



Educational Handbook of Social Investment

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Introduction. Why this handbook and how to use it

In this handbook we would like to inform (future) social and public professionals about the results of our extensive comparative research on welfare state reforms in Finland, Germany, Greece, Hungary, Italy, Poland, Spain, Sweden, The Netherlands and UK. The research reveals how reforms take place in local practice and gives insights on the implications of social policies on people's lives.

Social policies are defined as social investment in human lives. We evaluated the implementation of social investment policies in practice and studied 20 innovative cases, 2 in each of the above-mentioned countries. Starting from these professional practices, we would like to give (future) professionals more insights in the realities of system change and the new perspectives that come out of it.

Social services and social support schemes are under pressure since the 2008 crisis. In every EU state, important policy reforms are adopted aiming at another (affordable) social support system. This leads to confusing and complex situations both from international and national perspectives. These changes also affect the realities of public professionals, of service users and citizens. From a bottom up perspective we would like to invite professionals to get inspiration from innovative cases in their own country and abroad. It will give them ideas, insights and better understanding of their own changing practices and the involvement of policy, entrepreneurship, participation and inclusion. Reconsidering social support and welfare involves also new ways of cooperation and subtle adaptations of partnerships, cooperation and involvement.

Next to our extensive evaluation of these 20 case-studies, we also drew a state of the art of social policies and social investment, social innovation and did an economic and econometric analysis on local and regional expenditures on social investment policies in above-mentioned sectors. This resulted in several report of quantitative information. The information of all the extensive reports delivered to the EU Commission are available as background information. In this handbook we will not get into this financial comparison and evaluation, nor will we expose historical developments and comparative literary study within all 10 countries.

Next to academic research we emphasized on user voice and foresight as important strands in our research. In 10 of the case studies service users were asked to tell, register and share their own authentic stories. Community Reporters were trained to develop new insights on people's experience with social services within communities. The foresight was based on mapping and imagining future scenarios of social services by both experts and professionals in the core fields of social investment policies. These two strands serviced as practice based and experience based mirrors to the academic.

In **Module 1**, we will give a short overview on the concepts we used to study welfare state change. Three large core concepts are social investment, social innovation and social economy. We discovered that in the different countries these three core concepts are interpreted in different ways and have different connotations. This shows the complexity of doing comparative research, in which social systems and organizations have different historical sources and diverse developments due to political choices. However, comparative research sharpens the mind and gives new ideas about current practices. The differences between countries are a great opportunity to learn and to choose new pathways for new interventions in social policy and practice.

This chapter also gives insight in the EU Commission Social Investment Package that was launched in 2013 and in the work of Anton Hemerijck (VU-University and European University in Florence), who conceptualized this package. He invites policy makers and politicians to revise their thinking on welfare, not from a social support perspective-meaning that people receive when they are unable to contribute, but from a perspective of social investment in human capital. This means that the policy is not oriented on support of people when they are unable to work or to contribute, but it is much more oriented on the support of people's abilities and capabilities to contribute to society.

We made an overview of the different approaches to social investment, social innovation and social economy in the different countries. We first made a state of the art study on social investment in the ten countries involved. We focused in this study on 4 sectors: 1) Early childhood education and care, including, family benefits and parenting

services; 2) labour market participation of parents including long term care schemes, parental leave schemes; 3) Labour market participation incentives, including unemployment benefits, minimum income, active labour market policies and social services for persons seeking employment (social housing, mental health provision, disability support etc.); 4) other social services, relevant to issues of social investment and social innovation. (e.g. refugees and migrants support and integration).

In **Module 2**, we will get into the core of the handbook, based on the 20 case studies we realized in the InnoSi-project. Each of these case-studies gives insight in the reality of a social service provided. The analysis of the case study is extensive described in the country reports, that are accessible through the links provided to our InnoSi website.

Around 11 of these case studies we collected stories of service users, through a community reporting method. The Community Reporting method is expressed and detailed in **Module 3**. Community Reporting is developed and realized by People's Voice Media, a UK based, community organization. It can be used by the users of this handbook as a way of collecting stories of lived experience. These stories provide another type of knowledge and information, based on the authentic stories of the heart. Thus, within this academic and practice based evaluation, people's lived experience is used as a third source for evaluation. Through community reporter, research is linked to everyday life of citizens.

In **Module 4** we describe our method for imagining the future based on a foresight method. Professionals and teachers can also use this foresight as an interesting method to work with students and professionals on capturing trends and new developments. Based on this captures, professionals and students are invited to reflect upon the possible future situations. In this research we combined trend watching with the pinterest method, and linked it to focus groups and Delphi research methods. The chosen frame was again to reflect following a bottom up approach and from a human (personal) perspective. The foresight method can be used in the exploring of the case studies.

How to use this handbook

We produced many reports on many different topics. The knowledge we gathered will be published in two books: one on social investment (Innovative Social Investment: Strengthening communities in Europe) and one on the case studies (Implementing Innovative Social Investment: Strategic lessons from Europe) and will be published by Policy Press in 2018.

In this handbook we would like to make scientific, practical and experiential insights available to (future) professionals in the social field. The book aims at educators and trainers and offers them a guideline through the InnoSi material.

The handbook is to be used and improved by educators/ trainers and professionals. In this sense, we propose the book to become co-creative, so that professors, lecturers and trainers can share the courses and trainings they produced based on the InnoSi material we produced in the handbook.

Where possible we made one page working sheets, dealing with one topic of the handbook. At the page bottom we indicate further links to our research material, to the community reports, to full reports and other documentation we produced within the InnoSi project. We also make some suggestions for exercises, search questions where possible and invitations for International comparison on the topics of labor market participation, childcare, youth, elderly and migrant integration for instance.

How to evaluate social services?, Introducing our evaluation scheme based on theory of change. How to collect user voice within your own community or about delivered social service, so that (future) professionals can make it work. How to make future prospects based on actual trends within the community, based on our method for making a foresight.

We wish you a lot of new insights and working pleasure with this handbook through our research material and we do hope that you are getting more acquainted with the concept of social investment, which has as an overall aim to strengthen communities and in Europe.

MODULE 1

1 Defining Social Investment and Social Innovation

1.1 Social Investment as a policy driver

There is growing interest in “Social Investment” as an emerging welfare paradigm. The phrase “Social Investment” implies that spending on welfare is a long-term investment to improve prospects for economic and social participation. In contrast to more redistributive forms of welfare, Social Investment measures and instruments are intended to strengthen people’s skills and capacities over the life course. At its simplest, the Social Investment paradigm can be boiled down to viewing social policy as a productive factor, such that the resources deployed are not merely used up (or sunk) through current consumption but instead applied to increase some form of capacity for future wealth creation. The European Commission launched a major endeavor to rebalance economic and social progress with the Social Investment Package (SIP) in 2013. Many countries within and outside the European Union have adopted some elements of Social Investment although uptake is far from uniform and was to some extent stalled by the impact of the economic crisis and fiscal consolidation policies.

Social policies need to adapt to new challenges. Social innovation implies non-standard answers to non-standard risks and notions of co-production based on strengths and assets. According to the European Commission “social innovation mobilizes each citizen to become an active part of the innovation process”. In this way it seems to align closely with Social Investment principles. Yet the extensive and well established literature on Social innovation has not taken account of Social Investment approaches to welfare and social policy, and vice versa. In this book Social Investment is linked to social innovation with a strong emphasis on aspects of policies and programmes that are innovative in their contexts.

For advocates, Social Investment enhances human capital and stops disadvantage from compounding. Critics counter that it is less pro-poor than more traditional social policy. The scholarly literature on Social Investment focusses heavily on aggregate effects and total welfare spending. As a result, debates often remain on an abstract meta level and make limited reference to local micro level policy. In contrast to most writing on Social Investment, this book brings sub-national contexts to the fore. It does this with original, empirical research evidence about successes, challenges and setbacks.

In the English speaking world Social Investment is more commonly applied to financial mechanisms (e.g. Payment by Results, Social Impact Bonds) for funding social programmes. That is not the main focus of this book and we omit detailed discussion although we do consider aspects of financial innovation where applicable, and we reflect on the commonalities and contrasts between these meanings of Social Investment.

1.2 Concepts and definitions

Social investment is about investing in people. It means policies designed to strengthen people's skills and capacities over the life course and to support them to participate fully in employment and social life. It is a vision on social policy and responsibility of local and national governments. It gives insights in political responsibility and organization of policy structures. Key policy areas include education, childcare, healthcare, job-search assistance and rehabilitation. It is important that these investments '*break the cycle of disadvantage*' and prevent that children from low-income backgrounds will earn low incomes when they get older. That's why early interventions in peoples' life courses are the most effective social investments to tackle social exclusion. And that's part of the Social Investment Package (SIP) launched by the EC in 2013.

Social investment involves strengthening people's current and future capacities..... In particular, social investment helps to 'prepare' people to confront life's risks, rather than simply 'repairing' the consequences. Modernisation of social policies requires systematic introduction of ex-ante result orientation in financing decisions and a systematic approach of the role social policies play in the different stages in life: from education via work/unemployment to sickness and old-age (European Commission 2013: Towards Social Investment for Growth and Cohesion – including implementing the European Social Fund 2014-2020; p. 3).

Social Innovation is defined as the development and implementation of new ideas (products, services and models) to meet social needs and to create new social relationships or collaborations. It represents new responses to pressing social demands, which affect the process of social interactions. It is aimed at improving human wellbeing. Social innovations are innovations that are social in both their ends and their means. They are not only good for society but also enhance individuals' capacity to act.

Social innovation: Enabling individuals to live up to their full potential to take part in social and economic life in society entails supporting people at critical junctions in their lives. This starts with investing in children and youth, and continues thereafter. Social innovation must be an integral part of necessary adjustments by testing new policy approaches and selecting the most effective ones." (European Commission 2013: Towards Social Investment for Growth and Cohesion – including implementing the European Social Fund 2014-2020, p. 5)

*The **social economy**, also referred to as the 'third sector', refers to non-government actors such as community organisations, voluntary organisations, and social enterprises that undertake activities for social benefit. Social enterprises are businesses with primarily social objectives, and where surpluses are usually reinvested into the business or in the community, rather than maximising profit for owners and shareholders* ((European Commission 2013: Towards Social Investment for Growth and Cohesion – including implementing the European Social Fund 2014-2020; p. 11).

1.3 Key conceptual publications and reports of the InnoSi project

For each part of the research we published an extensive report. Aim of these publications within the InnoSI was to gather scientific insights on social investments on European, national and regional level in a comparative perspective. Hereafter you will find the titles and a short summary of each of these publications.

Title	Authors
The state of the art of Social Investment. A provisional overview of public policy according to 'social investment' from an institutional perspective. 2.3.1	Stephen J. Barnett (EUCLID Network), Dr. Gavin Bailey and Prof. Chris Fox (Manchester Metropolitan University)
Approaches to social investment from a scientific perspective. A literature review of the Social Investment concept. 2.3.2	Aldona Wiktorska-Świecka, Monika Klimowicz, Małgorzata Michalewska-Pawlak, Dorota Moroń, (University of Wrocław)
Social Investment: Quiet Revolution or Shaken Welfare Capitalism? 2.3.3	Riccardo Prandini (University of Bologna), Matteo Orlandini (University of Bologna), Alice Guerra, (Copenhagen Business School)
Social Innovation Policies Involving Social Economy Organizations. Survey Evidence from European Countries. 2.3.4	Andrea Bassi, Giulio Ecchia and Alice Guerra (University of Bologna)
Social economy: delivering social outcomes. A social investment perspective. An integrated report on the European social economy. 2.3.5	Matthias Freise, Annette Zimmer and Carolin Schönert (University of Münster)

1.3.1 A provisional overview of public policy according to ‘social investment’ from an institutional perspective by Stephen J. Barnett (EUCLID Network), Dr. Gavin Bailey and Prof. Chris Fox (Manchester Metropolitan University)

This report is a snapshot of the state of play in 2015 of the ways in which welfare states are moving towards social investment approaches and the extent to which these developments are being impacted by EU policy and funding. InnoSI takes a special interest in a community/citizen-led, bottom-up (including social economy organisations and private companies) approaches to social investment, rather than a government-led top-down perspective. This not of course a binary distinction: governments may involve non-State actors in welfare state reforms and in turn non-State actors may pilot reforms themselves, which are then adopted by governments.

If this report is to identify innovative and strategic approaches to social investments then definitions of those terms are necessary. InnoSI has adopted a working definition of Social Investment from the Social Investment Package (SIP) in full knowledge that social investment is an emerging rather than a fully formed paradigm: “The social investment approach stresses the case for considering certain parts of employment and social policies — and possibly other policy areas, such as education — as entailing investments improving prospects for future employment and social participation, together with more social cohesion and stability ... thus stressing the life course dimension of social policies and their long-term benefits for society.” (European Commission 2013a p. 3) According to the authors of the European Social Policy Network (ESPN) study, “social investment spending has been contrasted with ‘social consumption’ (or compensatory spending), consisting of old-age protection and passive labour market policies.”

Links:

Research briefing: <http://innosi.eu/wp-content/uploads/2017/04/Briefing-2.3-new.pdf>

Full report: <http://innosi.eu/wp-content/uploads/2016/04/InnoSI-Deliverable-D2-3.pdf>

1.3.2 Approaches to social investment from a scientific perspective. A literature review of the Social Investment concept by Aldona Wiktorska-Świecka, Monika Klimowicz, Małgorzata Michalewska-Pawlak, Dorota Moroń, (University of Wrocław)

This report presents the current state of research and scientific debate on the 'Social Investment' policy paradigm in European countries. An extensive review of literature and scientific sources is presented in this document covering the areas of social investment research in selected countries of the European Union.

The aim of the review was to identify innovative and strategic approaches to social welfare reform, which have been described in the existing scientific literature since 2000. Different types of scientific sources in 10 languages were reviewed including: academic papers, monographs, chapters from academic volumes, conference papers and scientific reports, both theoretical and empirical. Based on the review we answer research questions about defining the social investment concept, the main perspectives used to analyse the social investment, instruments of social investment, facilitators and limitations for their implementation in the welfare systems.

The review shows that social investment as an idea, concept and policy attracts attention and raises discussion among scholars and researchers. Some researchers and academics assess this new social policy paradigm very critically while others see it is a proper answer for current social, economic and demographic trends and challenges in Europe.

The report explains the reasons why this new paradigm and strategy of social policy has been established and developed by social scientists and policy makers. The analysis of scientific literature on the issues and problems of social investments collected as part of the query provides evidence of its significant contribution into scientific knowledge on the "Social Investment" concept, both in theoretical and practical terms. The issues covered in the scientific literature relate to relevant aspects of the concept of the "Social Investment"; they form the basis for scientific reflections and stimulus for further research studies. Scientific texts can also serve practitioners involved into information searching, planning and conducting activities in the field of social policy.

Links:

Research briefing: <http://innosi.eu/wp-content/uploads/2017/04/Briefing-2.2-new.pdf>

Full report: <http://innosi.eu/wp-content/uploads/2016/05/InnoSI-649189-D2-2.docx>

1.3.3.Social Investment: Quiet Revolution or Shaken Welfare Capitalism?

By Riccardo Prandini (University of Bologna), Matteo Orlandini (University of Bologna), Alice Guerra, (Copenhagen Business School)

This report analyses and seeks to establish whether and how, in the last twenty years, the EU member countries have adopted welfare systems that incorporate aspects of social investment.

The quantitative and comparative study focuses on social investment strategies across 28 European member states. The aim is to map out and explore the effectiveness of different social investment strategies. An overview of macro-level welfare performance indicators consists of a review of available macro-indicators to assess welfare performance in the light of social investment decisions.

Data confirm to some extent the interpretation of a quiet revolution but also fundamentally challenge it. On the one hand, the thesis of a stable European welfare system proceeding in a slow but progressive way is confirmed. On the other, there are no clear trends towards more social investment spending. In particular, there is no clear trade-off neither between compensatory and social investment spending, nor between social spending for the elderly and social spending for childhood and youth programmes.

The emerging literature on the social investment paradigm focuses on two theoretical and empirical pillars: 1) the development of a knowledge-based economy; 2) the contrast toward the so-called “new social risks”.

The report stresses the innovative features of social investment from three different points of view:

- Time horizons: from the present to the future, from consumption to investing policies.
- Factual issues: from repairing to preparing, from passivity to activity, from compensating to promoting.
- Social vision: from the hierarchical model to social poliarchy; from standardised social services to personalised social services.

The use of social expenditure data to equate social spending with welfare state effort raises different issues (methodological, political, institutional and concerning taxation), discussed in the paper.

For this report, the analysis of social investment adopts four different perspectives: total social expenditure and three specific areas of social investment; capacitating versus compensating, spending and the life-course perspective.

Links:

Research briefing: <http://innosi.eu/wp-content/uploads/2017/04/Briefing-3.1-new.pdf>

Full report: <http://innosi.eu/wp-content/uploads/2016/03/D3-1-Unibo-100316.pdf>

1.3.4 Social Innovation Policies Involving Social Economy Organizations. Survey Evidence from European Countries. Andrea Bassi, Giulio Ecchia and Alice Guerra (University of Bologna)

This paper investigates significant social innovation policies (related to the concept of social investment) involving the role of Social Economy organizations. It also discuss some relevant national and regional social innovation experiences by relying upon the current national and international literature, reports and website information. During the 1990s and the first half of the 2000s, the concept of “social economy” has evolved from one where the emphasis was on the social (social outcomes and collective action) to a neo-liberal one with more emphasis on the economic and individual actors (social entrepreneurs). Nowadays we are facing a transition period nevertheless in the recent developments of the policy orientation at European level, there are some slight but significant clues of a move back towards a more ‘social’ concept. As operating definition of Social Economy is proposed the one elaborated by CIRIEC and adopted as reference by the European Economic and Social Committee.

Links:

Full report: <http://innosi.eu/wp-content/uploads/2016/04/Social-economy-organizations.pdf>

1.3.5 Social economy: delivering social outcomes. A social investment perspective. An integrated report on the European social economy. Matthias Freise, Annette Zimmer and Carolin Schönert (University of Münster)

The focus of this report lies on the role of social economy in European welfare states, in the field of social investments and its importance for the realization and implementation of social innovations in four social policy areas: Child Care, Reconciliation Policies, Active Labour Market Policy, and Long Term Care. 33 Interviews have been conducted with policy experts from the ten countries that took part in the project (Finland, Germany, Greece, Italy, The Netherlands, Hungary, Poland, Spain, Sweden, and the UK) and from France.

The report shows that, although in all countries under study social economy organisations are involved in welfare production there is not a general increasing importance of these players in the welfare mix. Quite the contrary is some countries a decreasing importance of the social economy in welfare production is reported. There are different reasons for this development: while countries like the Netherlands and the United Kingdom embarked upon a rigorous budgetary policy which affected the financing of social economy activities, other countries like Finland and Italy rather expanded state activities instead of developing the cooperation between state and social economy. The greatest growth of importance of social economy organisations can be observed in most of the countries under study in the context of child care policies. In almost all member countries of the European Union the expanding of the child care sector has been the most important concern of welfare policies in recent years. And in contrast to reconciliation policies which are typically based on transfer payments (like parental allowances) from the public budget to the beneficiaries, child care is a generic person based service that requires facilities and human resources. Organisations of social economy are involved in long-term care policies in all countries of observation to a highly differing extent. Although social economy organisations have a tradition or are governmentally or municipally favoured for their social approach and profit limit in most of the countries, the prospects of the third sector in LTC are not promising.

Interestingly, the interviewed experts in many countries do not see an increasing importance of social economy in the field of active labour market policies. In some countries the importance of social economy has not increased in recent years or the policy field remains mainly in the responsibility of the public employment bureaus although a trend of communalisation has been reported in other countries.

Links:

Research briefing: <http://innosi.eu/wp-content/uploads/2017/04/Briefing-3.3-new.pdf>

Full report : <http://innosi.eu/wp-content/uploads/2016/05/InnoSI-D3-3.compressed.pdf>

Further reading and watching

1. Lecture by Anton Hemerijck on social investment paradigm
https://www.youtube.com/watch?time_continue=37&v=KVYIHH6XXCE
2. Anton Hemerijck: Changing Welfare States. Oxford University Press, 2012



Do It yourself

1. Compare the definitions of social investment, social innovation and social economy. Conclude differences and overlaps.
2. Who are your regional and local politicians active in this policy field and what are the most important current topics in the field of social investment?

MODULE 2

2 Comparing European Case Studies of InnoSi

2.1 Introduction

Twenty European case studies were selected for evaluation of provided social services; two per country. The case studies were selected for their thematic diversity, addressing different vulnerable groups and ways of working. They refer to the policy fields of social investment defined by Anton Hemerijck: childcare and parental support, labor market participation of women and vulnerable groups,

In this chapter we will give:

- an overview of the case studies
- insight in how these studies were evaluated
- a summary of each case study and a link to the more elaborate description of that case study
- illustrations of how clients of a case study experienced participating (link to video's)
- assignments for students to work on to develop more understanding of social investment in practice.

2.2 An overview

The case studies are examples of social investment that capture innovative approaches to financing and legislating/regulating social investment. The case studies also take into account the regional and local realities of social investment approaches. They help to identify effective policy and practice in social investment and also to understand the social and psychological impacts of these policies on beneficiaries and wider communities.

Overview of the cases:

- Youth Guarantee (Finland)
- User driven local public services (Finland)
- MAMBA Labour market integration for refugees and asylum seekers (Germany)
- Integrated Intervention to Connect Vocational Schools Graduates with Labour Market (Greece)
- Social land Program (Hungary)
- Urban Farming (The Netherlands)
- The Green Sticht (The Netherlands)
- Employment from A to Z (Poland)
- Valenciactiva (Spain)
- Partnerships between idea-based and public organisations (Sweden)
- Troubled families (United Kingdom)
- Working Well (United Kingdom)
- BerufundFamilie (Germany)
- Women in trade unions (Greece)
- Energy co-operatives (Spain)
- Personalised care plans (Italy)
- Active regardless of Age (Poland)
- Tanoda Brainwheel (Hungary)
- Integrated system of early childhood education and care (ECEC) in Emilia-Romagna Region (Italy)
- To take advantage of new-arrived pupils' earlier experiences and knowledge (Sweden)

12 Case studies have active labour market interventions for people without work as either a primary or secondary focus. Four cases (Youth Guarantee (Finland), Vocational school graduates (Greece), Valenciactiva (Spain) and Working Well (UK)) have a primary active labour market focus for people without work. Three cases (MAMBA (Germany), Social land Programme (Hungary) and Employment from A to Z (Poland)) combine this labour market focus with inclusion and social solidarity. In the UK case about Troubled families we see a different combination of active labour market policies and early intervention and education. In four cases (User driven local public services

(FinalInd), Urban Farming (Netherlands), Green Sticht (Netherlands) and Partnerships between idea-based and public organisations (Sweden)) we see a primary focus on social inclusion and solidarity and active labour market participation as secondary target.

Eight case studies have a different focus. Two cases support people in work to improve their employment (Berufundfamilie (Germany) and women in trade unions (Greece)); three cases are about social inclusion and solidarity (Energy co-operatives (Spain), Personalised care plans (Italy) and Active regardless of age (Poland)). The last three cases are local interventions for early years and education targeted at systemic solutions for successful policy (Tadoda (Hungary), Early Childhood Education (Italy); and School Reform (Sweden)).

2.3 Evaluation methods used

In the Innosi Project the case studies have been evaluated in a structured way using the following elements:

- **Literature review:** Covering key policy and research literature relating to the policy or programme that is the subject of the case study. This review may include: previous evaluations of the same or similar programmes; policy documents that help explain the development of the policy or programme; and academic papers that analyse the policy area.
- **Needs assessment:** Social programmes exist to alleviate a social problem (Rossi et al. 2004) and a needs assessment assesses the nature, magnitude and distribution of the social problem and the extent to which there is a need for the intervention (Rossi et al. 2004).
- **Define theory of change:** Evaluations often start with an assessment of the logic model or theory of change that underpins it. This programme theory may not be set out explicitly during the design of the programme. During an assessment of programme theory evaluators ask questions about the way a programme is conceptualized and designed (Rossi et al. 2004).
- **Process evaluation:** A process or implementation evaluation examines whether and how the programme was implemented and run. Even with a plausible theory about how to intervene a programme must still be implemented well to have a reasonable chance of making an impact. The main issues process evaluation will concentrate on are: the distribution of the policy, social and managerial roles between public, private and third sectors; evaluate the legal framework used; and the interaction and complementarity with broader social welfare policies.
- **Impact evaluation:** Effective implementation doesn't guarantee that the programme has the desired impact. An impact evaluation asks whether the desired impact was achieved and whether there were unintended side effects (Rossi et al. 2004). Different impact evaluation designs are possible. (Quasi) experimental designs are often favoured where the aim is to provide estimates of effect that are most robust in terms of internal validity. But, such designs have limitations: they assume that the intervention is fixed, focused on a narrow set of well-defined outcomes and, that while the intervention may be 'complicated' it is not 'complex'. Where these assumptions don't hold alternative impact evaluation designs are possible including theory-led designs, such as realist evaluation (Pawson and Tilley 1997) and case-based designs (Byrne and Ragin 2009).
- **Economic evaluation:** Even if a programme has a positive effect on the target population this does not guarantee that it is efficient. Some effective programmes may incur costs that are high relative to their impact in comparison to other alternatives (Rossi et al. 2004). An economic evaluation examines the relationship between the programmes costs and its effectiveness and commonly takes the form of either a Cost-effectiveness or Cost-Benefit Analysis. However, the possibility of using such designs is dependent on the type of impact design that is used, where in the implementation cycle the policy or programme is and the resource available to the evaluation team. Therefore some case studies may consider using a form of ex ante economic evaluation or alternative economic evaluation models such as Social Return on Investment (SROI).

This methodology is based on: Baines, S., Fox, C., Ozan, J., Csoba, J. & Sipos, F. (2016). InnoSI WP4 Case Study Research and Evaluation Guide. Manchester: MMU.

Links:

Guideline Evaluation Methods: <http://innosi.eu/wp-content/uploads/2017/09/WP4-Case-Study-guidance.pdf>

Do it yourself:

Take one of the InnoSi case studies related to your own work situation. The aim is that you can find useful information for your own working case. Answer the following questions:

1. What were the needs addressed? What needs do you address in your project?
2. Can you define clearly what the theory of change was, when the project started. What improvements/ changes were aimed at in the programme design? What about your own case?
3. How did the realization process go? What were the tasks, roles? Did the plan work? Was the project realized/ implemented following plan? If not? What were the bottlenecks? What about your own project

2.4 The cases, illustrated

2.4.1 Youth Guarantee (Finland)

This case study is about the Finnish One-Stop Guidance Center (OSG). Under the Youth Guarantee, the government should ensure that within four months of leaving school or losing a job, young people under the age of 25 can either find a good-quality job suited to their education, skills and experience or acquire the education, skills and experience required to find a job in the future through an apprenticeship, traineeship or continued education. Diagnosing the regulation and the implementation of the system means getting a grip on what sort of system YG/OSG is, how it works, who holds the power, where innovations are needed and where are the key leverage points.



How I got help from the employment office: A young woman tells that she has had mostly good experiences of the employment office. A couple of years ago she lost her job and she wanted to have an internship in a kindergarten. She found a place by herself in a kindergarten and contacted the employment office. The administration was arranged by the employment office very quickly. She was also offered to take part in a job search training which she accepted. The training was well organized and participants were supported in job search. She feels that support has been available and she has always got help and job offers when she has been unemployed. They've been in contact and offered her different kinds of courses and jobs.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/FINLAND-Youth-Guarantee.pdf>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=jTCMmycqrwY&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=4

Do it yourself:

Read the summary of the case-study results on youth unemployment. What is the project about? Can you compare the programme with youth (un)employment programmes in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.2 User driven local public services (Finland)

This case is about a collaborative, facilitated, experimental process taking place between municipal citizen groups, municipal service sectors and other relevant parties, using service design methods for planning and producing municipal services. As a product of this project, several service concepts were generated. The community development concept May I Help You? was chosen as the one to be realised. This service aims at preventing social exclusion by bringing unemployed young people and elderly persons living alone into contact with each other. The young people perform small, everyday services on behalf of the elderly.



Working with your hands: In this story Marja talks about joining a sewing and craft group in her community, and how it has helped her to meet new people. Marja tells that making crafts is an important hobby and it is empowering to work with hands and to get some concrete results. In recent years Marja has dedicated more and more time to crafts because she has retired and her husband has died and she lives alone. In Sotkamo, where Marja lives, there are good opportunities to participate in crafts courses together with other people in a local community college. Marja tells that she has found new friends. She tells that working with hands helps her in keeping the daily routines. She doesn't know any other activity that could have had the same effects.

Links:

Case study report (4 pages): <http://innosi.eu/wp-content/uploads/2017/04/FINLAND-Kainuu.pdf>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=N6VyOTS879A&index=5&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0

Do it yourself:

Read the summary of the case-study results on user driven local public services. What is the project about? Can you compare the programme with municipal programmes in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.3 MAMBA Labour market integration for refugees and asylum seekers (Germany)

In the frame of the case study the innovativeness, implementation and impact of social investment in the field of labour market integration of refugees and asylum seekers has been evaluated. The investigation describes ways of implementing social investment and helps to find a strategy to adapt effective and efficient social policy instruments for different policy fields and countries. With the term 'social investment' we refer to social policy instruments which aim at enabling people to cope with future risks through e.g. education, training, social services or universal access to child care. In this view, social policy becomes a preventative long-term strategy with social and economic returns over time instead of merely compensating for income losses.



Finishing school: Ismael is from Daraa in Syria. He fled (partly) because of the difficulties in continuing his education. Once in Germany, Ismael moved to Ingolstadt (two years ago) and was able to continue 11th grade in high-school (Fachoberschule). He came to Ingolstadt because a friend lived there and he liked it, so he stayed and found more friends. In the beginning he couldn't speak any German and found it very difficult to communicate. After studying hard, he was able to speak to lots of people and became more fluent. His professional goal is to study computer science and therefore is already specializing in technology at his school. He gives the advice to other refugees not to be afraid to talk to the local population in order to adapt to the new society. It is not an easy task and one has to be active and open-minded.



New start in Germany: This is Hossam from Syria. He is a professional dancer. Because of the war he had to leave his home with his wife and his 3 small children. He is talking about his experiences and his new start in Germany.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/GERMANY-MAMBA.pdf>

Community report Daraa (with subtitles in English): https://www.youtube.com/watch?v=LyRT-TLj6BM&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=10

Community report Hossam: <https://www.communityreporter.net/story/new-start-germany>

Do it yourself:

Read the summary of the case-study results on labour market integration for refugees and asylum seekers. What is the project about? Can you compare the programme with initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.4 Integrated Intervention to Connect Vocational Schools Graduates with Labour Market (Greece)

The programme aimed at providing a solid “corpus” of skills, motives and working experience to VET schools graduates and, also, being profitable for the participating enterprises through an integrated social investment initiative. The initiative as part of an EU active labour market policy (YEI) included: a) theoretical training in the form of horizontal (“soft”) “tools” so that beneficiaries are able to meet the requirements of labour market; b) vocational counselling oriented to the establishment of employability and adjustment; and c) acquisition of working experience (internship) in enterprises by matching the graduates’ specialties with the areas the enterprises trade in.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/GREECE-Vet-and-Labour-Market.pdf>

Do it yourself:

Read the summary of the case-study results on labour market intervention . What is the project about? Can you compare the programme with labour market initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.5 Social land Program (Hungary)

This program helps socially disadvantaged people to strengthen self-sufficiency and to decrease reliance from the social aid. It supports unemployed participants to produce agricultural goods and acquire competencies in household agriculture. The supported activities are the following: the production of goods, the delivery to markets, the creation of retail processes, the strengthening of network co-operations, and the procurement of missing tools, objects and equipment.



Attiláné describes briefly the social land program. 30 families received chickens and feed in the framework of the program in Jászladány. She has taken part in the program for 3 years together with her family. They upreared the chicken and used them for producing eggs, ate them and also kept some hens as egg-layers and use community incubator to produce chicken. They due the activities at home but discuss it with other participants. She is satisfied with the program and would like to take part in it in the future.

Links:

Case Study report: <http://innosi.eu/wp-content/uploads/2017/04/Hungary-Social-land-program.pdf>

Do it yourself:

Read the summary of the case-study results on supporting unemployed villagers. What is the project about? Can you compare the programme with social initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.6 Urban Farming (The Netherlands)

The two urban farming projects in the Netherlands offer a safe and peaceful environment where people who are not able to hold a job work on their personal learning, which eventually may lead to reintegration into the regular labour market. They combine coaching and personal development for vulnerable people with agricultural production of vegetables for the biological market. The social innovative element is the combination of farming and care. Vulnerable people work in the gardens, sowing, planting, watering, and plucking weeds. They gain self-confidence and experiment with group work and social exchange. In both gardens, the greenkeepers and care workers work from bottom-up.

Links:

Case study report (summary): <http://innosi.eu/wp-content/uploads/2017/04/Netherlands-urban-farms.pdf>

Do it yourself:

Read the summary of the case-study results on care farms. What is the project about? Can you compare the programme with farming initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.7 The Green Sticht (The Netherlands)

The initiative has been set up to reintegrate homeless people into society by giving them a home in a unique mixed housing project. The Green Sticht combines a variety of residential and working functions for a mixed group of people with and without a socially vulnerable position. The working functions include a thrift store, a furniture workshop (for recycling of furniture) and a restaurant which employs people with intellectual disabilities. In order to create a sense of community and to support social cohesion, active participation and mutual support are promoted. The social innovative element of this project is the provision of a safe haven and social support to homeless people by offering a favourable environment for their process of reintegration into society, and an informal support structure for socially vulnerable people living in the mixed neighbourhood.



My own House: After a very long time, I have my own home. I am enrolling in an education programme and starting a new job where I will be living in Majella. I am proud that I have been through some difficult times to get here.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Netherlands-Green-Sticht.pdf>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=LWPqo6UWxqc&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=8

Do it yourself:

Read the summary of the case-study results on reintegration of homeless people. What is the project about? Can you compare the programme with housing projects initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.8 Employment from A to Z (Poland)

The subject of the case study is the program Assistance from A to Z – Professional activation of homeless people from Wrocław Circle St. Brother Albert Aid Society. The project was implemented in the period of time: 30.09.2012-30.10.2015 in Wrocław by Wrocław Circle St. Brother Albert Aid Society. The project concerns the socio-professional activation of people at risk of social exclusion, hence it is a part of social inclusion of people at risk of social exclusion policy. It applies to a specific group of people at risk of exclusion - the homeless – and is an investment for activation and empowerment the homeless. The project was implemented under the Operational Programme Human Capital and was financed by the European Social Fund.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/POLAND-Assistance-from-A-to-Z.pdf>

Do it yourself:

Read the summary of the case-study results on activation of homeless people. What is the project about? Can you compare the programme with initiatives for homeless people in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2..4.9 Valenciactiva (Spain)

The brand Valenciactiva was created with the aim of coordinating existing structures in the city of Valencia and utilize them for purposes of economic development and employment. The employment scheme of Valenciactiva focuses on personalized treatment with the local area of the candidate. The idea is to move away from a traditional information-based assessment and produce a roadmap of functions and activities for active job seeking. One of the major differences with regional social services is that the centres are located within the neighbourhoods with the greatest rates of unemployment.



We still have time: In his four short stories, Jorge tells of how mismanagement has left around 50% of those employed in jobs related to the construction industry due to the ongoing economic crisis. He relates how the state is unable to provide coverage or services that are useful for finding a job and that even the training courses he is sent on by job centres are often non-existent and that work experience courses are designed to avoid paying unemployment benefits.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Spain-Valenciactiva.pdf>

Community report (with subtitles in English): https://www.youtube.com/watch?v=oMamhcjnS-o&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=3

Do it yourself:

Read the summary of the case-study results on this employment initiative. What is the project about? Can you compare the programme with employment initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.10 Partnerships between idea-based and public organisations (Sweden)

The case study is about the abilities of Gothenburg municipality to address the challenge of newcomer immigrant children without parents reception and integration through an innovative form of collaborative partnership between municipality and nine voluntary organisations. This unique partnership is explored against its ambitions to establish new patterns of more equal and long-term relations with civil society, in contrast to traditional contracts and grants, and its abilities and added value in addressing new challenges of social investment in unaccompanied immigrant children. Majority of partnership youngsters have gained access to social networks and some chose to gained labour market experience through summer on-job practice.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Sweden-Civil-society-PPs.pdf>

Do it yourself:

Read the summary of the case-study results on newcomer immigrant children. What is the project about? Can you compare the programme with immigration initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.11 Troubled families (United Kingdom)[Klik hier als u tekst wilt invoeren]

In broad terms, Social Investment is a distinctive approach in social policy that perceives welfare spending as a form of long-term investment, with an emphasis on improving human capital and expanding labour market participation. The underpinning principles of Troubled Families include early intervention with children and sustained employment for parents. The case study shows that local contexts of this national programme influence how it is delivered across the ten boroughs of Greater Manchester.



My experiences on a parenting programme: JL attended a parenting programme to help support her in her family life. However, she did not find the programme much use and in this video she describes her experiences whilst on the programme and also what support she would have liked to receive.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/UK-Troubled-families.pdf>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=LH2eQLkJ1C8&index=9&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0

Do it yourself:

Read the summary of the case-study results in social policy. What is the project about? Can you compare the programme with social policy initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.12 Working Well (United Kingdom)

Working Well is a city-wide program that aims to activate those claiming out-of-work benefits, recognising that those who have been unemployed in the medium to long term are very likely to also have physical and mental health needs that if unaddressed create a barrier to employment. The city government commissioned two organisations to do this work, one being a private sector 'welfare-to-work' provider, and the other being a community sector organisation. These two organisations were contracted on a Payment by Results (PbR) basis, such that they received funding for each person worked with, and a further payment when individuals moved into work.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/UK-Troubled-families.pdf>

Do it yourself:

Read the summary of the case-study results on activating unemployed persons. What is the project about? Can you compare the programme with employment initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.13 Beruf und Familie (Germany)

With this case study we evaluated the innovativeness, implementation and impact of social investment in the field of family policy. The investigation describes ways of implementing social investment and helps to find a strategy to adapt effective and efficient social policy instruments for different policy fields and countries. With the term 'social investment' we refer to social policy instruments which aim at enabling people to cope with future risks through e.g. education, training, social services or universal access to child care. In this view, social policy becomes a preventative long-term strategy with social and economic returns over time instead of merely compensating for income losses in certain situations.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/GERMANY-UKM.pdf>

Do it yourself:

Read the summary of the case-study results on family policy. What is the project about? Can you compare the programme with family policy initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.14 Women in trade unions and the labour market (Greece)

The project “Promotion and strengthening of women’s participation in trade unions and their representation bodies”, aimed at promoting and ensuring the active participation of women workers in positions of responsibility at all levels and types of trade unions. INE (Labour Institute) initially planned activities, which focused on the broader social education of women, in order for them to become key actors for the promotion of women’s issues through trade unions. In the due course of the programme the main goals focused on the general empowerment of women within the Greek society under crisis.



It is never too late: In this video Maria talks about her decision to seek a career different than her original studies and her current job. Even though she is not certain whether she will succeed in it or not, she is sure she will gain a lot of experience.



The role of women in the workplace: In this short snapshot story, Maria argues that although the majority of employees in the organisation she works for are women, there is a considerable degree of discrimination that is based on gender.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/GREECE-PUA-Women-in-Trade-Unions.pdf>

Community report: <https://www.communityreporter.net/story/role-women-workplace-2>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=E2du5GdS_Zk&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=11

Do it yourself:

Read the summary of the case-study results on women’s participation in trade unions . What is the project about? Can you compare the programme with participation initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.15 Energy co-operatives (Spain)

With Spanish energy prices among the most expensive in Europe and indicators of rising poverty, energy cooperatives are helping to bridge the gap in conjunction with local administration in providing for those most at need. Models in place at cooperatives such as the Central Eléctrica de Alginet (València) not only provide a reliable source of clean energy to consumers, but fundamentally form a central part of the local community. There is a clear need for private enterprises to collaborate with local authorities and social services under the social investment paradigm to provide solutions to drastic situations of poverty that are still prevalent particularly in areas of Southern and Eastern Europe.



Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Spain-energy-cooperatives.pdf>

Do it yourself:

Read the summary of the case-study results on energy services. What is the project about? Can you compare the programme with energy initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2-4-16 Personalised care plans (Italy)

Since 2000, the Sardinia Region has developed a set of coordinated interventions for both people with severe disabilities and their carers: the measures adopted are aimed at strengthening the public support for long-term care, promoting and maintaining independent living, and enabling and enhancing caring networks and home assistance. Personalised plans are the Sardinian implementation of National Law 162/1998. The service user goes through a process of person-centred planning together with her family members and social workers. In this process, the service user makes personalised plans for the kinds of services she wants to use in daily life. The personalised plans are discussed and collectively assessed. Once the plan is accepted by local authorities, the user starts to arrange the services according to this individual plan by using her personal budget.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Italy-Sardinia.pdf>

Do it yourself:

Read the summary of the case-study results on personalized care plans. What is the project about? Can you compare the programme with care initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.17 Active regardless of Age (Poland)

The project “Aktywni bez względu na wiek” was implemented between April 2015 and December 2015 in Gdańsk by the non-governmental organisation Towarzystwo Edukacyjne Wiedza Powszechna. The project was co-financed by the Polish government programme ASOS for elderly people in the framework of senioral policy in Poland. It focused on the social activation of Gdansk seniors aged 60+, at risk of social exclusion, being in a difficult economic situation and with limited ability of using the educational offer of the University of the Third Age in Gdansk. As the result of the project seniors collected new knowledge and learnt new skills that would enable them to more efficiently function in a changing world and maintain good physical, mental and intellectual condition.



Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/POLAND-ASOS.pdf>

Do it yourself:

Read the summary of the case-study results on elderly people. What is the project about? Can you compare the programme with social activation of elderly people in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.18 Tanoda Brainwheel (Hungary)

The 'Tanoda' programme is a complex programme that helps increase the chances of disadvantaged (especially Roma) children for social integration and also strives towards the implementation of 'equal opportunity' in education and in the everyday life. The programme aims to help students with multiple disadvantages to be more successful at school, to continue their studies and, in this way, to boost their chances in the labour market and social integration. It aims to individually develop each participant's personality as a whole using various methods with free time and educational activities.

The research on two Tanoda projects showed that the scope of these activities can cover:

1. Activities that can help compensate for social disadvantages, such as media camp, sports club, handcrafting events, drama club, "Opposite Days", excursions, family days, social events, "Tanoda Cup", Tanoda school year closing ceremony.
2. Activities that encourage improvement, boost/assist learning, such as study rooms for humanities, sciences and languages, Internet club, various training courses, skills development sessions (physical exercise, visual, learning and emotional intelligence), career orientation.



Links:

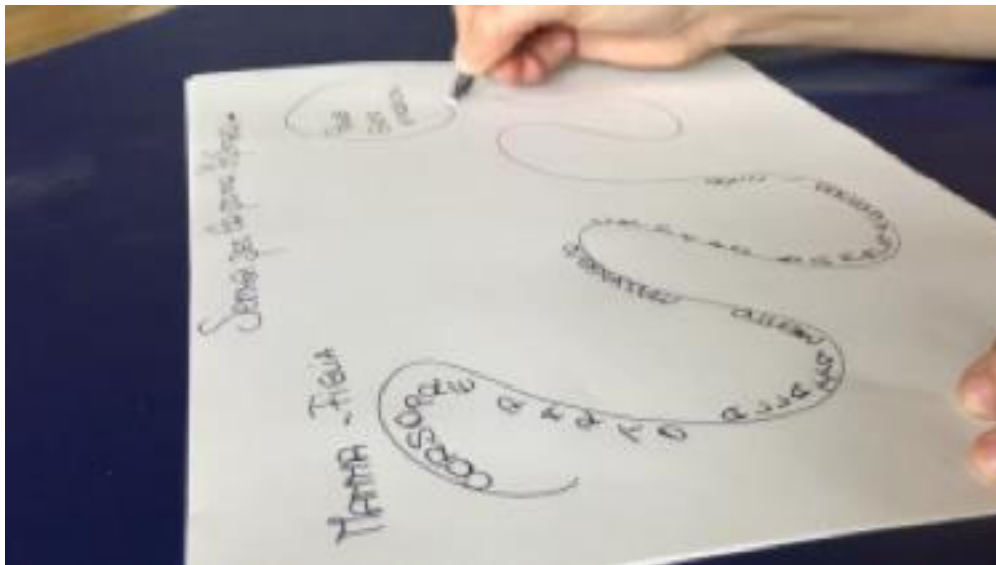
Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Hungary-Tanoda.pdf>

Do it yourself:

Read the summary of the case-study results on disadvantaged children. What is the project about? Can you compare the programme with initiatives to support disadvantaged people in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.19 Integrated system of early childhood education and care (ECEC) in Emilia-Romagna Region (Italy)

The project focused on three ECEC services in Emilia Romagna (a daycare centre for children aged 0-3; a small educational group (home-based) attended by 0-3 aged children; and an integrated service encompassing a daycare centre (attended by 0-3 aged children) and a centre for children and parents (attended by 2-5 aged children and their families). It showed how high quality ECEC provision is achieved through the co-creation and sharing of knowledge, expertise and experiences that are generated by innovative forms of public governance: local and regional networks, partnerships with parents, coalitions for policy advocacy, inter-agency collaboration. The evidence gathered highlights that ECEC quality is more likely to be the result of joint actions inscribed within a competent system rather than the direct consequence of practitioners' individual competences.



My Experience As Mum In ECEC Services: Chiara works in ECEC services for several years. In this video, she describes a journey as a mum instead of professional and the way this has affected her professional growth. At the beginning, she attended birthing and breastfeeding classes, after she went with her daughter to the family- child centre. She notes that motherhood has changed her way of looking at things and feelings. The emotions and fears experienced as a mother thanks to this new, exciting and unique experience, they will make Chiara feeling more empathetic towards other parents.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Italy-ECEC.pdf>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=S9Sk4vX3ucE&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=7

Do it yourself:

Read the summary of the case-study results on early childhood education. What is the project about? Can you compare the programme with education initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.4.20 To take advantage of new-arrived pupils' earlier experiences and knowledge (Sweden)

During the past year much of the European political debate centered on ways of handling the 'refugee crises'. Integration of new arrivals is a huge challenge on national, as well as on regional and local levels. As part of the issue of how the integration will be improved, recently increasing emphasis has been placed on making use of the knowledge and experience of immigrants, including, for example, their language skills, knowledge, and high levels of education. As a result, the Swedish government has presented a reform package for improving the education of foreign-born pupils. The reforms are regulated nationally, but has to be implemented locally. This study first and foremost deals with the implementation and short-term results of the introduced reform, but the medium-term and long-term effects are also discussed. It should be noted that this is a new reform that is by and large still in the implementation phase, so introduced methods and their results may be evaluated to a limited extent.



Changing schools: Having moved from Syria, a teenager discusses how he has settled into Swedish education because of good friends and teachers who respect him.



Adjusting to school in Sweden: A teenager talks about her classes in Sweden and how she was shy at the start. She felt she had no-one around her because of the language barrier, so you must learn the language to communicate with others.

Links:

Case study report: <http://innosi.eu/wp-content/uploads/2017/04/Sweden-School-reform.pdf>

Community report (with subtitles in English):

https://www.youtube.com/watch?v=_LeLGVtmoTI&index=2&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0

Community report: <https://www.communityreporter.net/story/adjusting-school-sweden>

Do it yourself:

Read the summary of the case-study results on new arrived refugee children. What is the project about? Can you compare the programme with refugee initiatives in your own country? What social investment scheme is adopted here? What makes this project innovative? What learnings can you take from this case?

2.5 Conclusions: Seven tendencies in innovative social investment

Observation 1: Building human capital usually goes along with social capital

Human capital is at the core of the Social Investment paradigm. The case study interventions in labour market activation usually involve the building of social capital alongside human capital (for example: Social Land Programme (Hungary) and Early Childhood Education and Care (Italy)).

Observation 2: New relationships across agencies and sectors

There are some highly positive examples in the case studies of success at achieving collaborative advantage through various kinds of joint working to achieve common Social Investment goals. The rationale is usually that the social challenges are too big and complex for one agency, and that users' needs do not conform to professional and organisational boundaries (for example MAMBA (Germany)).

Observation 3: Interdependency with wider policy and politics

Social Investment goals typically align closely with national as well as EU policy priorities e.g. for labour market activation, work and family reconciliation, early years education or active ageing.

Observation 4: A strong social economy presence.

Governments involve non-state actors in welfare state reforms and, in turn, non-state actors may pilot reforms themselves, which are then adopted by governments. In the case studies, there were many examples of the redistribution of implementation roles, often expanding the importance of social economy actors.

Observation 5: Financial Innovation

Personalised, user-focused services were characteristic across all the case studies. There was a strong sense from providers and users alike that this replaces a one size fits all model that has failed in the past. Some interventions went much further with involving users in the design of services.

Observation 6: Unpaid work to support Social Investment

In some cases, non-financial inputs (mainly unpaid work on the part of citizens) are essential to make Social Investment initiatives viable. This is particularly so where social economy partners are able to access local traditions of volunteering.

Observation 7: Very poor, vulnerable and stigmatised groups

Many InnoSI case studies set out to benefit some of the most vulnerable and stigmatised social groups, often with some elements of compensation. Nevertheless, they demonstrate success for initiatives with a socially investive and innovative character in tapping into new capacities and resources.

Further Reading

For more information look at: Baines, S., Csoba, J., Bailey, G., O'Leary, C., Sipos, F., and McNeill, T. (2017). Synthesis report on case studies. Manchester (MMU) and Debrechen (DE).

Links:

Synthesis report: <http://innosi.eu/wp-content/uploads/2017/09/Synthesis-of-case-studies.pdf>

Do it yourself

1. Choose one the case studies with new and interesting information for the situation in your country?
Describe the following aspects of these case studies:
 - What are the most important elements of these cases?
 - Why are these elements relevant for the situation in your country?
 - Which groups of stakeholders are involved in these cases?
 - Make a stakeholder analyses for these cases (<https://www.youtube.com/watch?v=5n1vf4pcmfw>).
 - What are the most important motives (prompting factors) for these case studies?
 - What are the success factors?
 - Is there any information on the barriers they met and the solutions they have found?
 - Have these case studies been financially supported by the government? If yes: Do you think that these initiatives can run without public funding?
 - Under which conditions are these case studies transferable to your country?
2. Find a local initiative with social investment aspects and make a short description using the above mentioned elements.

MODULE 3

3 Listening to people. Understanding the value of lived experience

Overview of the module: As part of this module, learners will explore the practice of Community Reporting and the value that stories of lived experience can have in terms of the insights that they provide.

Learners will watch a range of Community Reporter feature stories gathered as part of the InnoSI project in relation to the specific case studies examined and reflect upon what they have learned from the stories, what connection they had to the stories and what it tells them about social investment programmes.

To synthesise this understanding, learners will produce an independent summative project (i.e. a written report, presentation, short video) that brings together their learning from the stories and practice they have explored.

Learning Outcomes:

- Assess the value of lived experience in applied social science research.
- Identify the key messages and insights from stories of lived experience.
- Synthesise learning from the stories into an independent project.

Community reporting in InnoSi Project

- 100 x Community Reporters trained across 10 different European countries
- 25 x Insight Advocate Trainers trained
- 118 x 'User Voice' stories collated
- Online 'User Voice' story bank collated at www.communityreporter.net/innosi
- 1 x individual summative report for each of the 11 x 'User Voice' story collections

A range of packaged insights from the 'User Voice' stories that include:

- A geo-map of 'Stories of Social Investment and Innovation'
- A 'User Voice' thematically edited film on the topic of 'Peer Support Networks and Social Connections'
- 11 x feature stories (subtitled in English) for each 'User Voice' story collection
- 1 x playlists of extracts for each of the 11 x 'User Voice' story collections
- 1 x word cloud of tags produced for each of the 11 x 'User Voice' story collections



3.1 User voice in InnoSI

As part of InnoSI, *People's Voice Media* (see: <http://peoplesvoicemedia.co.uk>) and the *Institute of Community Reporters* (ICR) (see: <http://peoplesvoicemedia.co.uk>) have been running a series of Community Reporting programmes across Europe to capture user voice on the topics and themes from the social investment case studies being examined in the project. As part of these programmes, people have told stories about their own lived experience of social investment programmes and the issues that are pertinent in their lives, and gathered stories from their peers. These stories were curated and the insights from them presented digitally in a range of way as collated on the *InnoSI website* (see: <http://innosi.eu/community-reporting>)

What is Community Reporting?

Community Reporting is a storytelling movement that was started in 2007 by People's Voice Media, and it uses digital tools such as portable and pocket technologies to support people to tell their own stories in their own ways. Central to Community Reporting is the belief that people telling authentic stories about their own lived experience offers a valuable understanding of their lives. Through creating spaces in which people can describe their own realities, Community Reporting provides opportunities in which people can:

- Find their voice
- Challenge perceptions of self, others and social reality
- Be part of a conversation of change

Using the Internet to share these stories with others, the Institute of Community Reporters are able to connect them with decision-makers who are in a position to make positive social change.

Models of Community Reporting

There are three core models of Community Reporting. Community Reporting for Storytelling provides people with the knowledge and skills to become responsible storytellers and to have their say on the issues and topics that are pertinent to them.

Community Reporting for Co-Production uses different forms of digital media to present a range of perspectives on a subject matter, creating a dialogue between various points of view on a topic. Community Reporting for Insight uses people's experiences to provide rich qualitative data to projects, taking the insights from their stories to identify themes, inform findings of wider studies and positively impact on local agendas, policies and service design. These models of Community Reporting inform our programme design and can be used independently of each other, or brought together (as the diagram shows) to create multifaceted storytelling experiences.



Community Reporting in InnoSI

For the InnoSI project we adopted the Community Reporting for Insight model. The Insight model was used to collate 'User Voice' and grassroots perspectives on a diverse range of issues and topics, from unemployment through to thoughts on wellbeing, that related thematically or topically to the case studies and social investment projects being examined via traditional social science research techniques realized in the case studies of InnoSi. The purpose of this alternative method of engaging users in the research process was to provide insights into their wider lives and

experiences, and enable people to tell their own stories in their own ways. Unlike structured interviews or focus groups in which participants will answer and discuss a range of predetermined questions formulated by researchers, the model of Community Reporting for Insight is much looser in that it provides a space for people to talk about a broad topic or theme how they want to. Within this model we used three core storytelling methods:

- **Snapshot Stories:** These stories engage people in talking about their opinions on a particular topic. This method aims to gather quick insights into the topic and can be used as a 'starter' storytelling activity. As part of this technique an open question is asked to an individual and they respond to it with their opinion. This technique provided some useful insights into perceptions of *gender equality in the workplace* in the Community Reporter programme run in Athens, Greece.
- **Dialogue Interviews:** These are peer-to-peer 'interviews' that do not have pre-determined questions. Instead, an opening question (i.e. a conversation starter) is asked which enables the storyteller to start to tell their story and then the Community Reporter recording the story may then ask any questions within this storytelling process that naturally occurs to them. In essence, the structure of this practice mimics our day-to-day conversations, and does not involve a set list of questions. An example of this technique is *Marja's story* about community activities in Finland.
- **Personal Monologues:** In this type of story, people record themselves talking about a particular topic, experience, life journey etc. These stories are planned in a variety of different ways such as mind-mapping exercises, journey story maps, story and ideas boards, and story element planning sheets. These tools enable people to gather their ideas and structure their thoughts in their own ways before they tell their story. An example of this practice is *Jorge's story* about unemployment in Spain.

Underpinning these techniques is Responsible Storytelling that involves co-creating best practice guides in terms of the ethics and values adopted by our Community Reporters with local groups. This ensures ownership and that the guidance given is suitable for the context in which the Community Reporters will be operating in. You can join the Community Reporter movement as an independent member by emailing enquiries@peoplesvoicemedia.co.uk and working with us to create a best practice guide

Links to InnoSi reports and products:

People's Voice Media <https://peoplesvoicemedia.co.uk>

Institute for Community Reporting (ICR) <https://communityreporter.net>

Summary InnoSi – Community Report

Full Report InnoSi – Community Reporting

Do it yourself: Assessing the value of lived experience

In small groups discuss the value of lived experience in applied social science research. Think about:

- Why does experiential knowledge matter? How is it valuable?
- How does the Community Reporting techniques differ from traditional research methods?
- What challenges are there to gathering and working with experiential knowledge & stories?

3.2 Community Reporting in InnoSI

For the InnoSI project we adopted the Community Reporting for Insight model. The Insight model was used to collate 'User Voice' and grassroots perspectives on a diverse range of issues and topics, from unemployment through to thoughts on wellbeing, that related thematically or topically to the case studies and social investment projects being examined via traditional social science research techniques realized in the case studies of InnoSi. The purpose of this alternative method of engaging users in the research process was to provide insights into their wider lives and experiences, and enable people to tell their own stories in their own ways. Unlike structured interviews or focus groups in which participants will answer and discuss a range of predetermined questions formulated by researchers, the model of Community Reporting for Insight is much looser in that it provides a space for people to talk about a broad topic or theme how they want to. Within this model we used three core storytelling methods:

- **Snapshot Stories:** These stories engage people in talking about their opinions on a particular topic. This method aims to gather quick insights into the topic and can be used as a 'starter' storytelling activity. As part of this technique an open question is asked to an individual and they respond to it with their opinion. This technique provided some useful insights into perceptions of *gender equality in the workplace* (see: <https://communityreporter.net/story/role-women-workplace-1>) in the Community Reporter programme run in Athens, Greece.
- **Dialogue Interviews:** These are peer-to-peer 'interviews' that do not have pre-determined questions. Instead, an opening question (i.e. a conversation starter) is asked which enables the storyteller to start to tell their story and then the Community Reporter recording the story may then ask any questions within this storytelling process that naturally occurs to them. In essence, the structure of this practice mimics our day-to-day conversations, and does not involve a set list of questions. An example of this technique is *Marja's story* (see: <https://communityreporter.net/story/kasilla-tekeminen-working-your-hands>) about community activities in Finland.
- **Personal Monologues:** In this type of story, people record themselves talking about a particular topic, experience, life journey etc. These stories are planned in a variety of different ways such as mind-mapping exercises, journey story maps, story and ideas boards, and story element planning sheets. These tools enable people to gather their ideas and structure their thoughts in their own ways before they tell their story. An example of this practice is *Jorge's story* (see: <https://communityreporter.net/story/we-still-have-time-part-2>) about unemployment in Spain.

Underpinning these techniques is Responsible Storytelling that involves co-creating best practice guides in terms of the ethics and values adopted by our Community Reporters with local groups. This ensures ownership and that the guidance given is suitable for the context in which the Community Reporters will be operating in. You can join the Community Reporter movement as an independent member by emailing enquiries@peoplesvoicemedia.co.uk and working with us to create a best practice guide

Links:

Gender equality in the workplace: <https://communityreporter.net/story/role-women-workplace-1>

Marja's Story: <https://communityreporter.net/story/kasilla-tekeminen-working-your-hands>

Jorge's story: <https://communityreporter.net/story/we-still-have-time-part-2>

Institute of Community Reporters: <https://www.youtube.com/watch?v=mZy-ldGpr3c>

Do it yourself: Assessing the value of lived experience

In small groups discuss the value of lived experience in applied social science research. Think about:

- Why does experiential knowledge matter? How is it valuable?
- How does the Community Reporting techniques differ from traditional research methods?
- What challenges are there to gathering and working with experiential knowledge & stories?

3.3 Working with User Voice

3.3.1 Stories of Family Life

The UK Troubled Families programme is a national, systematic approach for working with families that are experiencing multiple problems. The method that the Troubled Families programme advocates is the adoption a 'whole family' working approach that puts family intervention at the heart of the support services whilst still addressing specific problems experienced by individuals within the family unit such as low attendance at school or unemployment. Previous support service provision had failed families with complex needs because it was provided in silos and in a reactive manner. It has been funded partially via a payment-by-results model that was 'designed to incentivise an outcomes-based approach'.

To gather user voice on this programme we worked with a small group of families from Manchester who have experienced support provision as part of this new approach. Their stories provide rich insights into their experiences of family life, identifying some of the issues they are facing (i.e. health problems), support they are accessing and seeking (i.e. peer support networks), and also their thoughts on the future (i.e. studies).

The feature story from this collection is from JL. JL attended a parenting programme to help support her in her family life. However, she did not find the programme much use and in this video she describes her experiences whilst on the programme and also what support she would have liked to receive. *Click here* (or see: https://www.youtube.com/watch?v=LH2eQLk1C8&index=9&t=2s&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0) to listen to her story.

Links:

JL and the parenting programme:

https://www.youtube.com/watch?v=LH2eQLk1C8&index=9&t=2s&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0

Do it yourself: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find out more:

Read our summative report on the insights from *Stories of Family Life* *here*. (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfFamilyLife.pdf>)

3.3.2 Stories of Unemployment

Spain is one of the countries in Europe most significantly affected by the 2008 economic crisis, with its impact still being acutely felt by people today. The term “Lost Generation” is one that is used to describe a huge proportion of Spain’s youth population who neither work nor study. Experts say that the archetypal young person from the “Lost Generation” is a product of an education that fails to adequately prepare them for the job market. However, the issue of unemployment is not one that just affects young people or those with limited education, and many people within Spanish society have felt the negative consequences of the crisis.

To gather user voice on this topic we collated stories from a group of participants from Valencia who have and are experiencing unemployment and the issues around it. Some of the people who shared their stories with us fall into “The Lost Generation” age demographic, and others are older. Their stories provide an understanding of the worries and concerns (i.e. issues around exploitation and retirement) that people in Valencia have about the on-going consequences of the financial crisis. The stories told also give an insight into what life is like for people who are unemployed (i.e. relying on soup kitchens) and how they feel about the situation that they and others are in (i.e. unfair). Although many of these stories depict a bleak reality for their storytellers, within some of the stories there is an air of optimism and hope for the future.

The feature story from this collection is from Jorge. Jorge tells of how mismanagement has left around 50% of those employed in jobs related to the construction industry due to the ongoing economic crisis. He relates how the state is unable to provide coverage or services that are useful for finding a job and that even the training courses he is sent on by job centres are often non-existent and that work experience courses are designed to avoid paying unemployment benefits. [Click here to listen to his story.](#)

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of Unemployment* [here](http://innosi.eu/wp-content/uploads/2017/03/StoriesOfUnemployment.pdf). (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfUnemployment.pdf>)

3.3.3 Stories of Finding Work

To increase young people's involvement in Finnish society a national policy titled the "Youth Guarantee" was devised and then implemented together with young people and various organisations. It aims to help young people gain access to education and employment. As part of this, every young person under 25 and recently graduated people under 30 are offered a job, a work trial, a study place, or a course of workshops or rehabilitation, within three months of becoming unemployed. Furthermore, every young person leaving comprehensive school is guaranteed a place to study in an upper secondary or vocational school, in an apprenticeship, workshop, rehabilitation, or elsewhere. There is no legislation on the Youth Guarantee. Instead it is a 'service promise' that different actors are committed to supporting.

Students at Turku University of Applied Sciences were trained as Silver Community Reporters by an Insight Advocate Trainer and with remote support from People's Voice Media. They then used these skills to collate stories relating to 'Youth Guarantee' policy from other young people. In these stories the young people talked about their experiences of unemployment (i.e. benefits, disability), the support they'd received (i.e. internships), their current and future plans (i.e. studies) and how they are or were feeling at different stages in their lives (i.e. empowerment).

The feature story from this collection is from a young woman who has had support from her local employment office. In this story, she says that she has had mostly good experiences of the employment office. At different points in time the office has been in contact and offered her different kinds of courses and jobs. *Click here* (or see: https://www.youtube.com/watch?v=jTCMmycqRWY&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=4) to listen to her story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of Finding work here* (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfFindingWork.pdf>).

3.3.4 Stories of Women in the Workplace

The Greek project 'Promotion and strengthening of women's participation in trade unions and their representation bodies' aims to promote and ensure the active participation of women workers in positions of responsibility at all levels and in all types of trade unions. The INE (Labour Institute) have delivered activities, which focus on the broader social education of women, in order for them to become key actors for the promotion of women's issues via the trade unions. Innovative approaches taken in this project include counselling services and information dissemination on labour issues for women.

Working with a group of women from in and around Athens who are involved in trade unions, we collated a range of personal stories about their own and other people's experiences within the workplace, and the impact that the services provided by the trade unions have had on their lives. In these stories they talk about specific support available (i.e. counselling), issues within the workplace (i.e. discrimination) and their ambitions for the future (i.e. career pathways).

The feature story from this collection is from Maria. In her story, Maria talks about her decision to seek a career different field than her original studies and her current job. Even though she is not certain whether she will succeed in it or not, she is sure she will gain a lot of experience. *Click here* (or see: https://www.youtube.com/watch?v=E2du5GdS_Zk&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=11) to listen to her story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More: Read our summative report on the insights from *Stories of Women in the Workplace* *here*. (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfWomenInTheWorkplace.pdf>).

3.3.5 Stories of Our Neighbourhood

't Groene Sticht is a mixed residential and working project in a new housing district in Utrecht. The residents of 't Groene Sticht are vulnerable citizens such as (former) homeless people, people suffering from mental disorder or disabled people, but also students, senior citizens and young families. The purposeful residential mixing of people from socially diverse backgrounds contributes to the project's aim of creating a socially integrated neighbourhood, supporting individuals to reintegrate into social life step by step. Set up in 2003, the programme is now a part of the Social Support Act (WMO), introduced in 2007. Together with the law, long-term care (WLZ) and the Health Insurance Act (Zvw), the Social Support Act forms the basis of the system of care and welfare in the Netherlands. The neighbourhood of Majella Wonen has similar aims and objectives and was inspired by the success of 't Groene Sticht.

To gather user voice on this topic we worked with a small group of individuals from Utrecht who live and/or work in these types of neighbourhoods, focusing on 't Groene Sticht and Majella Wonen areas. The stories provide an understanding of the people's life experience in these areas. In the stories, people share the events happening in their lives (i.e. recovery), the activities and work they are involved in (i.e. gardening) and issues that they or their communities are facing (i.e. homelessness) and their feelings with regard to their experience (i.e. empowerment).

The feature story for this collection is from Arina. After a very long time, Arina has her own home. She is enrolling in an education programme and starting a new job where she will be living in Majella. She is proud that she has been through some difficult times but has managed to pull through them and arrive where she is now. *Click here* (or see: https://www.youtube.com/watch?v=LWPqo6UWxqc&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJl0&index=8) to listen to her story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of Our Neighbourhood* *here*. (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfOurNeighbourhoods.pdf>).

3.3.6 Stories of Co-Design

The region of Kainuu faces multiple significant challenges. The remote area suffers from depopulation and has an ageing population. The Kainuu region has seen a decline in entrepreneurial activity and has the second highest unemployment levels in Finland. In order to overcome these issues an experimental project was launched in April 2014 and will continue until the end of 2017. This project seeks to bring together the municipality and other service providers together with the people who live in the area to co-design new user-driven services and business models. In essence, the project brings together citizens, public, private and third sector representative to promote wellbeing in the region and raise the quality of local service provision.

Working with a range of people from Kainuu, including young people and older people, we gathered a range of stories about what life was like in the area. In these stories, the people talked about their communities and what supported their well-being. This included digital inclusion projects, volunteering and the role of clubhouses. People also spoke about some of the problems that they faced (i.e. alcohol and exclusion) and also who provided them with support (i.e. family and friends).

The feature story from this collection is from Marja. In this story Marja talks about joining a sewing and craft group in her community, and how it has helped her to meet new people. *Click here* (or see: https://www.youtube.com/watch?v=N6VyOTS879A&index=5&list=PL1vtHOJD7gN3Yy1nwN_5LEU9Z8sb6ZJI0) to listen to her story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More: Read our summative report on the insights from *Stories of Co-Design* *here*. (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfCoDesign.pdf>).

3.3.7 Stories of Social Activities

The Government Programme for the Elderly Social Activity (ASOS) is one of the contributing programmes to the senior policy in Poland. The main objective of the programme is to improve the quality and standard of living for the elderly, and to dignify aging through social activity. It has four key priority areas: education of older adults; intergenerational social activities such as recreation activities for grandparents and grandchildren; participation of older adults in social activities such as gardening, interaction through learning, physical exercises with a group; and recruiting older adults as volunteers to support others within their community. The programme is a response to the challenges faced by this age demographic and the social pressures in Poland. The population boom in the 1950s means that many of people born in this era are entering the 60+ age bracket and therefore this policy is designed to enable them to age well.

Working with a group of older people who accessed different provision as part of the Association of Towarzystwo Edukacyjne Wiedza Powszechna's elderly social activities programmes, we gathered stories about their experiences of what such activities were like. In their stories, the people describe the variety of classes available (i.e. Nordic walking), how accessing such classes has changed their perceptions, and the benefits of such activities (i.e. health.). The stories also explain the key influencers in engaging older people in these activities (i.e. the teacher) and also what barriers they have experienced in getting other older people involved in their communities.

The feature story from this collection is from a couple who have been on some of the educational programmes. They talked about their experiences on these programmes and how their teacher inspired them. *Click here* (or see: https://www.youtube.com/watch?v=nAwc9u4eYsU&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=1) to listen to their story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of Social Activities* here (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfSocialActivities.pdf>).

3.3.8 Stories of Childhood Education and Care Services

The Childhood Education and Care (ECEC) services in the Emilia-Romagna region of Italy have undergone a period of innovation and transformation from the 1990s onwards. This process has involved experimenting with new types of services in order to meet the changing needs of families. This has included creating centres for both children and parents, establishing children's spaces and delivering learning in small education groups. There has also been changing patterns in welfare policies due to constraints on public expenditure that has led to the emergence of innovative partnership between public and private actors (with a relevant presence of Social Economy actors (i.e. social cooperatives)). The results of this have been a diversification in the models adopted and in how the ECEC service provision is delivered. Increasing of accessibility and quality of ECEC services provision has been possible through a pro-active engagement with local actors, including children, their families and the communities in which they are living. The innovation partnership provides further improvements in term of flexibility in opening times of centers, combining ECEC with relevant healthcare provision, and greater respect of diversity

Working with professionals from these ECEC services such as Educators, Centre Managers and Pedagogy Coordinators, we gathered a range of stories about what the service provision is like and what it offers to children and their families. In the stories, people spoke a lot about the environment, and how the outdoors and nature could be used as part of children's and families' learning experiences. They also talked about the fundamental approaches and aspects of the pedagogical practices that they use (i.e. discovery and dialogue) and the results of this (i.e. independence and connection).

The feature story from this collection is from Chiara. Chiara works in ECEC services for several years. In this video, she describes a journey as a mum instead of professional and the way this has affected her professional growth. Click here (or see: https://www.youtube.com/watch?v=S9Sk4vX3ucE&index=7&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0) to listen to her story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of ECEC Services* [here](http://innosi.eu/wp-content/uploads/2017/03/StoriesOfECEC.pdf). (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfECEC.pdf>)

3.3.9 Stories of School

The Swedish school reform is a national programme for children and young people aged 7 – 16 that have newly arrived to Sweden and do not speak Swedish. The reform states that all schools must chart all newly arrived students' prior knowledge and experience. The purpose of this is to better plan the student's education based on their individual circumstances. The reform also seeks to integrate newly arrived students more quickly into mainstream Swedish school education than it was previously done.

To gather user voice on this topic we worked with a group of newly arrived students who attend a school in Karlstad and their language teacher. Their stories provide an understanding of what the education reform is like from both a users' and practitioners' perspectives. These stories explore the students' feelings about their first days at school in Sweden (i.e. shy), how they have found the process of joining a new education system (i.e. supportive) and some of the barriers they have faced or may face in the future (i.e. language and communication).

The feature story for this collection is from a teenager who has moved to Sweden from Syria. In this story he talks about his experience of integrating into school. *Click here* (or see: https://www.youtube.com/watch?v=_LeLGVtmoTI&index=2&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0) to listen to his story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of School* *here* (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfSchool.pdf>).

3.3.10 Stories of Integration

Although immigration rates in Germany have been constantly high for decades, particularly since 2015, many immigrants still face problems integrating into social and economic life. Refugees especially are confronted with a rather restrictive legislation regarding residence and working permissions. Without a residence permit it is hard to get a job and many employers do not want to hire refugees because of bureaucratic hurdles and refugees' uncertain future prospects. Due to this, refugees need special support and consultancy for labour market integration. A number of projects and initiatives to support this integration have been established across Germany, including the MAMBA scheme in Muenster.

To gather insights into refugees and immigrants' integration into the labour market and Germany society in general, we worked with a group of people from a range of different countries including Syria, Afghanistan and Romania who are now currently living in Ingolstadt. Their stories of integration focus on their journey to becoming part of German society and what they have done to integrate, such as learn the language, access the education system and try to find work. Their stories details some of the challenges involved in this process such as asylum regulations and restrictions, and also how certain elements of the system can be problematic or frustrating (i.e. food stamps). Their stories also touch upon why they came to Germany and what they aspire to do in the future.

The feature story for this collection is from Ismael. Ismael is from Daraa in Syria. He fled (partly) because of the difficulties in continuing his education. Once in Germany, Ismael moved to Ingolstadt and was able to continue 11th grade in high-school. [Click here](#) (or see: https://www.youtube.com/watch?v=LyRT-TLj6BM&list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0&index=10) to listen to his story.

Activity: Identifying the insights in stories of lived experience

1. Listen to the feature story.
2. Think about the following questions:
 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with you and why?
 - What did you learn about user experience of social investment programmes from the story?
3. Discuss your thoughts with your group and tutor.

Find Out More:

Read our summative report on the insights from *Stories of Integration* [here](http://innosi.eu/wp-content/uploads/2017/03/StoriesOfIntegration.pdf). (see: <http://innosi.eu/wp-content/uploads/2017/03/StoriesOfIntegration.pdf>).

Do it yourself

Independent project on responsible storytelling

Instruction:

This assignment is about the ethical implications of user voice and sharing experience.

Students will experience their own vulnerability while sharing experience through video or audio. It is important that the conversation about the stories will be held in a safe environment and a positive feedback and exchange mode. For the quality and depth of conversation small working groups could be established.

Mutual respect and socratic debate could be applied to guarantee the quality of the discussion.

Individual

1. Make an audio or video story about your own experience. Choose an experience you would like to share with colleagues for instance related to you work or study, your neighbourhood, family life, etc. Register your story on audio or video.
2. Reflect upon the making of your story and write your reflections in a written paper.
 - How did you proceed to tell and register your story?
 - Are there things you were hesitating to share with others?
 - How did you feel while making the story? How did you feel while sharing the story with others?
 - How did you feel watching your own story before sharing?
3. What wider social issues are related to your story?
 - Look up relevant reports and evaluation reports, policy plans on local and national level about this social policy field.
 - How does this question relate to social investment policies?
 - Write a short analysis of the policy field. And formulate a critical statement about the policy, where possible.

Group work

4. Share your story in the group and discuss the story with others.

A working form could be: All participants have yellow sticks to write down answers on the following questions. Reflections are shared on different flip over papers.

 - What was the key message or messages from the story?
 - What did you feel when listening to the story – did anything resonate with the class room and why?
 - What did you learn about user experience of social investment programmes from the story?
5. Discuss about the wider social issue your story is related to and analyse the social issues evoked.
 - What social investment policies are related to the social theme you evoked? Discuss your findings with the group. And discuss about the provoking question/ statement you formulated.
6. Share the analyses of small group with the other groups.
 - Make an experience mind map and identify the difference social policy fields on this map.
 - Do you recognize contradictions, paradoxes between the experiences you shared and the actual evaluation of social policy in the field?
 - Can you relate this to the Jürgen Habermas' and his theory on the System and Lifeworld gap?
 - Why do you think it is important to listen to people's experiences?

Further watching and reading

Digital and online content links

- InnoSI 'User Voice' story bank <http://www.communityreporter.net/innosi>
- Playlist of Feature Stories from each 'User Voice' story collection
https://www.youtube.com/playlist?list=PL1vtHOjD7gN3Yy1nwN_5LEU9Z8sb6ZJI0
- Stories of Family Life playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN2WamvUCalLOZMQ6nUihQto>
- Stories of Unemployment playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN3xlA5aViDqidu1tZEeu53N>
- Stories of Finding Work playlist of extracts
https://www.youtube.com/playlist?list=PL1vtHOjD7gN3x9F3MkyBqi-LnHloA_qUb
- Stories of Women in the Workplace playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN1JR02ekUubvq3MZzgEy1ZE>
- Stories of Agriculture playlist of extracts
https://www.youtube.com/playlist?list=PL1vtHOjD7gN3keAVMgU7GkD_7l8h3b8x6
- Stories of Our Neighbourhood playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN1-5lMsBzJM5A0G0MVJQbcZ>
- Stories of Co-Design playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN1GLFOaeFgpkd3e2SbHS6CS>
- Stories of Social Activities playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN0dpHgfti4lDiK2CMUCbw4H>
- Stories of Early Children Education and Care Services playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN3zKX7Kt-0maRSDfD-v3moC>
- Stories of School playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN3W-3Yv3gqMNMh1khVJE-r->
- Stories of Integration playlist of extracts
<https://www.youtube.com/playlist?list=PL1vtHOjD7gN1wSC3qh-V9TiOq075zzP4P>
- Geo-map of 'User Voice' extracts and feature stories
<http://goo.gl/VInYPA>
- Peer support networks and social connections thematic edit overview film
<https://communityreporter.net/story/peer-support-networks-and-social-connections>

MODULE 4

4 Foresight: Sketching the future

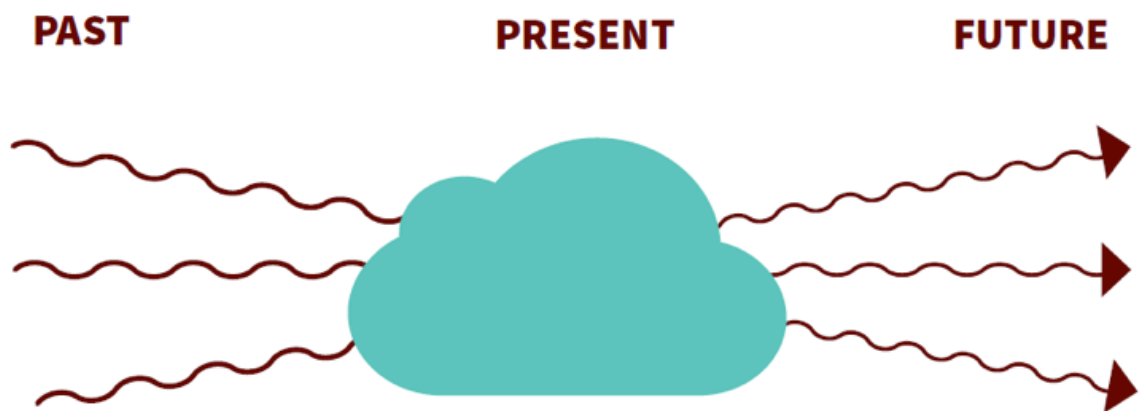
How does the refugee crisis influence European welfare societies? Are 'big data' a remedy for productivity challenges in healthcare or are they only one new threat to citizens' privacy? How does climate change impact on migration within and between countries and continents: Big questions without easy answers. We don't know what will happen in the coming years, let alone the coming decades.

Although the future is always unknown, we cannot just sit and wait what will happen. We must remember that to some extent, the future is an outcome of the choices and decisions we make today. The future is unknown yet simultaneously we are active creators of the futures. We need to create the desired futures with and for people – not only prepare or arm ourselves for the futures.

Foresight is a future oriented activity, a mindset for addressing the unknown future. Executing a foresight is not meant to explore what may happen, but how the future can be perceived as alternative futures.

In this part of the InnoSI educational handbook we convey:

- 1 What is foresight
- 2 The method itself and instructions how to use it in an educational environment
- 3 How we used this method in InnoSI research
- 4 Possible assignments for your students
- 5 Further reading



The Foresight process was applied within the InnoSI project, where each phase was carried out with local partners in 10 European countries with a specific focal question: "What constitutes social investments and thus wellbeing in 2027 in Europe?"

In the context of social investments in particular, we wanted to pay attention to shared value creation and societal impact creation where 4P (people, private, public, planet) collaboration and People Primacy are required.

For our InnoSI Foresight handbook; "From Signals to Future Stories", just follow the link:
<http://julkaisut.turkuamk.fi/isbn9789522166395.pdf>

4.1 What is foresight?

We believe that foresight is not a mysterious gift bestowed at birth but an ability that can be cultivated. We hope that this method provides you insights and practices that you can use today in order to influence the future. We capture our key ideas into the concept of foresightfulness – a mindset for addressing the unknown future and more than a set of methods.

Social investing is a future-oriented activity. Money and other resources are invested in a particular policy area for the purpose of gaining returns in the future. However, in contrast to investments in machinery, the return on social investments is difficult to calculate exactly. Returns depend on positive and negative spill overs and the success of collaboration between the private, public and third sectors.

With social investment, we refer to investments to improve the prospects for future economic and social participation. The emphasis is on investments in people to enhance their productive capacities and foster longer-term economic development.

During the InnoSI project, it has become explicit that the forms and phases of development of social investing vary between countries and regions. Due to historical, political, economical and cultural reasons, social investments are typically country or region-specific solutions to more or less global challenges.



4.2 Objective of a foresight

The aim of the exercises is to improve foresightfulness that can be used for exploring the future and supporting the strategic decisionmaking process. Executing a foresight is not meant to explore what may happen, but how the future can be perceived as alternative futures.

We split foresightfulness into three phases (Koskelo & Nousiainen):

1. Sensing
2. Sensemaking
3. Seizing

We aim to provide thinking tools for mapping and understanding the big picture around social investing. We do not provide forecasts of social investments.

The 3S process was applied within the InnoSI project, where each phase was carried out with local partners in 10 European countries with a specific focal question: "What constitutes social investments and thus wellbeing in 2027 in Europe?"

In the context of social investments in particular, we wanted to pay attention to shared value creation and societal impact creation where 4P (people, private, public, planet) collaboration and People Primacy are required.

For our InnoSI Foresight handbook; "From Signals to Future Stories", just follow the link:
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4.3 Why thinking about the future is difficult?

Uncertainty: we don't know

Uncertainty means a lack of information and knowledge about facts. Information refers to a situation or a phenomenon, which exists irrespective of the people involved in it. Uncertainty is the gap which opens between the information required in a certain task and the information possessed by an individual or organisation.

Complexity: not simple combinations

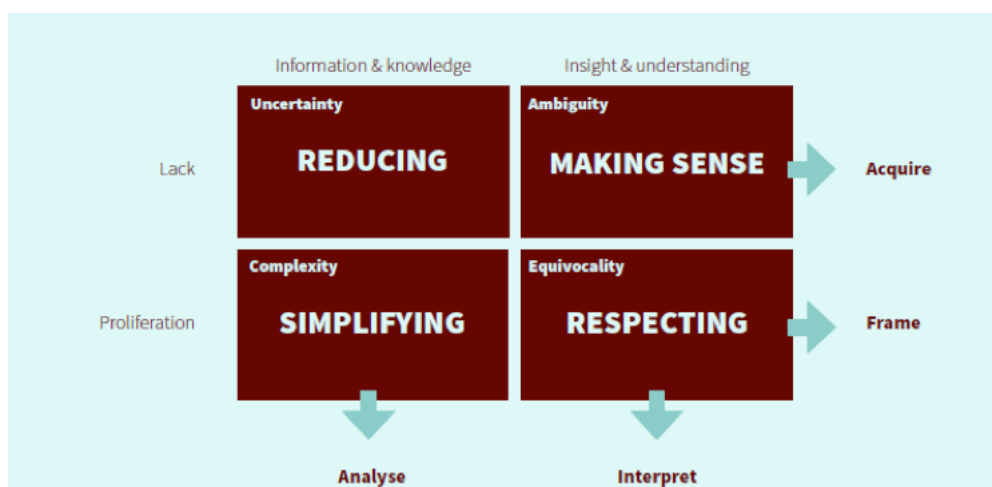
Arises from connections between situations or phenomena. Complexity refers to situations and phenomena interacting in a non-simple way. Complexity also means that the direction and strength of the development of situations and phenomena are difficult, but not necessarily impossible, to predict.

Ambiguity: how to interpret

Ambiguity refers to difficulty in interpreting a situation or phenomenon. In surface ambiguity, the interpreter has the relevant interpretative knowledge but it is difficult to apply because the available information does not trigger the process of meaning construction, where individual information hints are arranged as part of a larger framework of interpretative knowledge. In deep ambiguity, interpretation difficulties arise from the lack of relevant interpretative knowledge.

Equivocality: which interpretation is right?

Equivocality manifests itself as different interpretations of a situation or phenomenon. Equivocality means a situation where the actors look at the phenomenon at hand through different 'lenses'. Even if each interpretation was unambiguous and logical as such, when combined with the interpretations of others, the end result is typically a contradictory explanation of things and phenomena, and it contains mutually exclusive views.



For more information see page 16 and further of the handbook.



<http://julkaisut.turkuamk.fi/isbn9789522166395.pdf>

4.4 For whom?

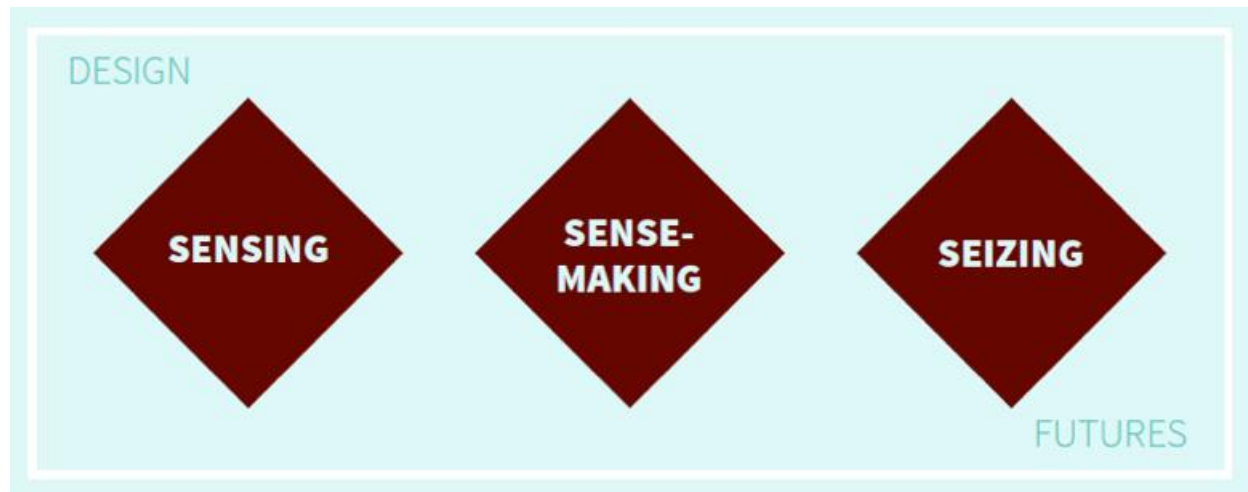
Foresightfulness is not a privilege for futures researchers. Quite the contrary, foresightfulness can be deployed by anyone who is open minded, curious and self-critical.

Future- thinking is a capability that can be developed and strengthened. The more convincingly the future is told, the more it guides today's decisions.

The methods presented in our "methods" chapter can help you to develop foresightfulness in you students, and tackle the above mentioned difficulties.

4.5 InnoSi Foresight method in steps

This is the step-by-step method the InnosI research team used. The tools and instructions used are fun and inspiring and give a variety of instruments and assignments of different levels to organize your lessons. You will see that your students will be open for different perspectives and they will develop great perceptiveness of the future by studying their present day environment.



Phase 1: Sensing

The foresight process starts with environmental scanning, sensing. The focus and goal of the sensing phase is to recognize signals of change: novel trends or weak signals that provide hints about the futures. At its best, sensing is an ongoing task in the organizations and not a rapid one-off strategic activity.

Important steps in the sensing phase:

- Have a clear focus by asking what you are looking for and for what purpose. Formulate a focal question accordingly, including actor(s) context, timeline and theme
- Utilize STEEPLED (social, technological, economic, environmental, political, legal, ethical and demographic) to ensure a holistic view
- Work with a multidisciplinary team to ensure systems thinking
- Use various methods of observation (offline as well as online, FARAO: follow, attend, read, ask, observe)
- Be sure to look for novelty, niche, locality, opinion leaders and innovators
- Gather your signals in an inspiring way, for instance on Pinterest, for everyone to see (see fig. 8 in the handbook)
- Gather many signals (>500) in a short period of time.

For a further description on how to execute the “sensing” phase, see the handbook pages 25-27 and figure 8 (pg 28) <http://julkaisut.turkuamk.fi/isbn9789522166395.pdf>

Phase 2: Sensemaking:

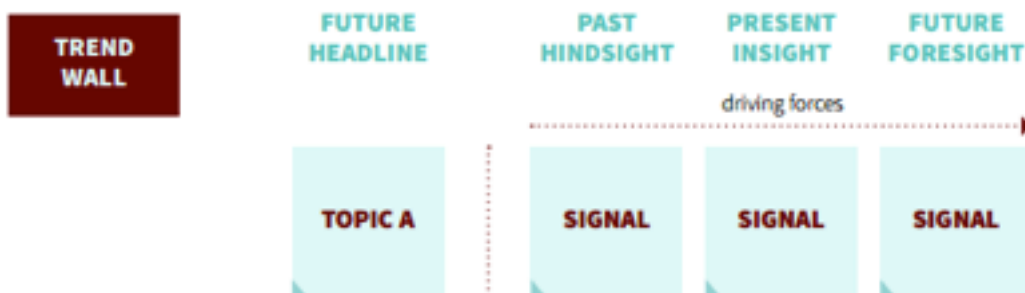
The Sensemaking phase is about analyzing the data – systematically and intuitively. Therefore, the signals gathered in the Sensing phase are approached through various angles: their affinities and linkages, their novelty and quantity. The goal of the analysis is to find patterns and perspectives for the signals, to group them around common nominators and to formulate initial trend topics for the focal question.

The steps taken in this phase are:

- Print all the pinterest signals in full color
- Organize the signals in different ways, finding different underlying patterns (Affinity wall, see handbook page 28-30) and so finding possible trends.



- Make a trend wall, making a narrative of the possible trends, extrapolate the trends.



- Write a trendcard, see page 31 of the Foresight Handbook for the example and instruction

Phase 3: Seizing

In order to seize the change, we need to:

- 1 Test and validate the foresight from the Sensemaking phase. A good way to validate, test and enrich the trends found is to share your trendcards with experts in the fields and ask their opinion (Delphi survey)
- 2 To identify and concretize future opportunities based on validated foresight. A very insightful way to concretize the validated trends, is to describe a persona or more personae: how does this trend affect someone's personal life?

THIS IS HOW WE DID IT – SEIZING



Fig 11. Personas are descriptions of the different people or actors relevant for the focal question. Trend cards are interpreted through these personas: if the change were to happen, then what is the impact on the person's everyday life?

Developing foresight fullness with and within your students is fun, builds empathy and gives insight into politics and policies.

Do it yourself!

1. Choose a policy or professional context.
2. Define your development issue (labour market developments; ageing; welfare or well-being; human resources management, social work, etc.)
3. Use the tools to follow the foresight steps (sensing, sense making, seizing).

Further reading

If you are interested in foresight, you will find further reading and literature in our handbook.

Innosi project 2016. *From signals to future stories. A handbook for applying foresight in the field of welfare.*



<http://julkaisut.turkuamk.fi/isbn9789522166395.pdf>

Video's about foresight

Human centric participatory foresight: <https://www.youtube.com/watch?v=29o-fStn-u8>

Monitoring future signals: <https://www.youtube.com/watch?v=DmlxYiFwSI0>

Trend cards as tools: <https://www.youtube.com/watch?v=KdYisyOjOoo>

Designing desired futures: <https://www.youtube.com/watch?v=bqd6oUdEgrw>