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OPPORTUNITY



PERSONAL
DEVELOPMENT

The potential for a social enterprise environment
to meet the training needs of older job seekers

An International Specialised Skills Institute Fellowship.

LEANNE FITZGERALD

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i. Executive Summary

In Victoria today if you lose your job past the age of 50, you are in the hardest age bracket to find work again. The average older job seeker searches for work for twice as long as a 15 to 24 year old. The average time unemployed 55 to 64 year olds spend looking for work has hit an 11-year high of 116 weeks.¹ Yet current government funded programs have a much stronger focus on youth unemployment than the plight of older workers.

From visits to more than a dozen Social Enterprises, Leanne FitzGerald (the Fellow) was given repeated evidence of the value of the Social Enterprise model to provide effective training for the older job seeker in addition to meeting organisational and community needs that align closely with the values of the Learn Local sector.

Not only did the Fellow witness effective pathways to employment through Social Enterprise but she also observed a range of other benefits for older job seekers including improved mental health, confidence and a reduction in social isolation. Through a Social Enterprise model, the older job seekers were given a valuable opportunity to be more productive and connected to community. Their lifelong suite of skills and knowledge was validated and valued. Through addressing their disconnection from community, as well as their employability skills, they achieved increased wellbeing and improved opportunities to re-enter the workforce.

The Fellow researched the skills enhancement areas required for Learn Local Organisations (LLOs) to be able to use social enterprises as customised training environments for the unemployed over 55s. One of the strongest themes observed

by the Fellow in the host organisations visited was the prevalence of co-designed and peer to peer learning within the Social Enterprise environment. This aligns with Billett's findings that older workers need to be able to contribute to the learning in a training environment that positions them as contributors as well as learners for effective results.²

The Fellow observed many examples of high quality training of older job seekers within social enterprises. In every case, the training was conducted within the context of the work environment with roles and terminology reflecting that environment rather than the classroom, effectively reinforcing the development of employability skills. In most cases the learning embraced far more than the strictly technical or vocational aspects of the task. The employability skills identified by the Learn Local sector in the Pre-Accredited Quality Framework were included in a very practical way in the Social Enterprise environments. However, the learning taking place was generally wider, deeper and of a longer duration than that included in regular Learn Local pre-accredited courses. The identification of barriers, needs, and strengths was successfully embedded in a range of wrap around services that accompanied most of the Social Enterprises. Most of these were offered as workplace 'clubs' or 'groups' or as on the job professional development.

In a Victorian environment where some Learn Local Organisations are moving away from Pre-accredited training because they feel it sits awkwardly within a community development environment, the Social Enterprise model with associated workplace wellness programs observed by FitzGerald could be of great value. The potential

¹ SBS, Older Unemployed facing long wait for work, <http://www.sbs.com.au/news/article/2016/04/21/older-unemployed-facing-long-wait-work>, Accessed September 15th 2017

² S. Billett, Older workers, employability and tertiary education and training, Older Workers Research Readings, NCVER, Adelaide, 2011, p. 97

to rethink the design of pre-accredited training courses using Social Enterprise, co-design and community development principles may provide a win-win situation for older job seekers, Learn Local Organisations and their communities.



Image 1: Grassmarket Community Project, Edinburgh

1. Fellowship Background

In the year to January 2015, there were 80,000 unemployed Australians aged 55 and over, an increase of 12 per cent over that year. The Australian Human Rights Commission's National prevalence survey of age discrimination in the workplace paper found that over a quarter (27 per cent) of Australians aged 50 years and over indicated that they had experienced some form of age discrimination on at least one occasion in the workplace in the last two years and that a third (33 per cent) of people who had been discriminated against gave up looking for work as a result of experiencing age discrimination.³

The current Centrelink Newstart requirement for job seekers in the over 55 cohorts is that they meet their mutual obligation requirements by doing at least 30 hours per fortnight of suitable paid work, self-employment, approved voluntary work or a mix of these.

The aim of the Fellowship was to investigate how not for profit organisations in the United Kingdom, with similar profiles to Victorian Learn Local Organisations, have developed learning programs that address mutual obligation and training options for the over 50s. The focus of the research was the use of social enterprises as environments for training that includes employability skills, vocational skills and/or entrepreneurship skills for older job seekers.

The Fellowship study aimed to research:

- » Successful models of social enterprise for the employment and training sector
- » Models for embedding vocational and employability training that meet the needs of over 50s
- » Models of providing entrepreneurship skills for older job seekers to establish their own social enterprise or small business start up
- » Factors for achieving successful pathways to employment and self-employment.

1.1 Methodology

The methodology employed by FitzGerald included an extensive literature search to determine organisations in the United Kingdom that had been successful in establishing social enterprises that met important local needs. In addition, peak bodies providing funding and networking support to social enterprises were investigated for relevant reports and resources.

Having identified promising organisations, the Fellow contacted the Chief Executive Officer or the public relations manager with a set of questions to determine the extent to which the organisation aligned with Victorian Learn Locals and the degree to which they provided training to over fifty year olds.

³ Australian Human Rights Commission, 'Issues paper: employment discrimination against older Australians', *Australian Human Rights Commission Website*, 2015, <https://www.humanrights.gov.au/publications/issues-paper-employment-discrimination-against-older-australians/5-what-do-we-know> , accessed 25 July 2017

Via emails, the Fellow arranged for a series of interviews with key personnel in fifteen organisations. In two of the organisations considered most relevant, a more prolonged visit was arranged to enable the Fellow to shadow key staff and interact with clients (The Grassmarket Community Project in Edinburgh and Better Pathways in Birmingham).

Notes were kept of each interview and additional available documentation collected on site. This material was written up in detail after each visit.

The Fellowship was conducted between May 21st and June 14th 2017.

1.2 About the Fellow

Leanne FitzGerald - (Manager, Coonara Community House, Learn Local Organisation and RTO)

Qualifications:

- » Bachelor of Arts (Deakin University)
- » Graduate Diploma in Human Services Management (Monash University)
- » Diploma of Librarianship (Box Hill TAFE).

With over twenty years in the Adult Community Education sector as Manager of Coonara Community House in Upper Ferntree Gully (Victoria), Leanne has a passion for using a community development approach to adult learning. Coonara is a Learn Local RTO with four qualifications on scope and a selection of over 30 pre-accredited courses aimed at providing pathways to employment and further study in the local community.

Leanne's interest in providing students with experiential learning opportunities has led to the development of many community initiatives and projects over the years. These include: a community magazine published quarterly, a community food garden and kitchen, an artisan market and three television series broadcast nationally on Channel 31.

Leanne leads an innovative team of trainers and community development workers who are always eager to take learning to new levels and new places. A 2012 project entitled 'Pop up learning in Knox' took 48 different learning opportunities into community places such as cafes, sports clubs, mobile libraries, the recycling centre and empty shops. This was so successful that Westfield Knox City now provide a permanent retail space for pop up learning and community engagement activities which is managed by Leanne and her Coonara team on behalf of more than 400 not-for-profit groups in the City area.

Leanne's focus for her Fellowship was the specific training needs of unemployed people over 55 years of age with mutual obligation requirements to undertake 15 hours per week of volunteer work in the community. The opportunity to investigate social enterprises most suitable for both a Learn Local Organisation and the older learner, and the models for embedding training used in these enterprises, has inspired Leanne to trial a model at Coonara Community House in 2017-2018.

2. Australian Situation

The National benefits of increasing the workforce participation rates of people aged over 55 in Australia are significant for individuals and the economy. If Australia's employment rate of 64 per cent for workers aged 55-64 were increased to those of Sweden (where 74 per cent of those aged 55-64 are employed) Australia's GDP could be around 4.7 per cent higher. This represents gains of up to A\$78 billion for the Australian economy.⁴

There are existing social enterprises within Learn Local Organisations and Neighbourhood Houses in Victoria. The Fellow could not identify any that were targeting the participation of unemployed over 55s however the use of Social Enterprise to achieve social and economic outcomes for participants is starting to be recognised within the sector and is potentially ready for expansion.

Social Enterprises are gaining an increasing share of the mainstream business sector in Australia, and as David Brookes, Managing Director, Social Traders states, it is recognised for its contribution to a diverse economy, providing innovative solutions to employment and access to services for disadvantaged Australians. There are an estimated 20,000 social enterprises operating in Australia across all industry sectors. Social Traders statistics show that 35 per cent of these target people with disabilities, 33 per cent target young people and 28 per cent disadvantaged women. There is currently no significant Australian focus on the engagement of unemployed over 55s.⁵

In 2016 the Victorian Government drafted a sector-wide strategic framework, the first of its kind in Australia. The framework includes a suite of proposed initiatives that provide potential support for the Learn Local sector to realise the potential of Social Enterprise for both economic and social benefit. The time would appear to be right for innovation by Learn Locals in this area.

Research by Stephen Billett, from Griffith University, suggests that many current training models are designed for occupational preparation at the start of a career and aren't entirely suitable for this cohort. Billett suggests that the contribution of older workers to the learning process needs to be recognised.

"They require a training environment that positions them as contributors as well as learners – collaborators... those (training models) that can be supported and sustained within community or workplace settings also need to be identified and developed."⁶

As VET providers, Learn Local Organisations are uniquely positioned community businesses with potential to develop 'enterprise' style training environments designed to benefit the local community as well as a range of learners.

⁴ Australian Institute of Health and Welfare, Australia's welfare 2015; *Australia's welfare series no. 12, Cat. no. AUS 189*, Canberra, 2015 p. 1

⁵ J. Barraket, C. Mason, B. Blain, *Finding Australia's Social Enterprise Sector 2016: analysis*, Social Traders, Melbourne, 2016, p. 3

⁶ S. Billett, *Older workers, employability and tertiary education and training*, *Older Workers Research Readings*, NCVER, Adelaide, 2011, p. 97

3. Skills Enhancement and Knowledge Acquisition Areas

This Fellowship researched the skills enhancement areas required for Learn Local Organisations to be able to develop social enterprises as customised training environments for the unemployed over 55s. These were identified as including:

- » Social entrepreneurship and business development skills
- » Training models for embedding vocational and employability skills that meets the needs of over 50s
- » Training models for providing entrepreneurship skills for older job seekers to establish their own social enterprise or small business start-up.

1. Observation and identification of the key factors in the design and operation of successful social enterprises in the employment and training sector.

- » Meeting with key staff in a number of successful social enterprises that have a potential alignment with the Victorian Learn Local sector.
- » Discussing the operational models of their social enterprise.
- » Discussing the key challenges to, and factors in, the success of these social enterprises.

Expected outcome: Document potential models of operation for Learn Local social enterprises with key success factors.

2. Observation and identification of how the training needs of older job seekers are addressed within these social enterprises.

- » Discussion, with key staff, about if and how the training needs of this cohort differ from other learners.
- » Investigation of training techniques used within the social enterprises to deliver employability and vocational skills.
- » Discussion and observation of how the outcomes of the training are captured or assessed.
- » Discussion, with key staff and clients, about the provision of pathways to employment.
- » Discussion, with key staff, about the outcomes and success of the training delivery.

Expected outcome: Documenting the key features of successfully embedded training for older job seekers within a social enterprise environment.

3. Observation and identification of how social entrepreneurship skills are delivered to older job seekers to enable them to establish their own small businesses.

- » Discussion with key organisations about the features of successful projects conducted in the UK with over 55 unemployed people.
- » Discussion of the potential use of a range of resources developed from the social entrepreneurship programs for this cohort.

Expected outcome: Identification of the key recommendations for the delivery of social entrepreneurship skills to the over 55 job seekers including a listing of available resources from successful UK projects.

4. International Experience and Discovery

4.1 International experience and learnings

The Fellowship provided FitzGerald with a unique opportunity to explore the potential for social enterprise to provide a robust learning environment for mature-aged job seekers in a range of different organisations across the UK. As is the case with the Learn Local Sector in Victoria, none of the organisations had an exclusive focus on training over 55s, however all of them provided valuable insights into the chosen skills enhancement and knowledge acquisition areas of the Fellow.

One of the strongest themes observed by the Fellow was the prevalence of co-designed and peer to peer learning happening within the social enterprises she visited. This aligns with Billet's findings that older workers need to be able to contribute to the learning in an environment that positions them as contributors as well as learners. This was illustrated by strong team environments that included the unemployed participants as 'volunteers or unpaid staff' with recruitment, induction, ongoing training, appraisal and recognition on the same basis as paid members of the team. The terms 'team member', 'volunteer' or 'trainee' were favoured over 'learner or student'. In most cases where classroom-based learning was included in the social enterprise it was described as a 'group' or 'club', not a 'class'. Whilst the main purpose of the social enterprise was often training, the initial engagement strategy seemed to be focussed on the immediate, mostly self-identified, needs of the participant. Most often this was the desire to find work but also included addressing social isolation, mental health issues or disability. Training was just one of the tools used to meet these needs. Once engaged in the social enterprise environment, the participants were often able to progress through internal pathways into leadership roles within the teams, thus enhancing their confidence and employability.

An apparent boom in re-use, up-cycling and repairing to divert resources from landfill and more expensive recycling operations seemed to provide an exciting range of opportunities for social enterprises. This was, in some part, due to government waste reduction initiatives and public demand for environmentally sustainable consumer products.

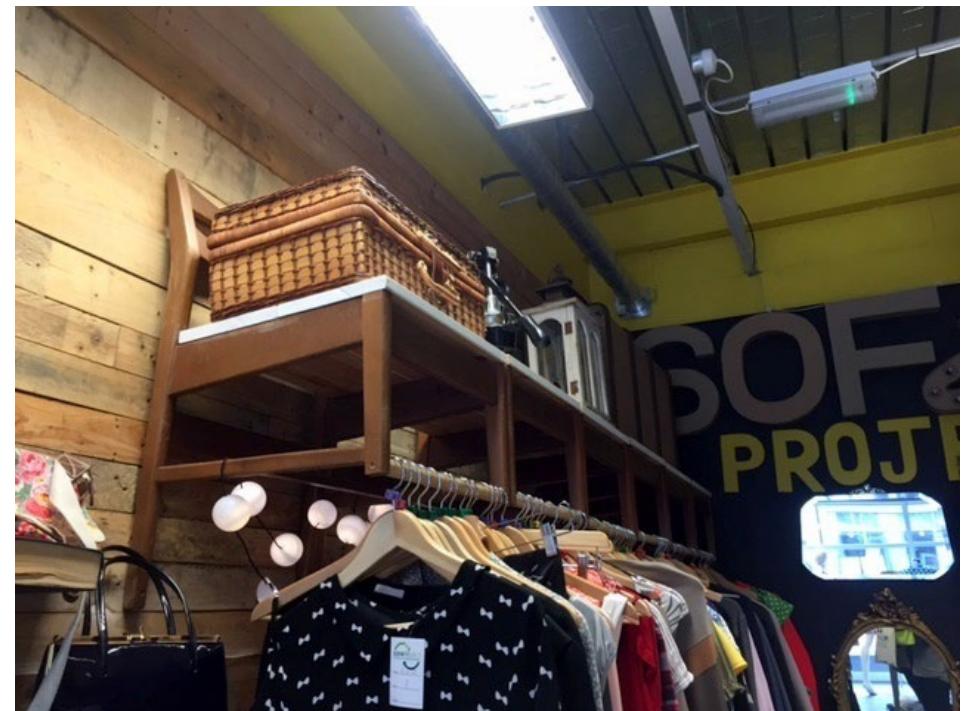


Image 2: SOFA project shop



Image 3: Remakery, Edinburgh

The application of the *Employability Pipeline* model in Scotland acknowledges that there are two stages of work that needs to be addressed for those furthest from employment prior to the provision of 'employability skills' training.⁷ The first being engagement and the second, needs assessment and barrier removal. The social enterprises that the Fellow visited illustrated the value and success of this model. In the words of Tommy Steele, Wood Workshop manager at The Grassmarket Community Project in Edinburgh, "Sometimes you need to get people to understand right from wrong before they can progress to being remotely employable and that takes time and trust". The best trainers observed by FitzGerald understood that it does take time and trust to build confidence and remove barriers to learning and employment for many older job seekers. Any rush to fast-track this process can result in job seekers falling back out of employment in a short time and returning to step one in the process. Outcomes-based funding models are a challenge to this process so developing a viable social enterprise environment provided many organisations, such as the Grassmarket Community Project, with the freedom and resources to work within their own model.

⁷ Employability Pipeline, Employability in Scotland website, <http://www.employabilityinscotland.com/employability-pipeline/the-employability-pipeline/>, accessed 19 July 2017



Image 4: Tommy Steele, Grassmarket Community Project Woodshop Manager

Funding initiatives such as the one hundred million pound Millennium endowment that established the UnLtd Awards Trust, provides funding and support to individuals in the community with ideas for social enterprise start-ups. This exciting, and long-term initiative, enables a high number of small social enterprises to be established often meeting very local community needs. This seems to provide valuable self-employment opportunities to individuals, in direct contrast with the situation in Australia where the majority of social enterprises are operated by existing not-for-profit organisations.

Managers within the social enterprises visited by the Fellow confirmed that the success of the enterprise itself was based on sound business principles including; developing the right product or service, identifying a strong market, employing senior staff with the appropriate skills and having a sound business plan. FitzGerald was impressed with their ability, however, to create a strong community development culture within a business and training environment. She observed

that this model could be very valuable for the Learn Local sector in Victoria. Sam Baumber, from The Social Enterprise Academy in Edinburgh explained that even in the UK, where social enterprises are far more prevalent than in Australia, there are still key stakeholders in the community and in government who don't understand the concept. He declared to FitzGerald that he prefers the term 'Enterprising Third Sector' to Not for Profit, Community-based, or Social Enterprise as it makes a positive statement and embraces the whole sector.

4.2 Analysis of skills enhancement and knowledge acquisition

4.2.1 Area 1: Observation and identification of the key factors in the design and operation of successful social enterprises in the employment and training sector.

The peak funding agency for Social Enterprise, UnLtd, has explored potential and existing business models for social ventures tackling unemployment. Their research identified that social business models are shaped by three factors:

- » *Buyer – who is paying for social impact? UK central Government, Local Authorities, Charitable Foundations, other businesses or individual consumers.*
- » *Method of purchase – how is the buyer paying? Through grants, contracts, sales, employability services, donations or sponsorship.*
- » *How social impact is purchased – directly or indirectly? Social impact can be directly purchased, or indirectly through the sale of other products and services.⁸*

⁸ UnLtd, *Understanding social business models in the employment sector; insights for social entrepreneurs*, UnLtd, London, 2013, p.11

Using government training funding, either accredited or pre-accredited to support the operation of a social business is an obvious option for Learn Locals. This model fits the Impact Seller model described below.

The report identified three models and gave simple examples:

Social Business Model: The Impact Sellers we spoke to are delivering a range of social impact, supporting the long-term unemployed ... as they move towards employment. Social impact includes; improving employability skills, creating employment opportunities, building capacity and networks to deliver employment services, and supporting people into employment.⁹

Example - Social Business Model: Impact Employer

- » Buyer: Business to Business. The largest customer group are local catering businesses.
- » Method of Purchase: Sales to the general public or business.
- » Social Impact: Indirect Social Impact. All customers are buying a range of products. The social impact is the employment of unemployed people in the business and that is being paid for out of operating costs.¹⁰

Social Business Model: Partial Profit Donor

- » Buyer: Businesses and General Public. Customers pay for the commercial goods and/or services.
- » Method of Purchase: Sales. Consumer sales.
- » Social Impact: Indirect. Consumers directly pay for the products and services and are therefore, indirectly pay for social impact when the business donates to charity from its profits.¹¹

⁹ UnLtd, *Understanding social business models in the employment sector*, UnLtd, London, 2013, p.12

¹⁰ UnLtd, *Understanding social business models in the employment sector*, UnLtd, London, 2013, p.15

¹¹ UnLtd, *Understanding social business models in the employment sector*, UnLtd, London, 2013, p.16

This report, and the Fellow's discussions with Ben Smith from UnLtd, provided some clear information about the advantages and disadvantages of each model of social business and identified the potential of a hybrid of Impact Seller/Employer as the most appropriate option for Learn Locals.

Ben echoed the report's observation of a trend amongst Impact Sellers to try and reduce their reliance on public funding and pursue a hybrid Impact Seller-Impact Employer model. Social ventures using this model are able to diversify their income sources to ensure sustainability. They often have multiple buyers, including public sector agencies, Local Authorities, individual consumers and other businesses.¹² This model of operation would seem most suitable for Learn Locals.

FitzGerald discussed the key success factors for operation of a social enterprise with each of the organisations that she visited. The responses aligned clearly with accepted best practice for the operation of any small business.

- » Have a business plan and get good support to develop this (Sam Baumber -The Social Enterprise Academy, Eileen Ingliss – UnLtd Scotland).
- » Choose a product or service for which there is a market (Jonny Kinross, GMP).
- » Choose the right market for your product/service (Ben Smith, Unit London).
- » Employ the right team for the job (Jonny Kinross at GMP searches for the person who has the technical competencies and strong values base/ community development knowledge that aligns with the organisation. Ambreen Khan at Better Pathways separates the business and support roles to allow specialisation).
- » Secure orders for your products/services in advance and work to those targets if possible (Better Pathways, GMP, SOFA project).
- » Better networked enterprises are more successful and less reliant on funding either through collaboration or excellent marketing or both (Ben Smith, Unit London).

¹² UnLtd, *Understanding social business models in the employment sector*, UnLtd, London, 2013, p.29

Relevant resources used or provided by the organisations visited by the Fellow:

- » NESTA & UnLtd. *Rooted; a guide to growing your own social venture*, London, 2012
- » Ingrid Burkett - *Using the business model canvas for social enterprise design*, <https://mbs.edu/getmedia/91cc0d01-3641-4844-b34c-7aee15c8edaf/Business-Model-for-SE-Design-Burkett.pdf> accessed February 2017
- » UnLtd, *Understanding social business models in the employment sector – insights for social entrepreneurs*, London, 2012
- » The Social Enterprise Academy Scotland - <http://www.socialenterprise.academy/scot/>
- » UnLtd - <https://unltd.org.uk/>
- » Social Enterprise UK - <https://www.socialenterprise.org.uk/>

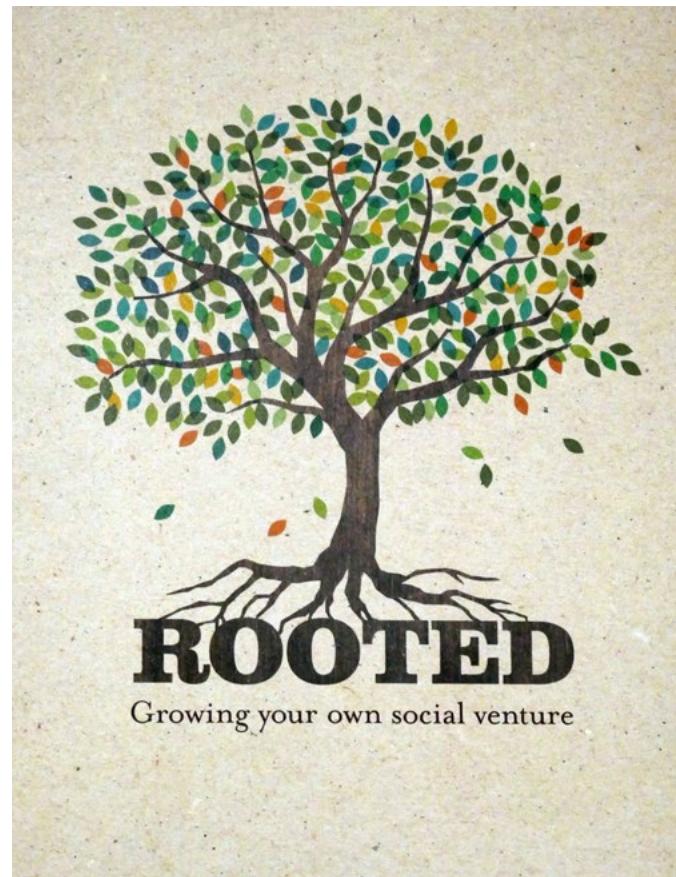


Image 5: Rooted – A guide to growing your own social venture

4.2.2 Area 2: Observation and identification of how the training needs of older job seekers are addressed within these social enterprises.

The Fellow observed many examples of high quality training of older job seekers within social enterprises. In every case the training was conducted within the context of the work environment and embraced far more than the strictly technical or vocational aspects of the task. Whilst the employability skills identified in the Learn Local Pre-Accredited Quality Framework¹³ were included in the learning, FitzGerald witnessed, there was also a broader and deeper set of personal and social skills training than often occurs in pre-accredited courses in LLOs.

The Scottish Employability Pipeline suggests that “the identification of an individual’s needs, followed by an assessment of how severe those needs are, is critical to understanding the barriers faced by an individual and the types of activities required to support them towards and into employment”.¹⁴

In addition to vocational factors, it suggests that in identifying and assessing an individual’s needs and strengths that some of the features that should be reviewed include: confidence/self-awareness, attitude and motivation towards work, health and wellbeing, caring and/or childcare responsibilities, transport and financial position.

¹³ ACFE Board, *Pre-accredited Quality Framework teaching guide*, Adult Community and Further Education Board, Melbourne 2013, p. 17

¹⁴ Employability in Scotland, *Employability Pipeline*, Stage 1, <http://www.employabilityinscotland.com/>

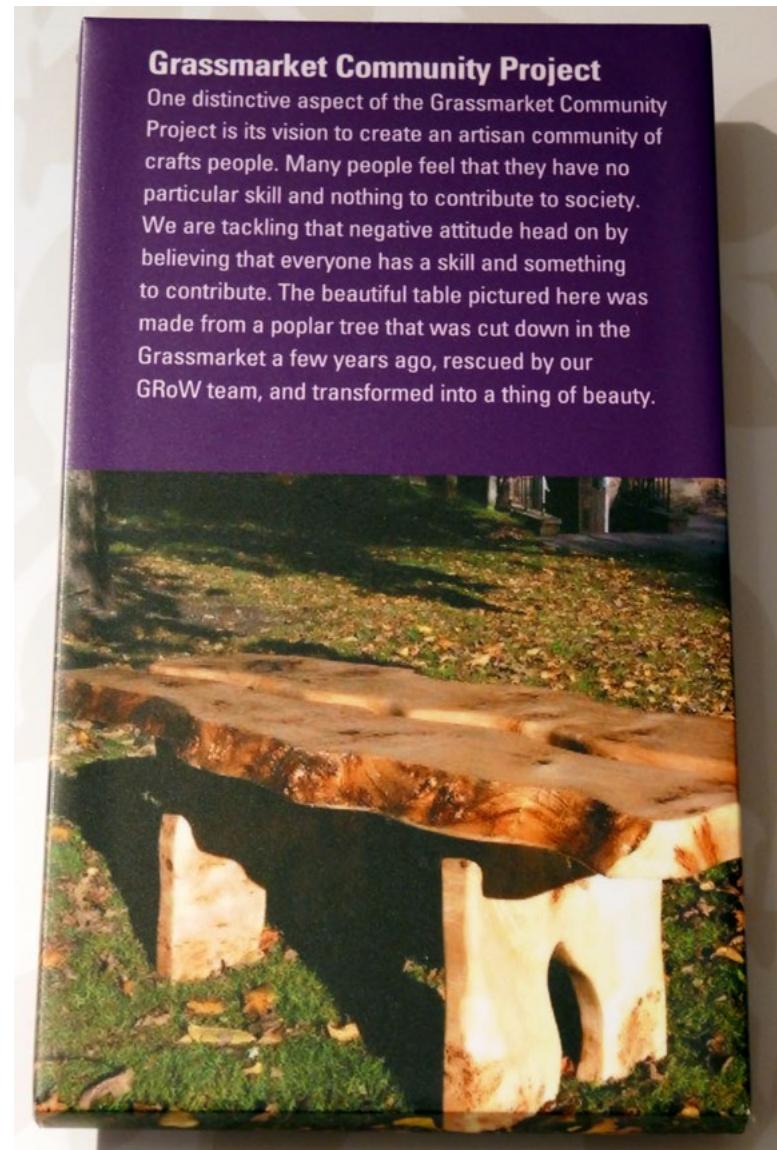


Image 6: Grassmarket Community Project, Edinburgh

This process constitutes stage one and it is recognised that the client's status at the end of this process will be 'not job ready'.

Stage 2 in the Employability Pipeline suggests that it may take a range of partners to address all of the needs and barriers to employment experienced by job seekers. Among the activities that are recommended it includes: confidence building, careers information, advice and guidance, improving health and wellbeing, peer support and mentoring alongside literacy and numeracy, core skills and job clubs. At the end of this stage the job seeker is still recognised as 'not ready for work'.

It is at the end of Stage 3 that a job seeker is declared 'work ready'. This stage includes activities such as "employability training, vocational training, job search advice, and activities to raise awareness of enterprise and entrepreneurship to meet the needs of individuals".

Jonny Kincross from Grassmarket Community Project (GMP) finds the *Employability Pipeline* a useful tool even though the activities at GMP tend to blend stages 1-3 to a great extent. At GMP in Edinburgh and at Better Pathways in Birmingham staff advised the Fellow that discussions and advice about job search are not addressed until the mentors believe that the participant is ready to start the job search process by having reached the status of 'job ready'.

As is the case with many learner cohorts, over 55s are not a homogenous group and have varying learning styles and barriers to employment. However, from observations of, and interviews with, several experienced trainers, the Fellow identified the following key features of successfully embedding training for over 55 job seekers in the social enterprises operated by the Grassmarket Community Project in Edinburgh. Many of them were also observed in other enterprises:

» **Initial engagement** seems to be enhanced by offering the client a solution to their problem rather than 'training' as such. GMP offers an experience or program that gives the older job seeker (and other participants) what they need at that point in time. e.g. Ability to meet social security requirements/

volunteering to receive benefits, social contact and connectedness – a sense of belonging, understanding and acceptance, a chance to contribute and feel valued.

» **A strong and equitable team environment.** From the first point of contact most of the enterprises treated the potential participant as a job applicant. Applications were made for entry to the program (not an enrolment form). Applicants were interviewed, inducted, provided with initial training and put into a job role as soon as possible. On several occasions whilst embedded in programs at the GMP, the Fellow was unable to accurately discern which participants in an activity were the paid instructor, the volunteer leader or clients. This was due to the fact that the team functioned so inclusively that people adopted varying roles according to their ability and interest in the task. It was also due to the fact that participants have internal pathways into leadership roles that assist in preparing them for internal or external employment.

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Image 7: Tools for life newspaper article, Edinburgh Tool Library

- » Within this team working environment **learning is co-designed and teaching shared** by paid staff and peers.
- » At GMP and some of the other enterprises, alongside scheduled times for work within the social enterprise were **health and wellbeing activities** attended by participants within the social enterprise as well as members of the local community. This addressed not only the well-being barriers to employment but also provided an opportunity for building confidence and social skills.
- » **Roles reflect the work environment not an education environment.** Trainers are referred to as Managers if they are in charge of the particular enterprise or coaches, mentors, leaders in other circumstances. Some coaching and leadership roles are filled by volunteers as well as paid staff. In some cases clients who have completed training to act in a leadership role share their particular skills and talents by facilitating activity groups. The well-being activities that are termed clubs or groups, not classes, provide an excellent opportunity for clients to share their existing skills such as photography, music, reading, gardening, or art. This is a very effective method for demonstrating to them the transferability of the skills that they had previously thought of as interests that didn't have employment potential.
- » **Demonstrating pathways in a practical manner.** When teaching vocational skills such as woodwork, cooking and sign-making, the coaches and managers emphasise the design aspects of the role to encourage creativity and enterprise. In some cases this enables job seekers to identify self-employment opportunities as well as demonstrating the pathways within the particular employment area.
- » **Length of training.** Because the training is embedded within the social enterprise there are no scheduled end dates by which the participant needs to have demonstrated competency or is required to exit the program. Each individual learns at their own pace which gives them and their trainers time to work on all their employability issues not just the skills attainment. Logically the further the job seeker is from employability, then the longer it may take for them to reach job readiness.

4.2.3 Area 3: Observation and identification of how social entrepreneurship skills are delivered to older job seekers to enable them to establish their own small businesses.

The transmission of social entrepreneurship skills to individuals exploring self-employment options was the subject of two interviews that the Fellow conducted with peak bodies in the Social Enterprise sector in the UK: Eileen Ingliss from UnLtd Scotland and Sam Baumber from The Social Enterprise Academy (Scotland). Both provided details of the roles of their organisations in providing social entrepreneurship training and support. Their organisations are funded to provide this service to both start-up social entrepreneurs and to those seeking to grow their business.

Both interviewees indicated that training and support required by over 55 year old potential entrepreneurs was not substantially different to others but did agree that there were some key differences. A 2012 report by UnLtd described the key considerations identified by Eileen Ingliss:

Entrepreneurs over 55 can be distinctive, as a group, from others in several ways:
Focus on social value more than economic outcome, Ambitious - 72% wanted to scale up their enterprise but using a micro-franchising model rather than expanding themselves (looking for legacy), Risk-takers – no less willing to take risk than younger age groups.¹⁵

In discussion with Chris Bell, the Fellow was introduced to a report completed by The Age and Employment Network (now administered by the Shaw Trust) which noted the following advice when planning entrepreneurship training for over 50s:

» *be prepared to outreach anywhere (for initial engagement) "talk to people, find out what they want and tell them what you can offer"*

- » *"nothing replaces word of mouth (if a friend recommends the service it has added power)"*
- » *accessible information – bite size and visible - available in all formats for people not on Internet,*
- » *slow burn (accept that working with marginalised (people and) communities will be a slow burn. Don't expect fast results...)*
- » *build trust and offer consistent support (e.g. coaching)*
- » *share success.¹⁶*

The Fellow noted that organisations that can provide access to start-up funding in addition to training and advice for their clients have a serious advantage over the current capacity of Learn Locals to provide support to potential entrepreneurs. Whilst Learn Locals might have a role in assisting individual social entrepreneurs by providing co-working and or learning spaces, introductory short courses and information sessions, it is probably more realistic to seek partnerships with, or provide referrals to, larger providers as the opportunity for funding is critical for people in this situation.

There may, however, be potential for individual over 55s to gain social entrepreneurship skills within LLOs in circumstances where they are involved in the business operation of the social enterprise particularly from initial start-up.

Suggested resources:

- » NESTA & UnLtd, *Rooted; a guide to growing your own social venture*, London, 2012.
- » Burkett, Ingrid Burkett, *Using the business model canvas for social enterprise design*, <https://mba.edu/getmedia/91cc0d01-3641-4844-b34c-7aee15c8edaf/Business-Model-for-SE-Design-Burkett.pdf>, accessed February 2017

¹⁵ B.Stumbitz, H. McDowell and M. Gabriel, *Golden opportunities; social entrepreneurs in an ageing society*, UnLtd, London, 2011, p. 3

¹⁶ The Age and Employment Network, ESF projects successfully engaging with the over 50s, TAEN, London, 2012, p.3.

- » Social Connect, *Social enterprise guide; legal issues to consider when setting up a social enterprise*, Melbourne, 2014 https://www.nfplaw.org.au/sites/default/files/media/Social_Enterprise_Guide_0.pdf
- » Social Ventures Australia, *A business planning guide for social enterprises; putting the pieces together*, Parramatta, http://socialventures.com.au/assets/Business_Planning_Guide_for_Social_Enterprise.pdf



Image 8: Grassmarket Community Project Café

5. Considerations and Recommendations

5.1 Area 1: Observation and identification of the key factors in the design and operation of successful social enterprises in the employment and training sector.

- » All social enterprises visited confirmed that it can be very difficult to establish a social enterprise without start-up funding and business guidance.
- » Recommendation: That the peak bodies in the Learn Local sector (ACEVic, NHVic) and the ACFE Board, seek to advocate for the sector with regards to the Victorian government's Social Enterprise Strategic Framework and its further development.
- » Recommendation: That such peak bodies seek to partner with relevant Philanthropic Trusts to develop the Learn Local Sector's ability to develop social enterprises as relevant training environments for older job seekers and others.
- » The financial viability of a social enterprise can be difficult to sustain in competition with other mainstream businesses.
- » Recommendation: That the Victorian Government consider adopting the Scottish Government's policy on "Community Benefit Clauses" in procurement as one of its strategies to achieve Action Area 3 of the Social Enterprise Strategy for Victoria. <http://www.gov.scot/Topics/Government/Procurement/policy/corporate-responsibility/CSR/SSPAP/ComBen>
- » Recommendation: Hybrid model of operations described by Ben Smith, UnLtd UK, could suit most Learn Local Organisations as the most financially viable building on existing training funds.

» Consideration: For a social enterprise to be a valuable learning environment it doesn't need to be large-scale or long-term. There is the potential for Learn Locals to develop smaller, time-limited enterprises as a relevant training environment for older job seekers.

5.2 Area 2: Observation and identification of how the training needs of older job seekers are addressed within these social enterprises.

- » The training needs of older job seekers don't currently attract of support from State or Federal Government that is needed.
- » Recommendation: The funding for the Victorian Governments Reconnect Program could be expanded to include older job seekers in the same way that unemployed youth are currently supported.
- » The journey to employment or further study is different for each person. Those furthest from employment can obviously take longer in the pre-accredited learning space than others.
- » Recommendation: That the ACFE Board and the sector recognise that funded pre-accredited courses need to be flexible in delivery styles and of suitable duration to allow for the needs of older job seekers to fully develop pathways to employment. Thus avoiding the potential to fall out of employment again after a short time.
- » The Scottish *Employability Pipeline* describes a wide range of supports and services required by the unemployed that are deemed necessary prior to Employability Skills training.

- » Recommendation: That Learn Local Organisations and the ACFE Board explore the *Employability Skills Pipeline* as a model for developing a much broader and long-term range of programs to meet the needs of older job seekers.
- » Recommendation: That the Pre Accredited Quality Framework endorsed by the ACFE Board include a broader definition of Employability Skills to include needs identified in stages 1 and 2 of the *Scottish Employability Pipeline*.
- » Social Enterprises working with mature aged job seekers identified that one of the job seekers most difficult challenges was to recognise the transferability of their existing skills.
- » Recommendation: That Professional Development is provided to Learn Local Organisations and Pre-Accredited trainers to develop strategies and teaching methods that more effectively assist older job seekers to identify the transferability of their existing skills and knowledge. That this professional development includes co-design and the use of work integrated learning.
- » The most successful learning and support programs for older job seekers participating in social enterprises included a range of wrap around services in addition to the specific vocational training. These programs developed attributes such as creativity, enterprise and confidence.
- » Recommendation: That the development of delivery plans within LLOs catering to the needs of older job seekers include a connected plan for taking a learner from first contact to job readiness not just a suite of disconnected short courses.
- » Recommendation: That the ACFE Board fund a range of activities that more fully address barriers to employment as identified in the Scottish *Employability Pipeline*. These could be accommodated if the definition of "employability" skills is expanded to recognise such personal attributes as well-being and confidence.
- » Co-design and co-learning environments that facilitate peer to peer exchange of skills and knowledge are most appropriate for learners with a lifetime of skills and experience.
- » Recommendation: That the Learn Local sector explore opportunities to use co-design and co-creation strategies in the learning environment even if not using a social enterprise model.
- » Recommendation: That LLOs explore the creation of internal pathways in their programs not just through progression to more advanced courses but by creating leadership roles within their organisation/enterprise for volunteers/participants and conducting training for the advancement to these roles.
- » Social enterprises don't have to be on a grand scale or have to operate long term to provide an effective learning environment.
- » Recommendation: That LLOs explore small, time-limited projects as well as social enterprises as a learning environment for older job seekers that could be accommodated within well-thought out training programs.

5.3 Area 3: Observation and identification of how social entrepreneurship skills are delivered to older job seekers to enable them to establish their own small businesses.

- » Whilst the development of social entrepreneurship skills is something that a LLO could provide in a formal training setting the lack of financial support to assist the individual to achieve start-up is a serious disadvantage.
- » Recommendation: That the Learn Local sector explore developing relationships with those agencies funded to support social enterprise start-ups. This could include; Social Ventures Australia, Social Traders, Social Enterprise Finance Australia.

- » The delivery of social enterprise skills to older job seekers could be achieved in LLOs if the job seekers are included in the development of the social enterprise from the start-up phase.
- » Recommendation: That LLOs consider the benefit of small, shorter-term social enterprises as a co-design environment for the delivery of social entrepreneurship skills to suitable participants.

6. Knowledge Transfer, Application and Dissemination

As a long-term manager in the Learn Local sector, the Fellow has a strong network of colleagues and peers with whom to share her new knowledge. FitzGerald is keen to trial the development of at least one social enterprise in her own Learn Local Organisation (Coonara Community House) and seek partnerships with potential stakeholders such as peers, local business and TAFE to extend the trials.

FitzGerald is also keen to explore ways in which other cohorts may be included in the social enterprise model of training and to trial micro social enterprises in short-term training options.

The opportunities in the emerging regenerative or circular economy are of particular interest to the Fellow. This sector is a section of the economy that is relatively new in Australia and could create new, small-scale business opportunities and revenue streams for Learn Locals while assisting to minimize the generation of waste.

Knowledge transfer activities planned and/or completed to date include:

What	Who	How	When
Learn Local sector discussions and presentations	Knox Learning Alliance	Networking meetings and planning days	September – December 2017
Project to trial small scale social enterprise model engaging unemployed women over 55	ACFE Board	Capacity and Innovation Fund project	July 2017 – June 2018

Social Enterprise sector discussions and presentations	Foundation for Rural and Regional Renewal Alice Springs Social Enterprise Group	Presentation to Social Change 101 Project – Mitchell Shire Presentation to Social Change 101 Project – Murrindindi Shire Presentation and discussion group	29th August 2017 4th September 2017 7th September 2017
Local government sector discussions and presentations	Knox Active Ageing Advisory Committee	Presentation to committee meeting	15th November 2017
Neighbourhood House Sector	Neighbourhood Houses Victoria	Presentation at Annual Conference	May 2018
Adult Community Education Sector, Victoria	ACEVic	Presentation at Annual Conference	

7. References

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8. Acknowledgements

Leanne FitzGerald sincerely thanks the following organisations and individuals who gave their time and energy to assist in the completion of the Fellowship.

Awarding Body – International Specialised Skills Institute (ISS Institute)

The ISS Institute exists to foster an aspirational, skilled and smart Australia by cultivating the mastery and knowledge of talented Australians through international research Fellowships.

The International Specialised Skills Institute (ISS Institute) is proud of its heritage. The organisation was founded over 25 years ago by Sir James Gobbo AC CVO QC, former Governor of Victoria, to encourage investment in the development of Australia's specialised skills. Its international Fellowship program supports many Australians and international leaders across a broad cross-section of industries to undertake applied research that will benefit economic development through vocational training, industry innovation and advancement. To date, over 350 Australian and international Fellows have undertaken Fellowships facilitated through ISS Institute. The program encourages mutual and shared learning, leadership and communities of practice.

At the heart of the ISS Institute are our individual Fellows. Under the International Applied Research Fellowship Program the Fellows travel overseas and upon their return, they are required to pass on what they have learnt by:

- » Preparing a detailed report for distribution to government departments, industry and educational institutions

- » Recommending improvements to accredited educational courses
- » Delivering training activities including workshops, conferences and forums.

The organisation plays a pivotal role in creating value and opportunity, encouraging new thinking and early adoption of ideas and practice. By working with others, ISS Institute invests in individuals who wish to create an aspirational, skilled and smart Australia through innovation, mastery and knowledge cultivation.

For further information on ISS Institute Fellows, refer to www.issinstitute.org.au

Leanne would also like to thank the following organisations and people for their support during the Fellowship:

- » Coonara Community House Committee, staff and volunteers
- » ACEVic – support and encouragement
- » Jobs Australia – support and encouragement
- » Mentors - Sally Brennan, Margaret James, Kylie Quirk – guidance, wisdom and sector expertise
- » Knox Learning Alliance colleagues – Heather McTaggart, Janet Claringbold, Karin Absolom, Kerry Cronjaeger
- » Hosts – see Chronological trip summary in Appendix – thanks to all of my hosts for the generosity shown in sharing your knowledge and thoughts and for engaging in discussions around the transfer of this knowledge to the Australian situation.

9. Appendices

Appendix 1: Abbreviations/Acronyms/Definitions

ACFE Adult Community and Further Education

GMP Grass market Community Project

PQF Pre-Accredited Quality Framework

LLO Learn Local Organisation

SEA Social Enterprise Academy

Employability Pipeline (Scotland) – A model which has been developed as a Framework to support the effective delivery of employability services. The pipeline is made up of 5 key stages, whereby the needs of the individual are considered in relation to existing soft skills, employability skills and skills requiring development.

Pre-Accredited Training - Pre-accredited programs are short modular courses designed for learners to gain confidence and skills. They focus on creating pathways to further education and training or a step to employment. Pre-accredited training has an emphasis on those learners who have not achieved Year 12 or an equivalent qualification. Pre-Accredited Training is funded by the Victorian Government through registered Learn Local Organisations.

Learn Local – Registered Learn Local organisations provide quality vocational courses for adults. Their government-supported programs help learners boost their earning potential, improve literacy skills and transition into new learning pathways. Not-for-profit organisations can apply to be registered with the Adult,

Community and Further Education (ACFE) Board. Registered organisations are eligible to receive Government funding to deliver pre-accredited programs and to apply for a range of other supports. This pool of funds supports organisations build their capacity to deliver outcomes for their learners. The ACFE Board has developed guidelines relating to the eligibility of organisations to be registered as a Learn Local organisation with the ACFE Board.

Pre-Accredited Quality Framework - The Pre-accredited Quality Framework is a quality improvement mechanism and curriculum framework that supports teachers and managers plan, develop, teach and review pre-accredited courses. It incorporates a variety of new resources including an updated A-frame.

Social Enterprise - Social enterprise is simply a way of doing business which focuses on tackling social problems, strengthening communities, improving people's life chances or protecting the environment, as opposed to generating profit for private individuals or bodies. Any surplus income that a social enterprise generates (after covering its costs – including salaries for those running the organisation and delivering services) are reinvested in the business, and go towards its social aims. <http://www.firstport.org.uk/funding>

Appendix 2: Chronological Trip Summary

Date	Organisation	Contact details	Summary
May 24th 2017	Re-Union Canal boats	Samantha Adderley, RE-Union, 15 Valleyfield Street, Edinburgh, EH3 1LP www.re-union.org.uk/	<p>Tourist boat cruises and hire is focus of the Social Enterprise.</p> <p>Access Scottish government funding for development of soft skills such as confidence and community engagement due to low socio-economic area.</p> <p>Comprehensive training for volunteers includes wellbeing programs and can include accredited training to achieve licenses for captaining the boats.</p>
May 24th 2017	UnLtd UK (Scotland)	Eileen Ingliss, Edinburgh Representative, Head Office: UnLtd 123 Whitecross Street, Islington, London, EC1Y 8JJ http://unltd.org.au/	<ul style="list-style-type: none"> » Unit is a national body providing funding and support for Social Enterprises. » Clear product or service that the public need and will buy (or agency will pay for or fund) is key to success. » Social enterprises need to look to and behave professionally to be taken seriously as businesses by private & government sectors. » Start-up capital is essential for most Social enterprises to be successful. » Government procurement policies could be improved to assist Social enterprises
May 25th 2017	The Melting Pot	Philip Reid, Engagement & Events Coordinator, The Melting Pot, 5 Rose Street Edinburgh, EH2 2PR www.themeltingpotedinburgh.org.uk/	<ul style="list-style-type: none"> » The Melting Pot provides a co-working space that is facilitated and supported by online communication to ensure sharing of ideas and resources by members. » They have developed the Good Ideas Academy to fund and support very early start-ups at ideas stage. » 'Volunteer Assembly' - a gathering where volunteers vote on projects proposed by members of the public.

Date	Organisation	Contact details	Summary
May 25th 2017	The Social Enterprise Academy Scotland	Sam Baumber, Managing Director, Social Enterprise Academy International Thorn House, 5 Rose Street, Edinburgh, EH2 2PR www.socialenterprise.academy/scot/	<ul style="list-style-type: none"> » The Social Enterprise Academy (SEA) provides training to support social enterprises in Scotland and has recently commenced operations in Australia. » Strategy for SEA has been to specialise then collaborate rather than diversifying. » Provide sustained support to Social Entrepreneurs. » Great relationship between Social enterprise sector and Government in Scotland has been hard won and is solid. » Scottish government invests in what they call “anchor organisations” with an emphasis on preventative activities. » Government play a role in direct procurement and by community benefit clause in government contracts.
May 26th 2017	The Remakery	The Remakery, 127 Leith Walk Edinburgh www.edinburghremakery.org.uk/	<ul style="list-style-type: none"> » The Edinburgh Remakery provides affordable and well-designed creative opportunities for individuals and groups; including workshops, free events, and training. » The Edinburgh Remakery is one of five RE-use and Repair Hubs located throughout Scotland, which has been made possible with funding granted by Zero Waste Scotland.
May 29th - 31st 2017	The Grassmarket Community Project	The Grassmarket Community Project, 86 Candlemaker Row, Edinburgh http://grassmarket.org/ Jonny Kinross, CEO Catherine Jones, Senior Manager, Catering and Events Tommy Steele, Woodshop Manager	<ul style="list-style-type: none"> » The Grass market Community Project (GMP) operates four social enterprises; Catering/Events, Tartan, Woodwork and Learning. » Creating the right atmosphere is essential to the learning embedded in a social Enterprise AND to the success of the enterprise itself. After all a Social Enterprise is all about the people – you need them to want to work for your business to be viable. » GMP don't measure their success or outcomes by how many people they move on to employment, further study. Sometimes people's needs are so high that they don't move on but they are productive at GMP. Significant numbers of people do move into paid work with GMP & other employers. » One key to their success is employing the right people for supervision / teaching roles "... Vocational and Community Development skills. Combined technical competencies and strong values base that aligns with the organisation."

Date	Organisation	Contact details	Summary
May 30th 2017	The Edinburgh Tool Library	Chris Hellawell, The Edinburgh Tool Library, 8 Spey St Ln, Edinburgh, EH7 4QB http://edinburghtoollibrary.org.uk/	<ul style="list-style-type: none"> » The Edinburgh Tool library lends a range of tools to individual members, provides a workshop for members to access, hires their venues to other community groups and produces bespoke wooden items to raise funds. » Volunteers and members are invited to regular meetings to discuss priorities and planning. » Have a business plan and code of ethics. » Longer term aim to promote trades as a first option not a fall back. Doing this through a focus on the design element not just the making aspect of the trades. » Many of the members are referrals – un-employed or under-employed, people who want to transition from this “stage of their life”.
June 1st 2017	Recyke-a-bike	Angela Barron, CEO, Recyke-a-bike, Alloa Road, Causewayhead, Stirling www.recyke-a-bike.co.uk/	<ul style="list-style-type: none"> » Recyke-a-Bike has a contract to collect unwanted bicycles from local refuse centres as well as receiving individual donations. They handle thousands of bicycles per year. » The enterprise could not survive on selling bikes alone. It creates some cash flow but its prime purpose is as a focus for the training and social activities of the organisation. In addition to repairing and selling bikes, the training activities – with job seekers, volunteers and the wider community through outreach are the key to generating funds for the enterprise. » They interview, induct and train volunteers and job seekers as employees. Source additional training to offer as PD to participants. Some of the other training is non-vocational: <ul style="list-style-type: none"> » Budgeting » NHS nurses do health checks » Mental health first aid and resilience » The organisation CARES about why the person is not working and works with them to develop all the skills and attributes they need to be employable.

Date	Organisation	Contact details	Summary
June 5th 2017	Better Pathways	Ambreen Khan, Recovery and Employment, Better Pathways 201-206 Alcester Street, Digbeth, Birmingham B12 0NQ http://betterpathways.org.uk/	<ul style="list-style-type: none"> » Better Pathways operate four social enterprises <ul style="list-style-type: none"> » Textiles » Garden centre » Light packaging and assembly (moving into pallet items for garden centre) » Signage (including small items) » All vocational courses include work experience in their social enterprises (4 choices). » Support for learner from transition from “discrete” learning into mainstream if qualifications are necessary. » Range of job preparation and personal development courses offered in house. People choose what they need/want as part of their personal development plan
June 6th 2017	FRN – Furniture Re-use Network	Claire Charras, Business Support Officer, Furniture Re-use Network, 48-54 West St, St Philips, Bristol www.frn.org.uk/	<ul style="list-style-type: none"> » Furniture Re-use Network (FRN) is a national body providing support to small independent charities operating shops to re-use furniture. » FRN provides the following support for members: <ul style="list-style-type: none"> » Divert furniture from landfill and source donations on a national scale (e.g. Ikea, John Lewis). They coordinate the collection by members. » Working with big retailers for take back schemes (e.g. buy a new fridge, take old one away). Paid per item so offsets the cost to the charity of disposing of up to 50% of items that can't be repaired or re used » Information and advice » Facilitate networking groups with members » Sourcing volunteers » Business management, HR issues, insurance issues, etc » Annual conference » Regional roadshows

Date	Organisation	Contact details	Summary
June 6th 2017	SOFA project	Steve Orman, Operations Manager, SOFA Project 48-54 West St, St Philips, Bristol http://sofaproject.org.uk/	<ul style="list-style-type: none"> » SOFA is a member of the FRN operating a large retail shop and a separate workshop. » They conduct mostly in house training. Comprehensive OHS induction. » Participants include unemployed, volunteers and people in the justice system. » Participants start with low level skills and learn on the job. They have some choice about working on what interests them. » Induction includes finding out about their existing skills and interests. » They have contracts to supply used furniture for those in social housing
June 6th 2017	Community Repaint Scheme	Martin Pearce, Network Manager, Community RePaint Network, Create Centre Smeaton Road, Spike Island, Bristol, BS1 6XN https://communityrepaint.org.uk/	<ul style="list-style-type: none"> » The Community Repaint Scheme is a national organisation with a focus on re-use and community engagement. » They identify the growing importance of the SOCIAL MARKET which includes reuse. » 55-65% of all Household paint is re-usable. This includes that from painters and decorators and retailers. » Over 40m gallons per year in the UK. » They don't provide direct financial support for schemes but do provide: <ul style="list-style-type: none"> » Day to day support and set up advice » Tech support, legal, communications » Marketing and promotion materials » Form partnerships for supply and demand » Work with government and industry » Develop and expand scope and reach of network » Broker deals » PR and marketing

Date	Organisation	Contact details	Summary
June 9th 2017	Petit Miracles	Various staff, Petit Miracle Interiors, West12 Shopping Centre, Shepherd's Bush Green, London www.petitmiracles.org.uk	<ul style="list-style-type: none"> » Petit Miracles a small charity aiming to reduce unemployment primarily through provision of training and work experience in skills training in traditional craft, restoration, basic DIY, painting & decorating, interior design trades, retail, entrepreneurship and business skills. Creating opportunities for beneficiaries to create their own jobs. » Sell upcycled furniture created by participants. Sold in retail shop in London and online. » Petit Miracle Hub – Local entrepreneurs hosted in their business incubator which also provides retail opportunities in their retail shop. » Run fee for service workshops for the public to generate further income.
June 13th 2017	UnLtd UK	Ben Smith, UnLtd, 123 Whitecross Street, Islington, London http://unltd.org.au/	<ul style="list-style-type: none"> » UnLtd is a national organization providing funding and support to new social enterprises. » Identifies that early stage capital is vital to the success of new social enterprises. » Better networked SEs are less reliant on funding (eg. Collaborate or marketing).
June 13th 2017	The Shaw Trust (TAEN)	Chris Bell, Specialist Advisor on Ageing Workforce, TAEN - administered by the Shaw Trust, Jessica House, Red Lion Square, Wandsworth High Street, London SW18 4LS www.taen.org.uk/	<ul style="list-style-type: none"> » The Shaw Trust controls a range of resources developed from The Age and Employment Network project which concluded in 2014. » Resources include guides to 55+ job seekers and materials for those working to assist older job seekers. » A history from 1970s to early 21st century of forcing or encouraging early exit from the workforce to assist with getting younger workers into employment created an “Early Exit” culture that is now having to be turned around.

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