENTIFICATION OF THE LEARNING NEEDS

**Understanding the gap between existing and ideal profiles for managers  
in the coops**

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Partner: P2 - EURICSE

Deliverable: 2.2. Bottom-up identification of the learning needs

Work package: 2 State of the art analysis

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## 1. Premise

Work package 2 was planned with the aims of:

- providing an overview of existing cooperative manager profiles in the partner cooperative systems in relation to learning outcomes (LO), cooperative learning frameworks, EQF/NQF and ECVET system, by comparing countries and coop types [*existing*]
- defining common and transversal learning units for a coop manager specialization, which will identify a new and specific European job profile for cooperative managers in line with the cooperative principles and values [*ideal profile*]
- conducting a gap analysis of the needs of the cooperative enterprise in terms of qualified managers and existing suitable profiles [*gap analysis*]
- identifying areas of competences suitable for mobility learning units (MLU) [*proposal*]

In order to meet these objectives, the work package was structured in two phases of analysis.

The first step was the understanding of the existing supply of learning activities in the various partner countries, where learning was divided by formal, non-formal and informal. The analysis was carried out in the month of February 2013 and it resulted in a first report entitled “Understanding the existing supply of training programs by partners”. By asking the partners the specific competences developed and topics addressed in the learning activities, the report also allowed for a preliminary understanding of the main traits to be included in the job profile of cooperative managers. Furthermore, by comparing data among countries, complementarities and heterogeneities in programs and methodologies provided was sketched.

The second step of analysis was carried out between the end of March and the month of April 2013 and it consisted of the management of one focus group for each partner country. Focus groups were managed by following a common methodology and questions. The aim was to understand the existing professional profile of managers in the cooperative sector and in the different countries, their training and learning needs, and their perceptions about learning activities. The information collected is the core of the present report.

The report therefore follows this approach: it firstly individuates and schematizes the main results of the previous phase of analysis in order to point out outcomes achieved and questions already opened. It then introduces the methodology, aims, and specific questions which represented the core of the focus group analysis. Results are briefly introduced by sketching them in a synthetic grid and by expounding the outcomes achieved. Some final conclusions follow and an appendix with the all of the reports from the individual focus groups complements the analysis.

## 2. The starting point

The analysis which was first conducted with partner feedback on learning activities helped 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 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 and for some partners only: 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 do not 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 frequently 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 declare 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 none of the competences are particularly country oriented or specific to sectors, but that 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, none of the competences and almost none of the topics are considered 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 not answered responses.

### **3. Methodology and aims of the focus groups**

The focus groups were conducted in order to test and confirm the results obtained in the first step of analysis, in particular the gaps and professional profile that emerged. In the focus groups, partners were asked to 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?

Focus groups were organized by Coexphal (Spain), FTC (Italy), FDSC (Romania), ADG (Germany), and, the University of the Aegean (Greece)<sup>1</sup> while Co-operative collage (the UK) did not conduct a focus group.

As suggested in the guidelines to the focus groups, a minimum number of 10 cooperative managers or elected members should have been included in the discussion. The achieved number however ranged from 6 (Greece) to 19 (Germany) - with 9 participants in Romania, 10 in Italy, and 15 in Spain -. The groups were quite heterogeneous in terms of age of the participants (managers with lengthy experience as well junior managers were involved) and role in the organization: some senior managers (one or two per focus group), middle managers (who comprised generally half or the whole of the group), elected members (mainly board members). Each partner involved representatives of their member cooperatives and therefore a mix of managers coming from different cooperative types were involved in the Italian and in the Romanian focus groups; agricultural managers only in Spain; managers from the financial sector in Germany; and managers of social cooperatives in Greece.

#### **4. A sketch of information collected**

Questions brought to the attention of participants are reported in the following table and answers and main points raised by the focus groups are distinguished for each country and sketched in the columns. In order to provide further detail on the specific questions and points raised in each country, we included the individual reports completed by the partners as attached files and summarize the information in the following observations.

As a first result of the focus groups, all the participants in all of the countries find the job profile individuated in the previous step of the analysis sufficiently elaborated and complete. Competences and topics proposed were found to be in line with the participants' experience, while participants have some suggestions related to the need for focalizing most of the topics on the specific traits and needs of cooperatives and adding some 'business viability issues' by reflecting more, for example, on strategies for the coops, planning activities, facing competition, etc. While some of these topics are already included in the units proposed in the conclusion of the previous report, they need to be further highlighted when describing the learning outcome related to these topics. The job profile already described was viewed as somewhat excessively detailed but missing only very few topics. The practitioners confirmed that some of the topics that were already individuated by the partners as superfluous in the training program can be disregarded in the final job profile. This is the case for political representation, external stakeholder management and internal legal framework, although not all of the practitioners consider these topics irrelevant.

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<sup>1</sup> University of the Aegean did not respond to the first part of the study (grid of analysis), but sent its contribution through the focus group feedback.

Linked to some previous results, the second question about which practitioners were asked to discuss was the individuation of the main topic for each competence. The objective of this question was to individuate the specific traits and skills that managers of cooperative enterprises should possess in order to distinguish their training and knowledge from general training and skills and from for-profit managers especially. By comparing answers collected, we find some agreement on the relevance of the competence 1 - Cooperative knowledge as a whole, while in the other competences the topics that seem to be of particular relevance to the role of cooperators are: values, social and relational skills, and organizational culture (in defining leadership), mission and vision (in governance), policies of HRM (in the fourth competence), achieving economic and social goals (in financial management), stakeholder map and social impact (in external stakeholder management) and finally different topics without priorities in market and products knowledge.

When looking to the third discussion topic, the focus groups mainly indicated that the competences related to governance, human resource management and financial management are better learned through formal training, while training on leadership and external stakeholder management is more frequently acquired through informal training. The agreement is not so diffused, and some countries diverge in the perception of training methods, but the idea that cooperative managers are involved in a daily learning-by-doing process and therefore formal learning can only support and formalize practices and learning outcomes that are usually developed in informal and sometimes non formal ways seems to be quite diffused.

The fourth discussion theme helped in understanding the actual knowledge by practitioners, the gap that they perceive in their actual training, and therefore their need for training. Firstly, managers and elected members interviewed claim that cooperative knowledge and leadership are the most utilized competences, although the former are not so diffused in all of the countries and therefore should also be considered in training programs. The most difficult activity, however, is to put into practice the knowledge acquired in the daily working life, meaning that, in our opinion, although informal learning is a diffused practice, cooperators always require formalization of their knowledge in the form of formal training. This statement is supported by other data: managers and elected members find that all competencies should be learned (as claimed in Spain), and special attention should be devoted to cooperative identity, HRM, marketing and project management, governance as a whole, and financial management.

Further, the last topic of discussion reflected on the competences that must absolutely be learned by cooperative managers in light of the recent crisis and challenges faced by cooperative firms. Having a proper leadership style appears to be the most needed competence to acquire, since a good leader is able to manage teams and human resources, to relate with external stakeholders also by embodying social responsibility, and to have predictive answers for innovation, and facing market and product competition. Certainly, the *fil rouge* in the answers by practitioners of different countries can be individuated in the need to be a 'problem solver' by understanding the right way for translating values and cooperative traits into competitive and exclusive advantages in managing both internal and external resources. Advantages that can improve loyalty, trust in the organization, and, as a consequence, lead to higher resource gathering and long-term stability.

	Italy	Spain	Germany	Romania	Greece
Is the job profile <b>accurate</b> /does it resonate with the participants' experience? Is there something they find <b>irrelevant</b> or is there anything <b>missing</b> ?	<p>"...all the participants generally found the profile emerging was in line with their experience..."</p> <p>"...should be even more focused on the competences that distinguish the management of a cooperative from the management of another form of enterprise..."</p>	<p>"...The profile is in accordance with the experience..."</p>	<p>"...the 100% of the participants indicated their agreement..."</p> <p>"...irrelevance of the 'political representation' (...) 'External Stakeholders Manag.' and 'Inter. legal frameworks'..."</p> <p>"...The topic of strategy should be included, in their opinion, either under 'Governance'..."</p>	<p>"...the profile is quite accurate (...) several proposed modifications (...) reformulating Topic F of Competence 1; competence 2 add Topic E - Communication and media (...) adding of Topic H in competence 7 'Environment protection in delivering/creating services/products'..."</p>	<p>"... all the above are important in theory but the coop. in Greek reality have to face crucial/basic business viability issues..."</p>
For each of the 7 competences, what is the topic/aspect that <b>stands out</b> as a characteristic of a co-operative manager as opposed to a manager in a different enterprise form?	<p>"...Competence 1-Cooperative knowledge..."</p> <p>"...to put cooperative knowledge into practice ..linked with Competence 2- topics values, relational skills and leadership style, and Comp 3- topics governance models, involvement strategies, mission"</p>	<p>"...the exception of those related to cooperative knowledge, were necessary for any decision maker within a business..."</p>	<p>"...Competence 2, 'Values and 'Organ. Culture' - Competence 3 'Member engagement' - Competence 5 'Achieving eco. and soc. goals' - Competence 6 'Social impact' - Competence 7 'Local market dynamics'..."</p>	<p>"...only small differences between a coop and other form of enterp..."</p> <p>"...Comp. 1 All topics - Comp. 2 Topics B, C and D - Comp. 3 Topics B, C and D - Comp. 4 Topics A, B and C - Comp. 5 Topic E - Comp. 6 Topics A, D and E - Comp. 7 Topic C..."</p>	<p>"...in Comp. 1 topic A, topic F was incomprehensible (...) Comp. 2 topic B and D (...) Comp. 3, Topic A and D (...) Comp. 4 topic A and F (...) Comp. 5 topic E (...) Comp. 6 topic A and B (...) Comp. 7 topic F..."</p>
Please, tell us which competence(s) you think can be learned in <b>formal</b> training settings, <b>informal</b> training, or <b>non-formal</b> training.	<p>"...all technical, legal, financial, economic (...) knowledge can be acquired in formal training, while other competences such as cooperative identity, cooperative leadership and governance, are easier to acquire in non-formal and informal settings..."</p>	<p>"...people who work in a cooperative were in a continuous process of learning and recycling knowledge in these competences (...) elected members receive formal and informal training periodically..."</p>	<p>"... formal: competence 5 'Financial Management' and some topics of the competence 7 (...) informal: competence 2 and 4 (...) all competences could be leaned in non-formal way, except for competence 5..."</p>	<p>"...formal: Competence 3, 4, 5 and 7 (...) informal contexts, the group named Competence 1 and 6 (...) leadership competences through non formal learning..."</p>	<p>"... Formal Training: Competence 1, 2, 3 (topic a), 4, 5 - Informal Training: Competence 2, 3, 6, 7 - Non-formal Training: Competence 1, 2, 3, 4, 5, 6, 7..."</p>
For you personally, which is your <b>strongest</b> /most utilized competence? Which one do you use <b>least</b> ? And for which competence do you feel you are most in <b>need of</b> training?	<p>"...most utilized competences are technical..."</p> <p>"...the most difficult part is putting into practice the cooperative values..."</p> <p>"...training in cooperative identity not only at local/national level is still needed..."</p>	<p>"...first and second are the most important: 'Cooperative Identity and Knowledge' and 'Leadership'..."</p> <p>"...all competencies should be learned by all the members of the board, general directors and middle managers..."</p>	<p>"...the most utilized was the competence n. 2 'Leadership' (...)used least, competence n. 6 'External stakeholder management' (...) competence n. 4 'HRM' they feel to be in need of training..."</p>	<p>"...most utilized competences in the group are Competence 2 and 3 (...) Competence 7 is the one mentioned by all participants as being less used (...) they need training in marketing and project management (Competence 7)..."</p>	<p>"... 'co operative principles' is the most utilized (...) least utilized is Competence 6 'External stakeholder management' (...) a need for training in competences 3, 4, 5 (Governance, HRM, Financial Management)..."</p>
Thinking about challenges faced today, what do you think is the competence	<p>"...need to have more competences in networking, in strengthening alliances (...) managing innovation, and in</p>	<p>"...they consider the most relevant competences to be 4, 1 and 2"</p>	<p>"... competence n. 2 'Leadership' is a crucial pillar (...) also expressed competences 5 and 7 of being</p>	<p>"...all of them are of absolute importance in managing a Coop. (...)loyal teams and loyal employees (...)which leadership</p>	<p>"...should definitely develop according to the participants are the competences 4, 7 (Human Resource Management, Market &amp;</p>

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<p>that must <b>absolutely be learned</b> by cooperative managers?</p>	<p><i>embodying c.s.r. as a prerogative of the cooperatives...plus certificate of coop.training...</i></p>		<p><i>of great importance..."</i></p>	<p><i>style is the most suitable (...ability to position the cooperative on the market..."</i></p>	<p><i>products/services) ..."</i></p>
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### 5. Remarks on the gap between existing and ideal profile

While at the beginning of the analysis we expected managers and elected members to be insufficiently trained on the different competences and topics, previous results tend to support instead that we should not consider the gap in terms of deficiency or lack of skills. Managers conduct their activity by possessing some informal knowledge, and this informal knowledge differentiates them from for-profit managers. Nonetheless, ideologies and a feeling of being different and having a social value and solid principles do not help in managing in a proper way some competencies: from financial management to human resource management, from governance to market and products issues. Therefore, the real gap is in the ability to translate what we could call 'intentions' into 'actions' and the training programs should help in solving this point. What could be the solution? To provide complementarities among formal, non formal, and informal training, to apply knowledge acquired into work projects, and to convert theory into learning outcomes.

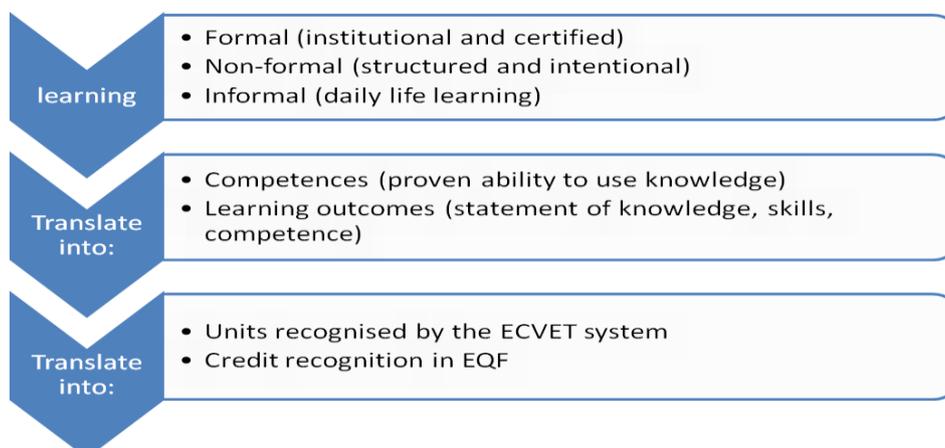
The ideal profile, as a consequence, should include all the competencies and all the topics proposed in the former step of the analysis, apart from a few topics that appear to be too specific and differentiated by country. Furthermore, the ideal profile must take these competencies and topics by contextualizing them in the cooperative sector and therefore by putting values in the practice of each technical skill and managerial activity (from HRM to marketing, from stakeholders and governance to products and innovation).

The learning outcomes achieved at the end of the training programs from the practical execution of activities in the organizations will therefore have to develop relational and leadership abilities for each competence among managers.

### 6. Conclusions and suggestion for the following WP

As a conclusion we come to summarize some results that work package 2, carried out by Euricse, has achieved and to make some suggestions for the following work packages.

Generally, we can claim that the work package has helped to build the first two steps of the methodological process for arriving at a common cooperative professional profile and understanding the needed training supply. The process is sketched in the following figure and the work package has achieved sufficient results upon which to base the last step and work package three.



Specifically, we come to summarize a proposal for formal and informal/non formal learning. As regards formal training, we already claimed that the course “on cooperation and mutuality directorship” in the UK and “social economy entrepreneur” in Romania, which are formalised can represent the pillar for the mobility training program and can give other countries methods for recognition and formalization of their courses. Other countries, which provide more specific courses and with academic teaching also (see Italy and Germany), can supply other specific knowledge and opportunities for training, although a formalization is needed as well as an increase in the number of hours of teaching. All countries need to apply ECVET and EQF and partners have to also consider the opportunity to work more in partnership with umbrella organizations for example to cover the participants’ fees.

As regards informal and non-formal training, the mobility learning program should provide a strict integration among on-the-job and within-cooperatives training (informal) and structured meetings (non-formal) since both types of learning and especially this last one are considered very important. Our suggestion, derived from the data analyses carried out in the work package, is to consider that the mobility could be structured in workshops/seminars on one specific topic/unit at a time followed by visits to local cooperatives and comparisons with other practitioners in order to implement the ‘individual experience’. Countries such as Italy, where many courses are provided with structured methods but are not as formal as in other countries, should be considered for non-formal learning experiences; all countries are however specialised in workshops. Moreover, learning managed by practitioners (as occurs in many countries) can be considered as the link between non-formal and informal.

As a final consideration, data that emerged from the focus groups give further support to the idea already shared in the grid analysis: competences and topics proposed are very important in the managers’ training and can be learned not only in generic terms, but also by adapting theory and practice to the context of cooperatives and to the cooperative values and aims. In order to achieve a complete and detailed learning profile, we therefore feel obliged to give some advice to the partners for the following work packages. Firstly, regarding the existing gap in managers’ knowledge, although a real gap does not exist in terms of daily activity, formal training on all of the competences is deemed important, in particular for Financial Management, less so for Governance and External Stakeholder Management. Non-formal learning prevails in Cooperative Knowledge and Values and in Leadership. Special attention should be devoted to a better understanding of intrinsic motivations, the social impact, innovation and project management, which are not considered as belonging to the general culture or educational background of cooperative managers.

Finally, the possibility of common training programs with different types of managers and mobility through countries is supported since none of the competences are considered country oriented or specific to sectors, but 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. 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.